New Zealand Ministry of Education

Internationalisation in New Zealand Tertiary Education Organisations

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MAY 2006

Foreword

The Ministry of Education commissioned Australian consultants Professor Craig McInnis and Mr Roger Peacock from PhillipsKPA, and Mr Vince Catherwood from Wellington, to undertake a national trend study of developments in the internationalisation of New Zealand tertiary education organisations since 1998.

This report contains their findings, based on an analysis of existing data, interviews with key stakeholders, a survey of institutions, and two invitational forums. The authors also note what they see as the key challenges for New Zealand moving forward, and propose what the next steps for meeting these challenges may be.

This study is the first element in a package of initiatives designed to assist tertiary education organisations in New Zealand as they devleop their strategies and engagement in this area. The Ministry of Education will consider the findings of this study and the authors' recommendations in the development of further initiatives.

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Executive summary

The International Division of the Ministry of Education (MoE) commissioned this national trend study as the first element in a package of initiatives extending over four years (2004 – 2007) designed to assist the internationalisation of tertiary education organisations in New Zealand. The project is linked to the Tertiary Education Strategy 2002/07 objectives concerned with strengthening system capability and quality. It replicates aspects of the study undertaken in 1998 to determine the extent to which New Zealand tertiary education institutions (TEIs) had become internationalised. The results of that survey were published as *Internationalisation and Tertiary Education Institutions in New Zealand* (MoE 1998).

The primary purpose of the 2005/06 study was to assess the changing nature and extent of internationalisation across the sector, and to inform planning. The findings of this report are based on:

- an analysis of the Ministry databases on trends in student enrolments from 1998 to 2004;

- the outcomes of survey responses from 36 tertiary education providers;

- consultations with targeted stakeholders;

- an experts' workshop that addressed the impact of global developments on New Zealand policy and the responses of institutions;

- a call for submissions advertised across the sector; and

- invitational forums on the interim findings conducted in Wellington and Auckland with private and public tertiary institutions, the MoE, officials from other government agencies, and the Project Advisory Committee.

This study differs from the stocktake focus of the 1998 study. The 1998 survey mapped the internationalisation activities in the sector as a baseline for policy development and future evaluations such as this. The 2005 study assesses developments in the internationalisation of the sector in the context of broader global trends, reports on the related plans and priorities of New Zealand tertiary organisations, and identifies their needs as well as some likely policy incentives and obstacles affecting their progress.

In order to provide the basis for a strategic approach to internationalisation across the sector, the 2005 study re-conceptualised major elements of the model of institutional internationalisation used in 1998. It started with a different set of assumptions about the nature of internationalisation, in particular shifting the focus away from international student numbers to the more profound imperatives of internationalisation now facing New Zealand. The perspectives evolved further with the rapidly changing international education context since the study began. While there was no requirement or expectation that this study would provide the MoE with recommendations, a number of areas for potential policy intervention have been identified.

Student enrolment trends 1998 to 2004

An analysis of trends from the Ministry 2004 database provided a reference point for the development of the survey of institutions. Variations on this data have been reported from a number of other sources throughout the report. Although reliable data was not available while this report was being prepared, the recent downturn in international student numbers has been widely reported and was the source of considerable discussion at the stakeholder forums. The key findings from the Ministry data follow.

- Between 1998 and 2004 the number of international students in public tertiary education increased from 7,750 to 40,337. The total number of foreign fee-paying (FFP) students in both public and private tertiary institutions in 2004 is reported to be 50,213 (excluding English language students).

- The number of FFP students in public tertiary education grew dramatically by 59% from 2000 to 2001, but the growth slowed to just 10% from 2003 to 2004. Public providers have experienced a greater increase in FFP students as a share of the total.

- In 1998, the fee income from international students was around $70 million. By 2004 the international education industry was generating around $2 billion annually. International student fees increased by 24% on a per equivalent, that is, effective full-time student (EFTS) basis between 2000 and 2004.

- There has been increasing dependence on international fee income as a component of total income for TEIs. The proportion of FFP students increased from 3.1% in 1999 to 8.9% in 2004. This increase has been greater for public tertiary institutions over the last five years. In the TEIs, the rate of increase in international students was significantly greater than that of domestic students between 1999 and 2004.

Key findings from the survey and consultations

There has been a substantial and positive shift towards a broader and deeper response to the internationalisation of tertiary education in New Zealand in recent years. This is in contrast to the situation in 1998 when it was reported that, although there were many examples of best practice in a range of dimensions of international activity at that time, there appeared to be a lack of a culture of commitment to internationalisation across the system. About a third of the institutions surveyed in 1998 had no mention of a policy of internationalisation in their mission statements; almost half had no strategies in place to internationalise the curriculum; and only a small minority had relevant incentive or reward programmes for staff or academic units.

The survey results indicate shifts in perspectives and activities away from the previous focus on export sales orientation to embedding the broader goals of internationalisation in the tertiary education system, but there is still much to be done, and with some urgency. The key themes emerging from the survey and stakeholder meetings concern: the level of commitment to internationalisation; the links between government policy and institutional activities; the need for a co-ordinated national response; meeting the demands of strategic planning and management; improving the levels of staff and student mobility and global connectedness; internationalising the student experience for the benefit of all students; enhancing collaborative research programmes; responding to rapid changes in international student markets; and finding new and effective ways of engaging in offshore activity.

The importance institutions currently attach to internationalisation is significant. The survey showed that most (80%) believed that internationalisation is 'extremely' or 'very important'. Indicators of their commitment include the establishment of a committee or working group specifically focused on internationalisation and chaired by a senior person. More than half have these arrangements in place. Revenue and funding are nominated as the primary benefits of internationalisation, but the major challenge at the institutional level is getting internal commitment. The main obstacles to the development of initiatives are the costs and staff resistance.

A clear majority of the institutions (84%) have involvement in an international or regional network of some kind. However, while there has been a marked increase in the number of agreements with overseas institutions, there has been no corresponding increase in the international mobility of staff. The stakeholder forums raised concerns about the obstacles

to staff mobility such as lack of funds, but also drew attention to sector differences in the motivation and level of interest in support for staff gaining international experience. Further investigation would be useful.

The need for a national focus and co-ordinated strategy is discussed in detail in the final chapters of this report. Around 60% of institutions believe that New Zealand tertiary education policy documents do not give sufficient emphasis to internationalisation. More than half do not see a link between their institutional strategy and the national policies. About half of the academic and business units in the institutions surveyed have strategic plans that include internationalisation objectives. Of these, most (79%) have planned targets for international students but only 53% have procedures or models to determine the cost of places. Any reduction to this revenue stream is likely to result in reduced innovation and quality improvement. Priorities are likely to shift to maintaining staffing and infrastructure that had been built up to respond to earlier demand projections.

Most institutional plans are still dominated by a focus on education exports. While institutions expressed concerns about their growing reliance upon a small group of source markets, just 56% have country-specific business plans for regions of interest. The five markets considered most important for international students in New Zealand are, in rank order, China, India, Korea, Japan and Thailand. China is considered the most important of these in terms of student numbers comprising more than 60% of the total international market, international humanitarian activities, marketing programmes and international alumni chapters. China is also ranked in the top five countries for international student exchange links and exchange programmes. Institutions rate offshore recruitment agents, Education New Zealand and NZ Trade and Enterprise as the 'most' effective and offshore feeder schools the 'least' effective in supporting marketing and recruitment.

The survey items concerning the internationalising of the student experience raised a number of issues. The focus on international students has largely been concerned with the quality of their experience. The Code of Practice for Pastoral Care of International Students (MoE 2002b) is widely considered effective and the vast majority of institutions provide training specifically to staff involved in the support of international students. Four out of five institutions have student satisfaction or exit surveys in place and 90% systematically gather data to monitor the attitudes, outlooks and academic performance of international students. Most institutions (72%) provide a specialist centre specifically for the support of international students. However, while almost all institutions (94%) provide orientation programmes, only 20% offer a return home programme.

Internationalising the student experience to the advantage of all students, and indeed for the national interest, is much discussed but there is little shared understanding in New Zealand (as elsewhere) as to what this means in practical terms. There is nevertheless a high level of consensus about the benefits of student exchange and study programmes although this is based largely on assumptions rather than empirical evidence. The survey results indicate a significant increase in the level of student mobility since 1998; however, it is still the case that relatively few New Zealand students participate in exchange programmes. Likewise, progress towards internationalising the curriculum in tertiary institutions has been patchy. Less than 20% of institutions provide seed funding for innovations in the internationalisation of teaching and learning. About half have in place courses where international dimensions are specifically included in the curriculum, and examples of innovations provided in the survey responses are indicated in the report.

There has been a significant increase in international research collaborative activities overall since 1998 although the bulk of activity comes from a small number of universities. The impact of the Performance Based Research Fund (PBRF) on internationalising research has

been seen as a positive outcome. The major obstacles to international research are funding, teaching workloads and travel costs. The report gives particular emphasis to the potential role of research in raising the profile of the sector as a whole internationally.

The number of courses offered offshore has increased since 1998 along with an increase in offshore activity, especially in the development of strategic alliances with overseas institutions. The most popular model for offshore education delivery involves agreements about bilateral academic credit recognition and matching arrangements with offshore partners. The increasing demand for postgraduate programmes is of particular interest to the sector and may call for a realignment of marketing activity towards the negotiation of longer-term strategic partnerships with offshore institutions, and entities such as scholarship agencies, which in turn may require institutions to reassess the skill sets of their international marketing units.

A number of caveats about the survey data are raised throughout the report. One of the most important is the need to recognise that the survey questionnaire was targeted at a range of institutions with diverse size and missions. More fine-grained investigation – for example, using diagnostic audits – is likely to provide a useful picture of the internal dynamics that support or hinder internationalised perspectives and behaviours.

Challenges and conclusions

New Zealand has developed a framework of policies focused initially on the 'sales' dimension of the internationalisation of education and, more recently, on the broader national benefits. These policies create a large part of the framework for the internationalisation of public and private tertiary institutions. However, it is clear that institutions regard the domestic tertiary education policy settings as having considerable impact on their capacity to develop the wherewithal to become and remain competitive and help sustain New Zealand's active participation in the global knowledge economy. This constraint will endure unless the broader internationalisation objectives are integrated into the fabric of domestic tertiary education policy.

A key question is the extent of the preparedness across the system for the inevitable adjustment in the education export sector in response to global competition and changing patterns of international student demand. For example, an unanticipated finding from the survey was the major problem of information management facing many institutions. We understand the difficulties of the current compliance demands placed on institutions and individuals and went to some lengths to minimise the workload involved. However, we found many respondents had great difficulty in locating information about the activities of their institution. Some complained about the lack of internal co-ordination of data.

The challenge for New Zealand policy agencies, education, research and training institutions, and their stakeholders, is to firmly embed high quality international, intercultural and global dimensions into the overall purpose, functions and delivery of education and training. In the concluding chapters the report makes the point that New Zealand's ability not only to sustain but also to move strategically beyond its dependence on the sales relationship, depends on having several lead institutions that define and pursue their broad internationalisation objectives.

This will require institutions that, in addition to producing quality research, teaching and training, are attuned to global developments, capable of adjusting their strategic and operational plans accordingly, and staffed by individuals with the competencies for effective practical global engagement. The findings suggest that without developing nodes of education, training or research excellence, and leveraging these through strategic alliances

with institutions in the 'macro' societies, smaller economies such as New Zealand will find it increasingly difficult to sustain an international profile for their education programmes and their research activities.

Acknowledgements

1 Introduction and overview

1.0 Introduction

The International Division of the Ministry of Education (MoE) commissioned this national trend study as the first element in a package of initiatives extending over four years (2004 – 2007) designed to assist the internationalisation of tertiary education organisations in New Zealand. The project is linked to the *Tertiary Education Strategy 2002/07* objectives concerned with strengthening system capability and quality (MoE 2002a). It replicates aspects of the study undertaken in 1998 to determine the extent to which New Zealand tertiary education institutions had become internationalised. The results of that survey were published as *Internationalisation and Tertiary Education Institutions in New Zealand* (MoE 1998).

1.1 The purpose of the project

The primary purpose of the project is to provide the Ministry of Education with an analysis of: developments and trends in the internationalisation of the New Zealand tertiary education sector since the 1998 survey; and the plans and priorities of New Zealand tertiary organisations, particularly the incentives and obstacles affecting their progress. The study is intended to provide strategic information for a programme of government initiatives to support the internationalisation activities of tertiary institutions.

It is useful to distinguish this study from the stocktake focus of the 1998 study. The 1998 survey was intended to map the internationalisation activities in the sector as a baseline for policy development and future evaluations. The study reported here had the primary purpose of assessing developments and trends as well as describing the plans and priorities of New Zealand tertiary organisations, and the likely incentives and obstacles affecting their progress.

The 1998 survey was commissioned to 'determine and document the extent to which tertiary education institutions in different sectors throughout New Zealand have become internationalised.' The report concluded that there was 'little evidence across the sector of a commitment to develop a culture of internationalisation.' It suggested that the performance of New Zealand tertiary institutions was 'uneven' on a number of fronts. For example: about a third of the institutions surveyed in 1998 had no mention of a policy of internationalisation in their mission statements; almost half had no strategies in place to internationalise the curriculum; and only a small minority had relevant incentive or reward programmes for staff or academic units.

The 2005 MoE Request for Proposals (Appendix C) set out the significance of the broader internationalisation agenda beyond the development of student markets. Current government strategies point to the potential 'benefits to the domestic education system through knowledge exchange and professional development.' The Export Innovation Programme 'Strategic Overview' acknowledges the importance of increased reputational benefits to New Zealand in terms of the national response to the challenges of globalisation.

The 2005 study results are intended to inform policy and programme development by government, and the adaptation and adoption of 'best practice' by institutions.

1.2   The meaning of internationalisation

Internationalisation of education has been variously defined. Some authorities have focused on the specific student outcomes expected from an internationalised education experience; others have posited different levels of intensity of internationalisation depending on the career patterns of individuals. Other definitions have focused on the characteristics of an internationalised institution or education system, such as the proportion of international students, or the proportion of staff with their highest degree acquired internationally.

What most definitions have in common is their generality. All identify the responsibility of domestic education institutions and systems to prepare students for the pervasive personal impact of global developments. The common transaction is the transfer of knowledge between systems, institutions and individuals across cultural, linguistic and national boundaries. Active involvement in internationalised knowledge and skills acquisition is seen as a prerequisite for durable participation by graduates, and hence their communities, in the global knowledge economy.

The project team suggested that the conceptual framework for internationalisation that guided the 1998 survey design needed to be revised to reflect changes since then, and the current context. Tertiary institutions in New Zealand, as elsewhere, have been transformed in the eight years since that survey was conducted. The criteria by which their level of internationalisation was judged in the past may no longer apply. The approach included a re-conceptualisation of the organisational forms in the tertiary institutions. Whereas most institutions might promote internationalisation as a key element in their strategic and business plans, many have not communicated this well across the fabric of the institution. Most have not undertaken the diagnosis of business processes nor introduced structured change management needed to meet their stated internationalisation objectives.

A recently updated definition of internationalisation provided a useful guide to the development of the proposal and methodology:

> *Internationalisation at the national, sector, and institutional levels is defined as the process of integrating an international, intercultural, or global dimension into the purpose, functions or delivery of postsecondary education. (Knight 2003)*

This emphasises the process nature of 'internationalisation'. Knight notes that 'integration' is the key dynamic that will determine the sustainability of internationalisation and that there is no generic 'best-formula' for this. The extent to which 'internationalisation' should imbue the identity and practices of an institution will be determined by the aspirations and priorities of the institution, staff, students and key stakeholders. As one submission to the project expressed it:

> *Any initiatives for internationalisation in NZ tertiary institutions need to shake off the mantle of economic dependency on international students and explore, encourage and develop the mutually beneficial advantages of global perspectives by cultural exchange, curriculum development and staff training. (S1)*

Nevertheless, the conceptual model of internationalisation guiding the 2005 study still fully acknowledges the critical importance of international student flows. It also acknowledges the importance of sustaining and growing the global attractiveness of New Zealand tertiary education institutions as preferred exporters of education and training services. However, the model places these directions within the context of an institution's capacity, consistent with its strategic aspirations, to identify and take advantage of the full range of international opportunities for:

• advancing the quality and quantum of its research;

- enhancing the effectiveness of its teaching and learning process;
- internationalising the student experience;
- increasing revenues; and
- meeting community service obligations, including as agents that ought to be taking a leading role in the economic, social and cultural development of New Zealand's international position.

In the strictest sense, the process of internationalisation will have succeeded when it is no longer regarded as something external, or as a separate enterprise, by the community of an institution. Internationalisation then would be embedded in the culture and practices of the executive, academics, administrators, and, importantly, the student body. Separate internationalisation labelling of elements in plans, strategies, and organisational structures would be unnecessary. In an 'internationalised' institution these processes would be organic to the teaching, research and community service activities, and to its management practices; that is, they would be fully integrated to the point where they would be assumed to be part and parcel of the core mission.

There are very few institutions globally that can claim to have approached this state of organic 'internationalisation'. Unless established primarily as 'for-profit' providers of teaching or training service, institutions that are considered to be 'quality internationalised institutions' have done so comprehensively, beyond a primary focus on international student recruitment for revenue purposes. In turn, they attract international students via this reputation.

1.3 Surveying and consulting the sector

A key element of this study is the survey of 56 New Zealand tertiary organisations, of which 36 responded. The survey includes key items matching those of the 1998 survey, and also introduces new dimensions from the conceptual model. The survey instrument was divided into five sections, and the ordering of sections was deliberately arranged to flag the shift in emphasis, that is:

1. Institutional strategy and responses to the policy environment
2. Internationalisation of teaching, learning and the student experience
3. Internationalisation of research
4. International student programme
5. International outreach.

A broader purpose of the study was to support dialogue among providers, policy makers and diverse interest groups about best practice. This involved interviews with a wide range of individuals and interest groups, invitational forums, and a call for submissions placed on the MoE website for public discussion. Details of the project design are provided in Chapter 3.

1.4 Identifying emerging issues

A number of new and emerging issues were identified in consultations with the stakeholders in two broad groups.

A. Institutional perceptions of, and interactions with, environmental factors such as:

- government policies that seek to regulate and/or provide incentive for the processes of internationalisation;
- movements in the international trade and political and cultural transactions;

- existing or emerging international/regional mechanisms for teaching, research, cultural or entrepreneurial cooperation;

- whether an institution, as a consequence of these factors, has sought to pursue a pro-active role in the internationalisation of the New Zealand economy and its cultural and community interactions.

B. The practical extent to which institutional internationalisation strategies, policies and rhetoric are reflected in research, teaching and learning, administrative and community service, and the quality assurance processes, including:

- the extent to which institutions have actively promoted the development of the skills and knowledge needed for competent internal internationalisation and effective international interaction in their administrative, academic and executives groups;

- the efficacy of government policies and programmes in promoting and encouraging effective internationalisation in the tertiary education sector across the range of exchange, collaborative, philanthropic and entrepreneurial transactions; and

- the extent to which institutions have leveraged the broad range of government policies, programmes and support mechanisms in pursuing internationalisation objectives.

Consideration of these issues contributed to the evolving conceptual model that formed the basis of the methodology and analysis for this project.

1.5   The conceptual model

The working model used by the project team has five broad concepts organised around principles and assumptions guiding effective internationalisation policy and processes in the current global context. The first concept is that effective internationalisation depends on the articulation and institution-wide adoption of a realistic and shared internationalisation strategy. The strategies include: engaging people with the appropriate skills, knowledge and cultural competencies; activity guided and assessed by the institution's stated objectives and performance targets; and, appropriate organisational structures, strategies and funding.

The second concept is that the internationalisation of the student and staff experience is at the core of the institution's ability to identify and take advantage of international opportunities for enhancing its core businesses. Student mobility is the fastest growing aspect and performance indicator of internationalisation and a new priority for investigation. Programmes are directed at teaching and learning, research, and the broader community roles of the institution.

The third concept is that the existence of a significant international student body creates an impetus to develop and sustain a culture of continuous improvement in the processes of internationalisation. The programme strategies are focused on international student recruiting and admissions programmes as well as support services.

The fourth concept is that where research is a core function of an institution, it will generally influence approaches to teaching and learning and the priority given to them. It will also determine the direction and emphasis of the institution's community service activities, where it is international in character and connection. The programme strategies in this concept include the research collaboration programme and international research commercialisation.

The fifth concept is that the international character of an institution is strengthened through active institutional and individual participation in international academic networking, international humanitarian activities, and international ventures that are consistent with its strategic objectives. The programme strategies in this concept include: the offshore

delivery of education and training services and consultancies; participation in national and multilateral development assistance programmes; international entrepreneurial projects/ ventures; and involvement in second track diplomacy and international cultural relations activities.

1.6   The current challenges of internationalisation

In the relatively short life of this project there have been rapid and, in some respects, dramatic changes to the global context against which New Zealand must reconsider its directions and aspirations for internationalisation. For example:

'Foreign advances in basic science now often rival or even exceed America's, apparently with little public awareness of the trend or its implications for jobs, industry, national security or the vigor of the nation's intellectual and cultural life.' ...Science analysts say Asia's push for excellence promises to be even more challenging. Ensuring America's Future Competitiveness (US Senate – May 03, 2004)

'We stand at a pivotal moment,' Tom Daschle, the Senate Democratic leader, recently said at a policy forum in Washington at the American Association for the Advancement of Science, the nation's top general science group. 'For all our past successes, there are disturbing signs that America's dominant position in the scientific world is being shaken.' (Broad 2004)

Europe is lagging behind the US and Japan in both innovation and research. Based on a set of comparable data for 16 indicators, the US and Japan are still far ahead of the EU average and the vast majority of Member States...China will be spending the same amount of GDP on research as the EU in 2010 – about 2.2%. (European Commission 2005 MEMO/05/366, 12/10/2005)

Remarkable growth in a small number of emerging Asian economies, is challenging the leadership of North America, Europe and Japan in research and development. This dynamism is largely driven by China, where, in 2002, there were more researchers than in Japan, 810,000 and 646,500 respectively. (UNESCO 2005 Science Report)

If the United States (US) was being 'shaken' in 2004 and European poise was disturbed in 2005, where does that place New Zealand in 2006 and beyond? Tertiary institutions are the primary drivers for the generation, acquisition, maintenance and distribution of knowledge into and within New Zealand. International efficacy is pivotal to how New Zealand participates in the global knowledge economy, and whether and how the consequent economic, social and cultural benefits will accrue to New Zealanders.

Taking a longer-term view, over the last 50 years, the nature of international education exchange has been characterised as moving through three phases. Each phase being defined by the dominant form of the knowledge transfer transaction.

Phase 1: Aid

Since World War II there has been an upsurge in international education mobility. This was particularly evident in the Asia Pacific region and was stimulated by a range of global programmes aimed at transferring, for a mixture of humanitarian and geopolitical objectives, knowledge and skills to developing from developed economies. These knowledge transfers complemented other aid-based capital and technology transfers to these economies.

Trans-national education opportunities were provided free or heavily subsidised under the aid programmes of the donor nations. New Zealand was a strong participant in this and

took special responsibility for the South Pacific region and built strong connections with Asia. This experience and the linkages established were to assist New Zealand to move quickly into the next phase.

Phase 2: Trade

While education aid continued, ensuing economic development further increased the demand for skilled graduates in those developing economies, but their education infrastructure development lagged behind this demand. From the late 1980s Australia and New Zealand were in the vanguard of a number of countries that adjusted their 'international education' policies to give access to their education and training institutions to students who now had the capacity to pay the full cost of those programmes. New Zealand and other Anglophone countries dominated as the major receivers of these international student flows through the next two decades.

In this phase, in New Zealand 'international education' and the measure of institutional success at 'internationalisation', have been defined overwhelmingly by the trade in education services. In the context of cost pressures and tightened government funding, institutions have devoted more and more executive, marketing and servicing resources to meeting the demands of the international student market. Private sector providers were encouraged to enter the education market. The market circumstances of high and pent-up demand and limited supply ensured early success, even for institutions that had applied minimal attention to the 'internationalisation' of their programmes and support services. This led to some quality failures and government intervention through legislated quality assurance measures and the provision of marketing support.

As a result, trade in education services has become a significant New Zealand export activity. In addition to a range of intangible international trade, cultural and political networking benefits, New Zealand jobs, capital investment and skilled migration benefits are now leveraged to its continuing success.

However, there is evidence that the locus of education trade advantage is shifting. The rapid growth in student flows to Anglophone countries, the dominant traditional providers, has slowed. Maturing education infrastructure investments in sending countries have increased the availability and quality of domestic programmes. Many of these countries are now competing for international students, including through the presentation of programmes in the English language. The pursuit of offshore and online provision by traditional providers and new marketers is deferring and displacing flows to traditional provider institutions, including New Zealand.

Over the last two decades, traditional providers were strategically advantaged in the education market place by underlying factors, such as the research-based quality of their programmes, the trade dominance of their medium of instruction, and life-style considerations. There are indications that these advantages are being offset by significantly enhanced research capabilities in North-East Asia, improved living conditions and the availability of quality programmes in culturally aligned societies, and, in many of New Zealand's key markets, the perception that China is the driver of economic development and the place to go for further education and the acquisition of related language skills and networks.

Phase 3: Internationalisation

New Zealand, like most traditional providers in the preceding phase, focused on the promotion of trade in their education services. A number of other countries, for a mix of cultural, political, labour market and trade reasons, have given closer attention to the strategic and societal value of internationalising their domestic education offering. They have adopted structured policies to develop and acquire the intellectual resources and skills

needed to build and sustain competitive economies and to enrich the social and cultural development of their communities.

These countries are pursuing strategies to ensure that the internationalisation processes are embedded in and help create high performance and internationally connected cadre graduating from their education and training systems. Some, judging that critical mass of quality research effort will continue to determine national and international competitiveness, have given priority to the internationalisation of their tertiary education and cognate research sectors (e.g. China and Japan).

Smaller scale and highly internationally exposed economies, like Singapore, Denmark and Ireland, are taking measures to ensure that 'internationalisation' is a core feature across their education system and is an integrated element of their broader economic planning. The European Community (EC) recently has expended considerable policy effort on redefining the role education institutions (particularly universities) play as the 'engines' to position their communities for leadership in the new global dynamic. The EC has committed significant funds to drive the internationalisation necessary for these institutions to fulfil this role. All of these internationalisation strategies aim to position their respective citizens, institutions and economies to take optimal advantage of the global knowledge economy.

Through international education interactions, including teacher and student mobility, and the internationalisation of the domestic education curriculum, these strategies aim to build intercultural understanding, skills for personal growth and, for some, global professional mobility. These strategies also recognise the iterative relationship between active international engagement and improvements in the breadth and quality of teaching and learning, and in consequent education outcomes for domestic students.

Diversity of approaches

Governments around the world are adopting different roles in the promotion of international education services. National level, strategic and well-resourced promotional programmes exist in Australia, United Kingdom (UK), and Canada. Japan, South Korea, China, Singapore, and Malaysia are strengthening their efforts. These countries are recognising the benefits international education brings; they are selecting their target markets, establishing national level bodies whose mission is to attract international students, and they are increasingly emphasising the provision of courses taught in English.

Around this focus on education export performance a number of countries have broadened the perspective to encompass a whole-of-government approach to internationalisation across or in targeted sections of their education, training and research activities. Singapore's Economic Review Committee (2005a, 2005b), for example, has recently published integrated strategies to build international innovativeness and creativity across their school system and to position Singapore as the pre-eminent 'education-hub' for the region. The latter includes attracting high brand-value international institutions to establish branded campuses or provide jointly branded offerings in Singapore – and into the region, including Australia and New Zealand.

The current macro 'knowledge-societies' in Europe and the US and rapidly developing capabilities of North-East Asia (Japan, Republic of Korea, and particularly the Peoples' Republic of China) and emergent India are all looking to enhance their international trade in international education. They have economies of scale for investment in innovation and quality development and in modes of delivery, which will challenge the market position of medium and small economy providers.

2 Internationalisation in New Zealand 1998 – 2006

2.0 Introduction

This chapter provides an outline of developments in the internationalisation of the New Zealand tertiary education sector since the 1998 study. The main focus is on policy initiatives, new programmes aimed at encouraging the internationalisation of the sector, and a summary of the changing patterns of student enrolment profiles across the tertiary system. The analysis of broad trends in student numbers draws on a number of sources, primarily data extracted by PhillipsKPA from the MoE website in consultation with Tertiary Sector Performance Analysis and Reporting, MoE. The data selected was intended to indicate the nature and extent of internationalisation in terms of student profiles at system and institutional levels since 1998. The discussion also uses data and commentary from the *2004 Profiles and Trends* report (MoE 2005a), and the 2005 OECD *Country Background Report for New Zealand* (MoE 2005b).

2.1 Changing context and national policy settings

Internationalisation trends in New Zealand need to be set against the changes in the sector generally. The tertiary education sector has seen a continued pattern of growth that began in 2000. In 2004 over 14% of the population aged 15 years and over were enrolled in government-funded tertiary education organisations (MoE 2005c:15).

In 2004, the number of students increased by 9% over 2003 to a total of 368,006 formal enrolments (Appendix B Tables 1 and 2). The proportion of students enrolled at university declined in favour of the institutes of technology and polytechnics (ITPs) and private training sectors. Between 2000 and 2004, the proportion of students enrolled at university level declined from 46% to 38% of all students and the actual number of students enrolled in ITPs and private training grew by around 20% from 2003 to 2004. This growth in students attending ITPs and private training was conditioned by tertiary education 'student component' funding policies that encouraged these providers to expand student numbers by rapidly developing new programmes, that in some cases are now judged to have marginal individual or workforce value.

New Zealand national policy makers have acknowledged that the country's ability to develop and sustain an international standard of education and research capabilities will determine whether New Zealanders play an active role, or are marginalised, in the rapid evolution of the global knowledge society. The MoE *Country Background Report to the OECD* confirms the fundamental starting point for analysis of recent trends and the current context:

> *Much of the improvement in the financial importance of the public tertiary education institutions (TEIs) over the last five years was associated with the rapid rise in international student numbers. (MoE 2006:1).*

Notwithstanding that acknowledgement and ongoing commitments to international education aid, to goodwill and student-experience exchanges, and to research and teaching collaborations, the recruitment of international students has been the dominant dimension of internationalisation for education sector policy and for institutional responses in New Zealand over the last two decades. This was reflected also in the attention given in the 1998 survey to international students as the primary dimension of the internationalisation of New Zealand tertiary institutions then and going forward.

The policies and related programme structures created since the 1998 survey include:

- *Export Education in New Zealand: A strategic approach to developing the sector* (MoE, August 2001);
- the *Code of Practice for the Pastoral Care of International Students* (MoE March 2002);
- an Export Education Provider Levy (MoE, December 2002); and
- *The Tertiary Education Strategy 2002/07* (MoE, May 2002).

These and other policy elements were consolidated into:

- *An International Education Framework* (MoE, March 2004); and
- *Strengthening International Education* (MoE, April 2005d).

The Export Education 2001 statement noted the connection between education export performance and a range of other international relations objectives and domestic education outcomes. In the subsequent policy responses, there was some recognition of these other dimensions, but overwhelmingly the policy developments and programme resources were directed to enhancing the international 'sales' performance of New Zealand institutions. This, and domestic funding regimes, influenced the focus of institutions on the revenue opportunities of internationalisation which in turn implied that the primary measure of successful internationalisation was the getting and servicing of increased enrolments of international students.

The 2005 statement from the Minister of Education on strengthening internationalisation, in addition to again giving primary and significant attention to enhancing New Zealand's education export performance, noted that the internationalisation of New Zealand education must be underpinned by improving the quality of education experience and outcomes for all students. The benefits of providing international study experience for New Zealand students were recognised in the increased scholarship funding allocated for short-term study abroad. However, the broader internationalisation matters were set largely in the context of domestic education policies and programmes and through individual institutional responses.

These series of policy developments were accompanied by 'governance' changes, including:

- the creation in 2002 of an international education issues sub-group within the External Relations and Defence group of public sector heads;
- the consolidation of industry consultation mechanisms via Education New Zealand; and
- structured and informal interactions between Education New Zealand and other agencies such as the Department of Labour on immigration matters, NZ Trade and Enterprise on trade promotion and related matters, the Ministry of Foreign Affairs and Trade on cognate bilateral and multilateral relations matters and the Asia New Zealand Foundation on a range of intersections with the study of Asian languages and societies and networking with those societies.

Public funding for policy initiatives also included:

- a strengthened offshore representation and associated international marketing collateral for New Zealand education;
- targeted scholarships for international students and 'domestic fee status' for international PhD students;
- enhanced quality assurance and pastoral care for international students;

- awards for short-term study abroad for New Zealand students as part of their New Zealand course; and

- grants for industry development and innovative practice projects.

The two major innovations in research funding since 1998 have been the Centres of Research Excellence (CoREs) and the Performance Based Research Fund (PBRF). The CoREs are designed to support world-class research using inter-institutional research networks to develop critical mass and synergies that would generally not be possible in a single institution. The PBRF has considerable potential to influence internationalisation beyond research activity. Indeed it may be seen as pivotal to the success of the broader internationalisation agenda for reasons that are discussed in the concluding chapter.

In the October 2005 briefing for the incoming Minister for Education, the MoE pointed to these 'significant policy changes, some in response to significant problems of growth and quality that have emerged' associated with New Zealand's involvement in international education (MoE 2005e). The briefing anticipated an increasing rate of change in the international education environment that called for 'further shifts in capabilities at institution, system and agency levels'. It particularly called for a more integrated policy development effort.

In early April 2006 the Minister for Tertiary Education announced a review of the 'student component' funding arrangements (MoE 2006). The Minister proposed, for consideration, multi-year funding based on institutional business plans that identified and developed strategic specialisations, articulated education and training outcomes for students and their communities, ensured the development of needed workforce skills, and consequently provided better value for New Zealand taxpayers. The Minister also foreshadowed improvements in the quality of management information across the sector and international benchmarking of New Zealand universities that would be used to inform national education investment decisions.

These foreshadowed policy developments resonate with the findings of this report. They potentially provide a framework for integrating into domestic tertiary education policy the further action on internationalisation recommended in the concluding chapters.

2.2   The changing international student profile

The data provided here are from the Ministry *July Snapshot* and the *Full Year Collection*. There are variations between the data sources on certain aspects of international student programmes. The *Snapshot* includes all private providers. The *Full Year Collection* does not include private tertiary education providers that do not receive any government funding and do not have courses approved for student loans and allowances. It is important to note that the varying definition of 'international student' means that the numbers reported against 'Foreign Fee-Paying', 'Formal International Student' and ethnic type of 'International Student' will vary. Despite the differences in methodology, common themes were identified.

The most obvious change in the international student profile is shown in Table 2.1. Between 1998 and 2004 the number of international students in public tertiary education grew from 7,750 to 40,337. It is worth noting, given the variability in the available statistics, that the public tertiary institutions surveyed in 1998 actually reported a total of 9,968 international students in the sector. The discrepancy is a reflection of the data collection systems. The total number of FFP students in both public and private institutions in 2004 is 50,213 (excluding English language students) as shown in Appendix B Table 3.

Growth and Distribution of Fee Income

The pattern of growth in the number of FFP students in public tertiary education from 1998 to 2004 (Table 2.1) illustrates the dramatic peak in growth of 59% in 2001, and the equally dramatic decline in 2004 to just 10% growth. Public providers have experienced a greater increase in FFP students as a share of the total over the last five years.

Table 2.1: Foreign Fee-Paying students enrolled in Public Tertiary Education Full Year (1998 – 2004)

	1998	1999	2000	2001	2002	2003	2004
Total	7,750	8,592	11,498	18,336	28,603	36,572	40,337
y/y growth	-4%	11%	34%	59%	56%	28%	10%

In 1998, the fee income from international students was around $70 million. By 2004 the international education industry was generating around $2 billion annually and international student fees increased by 24% on a per equivalent (EFTS) basis between 2000 and 2004.

Figure 2.1: International fee income as a component of total income
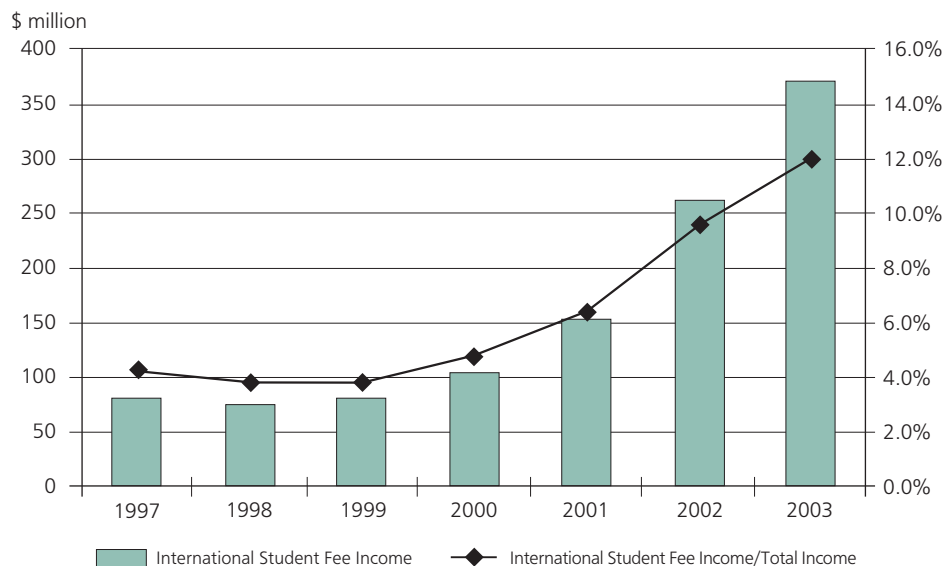
Figure 2.1 demonstrates the increasing TEI dependence on international fee income as a component of total income. The proportion of FFP students increased from 3.1% in 1999 to 8.9% in 2004. This increase has been greater for public tertiary institutions over the last five years. Between 1999 and 2004, the rate of increase in international students was significantly greater than that of domestic students in the TEIs. In 1999, only 4% of the student population in TEIs were international students compared with 10.6% in 2004. Nearly 40% of international students in 2004 were studying in English language schools – private training establishments (PTEs) that specialise in the delivery of English language training.

Patterns of sector differences

The most significant growth in international students has been in the university sector where the proportion has grown from 5.6% in 2000 to 16.6% of enrolments in 2004 (Table 2.2). Figure 2.2 shows the growth in the numbers of FFP Students enrolled in public tertiary education by sector.

Table 2.2: Formal International Students as % of Formal Student Enrolments July Snapshot (2000 - 2004)

Sector	2000	2001	2002	2003	2004	04 vs 00*
Colleges of Education	0.7	0.8	1.5	2.8	3.7	3.0
ITPs	2.9	5.1	7.2	7.4	6.4	3.5
Private Training Establishments	5.4	6.4	9.1	14.3	13.6	8.2
Universities	5.6	7.8	11.3	14.7	16.6	11.0
Wānanga	0.1	0.0	0.0	0.0	0.0	-0.1
Total	4.4	6.1	8.4	10.4	10.6	6.2

* Percentage point change

Figure 2.2: Foreign Fee-Paying Students enrolled in Public Tertiary Education by Sector Full Year (1994 - 2004)
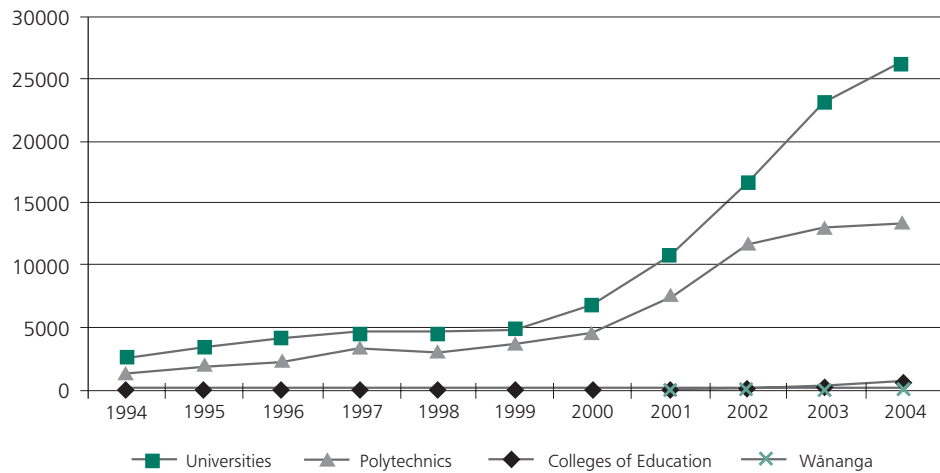
Figure 2.3: Formal International Students by Sector Full Year (1999 - 2004)

	Universities	Polytechnics	Private Training Establishments	Colleges of Education	Wānanga
1999	4716	3764	1690	12	
2000	6778	4628	3340	90	2
2001	10664	7588	6335	82	2
2002	16638	11804	9390	160	1
2003	23118	13081	10467	371	2
2004	26268	13500	9876	561	8
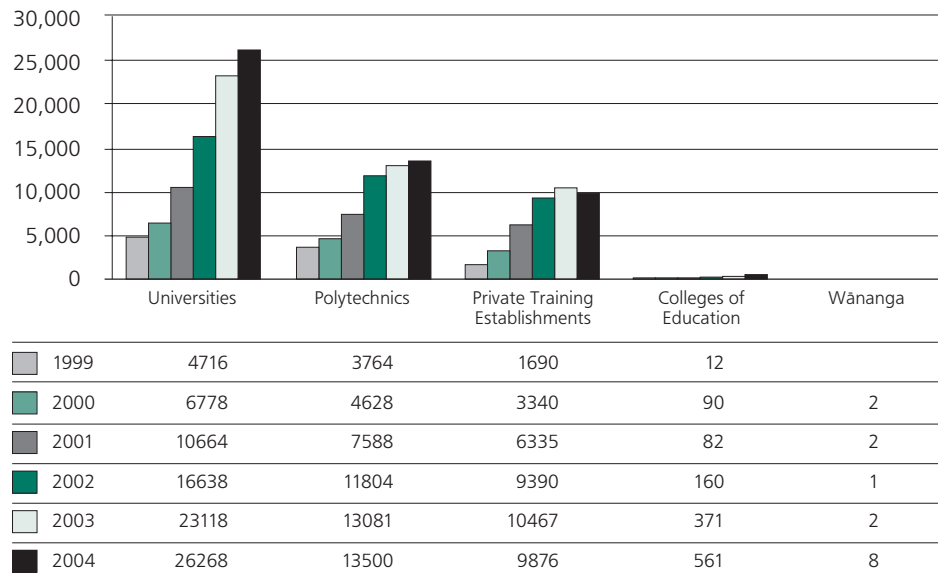
The numbers of students by sector are shown in Figure 2.3 above. With 26,268 students in 2004 the university sector has emerged as the main provider. This is in stark contrast to 1999 when the number of students in universities (4,716) was only marginally greater than the ITPs (3,764). As indicated above, the rate of growth in the ITPs over the last few years has flattened out to around 13,500 in 2004, as have the PTEs with 9,876 students in 2004.

Source regions and countries

The source countries for international students have changed since 1998. Table 2.3 shows an increase in numbers of FFP students from Asia enrolled in public tertiary education from 6,241 in 1998 to 34,189 in 2004. However, the change in the proportion of public tertiary students from Asia was not significant over that period (see Appendix B Table 7), with 81% in 1998, dropping to 79% in 2000 and increasing again to 85% in 2004. While there has been an increase in the numbers of students in each of the other regions since 1998, the proportion has been fairly stable. Students from Asia dominate the numbers enrolled in private tertiary education with 4,521 of the 4,966 enrolled, that is, 91% of the group (Appendix B Table 8).

Table 2.3: Foreign Fee-Paying students enrolled in Public Tertiary Education, By Region Full Year (1998 - 2004)

Sector	1998	1999	2000	2001	2002	2003	2004
Asia	6,241	6,664	9,100	14,958	24,098	31,212	34,189
North America	382	484	639	865	1,220	1,732	2,197
Europe	352	528	757	1,013	1,397	1,712	1,895
Pacific	604	615	817	1,124	1,402	1,311	1,338
Africa	63	75	82	164	218	306	308
Middle East	19	20	41	100	129	149	230
Central and South America	38	49	62	111	136	138	162
Not Stated	51	157	–	1	3	12	18
Total	7,750	8,592	11,498	18,336	28,603	36,572	40,337
Not Asia	1,509	1,928	2,398	3,378	4,505	5,360	6,148

Qualifications levels

From 2000 to 2004 the growth in the international student enrolments, although slowing, has remained high in degree, diploma and postgraduate levels of study (Figure 2.4 and see also Appendix B, Table 9). The number of international students studying at the Certificate level declined in 2003 (-12%) and 2004 (-15%). They have declined as a proportion from 29% in 2000 to 17% in 2004. In contrast, the proportion of international students at the degree level has grown since 2000 from 45% to 51% in 2004 and 24% were then at the Diploma level.

Figure 2.4: Formal International Student Enrolments by Level July Snapshot (2000 - 2004)

	Degree Level	Diploma Level	Certificate Level	Post-Graduate Level
2000	5488	1604	3544	1445
2001	7493	2182	6748	1685
2002	10390	5309	9008	2171
2003	16293	8396	7928	3008
2004	20156	9467	6713	3368
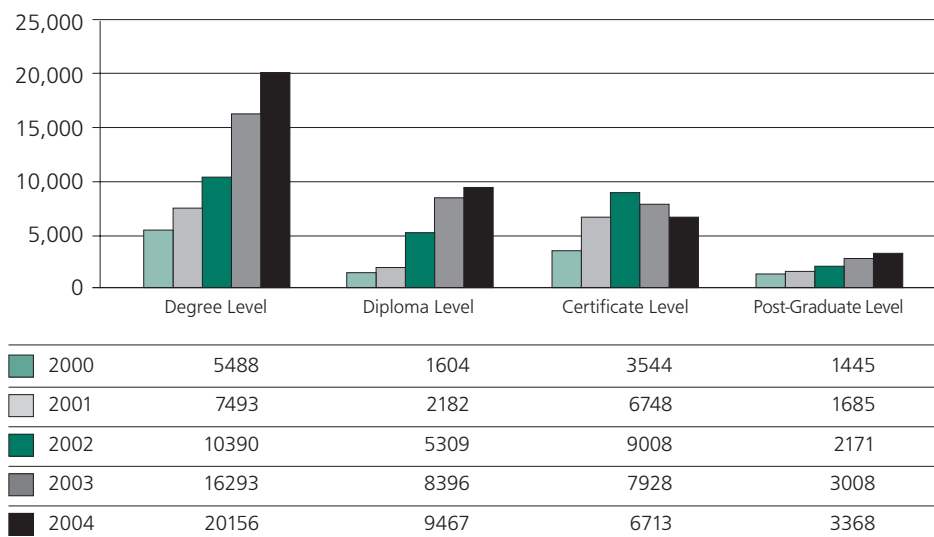
Finally, since the 1998 survey there have been changes in the field of study in which international students enrol. Appendix B Tables 10 and 11 show a growing proportion of international students enrolled in Management and Commerce courses. This group increased from 32% of international enrolments in 2001 to 47% in 2004. The decline in Information Technology students by 18% in 2004 reflects international trends that have deteriorated further. There was also a decline in Mixed Field Programmes from 26% in 2001 to 16% in 2004, and similarly, Society and Culture declined from 17% in 2002 to 10% in 2004.

3 Project design

3.0 Overview

A five-stage methodology was used in the project design incorporating analysis of existing data, interviews with key stakeholders, a survey of institutions, identification of case studies and two invitational forums.

The first stage involved the collation and analysis of Ministry data and the preparation of tables for the period 1998 – 2004 wherever possible. Extracts of statistical data were taken from the MoE *Full Year* and *July Snapshot* collections focused largely on the changing demographics and enrolment patterns of international students.

The project team then developed the survey structures and items in consultation with the Advisory Committee. This was further informed by site interviews conducted in Wellington with key government and agency people (Appendix E). The interviews were guided by a semi-structured schedule of questions on a range of issues concerning policy development and programmes. In almost all cases interviews were attended by two of the project team.

Identification of 2005 case studies was a specific requirement of the RFP. However, discussions at the first meeting with the Advisory Committee suggested that only preliminary indications of possible cases could be made on the basis of the survey returns. Ultimately, the project team concluded that rather than case studies, selected examples of diagnostic audits of institutional processes would be more useful to the sector. This was agreed to in principle by the Advisory Committee, subject to the availability of funding.

Two forums were proposed, one each in Auckland and Wellington, to discuss the findings of the research and potential directions for New Zealand's internationalisation agenda. They were attended by invited representatives from the tertiary institutions and from other parties with a direct interest in the development of internationalisation policy (see Appendix G). This sounding board device assists in enhancing the credibility of the consultative process by giving a direct voice to key interest groups. The outcomes of the forums are reported in Chapter 10.

3.1 Survey distribution and management

All 33 public institutions were invited to participate in the survey along with a representative cross-section of 23 private providers to make a total of 56 institutions surveyed.

Given the administrative demands on institutions generally, and from survey requests in particular, it was decided, in consultation with the Advisory Committee, to break the survey into discrete components for each institution to delegate as it saw fit. A mix of electronic and hard copy responses was offered to suit different contexts. The project team flagged the high risk of non-completion of particular sections and this turned out to be a problem in some instances.

Each CEO was contacted by letter and invited to participate in the survey. They were asked to forward the name of a primary contact person to liaise with the survey project team. The electronic version of the five separate sections was emailed to that person for internal distribution and management. Reminders were sent and deadlines negotiated to suit different circumstances. Of the nine organisations that did not respond at all to the initial invitation or follow-up reminder, some were identified as of particular interest and telephoned or emailed. This increased the number of responses by five. Three institutions

declined and 13 did not respond at all. The pattern of delegation within organisations varied considerably and is referred to at a number of points in this report.

The invitations to participate in the survey were mailed out on 11 October 2005 with a nominal deadline for returns as 11 November 2005. The survey was closed off on 8 December 2005 with six institutions pending. In some cases this means that sections of the survey were not completed because key staff were not available at the time.

As predicted, many of the organisations pointed out that they were overloaded with requests for survey and related information. A few mentioned that they had as many as four similar requests during the survey period. As Table 3.1 below shows, 36 questionnaires were returned. By way of comparison, the 1998 survey included seven universities, 25 ITPs, and four colleges of education to make a total of 36 institutions. The ITPs are under-represented in the 2005 survey.

Table 3.1: Summary of survey returns

	Universities	ITPs, Colleges of Education and Wānanga	Private Tertiary Establishments	Totals
Total mailout	8	25	23	56
Declined	–	1	2	3
No response	–	5	8	13
Phone/short survey	–	–	4	4
Completed responses	8	19	9	36

It emerged early on in the survey process that five private providers felt that, on balance, much of the questionnaire was not sufficiently relevant to their organisations to warrant a response. It was decided to construct a short survey of eight key questions to get at least some core information from these providers. This was emailed directly to four organisations and all replied. In addition, a telephone interview was conducted with the CEO of one organisation.

The numbers of the responding institutions varies across the five sections of the survey.

3.2 Definitions of student classifications

The project team reviewed the definitions (Appendix F) provided in the 1998 questionnaire and made only minor changes to the language, with the aim of keeping the operating definitions as simple as possible so long as they were consistent with Ministry data sets. The term 'institution' is used as the generic for all the providers, state or private. The advice received was that the Export Education Levy and the Code of Practice for the Pastoral Care of International Students, defines an 'international student' as a person who: a) is enrolled by a provider; and b) in relation to the provider, is a foreign student as defined in Section 2 or section 159 of the Act (whichever is applicable). The two descriptions would appear to be interchangeable between the Code and the Act.

This raised questions on the comparability between survey data and online datasets. The datasets determine a student's domestic/international status based on their citizenship. The Single Data Return Manual states that:

- All non-domestic other students are to have the three-letter country code corresponding to their citizenship as shown by their passport.

- Australian citizens and New Zealand permanent residents enrolled in extramural study who are not resident in New Zealand will have AUS and NZP as their respective country codes. These students are classified for reporting purposes as international students.

In the relevant items, and in the conceptual framework, the terms 'student exchange' and 'study abroad' are covered broadly as 'student mobility' except where the two types of programmes are distinguished for the purposes of analysis.

3.3   The questionnaire design

The survey questionnaire is the primary source of data and analysis in Chapters 4 to 8. The questionnaires are provided in Appendix J.

The shift in focus and emphasis between 1998 and 2005 has been discussed in the previous chapters. The 1998 survey asked institutions to report against six programme strategies and an overarching organisation strategy, in the following order:

- International Student Programme
- Internationalisation of Teaching
- Offshore and Distance Education
- Technical Assistance and training
- International Research Links
- International Student and Community Support Services
- Organisation Strategy in respect of Internationalisation.

The 1998 survey gave most attention to the contribution of international student flows (in terms of revenue and the enrichment of teaching, learning and the cultural environment) and an emphasis on internationalisation processes that responded to the needs of international students.

As indicated earlier, the 2005 questionnaire aimed to give more attention to the strategic policy development of institutions as well as gathering institutional profile data for the purpose of trend analysis. While it retained most of the elements of the 1998 survey, it rearranged some of those elements to reflect the higher order of importance assigned to them and added many new items.

The items were considered in some detail by the Project Advisory Committee. Numerous iterations produced a version that attempted to balance the need for detail against the realities of potentially low response rates if the questionnaire became too long and complex. The new and emerging issues underlying the survey design and items were discussed in Chapter 1. Figure 3.1 shows the 2005 survey structure set against the key elements of the 1998 survey instrument.

Figure 3.1: Conceptual model and survey structure

1998 QUESTIONNAIRE SECTIONS	2005 QUESTIONNAIRE SECTIONS	Focus 2005
International student programme Internationalisation of teaching	Internationalisation strategy and institutional responses	• Organisation and programme strategies • Integration and dynamism • Allocation of funds • Institutional base • Interaction with government policies and programmes
Offshore and distance education Technical assistance and training	Internationalisation of student experience	• Curriculum and student experience • Teaching and learning technologies • Internationalisation literacy • Staff development and mobility • Student exchange
International research links	Internationalisation of research	• Research collaboration • Research entrepreneurship
International student and community programme	International student programme	• Student marketing and admissions • Student and community support services
Organisation internationalisation strategy	International outreach	• International academic networking • International humanitarian activities • Offshore delivery and distance education • International ventures

3.4   Complementing the offshore project

At about the same time as this project got under way, the Education New Zealand Trust had commissioned a project to provide baseline data on the provision of offshore tertiary education by New Zealand providers. Vince Catherwood and Lester Taylor were the two researchers involved. The offshore project is expected to contribute to the outcomes of the Government's broader Export Education Innovation Programme, such as improvement of capacity and capability to engage in offshore education activities.

There was obvious potential for overlap and duplication between the two projects, but because of Vince Catherwood's involvement in both projects the work was complementary. However, it did add to the already significant problem of the sector being overloaded with survey requests and both projects required sensitivity to the demands on institutions. Some comparisons between the two projects and the results are discussed in Chapter 8. We are grateful to the Education New Zealand Trust for their co-operation.

4 Institutional strategies and responses

4.0 Introduction

Section 1 of the 2005 Survey sought responses to questions about how institutions develop and communicate their internationalisation strategies, the factors, including government policies, impacting upon those strategies, how they funded and organised their internationalisation activities, and whether performance targets are set, and if so, the incentives and accountabilities for achievement.

It also sought institutions' views on related innovation and future developments. It invited responses to these questions from persons with senior strategic responsibility for these issues. It was envisaged that institutional responses to the new elements of the 2005 survey might help determine whether it is necessary, or feasible, to expect all New Zealand tertiary institutions to reach the same level of international strategic capacity and what might best be done to encourage those institutions to further develop the capabilities that best matched their internationalisation aspirations.

4.1 Commitment to internationalisation

The 1998 survey found that many institutions had 'no explicit mention of a policy of internationalisation' in their corporate documents. Two-thirds made no mention of internationalisation in their mission statements, and a third had no related policy statement in their corporate or business plans.

There has been a significant change in this since the 1998 survey. Nearly all of the institutions responding to the 2005 survey indicated they believed internationalisation is at least 'very important', and nearly half felt it was 'extremely important'. This was reflected also in the high number of institutions that reported specific references to internationalisation in the hierarchy of their governance and planning documents, the dominant document being the 'Institutional Profile' where all reported an internationalisation reference.

The most often quoted benefits of internationalisation were, in order, revenue flows, opportunities for staff and student exchanges and preparing students for the global economy. The major challenges, in order, were seen to be gaining internal 'buy-in', costs generally and those associated with internationalisation affected by the value of the New Zealand dollar, and the concentration of student flows from a small number of countries. About half the institutions surveyed saw the presence of international institutions in New Zealand as a major threat likely to depress quality, prices and market share, but about one-third were ether unsure or felt they would have little or no impact.

Notwithstanding this high level of espoused commitment to internationalisation by institutions, only slightly more than half reported having a senior management or working group specifically focused on internationalisation, chaired by a senior executive. This showed little advance over the 1998 survey results. There was wide variation in the level of the position that carried primary accountability for this internationalisation policy function. Universities, as in 1998, were more likely to have assigned this role to a Deputy Vice-Chancellor or Pro Vice-Chancellor.

A clear majority of strategies are centrally determined, while only half of the institutions reported that academic and business units have internationalisation goals and objectives in their plans. Most indicated that they had mechanisms for communicating these plans and other information about international activities to administrators and academics, but

also indicated, as above, that getting staff 'buy-in' remained a major impediment to the effective achievement of internationalisation objectives. Perhaps, as one submission noted, some small but potentially effective initiatives should be considered:

> *Currently, funding for offshore education initiatives is targeted at developing business cases when, in fact, the need is for earlier seeding money which could be used at an initial level to get academics offshore to raise awareness by providing the opportunity for direct experience. (S2)*

Institutions pointed to increased student mobility, international competition and benchmarking as the most important factors influencing their internationalisation policies and practices, but less than half of the respondents said they had specific business plans for regions of interest. All of these factors were seen to be more important than advances in teaching and learning technologies.

4.2 Responding to the national policy context

Most institutions (80%) said they actively monitored government policy and programme developments affecting their internationalisation activities, with Education New Zealand and the MoE being the most used sources of such information. More than half the respondents felt that New Zealand national tertiary education policy documents did not give adequate emphasis to internationalisation. Only a third indicated that the *2002/2007 Tertiary Education Strategy* had influenced their internationalisation planning. Even this may have been an indirect influence as a third of all respondents saw domestic tertiary education funding policies as having the greatest impact on the capacity of their institutions to develop international standing in their education and research offerings.

4.3 Organisation and resourcing for internationalisation

It is difficult to draw strong conclusions from the reporting by institutions on the budget configurations, costing practices, the functions, reporting lines, and numbers of staff involved in the processes of internationalisation, given the wide variation in nomenclature for functions, position titles, and the way in which staff numbers were presented. The variations in ways in which public and private institutions organised their businesses means that the survey questions on these matters did not elicit easily comparable data. Subject to this qualification some observations are possible.

It is clear that the bulk of staff time that can easily be identified as contributing to 'internationalisation', appears to be invested in marketing, recruitment, and servicing student needs. Universities in particular indicated some investment of staff time in broader non-commercial internationalisation activities.

Fee income and distribution

Question 1.17 attempted to measure the extent to which institutional fee-income (non-public funding) was dependent on international student flows. Clearly, private institutions whose businesses are focused on international education are heavily dependent and reported between 70–80% of fee income derived from international students. However, the data also suggested high public institution dependence on international fee income, ranging between 10% and 50%.

How these revenues are deployed varies significantly between public and private institutions. Most private institutions operate on the basis of distributed profit centres within their organisations. Public institutions indicated there was no dominant mode for the internal distribution of international fee revenue. Where formulas were used as the basis for

distribution of revenue to teaching units, the factors used varied from 'load figures' or 'running costs', to 'full return of the total fee revenue', sometimes after prior deduction of central overheads or with a revenue levy later returned to 'the centre'. Over half the public institutions reported returning more than half of student revenue flows to the faculties or departments. There appears to be little overall change in these practices since the 1998 survey.

It is assumed that private institutions would apply commercial principles in determining the cost-of-delivery and therefore fees charged. However, around a third of all the responding institutions, public and private, said they had no specific costing model to determine such costs. This suggests that many public institutions do not apply structured costing models to determine the costs to them of providing international student places. One respondent noted that around 6% of the students produce over 15% of the institution's total revenue and that even after offsetting related marketing and compliance costs and estimating a further $0.5million to develop internationalisation in the institution, the international fee revenue would still contribute a surplus to the institution budget. However, it is not clear how this proposition can be sustained without full costing calculations. It may be that institutions are not actually generating the surpluses they believe they are from each of their international programmes.

Target setting

Nearly all institutions set targets for the number of international students to be recruited. Parallel consultations indicated that these were most often driven by revenue targets set, at the centre or business unit level, in the context of estimated operating costs for the projected budget period. Most public institutions ranged between 5 - 20% of their students being international students, though one university has set a target of around 50% in 2006 and one included the use of quotas for specific nationalities. Within these targets, most institutions share a concern for the observed over-reliance on a limited range of source populations.

Rarely were these targets or concerns about concentration couched in terms of a desired percentage of the student population based on pedagogical considerations. All institutions referred to diversification of marketing effort as the means of addressing this concentration. However, given the apparent absence of disciplined costings, the relative returns of this more broadly distributed and costly marketing effort against stiffening competition are likely to have been only lightly assessed.

4.4   Internationalisation performance and accountability

Again, the local variations in the nomenclature of positions/levels may lead to diverse responses to the question (1.26) of who in the organisation was the senior person with substantial responsibility for internationalisation. The clear majority of responses nominated the position of 'Director'. It is possible that International Directors within universities who were assigned responsibility for responding to the survey also, understandably, nominated themselves as this person. Only two university responses nominated persons at DVC/PVC or above. Responses to other questions (e.g. 1.6), however, clearly show many more with reporting lines to DVC/PVCs. Within ITPs this responsibility appears to be lodged with CEOs or their deputies, as is the case with private institutions.

While over two-thirds of the institutions reported that their institutional business plans set specific internationalisation targets and half indicated that there were similar performance targets set for each academic and business unit, only a third of institutions agreed that these were a feature of senior executive performance measures. Only half of that number had associated performance incentives, though this was double the proportion that reported

such schemes in the 1998 survey.

A clear majority of institutions reported the existence of quality assurance processes for internationalisation activities. Further investigation is needed to determine whether these are primarily orientated to ensure compliance with external regulations or are bona fide measures of the quality of these activities. A pointer to where the balance lies is that less than a third reported having international benchmarking processes in place, whereas two-thirds reported having risk management strategies for their international activities. The extent to which institutions have shifted from a compliance orientation to quality outcomes will be a useful measure for future investigation.

Of the public institutions that reported having a separate commercial arm its role varied considerably from 'no involvement' through to 'direct planning and operational involvement' in the institution's other international activities.

4.5 Assessing strategic capabilities

It is clear that there have been some advances in institutional strategic analysis and planning since the 1998 survey. However, it has not been possible through this survey to establish whether these institutional mechanisms are effective in monitoring global and market developments or are able to distil this intelligence into practical strategies and business plans. What is clear is that institutional strategic effort and attention is still very much focused on recruiting international fee-paying students with less attention to the fundamental processes of institutional internationalisation.

The majority of international education policy and framework statements and documents appear to have been developed by the MoE in concert with Education New Zealand and focus heavily on the pursuit of education trade. These policies and the programme and infrastructure support these agencies have provided for marketing appear to have been well received by institutions. A few institutions particularly welcomed operational guidelines, industry quality assurance measures, and codifications produced by these agencies.

As stated above, it would be unwise to draw from this data definitive conclusions about the efficacy of institutional organisation and resourcing for internationalisation. Sample diagnostic audits of a range of cases are needed to map more accurately how institutions are assigning priorities and deploying resources internally for internationalisation. The elements of such a study would need to be configured differently for public and private institutions. Nonetheless, there are some matters that warrant further investigation, in particular the apparent absence of rigorous and consistent costings for the provision of places to international students, and the somewhat related quick resort to diversification of marketing effort.

Overall, it is hard not to discern a sense of frustration and survey fatigue from a number of responses. It was clear from the nature of the responses and the accompanying commentary that the surveys were completed by staff with different levels of responsibility. Their knowledge of the corporate planning and change management processes varied considerably. One respondent noted that planning documents gave them little practical guidance and that there was a significant gap between rhetoric and action. In fact, the summary assessment for this section is well set out in the comment from one institution:

> *'Outward looking', 'world class capability', 'international links', 'global connectedness' are the sorts of phrases we often hear but there does not appear to be any centrally driven strategy or process which is designed to ensure that internationalisation becomes embedded in what we do on an ongoing basis.*

This statement and 2005 results resonate with one of the conclusions of the 1998 survey that said:

The national settings for internationalisation of tertiary education in New Zealand are in place. Yet there is little evidence across the tertiary sectors of a commitment to develop a culture of internationalisation (1998:4).

There is, however, some evidence that many of the institutions surveyed now have in place a number of the elements that the 1998 survey suggested were indicative of good practice in internationalisation. This is particularly so in some universities and ITPs. However, the plans, organisation, resourcing and performance targets appear still to be dominated by a focus on education export.

While there are institutional exceptions, there is little solid evidence from this survey that the sector as a whole is gearing itself for possible rationalisation, or building capabilities and alliances to ensure it is not marginalised in the international trade in education or in the other dimensions of involvement in the global knowledge economy.

5 Teaching, learning and the student experience

5.0 Introduction

The focus of Section 2 of the 2005 survey was on the internationalisation of the student experience, with particular attention to the changing patterns of student mobility via international exchange and study abroad programmes. It emphasises the new significance attached to the nature and quality of the student experience since the 1998 survey. Institutions were also asked to provide examples of initiatives specifically designed to internationalise the curriculum and teaching for the benefit of all students, domestic and international.

As with the 1998 survey, a series of items explored patterns and trends in the international movement of students (other than fee-paying international students), the financial support available for students, and the nature and extent of agreements between New Zealand and overseas institutions. The survey also asked for indications of the extent to which international dimensions were included in the curriculum and any arrangements for collaborative academic programmes with overseas institutions.

We are not in a position to comment on the nature and quality of the various initiatives and approaches to internationalisation. An audit involving site visits would be necessary to verify and expand on many of the responses.

5.1 Student mobility

A number of institutions did not appear to have accurate information available on the number of agreements or memoranda of understanding for student international mobility in place, or indeed, on the numbers of students involved and were only able to provide a rough estimate. The total of 495 agreements reported in 2004 is therefore probably conservative. It is useful to look at the distribution and concentration of those agreements. Six of the universities account for 344 of the 501 agreements, with Otago (80) and Auckland (79) the most prolific. UNITEC stands out amongst the ITPs with 77 agreements. Eight providers had no agreements and nine had just a few (1-3) agreements, most of which were the private organisations. The notable exceptions were AIS St Helens (13 agreements), and Whitecliffe College of Art and Design (10).

Table 5.1 shows the extent to which the tertiary institutions were engaged in student mobility activities in 2004. The data is extracted from 31 useable responses overall and the right-hand column refers to the number of institutions that said the item did not apply in their case. One institution was excluded because it provided what could only be assumed to be very rough estimates. Had accurate numbers been given this would have substantially increased the numbers on student mobility and related activities. The five major countries for international student exchange links/experience programmes are the US (15.9% of responses), Japan (10.6%), Canada (8.0%), China (8.0%), and Australia (6.2%). Altogether, 29 countries were listed covering all continents except Africa.

Since the quality of the 2004 data on student mobility is uneven, comparisons with the 1998 stocktake cannot be made with confidence. Notwithstanding the caveats regarding comparisons, it is fair to say that there has been a marked increase in student mobility in all respects. Indeed, since one of the larger institutions provided only rough and unreliable estimates, the level of activity is clearly understated.

As Table 5.1 shows, 20 institutions in 1998 reported a total of 175 links involving the international movement of students on an exchange basis. That resulted in some 408 incoming and 281 outbound international exchange students. By 2004 the links had increased to at least 495 and the numbers of incoming students had at least doubled. The number of outbound students remained relatively smaller but had increased overall to a conservatively estimated 453 individuals.

Table 5.1: Student mobility programmes 1998 and 2004

	1998	2004	*N/A*
Number of agreements or memoranda of understanding for student international mobility	175	495	*4*
Number of overseas institutions sending students to New Zealand institutions	N/A	280	*6*
Number of overseas institutions which New Zealand students attended	N/A	184	*6*
Number of incoming students from the overseas institutions	408	903	*5*
Number of outbound students on exchange or study programmes to overseas institutions	281	453	*6*
Number of students involved in other international experiences e.g. study tours, clinical experience, collaborative projects	345	798	*7*
Number of students taking all or part of an international qualification at the New Zealand institution	N/A	494	*8*
Institutions with international business/industry practice placements	N/A	6	*11*

The 1998 survey found that some 345 students were engaged in a variety of other international experiences such as study tours and work placements. It concluded that New Zealand tertiary organisations were providing an international experience of some form for 626 students. This represented 0.9% of the year cohort but for the universities the figure was 1.5%. The 2005 survey also asked institutions if they had specific target numbers for exchange/study programmes, and for student international experiences. Eleven of the 31 institutions said they had targets for exchange/study programmes, nine did not, and 11 responded that targets were not applicable to their case. Four of the 31 institutions had targets for student international experiences, 14 did not, and 13 said that targets were not applicable in their case.

Based on a survey of universities, Daly (2002, 2005) found that fewer than 1% of New Zealand students venture abroad as part of their university study. The figure in her estimation rose slightly from an estimated 0.11% in 1996 to 0.24% in 2001. Notwithstanding the differences between the surveys, the Daly study confirms that relatively few New Zealand students participate in student exchange although the number is growing. Table 5.1 shows an increase in the numbers of students involved in other international experiences to a modest, but again conservative estimate, of 798 individuals.

Institutions were invited to provide examples of courses or programmes where students are required to complete part of their studies at an overseas institution. Six responded, four universities, one ITP and one private provider. The diverse range of courses included:

Auckland University of Technology	*Bachelor of Business (International Business)*
Christchurch International College	*High School Year 13 (NCEA level 3)*
Lincoln University	*Masters of International Nature Conservation*
Southern Institute of Technology	*Bachelor in Audio Production*
University of Auckland	*Bachelor of Education (TESOL)* *Universitas 21 Global Studies Certificate*
University of Otago	*BA (Hons) Languages*

Other courses were cited with a particular focus on international developments that suggest or recommend time abroad as part of the programme.

Eight institutions have programmes or parts of programmes taught by, or on behalf of, an overseas institution. Ten of these programmes are at Victoria University Wellington, eight at Aoraki Polytechnic, four at the University of Canterbury, and two each at AIS St Helens, Lincoln University, Otago Polytechnic, Open Polytechnic, and the University of Auckland.

Scholarships

Thirteen institutions provide scholarships or travel grants for student exchange or study abroad students. This is only a slight increase on the 1998 picture when nine offered scholarships or travel grants. A total of 422 students were funded for student exchange programmes in 2004 and, as shown in Table 5.2, the institutional budgets for exchanges ranged from $5,000 to $300,000.

Scholarships targeted specifically at New Zealand students for study offshore are offered by nine institutions (25.0%). The University of Auckland provides around 100 scholarships. Otago did not indicate any total numbers of scholarships available but it listed 131 students overseas on scholarships, Massey had 12, UNITEC eight, Lincoln University five, and Eastern Institute of Technology had one. Using a smaller sample of 12 responses (multiple per institution), the three major countries for scholarships are the US (4 responses), Canada (3 responses) and the UK (2 responses).

For most institutions the funding for the scholarships comes from the central budget with the exception of UNITEC where individual schools support the scholarships; and the University of Otago where scholarships are provided from both central and divisional funding. The University of Auckland funds its scholarships through its international office, *Auckland International*.

Table 5.2: Student exchange numbers funded and budget 2004

	Total exchange students	Exchange budget ($)
Auckland University of Technology	10	50,000
Christchurch Institute of Technology	7	80,000
Eastern Institute of Technology	1	5,000
Massey University	12	30,000
Southern Institute of Technology	2	10,000
UNITEC Institute of Technology	N/A	8,000
Universal College of Learning	2	8,000
University of Auckland	67	300,000
University of Canterbury	55	130,000
University of Otago	150	260,000
University of Waikato	63	40,000
Victoria University of Wellington	50	120,000
Waiariki Institute of Technology	3	14,300

5.2 Internationalisation in teaching, learning and curriculum design

The 1998 study argued that in the 'interplay between an international education and intercultural education' the first issue is curriculum. It suggested that 'international students demand an international curriculum.' This is not so readily accepted in 2006 in the sense of a generic international experience. Indeed, it is often contested. There is an argument that students travel to another country such as New Zealand precisely to get a culturally-specific student experience, one that sets them apart from the education programmes in their home countries and elsewhere. Given the massive expansion of tertiary education in China and India it is timely for New Zealand institutions to look at the specific attributes of the New Zealand graduate.

That said, providing programmes that have global relevance is crucial. A few institutions have teaching or research centres specifically focused on other countries or regions, and on international issues. For example, AIS St Helens has a Centre for Research in International Education focused on international practice, the University of Auckland has more than 12 centres and institutes, most of them country-specific, the University of Canterbury listed four centres including one focused on the connections between New Zealand, Australia and Europe. Victoria University of Wellington nominated chairs devoted to particular countries and regions. The Asia Institute at the University of Otago focuses on business studies. Lincoln University makes the point in its response that 'all of our teaching and research centres have an international focus but none are solely international'.

A common approach to stimulating curriculum and teaching innovations in tertiary institutions is to use a small amount of strategically distributed seed funding for projects. The usual expectation is that the successful projects become self-sustaining and that they provide models of best practice to encourage further innovations. Six of the 32 institutions that responded to this item provided seed funding in 2005 for innovations in the internationalisation of teaching and learning, but half did not, and for almost one-third this item did not appear to apply to their situation.

Likewise, large universities and ITPs typically have a specialist group or unit with responsibility for professional development and the support of innovations. Of the 24 institutions that considered it applicable to their context, 14 have a unit dedicated to the development of teaching and learning, including innovative practices in the internationalisation of the curriculum and the provision of related professional development.

Asked if their institutions had in place courses or programmes where international dimensions are specifically included in the design and delivery of the curriculum, 17 said yes, nine said no, and seven responded that it did not apply to them. The programmes listed to exemplify these pedagogical approaches cover many different fields and disciplines. There was a strong focus on international business relations, tourism and hospitality, languages and communications. The examples included Certificate, Diploma, Bachelors and Masters programmes in: Diplomacy and International Relations, International Business; Language and Culture; Travel; Sustainable Tropical Forestry; Ecotourism Management; Landscape Architecture; International Marketing; and International Tourism.

As well as courses dedicated to international dimensions, examples were provided of more generic approaches to internationalisation in the curriculum. For example, Massey University, and no doubt others, encourages international students in its Master of Public Policy to examine issues of relevance to their own societies in their choice of research topics and theses. Similarly, Whitecliffe College of Arts and Design provides a 'global context to all of our degree based programmes.'

5.3   Foreign languages

While the study of foreign languages ought to be a strong indicator of internationalisation it is quite problematic for many institutions. Eight of the 36 providers surveyed had language programmes including a traditionally strong emphasis at some universities (Auckland, Canterbury, Otago, Victoria, and Massey). Otago notes an associated expansion of student exchange partners in, for example, Latin America, reflecting a strong growth in Spanish language study among students. The University of Canterbury offers studies in nine languages and these plus three others are available in Community Education Programmes. Christchurch Polytechnic points to its record of promoting languages as the first ITP to teach Japanese and Chinese language full-time, and the first to offer a degree in Japanese language. Beginners' part-time courses in foreign languages are free.

Beyond that the profile is quite mixed. Discussions are under way at Waiariki Institute of Technology to reintroduce Japanese and Mandarin after the languages programmes had lapsed. AIS St Helens has a range of language majors available and students in International Business and Tourism Management are encouraged to pursue a language. Aoraki Polytechnic provides short courses in Spanish, French and Italian. Auckland University of Technology has languages available as conjoint degrees. Wintec no longer provides language programmes as the uptake was very poor, and suggests that in its case 'there does not seem to be an interest in learning a foreign language'.

5.4   English as a second/foreign language

The survey asked institutions to indicate the emphasis they gave to the study of English as a second language and/or English as a foreign language. The responses were more comprehensive than any other item in this section of the survey. Twenty-two of the providers outlined significant efforts embracing a diverse range of activities, the most common being English Language Centres that teach English for Speakers of Other Languages (ESOL) and English for academic purposes. There are many short and bridging courses and various forms

of academic support for international students. For example, the University of Canterbury delivers the Certificate of English for Tertiary Studies and provides on-going support during a student's academic study through the English Language Support Programme.

In some instances these programmes were characterised as central if not defining features of the internationalisation process. Victoria University of Wellington, for example, notes the research-teaching nexus between its 'internationally renowned' School of Linguistics and Applied Language Studies, and its English Language Institute. Likewise, Tairawhiti Polytechnic considers the study of English a major part of its international programme, and Wintec links the English programmes to its central focus on adult literacy. As well as an English Language Centre, AIS St Helens provides a Certificate of English Teaching

Some of the innovative approaches nominated include: the Diagnostic English Language Needs Assessment, and the English Language Self Access Centre (University of Auckland); an advanced entry agreement with a partner in China (Auckland University of Technology); refugees assisted through zero fees for two years of full-time study of English (Christchurch Institute of Technology); incentives offered at Universal College of Learning for students to participate in ESOL refresher and intensive courses; and a bridging programme combining English language learning and creative arts (Whitecliffe College of Arts and Design).

5.5   Changing perspectives on the benefits and challenges of internationalisation

The major benefits of international students on the teaching, learning and community environments are considered by 14 of the providers to be cultural diversity (32.6% of responses), seven referred to the broadening of the domestic student experience (18.9%) and seven also saw different learning perspectives (16.3%) as a benefit. Three respondents suggested that the institution was internationalised, in a general sense, by the presence of international students, and two mentioned student networking while only two referred to revenue as a benefit. These perceived contributions of international students to teaching and learning included the enrichment of the social and cultural campus life for the benefit of all students. The University of Auckland expanded on this:

> *International students add to the cultural and linguistic diversity of the University's teaching and research programmes, and along with local student enrolments, reflect the increased diversity of the New Zealand population. They have a positive impact on academic standards and enhance the learning environment for all students.*

These benefits were reported in much the same way in 1998. At the same time, it is not clear just how much the institutions actually add value to the experience of all students by using the international students as a resource. Eleven (33.3%) providers said they had specific programmes in place on campus or in the community, and 15 (41.7%) said they did not. About one in five (21.2%) did not consider this question applicable to their context.

In 2005, the two major challenges for the student experience are cultural integration, cited by 18 institutions (41.9%) and language barriers, cited by 15 institutions (34.9%). The six other challenges identified by a small minority were: learning styles; plagiarism; developing and enhancing international links; managing pastoral care; lack of expertise; and maintaining diversity.

5.6   New challenges

Among the issues facing institutions in 1998 was the challenge of dealing with the sudden influx of large numbers of international students in the classroom. The impact on teaching and learning is widely reported, particularly in relation to academic workloads and standards. In 1998, the hard lessons of increasing numbers of international students included: the underestimation of the financial resources required for international programmes; the importance of developing niche markets; problems of obtaining academic credit for joint venture courses; and the need for leadership from the top.

In the current context these lessons are mostly no longer a central concern. There are no illusions about the financial commitment required to mount and maintain international activities. However, the notion of niche markets has developed in a different way. Establishing broad and sustainable relationships with particular countries is increasingly seen as an imperative.

The 1998 survey questionnaire put international student programmes, and the internationalisation of teaching, as the first two programme strategies for the national stocktake. The broad findings in relation to the internationalisation of teaching in 1998 were that 15 of the 34 institutions surveyed had no strategies in place to internationalise the form and content of the teaching curriculum, or to add international (or intercultural) dimensions to the curriculum. The 1998 study provided examples of good practice in this area and in approaches to multiculturalism.

The internationalisation strategies proposed by the 1998 study included the notion that a higher international student population is 'likely to broaden the international research interests of staff' (p186). There is certainly some logic to this. Exposure to international students is likely to raise awareness of international issues and perspectives amongst academics. Indeed, one of the commonly cited outcomes of research-led teaching is that student observations can stimulate new research ideas for academics. This dynamic is one of the recently reported key justifications for research-led universities from the UK and the US establishing offshore campuses and collaborative arrangements in research and teaching.

A major problem with the perceptions of the student experience reported in the surveys, positive or negative, is that they are typically untested. Institutions should have derived some pointers to the need for such analysis from the 2001 study *The impact of international students on domestic students and host institutions* commissioned by the MoE (Ward 2001). The study showed that institutions' performance in internationalising the student experience was patchy and 'that the desired outcomes of internationalisation do not occur spontaneously and that strategic interventions are required to maximise the benefits'. There still appears to be little or no evidence collected at the institutional level that might guide how, or serve as indicators of the extent to which, the student experience is internationalised.

Revisiting the conceptual framework for internationalisation of the 1998 report (p180) is instructive. It starts from the assumption that good practice in internationalisation of a tertiary institution involves:

- a series of organisation and programme strategies;
- integration of the organisation and programme strategies, and dynamism between the strategies;
- allocation of funds from the international student programme to other internationalisation strategies; and

- an institutional base for internationalisation within the institution.

The overall impression from the 2005 survey is that most universities and ITPs meet most of these criteria in relation to teaching and learning. The challenge remains of establishing an international leadership role in the design and delivery of the curriculum and approaches to learning and teaching at the tertiary level.

6   Internationalisation of research

6.0   Introduction

The purpose of Section 3 of the survey was to develop a broad picture of the current patterns of international research interactions. The 14 items covered the links and partnerships currently operating, the extent of commercial research ventures, geographic focus, and level of co-ordination. Of particular interest was the identification of key areas of research activity. The survey also sought views as to the kinds of national and institutional obstacles or incentives that influenced the internationalisation of research. The role of the Performance-Based Research Funding (PBRF) scheme was of particular interest.

Research does not figure as a significant consideration for most of the providers surveyed. The group that responded to this section represents less than half of the sample. The items reflect the view that research collaboration and international research entrepreneurship by New Zealand tertiary organisations will grow in importance as a key determinant, not only of the international standing of New Zealand institutions, but also for the economic, social and cultural development of New Zealand as a nation. Indeed, it may increasingly be seen as pivotal to the reputation of tertiary education beyond the higher education research-intensive providers.

In contrast, the 1998 stocktake gave nominal attention to research with just four survey items on these matters, that is: the number of formal links; the geographic focus; joint research degrees/programmes; and, the number of research centres. Direct comparisons between the surveys are therefore quite limited. The 1998 report suggested that 'increased internationalisation of research interests is likely to contribute to further internationalisation of the teaching curriculum, resulting in benefits to New Zealand students. It is indicative of the focus in 1998 that the contribution of research to internationalisation was centred on issues of teaching and curriculum for international students.

In 2005, 17 institutions recorded some international research activity: seven universities, eight ITPs and two private providers. One major institution was not able to complete the research section. The range of institutions responding was similar to the sample of 1998. The responses, including the institutions heavily involved in research, do not give a strong sense of an explicit focus on internationalisation in respect to research. Again, as with other sections, a number of the responses relied on broad definitions of research and general estimates. That may be a product of the survey instrument and timing as we suggest elsewhere, but a closer investigation is warranted. For example, one institution was unable to respond to a number of questions, noting:

> Due to the devolved nature of our institution such questions are virtually impossible to answer with any degree of veracity.

This significant underlying issue of the management of information will possibly be resolved as the PBRF processes develop.

6.1   International research links

The direct comparisons shown in Table 6.1 are informative in terms of the overall pattern of change. The depth of activity ranged from one or two international links to substantial programmes. On most of the initiatives, the bulk of research activity is generated by a few institutions, particularly the University of Auckland and the University of Otago where the medical schools are major contributors.

Some 16 fields of study were listed by the institutions as accounting for most of the international research. Science and cognate disciplines were the most common (31.0%). The other areas of relative strength in the international profile included: Business/Economics/Commerce; Education; Engineering; Design; and Arts, Film and TV.

The number of institutions with formal links or memoranda of understanding has remained about the same as 1998 once allowances are made for some non-responses. However, there was a major increase of almost 400 in the number of formal links or memoranda of understanding to a total of 547, of which 505 were in the universities. About half of those are at the University of Auckland. These agreements involved 449 overseas institutions. While comparable data is not available from 1998 it seems reasonable to conclude that there has been a major increase in activity. In addition, there were 145 international research ventures of a commercial nature provided in the responses. These were again concentrated in the University of Auckland (73) and University of Otago (58).

Table 6.1 also shows a significant increase in the number of research centres with international research links from 46 in 1998, to 261 in 2005. This has been stimulated in part by the doubling of the number of institutions with research centres – with international research links – from four to nine. In broad terms, the level of activity associated with the internationalisation of research has apparently quadrupled since 1998.

Table 6.1: Internationalisation of research

	1998	2005 (N=17)
Number of institutions with formal links or memoranda of understanding involving research	18	17
Number of formal links or memoranda of understanding	156	547
Number of overseas institutions involved in the formal links	N/A	449
Number of institutions with research centres with international research links	4	11
Number of research centres with international research links	46	261
Focus of international research links (number of institutions)		
Europe	2	7
North America	1	12
Pacific	2	11
Asia	1	5
Africa	N/A	1

The changes in the geographic focus of research links are in line with the patterns discussed in the other chapters. There has obviously been growth across the globe. However, the New Zealand presence in North America is concentrated in the US and only one institution records Canada as a partner. Australia is by far the dominant partner in the Pacific, and similarly, the UK accounts for the majority of the research activity in Europe. New Zealand institutions currently have research connections with at least 17 countries – a considerably more diverse network than in 1998. The Asian countries are: China (cited by 4 institutions); Japan (2); Korea (1); Vietnam (1); and Malaysia (1).

6.2   Strategic management of research

The issue of strategic management of internationalisation more generally was discussed in Chapter 4. In this section, the questionnaire asked the institutions if they had a co-ordinated approach to research and to identify the nature of the office involved. Seven institutions agreed they had a co-ordinated strategy for pursuing international research funding, 11 said they did not, and two said it did not apply. The reasons for the lack of co-ordination were diverse. In the cases where the research activity was reported as minor or marginal to the mainstream activity, a strategic approach was considered unnecessary. In some instances the extent of research activity comes about as the result of individual staff members becoming involved, perhaps by invitation, in an international research project. Three institutions said they were currently working towards developing a formal international research strategy with structures to be in place in 2006.

The University of Auckland splits responsibilities between the Deputy Vice-Chancellor (Research) for non-commercial funding and collaborative work, and Auckland UniServices for commercial funding and collaborations. The University of Otago combines these into a 'Research and Enterprise Office'. At UNITEC the research office co-ordinates all grant applications and agreements, including international. At the University of Canterbury the Deputy Vice-Chancellor co-ordinates research with the Pro Vice-Chancellors. In this case the pursuit of international research funding is largely managed by the Colleges.

The 17 institutions that nominated an interest in research were asked if they had an active programme of pursuing interaction with New Zealand industry. Six agreed, although one remarked that the concept was 'not well understood by all faculties'. Another said these were developed through individual researcher contracts suggesting that there was actually no planned approach. Areas of significant international research activity nominated by the institutions represent a wide variety of projects, for example:

- Pacific Circle Consortium five country study of teacher education
- Biosensors and biofuel cells
- Joint research on Biosecurity with Monash University
- Joint research on Bio-Protection with Horticulture Australia
- Joint research on Entomology with the CSIRO (Australia)
- Electro Chemistry
- Environmental studies
- Biomedical Engineering Institute
- Centre for Molecular Biodiscovery
- Light Metals Research Centre
- Genetics
- Quantum Physics
- Neuroscience
- Irish and Scottish Studies with Aberdeen and Ulster
- International Relations including European Union funding
- History of Architecture
- Fine Arts.

The key indicators used to measure the scope and outcomes of international research activity by the institutions included, in order of frequency: Amount of funding (8 institutions); Publications (7); Quality of research output (5); and PBRF requirements (4).

6.3   Obstacles and incentives

The sub-sample of 17 institutions were asked to identify three major obstacles to the internationalisation of research, and three major incentives. Lack of funding (13 institutions) was clearly the most commonly cited obstacle. The other aspects of concern spread across the institutions were: the low priority given to research; travel costs; time demands; technological limitations such as internet access and the cost of maintaining equipment; poor co-ordination of effort; and, lack of staff capacity and experience. One institution nominated the 'relative insignificance of New Zealand in global research' suggesting, perhaps, that this was a motivational barrier for potential researchers within the organisation.

On the incentives side there were a diverse range of responses. The incentives currently provided at the institutional level included:

*   study leave provisions
*   financial recognition for peer reviewed outputs
*   publication incentive grant
*   'working with top research groups'
*   professorial career track
*   sabbatical leave
*   time for research.

The incentives specifically targeted on an international focus at this level included: international recognition 'taken into consideration' in the allocation of internal research funding; international benchmarking of research; access to international travel funds and, more plainly, a 'strong expectation of international research'.

The 2005 survey also sought views on the major elements of current national research policy settings that might encourage researchers to pursue international opportunities. The PBRF was nominated as a key element by five institutions, followed by the International Science and Technology (ISAT) Linkages Fund (3 institutions). Also mentioned by individual institutions were: internal research funds; publication in Australasian journals; and, the Foundation for Research Science and Technology (FRST), including the MacDiarmid Awards for young scientists. The only national policy obstacle commonly cited was, unsurprisingly, the lack of government funding.

The final question in this section of the survey concerned the PBRF. We asked: 'What impact has the introduction of the PBRF had on internationalisation in research in your institution? The overall response was positive and, in one word, 'significant!' One of the two PTE respondents to this section felt that it had provided 'realistic new incentives, achievable progress targets and relevant New Zealand-based performance criteria.' The other PTE suggested that 'by definition' the PBRF had encouraged internationalisation in research. One university commented that the impact of PBRF was 'not measured'.

From the perspective of the universities and ITPs with research profiles, the PBRF had:

*   increased the volume of conference presentations and joint publications;
*   increased collaborative activities;
*   'heightened awareness of the importance of publishing in top international journals...';
*   increased awareness of the need for international recognition for research;
*   encouraged a focus on publishing research in journals of international repute;

- provided an incentive to publish internationally and to seek international research funding; and

- emphasised greater importance on global research.

6.4   Raising the profile of research

The research section was designed on the basis of a different set of assumptions to that of 1998. The focus was shifted from the impact of research on teaching and the curriculum to an interest in collaborative processes and networks that have a broader impact on New Zealand's international standing and future role in the global knowledge economy. Even allowing for the uneven quality of the responses from the 17 institutions, and the concentration of research activity in a smaller core, there is little apparent awareness of the significant role research plays in the internationalisation process. What was particularly striking was the lack of acknowledgement of the Centres of Research Excellence (CoREs), and their international orientation.

Nevertheless, there is strong evidence of a major increase in the amount of collaborative activity. Clearly, the mere existence of links and networks does not indicate their effectiveness and work needs to be done to identify the extent to which the collaborative exercises are having the desired impact. Some of this evaluation has already been conducted in relation to particular programmes such as the CoREs. An issue for consideration is the administrative capacity of institutions to actually maintain international links with institutions and research programmes. Managing the relationships is a significant call on institutional and individual resources.

While the CoREs clearly value collaboration to assist in creating a critical mass of researchers, it was the lack of explicit reference to international partners that was surprising. It was also disappointing that, in response to the question about interaction with New Zealand industry, the responses did not mention the tertiary partnerships for excellence (there are 5 of them), several of which have international research links. Again, this may be the product of the survey and/or the process of delegation.

The leading research universities have well-established management structures in place, which is not surprising since their international orientation is a defining characteristic of their identity. However, responses from other institutions raised issues about the management of institutional research information. This may have been the result of delegation to staff with limited first hand knowledge of institution-wide activity, but it may also suggest that research is not a prominent feature of internationalisation strategies. In these cases, research is perhaps pursued by interested individuals connecting directly on a personal basis with international colleagues.

While there appears to be a reasonably broad array of fields of study, disciplinary and cross-disciplinary arrangements, it must be remembered that this survey is indicative and not diagnostic. A detailed study of which areas and disciplines are leading, or lagging, and why, is warranted. The role and impact of research policy initiatives and programmes such as PBRF, ISAT and CoREs is discussed in Chapter 11.

7 International student programme

7.0 Introduction

This section of the survey, in addition to the stocktake of numbers of international students, also sought information on the current and emerging patterns of recruitment and marketing for international students, the support given to international students, and the institution's views of the resources available from government and other agencies. It was designed for response by persons with responsibility for the leadership and administration of the international student programme.

7.1 Market trends and competitor activity

Between 1998 and 2003 there was significant global growth in the number of tertiary level students studying abroad (1.3 million to 2 million). The main host countries for international students are still English-speaking countries, with Australia the third most popular destination after the US and the UK. These three countries combined are host to 55% of international students. Between 1990 and 2001 New Zealand had recorded the fourth largest increase (350%) in international tertiary students after Spain, Finland, and Australia (OECD 2004).

In 2004 approximately half of the global international student population originated from Asia, with China the main origin country (13%), followed by India, Korea and Japan (OECD 2005).

Recent data point to a global slowdown in the growth of international students numbers travelling abroad for study, particularly to the English-speaking countries. Most receiving countries continued to grow numbers, but experienced a slowing of the previous growth rates. In 2003 and 2004 the US actually recorded decreases in international enrolments of 2.4% and 1.3% respectively and the UK institutions cited declines in 2005 applications, particularly from China.

7.2 International student programme numbers

The following represents a distillation of a sub-sample of 33 survey responses presented by institutions. In some cases these were internally inconsistent and where appropriate the discussion refers to data from recent MoE reports summarised in Chapter 2. The 1998 survey showed that across the sample of the tertiary sector, international students made up 3.9% of the total student population. The range was from 0.1% to 22.5% with a median of 2.9%. International students made up 4.9% of the university student population. The proportion of international to domestic students varied amongst universities from 3.1% to 22.5% with a median of 3.5%. In 1998 only one university had more than 10% of international students.

Overall, the proportions studying with New Zealand institutions offshore and onshore appear to have changed little since the 1998 survey. Of the 30,000 plus international students encompassed in the 2005 Survey (5,800+ in 1998), 95% (93% in 1998) were studying onshore on-campus, and just over 400 were onshore off-campus. Around 510 students were offshore on-campus and around 210 at an offshore off-campus in 2005. This compared to a total number of around 290 offshore students reported in 1998.

In 1998, the aggregate figures for all institutions showed that 12% of international students were postgraduates, 53.9% undergraduates, 9.6% diploma candidates and 24.5% certificate candidates. The rounded figures derived from responses to the 2005 Survey are

65% undergraduates (includes preparatory and English programmes undertaken at tertiary level) and 35% postgraduates.

In 1998 nearly 25% (2,348 students) of all international students at New Zealand tertiary institutions were on scholarships. In 2005 this was only around 3% (980), of which more than half were funded or sponsored from overseas, around 15% (150) were funded by the host institution, and a third were funded by the New Zealand government, roughly the same proportion reported in the 1998 Survey.

7.3   Source countries

Universities in 1998 reported Malaysia as the key source of international students, followed by Japan, which was also the primary source for ITPs and colleges of education. Both of these countries then accounted for 43% of New Zealand's international tertiary students. In the interim, and in the face of declining demand from those countries, tertiary institutions have diversified their marketing focus. The five markets now considered by institutions as most important sources of international students in New Zealand in 2005 are China, India, Korea, Japan and Thailand. These broadly match those reported in the Ministry of Education, Tertiary Education Statistics Full Year 2004 in Chapter 2 and shown in Appendix B Table 12.

China dominates, providing more than 60% of the reported student numbers. It is the major focus for marketing activities, international humanitarian activities, and international alumni chapters and ranked in the top five countries for international student exchange links and exchange programmes. The next highest ranked source countries in terms of student numbers, namely Korea, Japan, US and India, collectively make up less than a third of the Chinese market. The proportion of international students with Chinese citizenship reaches as high as 70% in some institutions, including universities. Analysis of the Chinese student numbers by recruitment location reveals that some institutions are enrolling the majority of these students onshore in New Zealand.

7.4   Marketing and recruiting

Many institutions expressed the need to extend their marketing activities to new countries, though ITPs appeared less concerned with market concentration than Universities or PTEs.

While, as noted above, the top five countries of birth for international students in 2004 were China, Korea, US, Japan, and India, the following countries were rated as priority targets for marketing activities: China (18.8% of responses), India (14.8%), Korea (13.3%), Japan (9.4%), Thailand (8.6%), Malaysia (8%) and the US and a few European countries. This shows little evidence of diversification and it can only be assumed that institution responses meant an intensification of marketing effort in some of these traditional markets in order to increase flows and reduce the dependence on flows from China. No respondents mentioned markets in Africa or the Middle East, and two mentioned South American markets. Only half of the institutions indicated they have country- or region-specific business plans.

The 1998 survey observed that: 'Overwhelmingly, tertiary institutions use new technologies such as e-mail or a home page on the Internet to provide information to potential international students' (p. 41). To derive some indication of the extent to which institutions had extended the use of technology in their marketing and recruitment processes, institutions were asked whether they regarded as important and used international student portal on their website, an automated response to e-mail enquiries, and the electronic transfer of documents. Given the 1998 survey conclusion, the somewhat surprising responses to the 2005 survey are summarised in Figure 7.1 from 33 completed responses.

Figure 7.1: Importance of marketing tools (2005)
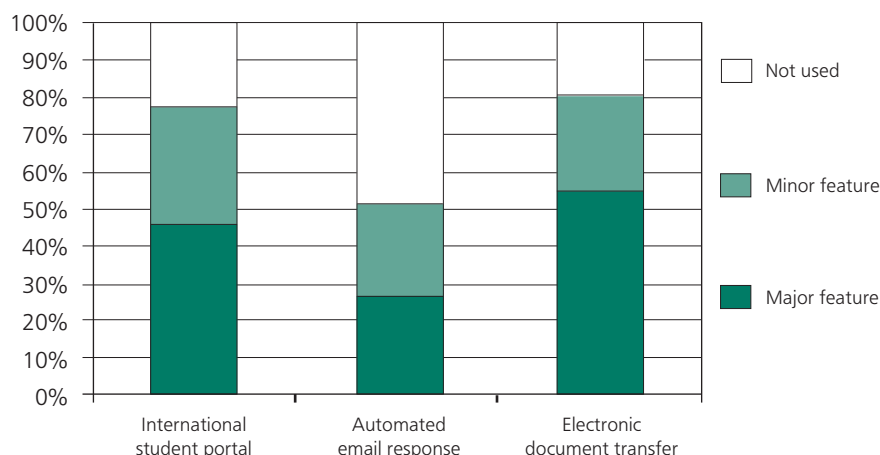
Figure 7.2: Effectiveness in supporting marketing and recruitment (2005)
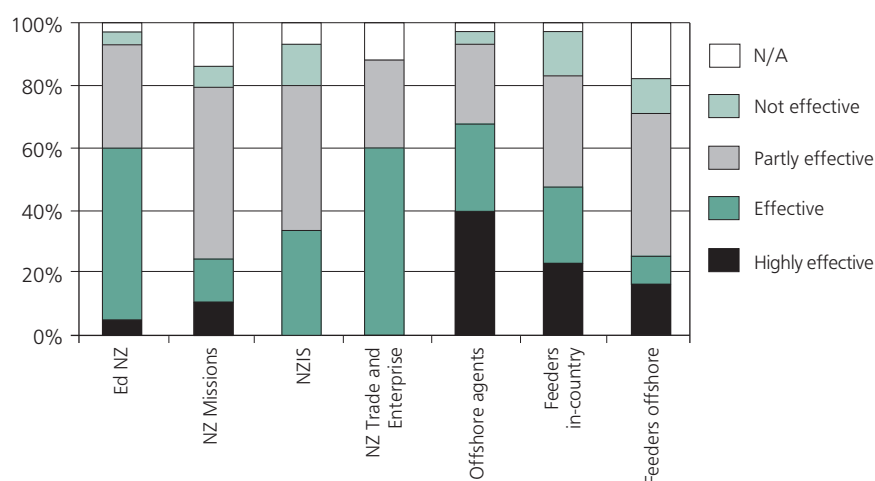
The responses in Figure 7.1 need to be disaggregated by institution to determine how much of the international student intake is actually covered by institutions which use instruments such as these. Nonetheless, there appears to be, at best, a 50% uptake of technologies that should extend the reach of institutional marketing and recruitment and its efficiency.

As shown in Figure 7.2, institutions rate offshore recruitment agents, Education New Zealand and NZ Trade and Enterprise as the most effective, and offshore feeder schools the least effective, in supporting their marketing and recruitment.

7.5   Administration and support for international students

This is perhaps where there have been the most discernable changes since the 1998 survey. In 2002-2003 institutional services and facilities were evaluated favourably by international students, 'particularly by tertiary students, and just over half of the international students rated their institution's facilities as good or excellent.' (Ward and Masgoret 2003). The researchers suggested that more effort could be vested in raising student awareness of these services.

These changes appear to have been driven both by institutional responses to student feedback and linked research, and the development of government-backed codes of practice for services and student pastoral care. There was strong support for the Code of Practice for the Pastoral Care of International Students with more than three-quarters indicating that

it was effective, or better, in encouraging the development of quality support services for international students.

Whereas in 1998 two-thirds of institutions claimed a specialised international student centre, now three-quarters have centres dedicated to the study and welfare support of international students. In general, these are headed by senior managers who report directly to a CEO, DVC/PVC (International), or an Executive Marketing Manager. Over half manage international student administration centrally and around one-third spread it among functional units. In 1998, 31 institutions reported a total of 94 staff FTE dedicated to the support of international students; in 2005 this number in central units had grown to 167 supplemented by uncounted faculty or other functional unit staff. In the same period tertiary international student numbers have quadrupled.

Only one-third of institutions surveyed offer pre-departure briefings to incoming international students, while nearly all offer 'meet-and-greet' and tailored orientation programmes prior to commencement. A handful offer return-home preparation programmes.

Whereas it was not a feature in 1998, two-thirds of the respondent institutions now provide cross-cultural training specifically to staff involved in support of international students and almost all implement student satisfaction or exit surveys and systematically gather data to monitor attitudes, outlooks and academic performance of international students. Nearly all have in place formal grievance procedures that may be accessed by international students.

Most institutions offer English language programmes for international students (enrolled in or enrolling in award courses) on a fee-paying basis, two-thirds offer these programmes as taught for credit, and three-quarters offer programmes in learning centres or as safety nets run centrally. Half indicated that these were also provided at the faculty level.

Nearly all institutions offer academic bridging or preparation programmes centrally, just under half offer academic bridging or preparation programmes taught for credit, and around a quarter offer these programmes as learning centres or safety nets offered by faculties. Half of the institutions centrally manage study methods programmes or assistance for international students and some also offer this support at the faculty level. Two-thirds offer specific international student support programmes at the institution level; about the same number also provide such services at the faculty level, and just under half also offer specific assistance for international students at the department level.

Three-quarters have programmes to promote interaction between New Zealand students and international students and the same proportion has created formal links with community organisations to provide support for international students on campus. Nearly half provide special facilities, such as places of worship, but most do not make these facilities available to the broader community. Just 10% of institutions provide financial assistance to generic international student associations or country-specific groups within their institution.

Nearly all institutions provide assistance in finding accommodation and most offer ongoing accommodation support services.

7.6   Developing market intelligence

New Zealand tertiary institutions have made significant commitments to enhancing the study support and pastoral care services provided for international students. Perhaps the most telling indicator is that all but three institutions claimed to systematically gather data that enabled monitoring the attitudes, outlooks and academic performance of their international students. The leadership role of Education New Zealand and the Ministry of Education in this area and in marketing support appears to have been well regarded.

Most institutions expressed concerns about growing international and national competitive pressures in these markets and also diminishing levels of student diversity, with particular reference to the numbers of students from China. Institution concerns about market concentration appear well founded as an Australian International Education (AEI 2005) Research Snapshot in October 2005 showed that New Zealand had 80% exposure to its top five markets, while respective exposures to their top five markets were for Australia (56%), Canada (46%), UK (49%) and the US (46%).

While most institutions have identified the vulnerability of their dependence on a narrow range of markets, and on China in particular, few have yet to identify markets beyond those in which they already operate. Only half of the tertiary institutions sampled appear to have in place structured international marketing plans, or use new technologies to support their marketing and recruitment activities. In addition, half of the sample appears to have a heavy dependence on agents and in-New Zealand feeder institutions to maintain intakes of international students.

The critical capabilities of distilling market intelligence – now plentifully supplied by Education New Zealand and international sources such as Australian Education International – into targeted marketing business plans appears to have been developed by only a few institutions. Staff with these skills and the infrastructure needed to develop these capabilities may be beyond the economic capacity and management perspective of many institutions. Replacing labour intensive marketing processes with new technologies and procedures would allow the redeployment of staff resources to more strategic marketing and/or service quality improvement activities.

8 International outreach

8.0 Introduction

Responses to Section 5 (International Outreach) of the survey were sought in order to develop a picture of the ways in which New Zealand institutions interacted with various international constituencies (including counterpart institutions, alumni and offshore students), and the extent of New Zealand's tertiary education contribution to humanitarian and technical assistance programmes. Data was also sought about distance education and offshore programmes, and about international commercial consultancies and ventures.

8.1 International networks and agreements

Institutions were asked if they were a member of international or regional networks, and, if so, were invited to list the major active ones. The majority (84%) responded that they were members of either a regional or international network of some kind. 15% were not members of any network.

Forty nine different networks were cited, ranging from well-known global international education networks such as Universitas 21, to national organisations like Education New Zealand (9% of responses) or New Zealand sector-wide organisations like the Institutes of Technology and Polytechnics New Zealand (13% of responses), the New Zealand Vice-Chancellors' Committee, or the Tertiary Education Alliance (an alliance of selected ITPs, universities and other public tertiary education institutions). There was frequent mention of various different local or regional networks such as Study Auckland, Education Tauranga, Education Manawatu, Education Christchurch, or Education Dunedin.

There was no unanimity about which network was the most effective. Apart from a few organisations like Education New Zealand, the Institutes of Technology and Polytechnics New Zealand, Study Auckland or the Tertiary Education Alliance which received more than one vote each, the majority of institutions nominated a different network as being the most effective. No one network appeared to be more effective than any other in promoting internationalisation, since, as the Massey University response noted 'they are all equally important as they each have a different focus'.

The University of Auckland noted that the Universitas 21 network to which it belonged brought together large research-led universities that faced similar challenges and opportunities. Its relationships with these universities were well established, and for that reason collaborative projects and benchmarking activities could be effectively and efficiently achieved. Some provincial providers expressed a preference for regionally-based networks which enabled local tertiary education providers to work with providers of English language courses, secondary schools and agents to assist in the recruitment of international students.

8.2 International agreements and international movements of staff

The participating institutions in the sample documented approximately 930 formal links, agreements, and memoranda of understanding or articulation arrangements with overseas institutions. Approximately 340 agreements involved around 90 academic staff in total across the sector in international movements in 2004 (excluding those involved in research projects, study or sabbatical leave). Only a very small number of exchanges appeared to involve administrative staff, as the majority of responses grouped numbers for administrative and academic staff exchanges together. Over 380 institutions were

estimated to be formally linked with New Zealand providers in these arrangements that involved the international movements of staff.

By comparison, the 1998 survey data indicated that institutions reported that a total of 170 programmes, exchange agreements, or memoranda of understanding were in place involving the international movement of staff. In 1998 there were 51 incoming staff exchanges and 54 outgoing exchanges.

While there has been a marked increase in the number of agreements between New Zealand providers and overseas institutions that have been put in place since 1998, there appears to have been no corresponding increase in the international mobility of staff. The international mobility of staff appears to have been operating at about the same level, or even at a slightly reduced level.

It would not be wise, however, to draw definitive conclusions about the extent of international mobility of staff, as there are questions about the comprehensiveness of some institutional data. Survey results from some institutions have not been able to provide accurate or comprehensive information about either total numbers of agreements or the incidence of international movements of staff, since institutional databases of this information are not centrally collated, and accurate figures were therefore not available. The survey responses provided only estimated figures in some cases.

It was significant that institutions reported that only 375 agreements were active in 2005. Half of the respondent institutions have an established cycle and set of criteria for reviewing the effectiveness of exchange agreements and network memberships against the institution's strategic plan, although just over a third do not. One comment made in response to this set of questions indicated that the institution reviewed agreements with international partners and only renewed them if there had been identifiable activity. Another institution indicated it was currently revisiting this issue with a view to ensuring effectiveness.

While no consistent pattern was evident, most institutions continued agreements where activity was occurring (sometimes through a formal renewal process), but did not generally attempt to resuscitate inactive agreements. Actual formal termination of agreements appeared to be less frequent than simply allowing dormant agreements to lapse.

8.3   Target countries for international staff exchanges

The six major countries identified for international staff exchange links were China (9 institutions), the US and Canada (6 each), Japan (5), and Australia and Thailand (4 each). The countries that are next equal in priority order after these were Germany, the UK, Malaysia, Singapore, North Korea and South Korea (identified by 3 institutions each).

It is of interest that the priority accorded to international staff exchange links with China reflects the fact that China is currently the major source country for international students studying in New Zealand. The other major regions of the world that are targeted for staff exchanges include North America, Europe, and South-East Asia. These regions tend to be parts of the world where current marketing efforts by New Zealand institutions to recruit international students are targeted.

Other possible reasons for choosing these regions for staff exchanges are speculative, but might include the perceived high quality of education and research at specified institutions in these countries, a degree of cultural and institutional compatibility (particularly in the case of North American, Australian and European institutions), the fact that English is spoken or widely understood as the language of intellectual discourse on many of the campuses in these countries, and (in the case of Australia and South-East Asian countries) their relative geographic proximity to New Zealand.

8.4   International alumni

Alumni chapters of a tertiary education institution in an overseas country can provide support for internationalisation through assistance with recruitment or provision of advice to international students who are travelling to the New Zealand campus of the institution from the country in question. They can provide mutual support and career mentoring for international students on their return to their own home country, and through ongoing provision of both moral and financial support for the objectives of the institution within the overseas country. Respondents were therefore invited in 2005 to respond in more depth to questions about alumni than were the respondents to the 1998 survey.

Institutions were asked whether they supported the establishment and maintenance of international alumni chapters. Half of the respondents said their institutions provided such support, while about a third did not. The remainder felt the question was not applicable.

Location of alumni chapters

The largest alumni chapters are in China (10 responses) and Malaysia (4), and more specifically in London (3), Beijing (2), and Shanghai (2). The most active chapters are in China (7) and Malaysia (3). This data is extracted from 30 usable responses. These responses to the 2005 survey show some change from the pattern in 1998, when the main alumni chapters were in Malaysia and Singapore. The significant change is the focus on China.

Alumni activity

A small proportion (22%) of respondent institutions have an annual calendar of international alumni events. Over half of the institutions did not have such a calendar. The small size of a number of the New Zealand institutions coupled with a relatively low concentration or dispersed population of graduates or alumni in overseas locations, may partly explain the low proportion of institutions that actually have an annual calendar of events for alumni.

There is evidence of approaches by just over a third of institutions to seek the support of eminent alumni when appropriate, but most institutions either do not actively seek the support of eminent alumni, or have not considered the possibility of the benefits that may accrue from such approaches. On the specific question of financial support, there is no evidence of significant or concerted fundraising approaches to alumni. Two-thirds do not regularly conduct fundraising with international alumni, although three institutions do. About a quarter of respondents did not respond to this question or felt it did not apply to them.

While a significant number of institutions do give some attention to communication with alumni, through various means, the majority either do not attempt to communicate with alumni or are silent on the question. Fifteen respondents regularly publish a print or electronic publication or newsletter for alumni, although the majority do not. Only three institutions have a dedicated website for alumni, and only seven provide lifelong services to these people.

Other possible ways of engaging alumni include actively engaging international graduates who have previously studied at a New Zealand institution in student recruitment, student pre-departure briefings, or student career mentoring. Fourteen institutions (about 45% of valid responses) actively engage international alumni in student recruitment, while the remainder do not. A much lower percentage (10% and 17% respectively) actively engages international alumni in student pre-departure briefings, or in student career mentoring.

Opportunities clearly exist for developing strategies that involve alumni in ways that would benefit New Zealand institutions. There could also be longer-term benefits for New Zealand's national interest from supporting such relationships. There appears to be

considerable scope for better communication and follow-up with international graduates after completion of their studies, as way of promoting internationalisation objectives. The development and maintenance of alumni links with international student graduates from New Zealand tertiary education institutions is to be encouraged.

As a first step, better communication and interaction with alumni would assist in gaining their engagement in support of the institution's mission. There is also scope for improvement in the way alumni are engaged in activities such as student recruitment, pre-departure briefings, and career mentoring. Institutions are urged to take advantage of the contribution that alumni could make to their international programmes, plans and objectives.

8.5   Humanitarian and technical assistance

This part of the questionnaire sought to discover the extent of the contribution by New Zealand's tertiary education institutions to humanitarian and technical assistance programmes. Several tertiary education institutions in New Zealand include within their broad mandate a 'public good' objective of providing humanitarian and technical assistance to international communities.

Whitireia Community Polytechnic, for instance, with its focus on a responsibility for the learning needs of Pacific communities, particularly those in its bailiwick in Porirua, includes in its charter the following statement:

> *International: Whitireia learning programmes have an international dimension to ensure that graduates are ready to participate in the global economy. We value international students as part of our student profile, to support our viability and to provide a wider multi-cultural experience for all our students. We are active in providing education for Pacific countries in partnership with local institutions in those countries.*

Seven of 36 institutions were managing, consulting or providing technical assistance to 9 overseas projects in 2004. Seven institutions also reported that they delivered 20 short or customised training courses to 386 students in 2004.

A relatively small proportion (3 institutions) has an active policy of engaging staff and students in institutional responses to international humanitarian events and programmes. The majority, however, do not have such an active policy.

Target countries for assistance

New Zealand's interest in the large population centres in Asia, its geographical proximity to the Pacific region, and the incidence of both opportunity and need in those two regions of the world, appear to be factors in determining the target countries for a range of international activities. The three countries that have been identified from 91 different responses as a major focus for a range of international activities (including staff exchange links, marketing of offshore education, delivery of distance education courses or programmes, consultancy and technical assistance projects, and staff participation in development assistance projects) are China (23 responses) and India and Vietnam (9 responses each).

The four broader regions that are a major focus for these activities (identified from 81 responses) are Asia and South-East Asia (12 each), the Mekong region (7), and the Pacific Islands/Pacific Rim (6). The most significant countries and regions for the institutions' international activities are China (12 responses), South-East Asia including India (8), and North America and Europe (3 each).

8.6   Distance education and offshore programmes

Shortly before this survey on internationalisation in tertiary education organisations was undertaken in 2005, Education New Zealand undertook a separate stocktake and analysis of offshore education by New Zealand tertiary education providers. In order to reduce the compliance burden on institutions, it was agreed that questions on specific aspects of offshore education would be asked only once, and information gathered in the Education New Zealand survey would be made available to researchers in this study. The full report of the offshore education stocktake (Catherwood and Taylor, 2005) is available from Education New Zealand.

The Education New Zealand stocktake observed that there is a growing international trend for students to seek tertiary education in their home country rather than travel abroad. As a consequence, the opportunities for tertiary providers in New Zealand to develop offshore education are increasing.

On the evidence from the 2005 Education New Zealand survey, participation in offshore education by New Zealand offshore education providers has been maintained since the previous survey in 2003. While there is no significant increase in offshore education activity, neither is there a significant downturn. The number of providers involved has increased significantly (53%) over the earlier surveys. The number of courses being offered has also increased. Offshore student enrolment numbers for 2004 are lower than those shown in the Ministry of Education surveys of 2001 and 2003. This reduction may in part have been accounted for by changes to the definition of 'offshore education student enrolment' and to the methodology used in earlier surveys.

The authors speculated that the nature of the offshore activity being undertaken by New Zealand institutions is changing. Offshore education is viewed as a high-risk activity and institutions are seeking ways to lower and manage the risks. The majority of tertiary education institutions involved in offshore education have partnerships or strategic alliances with offshore providers as a means of lowering the capital and development costs.

Students are often enrolled in partner rather than New Zealand qualifications, and therefore are not included in numbers of enrolled students reported by the New Zealand institution. However, New Zealand institutions are providing to international partners, for a fee, a range of educational and professional support including curriculum development, quality assurance, professional development for host institution staff, mentoring and moderation. The use of student enrolment numbers alone is not an accurate indicator of offshore education activity by an institution.

While the delivery of educational qualifications and programmes offshore is a fundamental part of offshore education, other education products and services such as education consultancy work, export of publications, and (potentially) the development and sale of educational software, are significant contributors to New Zealand's export education initiatives. The authors advocated that a strategy for New Zealand's offshore education industry should be developed that took a broad view of offshore education, and recognised that innovation and developments in areas in addition to the delivery of educational qualifications have the potential to generate considerable foreign exchange and provide tangible benefits such as employment within New Zealand.

Qualitative data from the Education New Zealand stocktake

The Education New Zealand research study gathered qualitative data from a number of sources through interviews, forum discussions and questionnaires. Responses to the questionnaire and from people who were interviewed identified the following points.

- There is recognition that, while offshore education involved some risk, a cautious approach based on careful long-term planning and the establishment of sound strategic alliances offshore could bring dividends for tertiary education organisations and for the country as a whole, provided that quality is perceived to be paramount and strong institution-wide project management put in place.

- There is agreement that New Zealand needed an overall strategy for the delivery of education offshore. However, different viewpoints are expressed as to the nature of that strategy. Concern was expressed during the stocktake at the ability of New Zealand institutions to compete with larger nations, against the 'big name' institutions of major provider countries, especially in the provision of qualifications in subjects such as commerce and business. It is argued that New Zealand should focus on niche markets where it had world-class expertise. Some of the health sciences (e.g. aviation medicine) are quoted as examples. There are a number of such areas that could or are being exploited.

- Others argue that New Zealand providers should not be discouraged from competing with more mainstream qualifications in larger population centres, but that it is necessary to find ways that make it possible for New Zealand to compete effectively. Seeking opportunities in smaller or regional cities, which might not be targeted by the major overseas providers, and where development costs might be lower, is seen as a suitable approach. The increasing need for vocational and technical skills in the workplace also provides further opportunities for offshore education by New Zealand institutions with expertise in these areas.

- There is a need, in the national interest, for better co-ordination and a sector-wide collaborative approach to assist New Zealand providers to take advantage of economies of scale, and to avoid the wastage inherent in small individual providers 'rediscovering the wheel'.

Quantitative data from the Education New Zealand stocktake

The quantitative data from the Education New Zealand stocktake reported on the 2004 academic year. An analysis, based primarily on the student enrolment data provided for the 2004 academic year, demonstrated the following aspects.

- Of the 78 tertiary education providers surveyed, 29 providers (37%) responded that they were offering or planning some form of offshore education in 2005. Of these, 21 are state tertiary education providers and eight are private training establishments. The 21 state tertiary education providers included seven universities, 13 institutes of technology and polytechnics (ITPs), and one college of education. This number represents a numerical increase of 10 providers (a 53% increase) over the 19 providers that were offering offshore education in 2003.

- There is a reported headcount of 1,385 students enrolled offshore in 2004. Of these students, 459 are enrolled in university courses, 703 in other state institutions (mainly ITPs), and 223 at private training establishments. While a previous Ministry of Education survey found a larger number of international students (1,655) enrolled offshore in 2003, a different methodology for counting offshore student enrolments was applied in this previous stocktake.

- New Zealand tertiary education providers offered 137 courses and programmes (a 64% increase over 2003) offshore in 2004, of which six were programmes that were not formal qualifications. Of the qualifications, 52 were degree level, 49 were diploma level and 30 were at certificate level or below. The 52 degree programmes were split between 15 postgraduate and 37 undergraduate degree programmes.

- Business and commerce (46%) were by far the most popular types of courses offered offshore. The next most frequently offered courses were in the fields of health (11%), science and engineering (9%), and arts and social science, and tourism and hospitality (both 7%).

- The most prevalent form of delivery was offshore on a campus owned by a partner (45%). The other significant form of offshore delivery was through distance education or distributed learning. The most significant choice of the various distance learning options offered was a combination of web-based e-learning and correspondence (38%). There was little evidence of institutions reporting the establishment of their own offshore education campus or campuses.

- The strongly preferred mode of delivery was teaching by staff of the New Zealand institution (56%). Teaching (exclusively) by the staff of the partner institution was done in 23% of offshore programmes, and a mix of teaching or related activities by combined staff of both the New Zealand institution and the partner institution in 21% of programmes.

- The country in which the greatest number of offshore education programmes was offered was China (28%), followed by the Pacific (21%) and Malaysia (13%). Most programmes in the Pacific were offered in the Cook Islands and Tonga (9 programmes each). No other country exceeded 10% of the total number of programmes offered offshore.

8.7 Distance education and offshore programmes: 2005 Internationalisation Survey

The questions asked in Section 5 of the internationalisation survey on distance education were designed to supplement the information gathered from the Education New Zealand stocktake, and to probe more deeply into the nature and extent of the distance education and offshore programmes offered by New Zealand providers. The responses gained in this survey also provided a crosscheck on the validity and reliability of the findings of the complementary Education New Zealand stocktake.

Quality assurance at offshore campuses

Presumably because the delivery of programmes at an offshore campus of a New Zealand institution was a relatively unusual occurrence, the question about quality assurance for programmes at offshore campuses in respect of teaching and learning at offshore campuses received only nine valid responses. Of the eight offshore programmes, five used quality assurance mechanisms that were the same as those on campuses within New Zealand, three were specifically developed for an offshore campus, and one used a mixture of both.

For similar reasons, the question asking about quality assurance with respect to international delivery of distance education generated few responses. Four of the five responses indicated that quality assurance programmes were the same as those on campus in New Zealand, and one response indicated that its quality assurance mechanism was specifically developed for an offshore campus.

Distance education

Specific information was sought in order to differentiate whether, and the extent to which, institutions delivered distance education to offshore off-campus students, either to New Zealand distance education students overseas (that is, students with domestic student status living overseas, including permanent residents and Australian students), or to foreign (international) distance education students overseas.

Only six institutions responded that they were participating in any onshore or offshore consortia for the delivery of distance education programmes. Ten institutions confirmed that they delivered distance education courses or programmes offshore. Eight of these delivered courses or programmes to New Zealand distance education students overseas, and nine delivered courses or programmes to foreign distance education students overseas.

The institutions participating in this survey reported that they enrolled 275 international distance education students in 2005 (excluding New Zealand domestic students resident overseas), the majority of whom were enrolled at Massey University and The Open Polytechnic of New Zealand. Massey University enrolled 135 international distance education students. The Open Polytechnic of New Zealand has 60 international students in distance education in New Zealand or overseas.

By comparison, responses to the survey showed that (in 2004) institutions enrolled in total 54,139 New Zealand (domestic) distance education students resident in New Zealand, 1,295 New Zealand (domestic) distance education students resident overseas, 150 international (foreign) distance education students resident in New Zealand, and 109 international (foreign) distance education students resident overseas. The numbers provided above about distance education enrolments need to be treated with some caution, as not all institutions were able to provide enrolment information in the categories requested, and consequently the data is incomplete.

While only a relatively few (7) institutions have in place pastoral care arrangements for offshore students, it is likely that this situation may reflect the relatively few international offshore student numbers that are enrolled in New Zealand qualifications.

8.8   Models and methods of offshore education delivery

The data recorded in the table below demonstrates that the most popular model of delivery for offshore education (for those selected institutions which offer such education) involves agreements about bilateral academic credit recognition and matching arrangements with offshore partners. Under these arrangements students will undertake a substantial part of their programme offshore before enrolling in the New Zealand institution.

Table 8.1: Models of offshore education delivery

Type of delivery model	No. of institutions using model
Bilateral academic credit recognition and matching arrangements with offshore institutions allowing students to undertake a substantial portion of their programmes offshore before enrolling at your institution	13
Delivery of your institution's qualifications, or components of those qualifications, at your own offshore campuses using your own staff	2
Delivery of your institution's qualifications, or components of those qualifications, at other sites but using your own staff	6
Commissioning or franchising offshore institutions to deliver your qualifications or components of those qualifications on your behalf	7
Delivering your programmes primarily by distance education media (print, telecommunications, web, multimedia)	7
Marketing your institution's distance education programmes and courseware to offshore institutions	4

It is much less common to find a New Zealand institution offering a qualification offshore at its own offshore campus. This finding corroborates the finding in the Education New Zealand stocktake that institutions are aware of the high risk in offshore education, and manage that risk by partner agreements with offshore institutions. It is, however, apparent that commissioning or franchising offshore institutions to deliver New Zealand qualifications is an emerging trend, as is the delivery of programmes through various distance education media such as telecommunications, the web or multimedia, as well as the more conventional print medium.

The survey also sought responses about the media and services institutions made use of in their offshore distance education programmes. While only about a third of institutions that responded confirmed that they were committed to offshore distance education delivery, most of those providers that have made such a strategic decision are using available technology such as the web as one means to enhance the quality of delivery of their programmes.

Traditional means of delivery such as postal or courier services are still being used to deliver study material, but the World Wide Web is being used reasonably extensively for delivery of courseware and administration, and for student and staff communication and interaction. Institutions appear to have responded to the educational benefits that new technology offers for distance education learners (for instance, improved access to learning materials, immediate personalised feedback, speed of response, and convenience) in a way that was not so readily apparent in the institutional responses when the previous 1998 survey was conducted. The following table (8.2) sets out the responses from institutions in more detail.

Table 8.2: Methods of service delivery for offshore distance education

Method of service delivery	No of institutions using method
Postal or courier services to deliver printed or digital study material	10
Web to deliver courseware and course administration	12
Web for student communication with peers and tutors	10
Teleconferencing (voice and/or video) to support real time tutorials	6
Regional tutorials/block courses to enhance the distance learning	8

These patterns of response suggest that institutions working in the field of distance education need to have clear arrangements and protocols in place in respect of dimensions such as credit transfer with partner institutions, and the use of internet technology, to ensure that quality is maintained.

8.9　International commercial consultancies and ventures

All New Zealand's universities, and a number of ITPs, have established separate entities that operate as commercial research and knowledge transfer organisations or companies, or that meet commercial objectives through consultancy work or entrepreneurial activity. It is not possible to disaggregate the national from the international activities of these separate entities from the responses supplied, but it is clear that nearly all have an international flavour to some of their work.

The following organisations associated with universities, for instance, offer research commercialisation services, or undertake other consultancy work:

- Uniservices (The University of Auckland)

- AUT Technology Park (Auckland University of Technology)

- Canterprise (University of Canterbury)

- Lincoln Ventures Ltd and Lincoln International Ltd (Lincoln University)

- Massey eCentre (Massey University)

- Centre for Innovation (University of Otago)

- VicLink (Victoria University of Wellington)

- UniLink (The University of Waikato).

The participating institutions in this sample reported 44 international commercial ventures that were initiated in the last 24 months (2004 and 2005). Institutional policy will determine whether international commercial consultancies and ventures are provided as part of the institution's general mission (and therefore a part of a staff member's regular duties), or whether an individual staff member is permitted to contribute in a paid private capacity.

A Victoria University of Wellington policy statement, for example, is reasonably typical of approaches that encourage such activity in the sector. It distinguishes university-related work, community service/pro bono work, and paid private work:

> It is recognised to be in the interests of both the University and of its academic staff members that they should be involved in contract research, professional practice, consultancy and community service, so that they can share their knowledge and expertise with the community and keep up to date with modern practices. Insofar as it is consistent with the staff member's primary teaching, research and administrative responsibilities within the University, such work is therefore encouraged.

A significant minority of the institutions, however, do not encourage academic staff to undertake international commercial consultancies or ventures aligned to institutional strategic objectives. About 40% have a policy not to provide additional remuneration for these initiatives, and nearly half do not make provision for leave.

All New Zealand's universities have established separate entities to undertake commercial research, knowledge transfer, consultancy work or entrepreneurial activity. Some of this work has an international dimension. Smaller institutions, however, do not have the resources to commit to such activity. Business case risk assessments of international ventures appear to have been undertaken by the institutions engaged in these activities, although it was not clear from responses received how thorough or systematic those risk assessments were.

Just under a third of institutions do recognise such external commercial consultancy work in promotion of academic staff, although a similar proportion does not. Over a third did not declare a position, as this issue apparently did not apply to them.

About 40% of the institutions have developed and promulgated policies and procedures for undertaking business case risk assessments and proposals for international ventures. While almost all institutions indicated that they had available within the institution the skills needed for these assessments, eight of the respondents nevertheless responded that they also procured some specialist skills externally. The procurement of skills externally may reflect the need for particular specialist skills not available in the institution, or it may simply reflect pragmatic decisions to engage additional expertise at peak periods when regular staff teaching or research priorities and commitments meant they could not be released to undertake such assessment tasks. Business case risk assessments of international ventures

appear to have been undertaken by the institutions engaged in these activities, although it was not clear from responses received how thorough or systematic those risk assessments were.

8.10 Scope for improvement

There is a general commitment to membership of national and international networks by New Zealand tertiary education institutions. The nature of these networks varies, but appears to be in line with the distinctive contributions made by the different kinds of institutions. Large universities, for instance, associate with other like-minded research-led international universities, whereas some ITPs tend to associate with regional networks or groupings with an international focus in recognition of the polytechnic role in New Zealand's regional infrastructure. Different networks have a different focus. More research would be needed to determine what the different networks really achieve.

There has been a significant increase in the number of international agreements by comparison with the 1998 survey, although it is puzzling that the increase in international agreements does not appear to have been matched by a corresponding increase in international movements of staff.

About half of the respondent institutions provided support for alumni activities. There is scope for further development of strategies to involve alumni in ways that would benefit New Zealand tertiary education institutions through a contribution to their international programmes, plans and objectives. There can also be longer-term benefits for New Zealand's national interest from supporting such relationships. Specifically, there is scope for improvement in the way alumni are involved in activities such as student recruitment, pre-departure briefings and career mentoring. The development and maintenance of alumni links with international student graduates from New Zealand tertiary education institutions is supported.

About 20% of institutions are managing or providing consultancy advice or technical assistance to international projects. Only a very small proportion actively engages staff in institutional responses to humanitarian events or programmes.

China emerged from the survey responses as the most important country for international staff exchanges, while the major regions of the world targeted for these exchanges in 2004 were Asia (especially South-East Asia), North America and Europe. The global focus for international staff exchanges identified in the 1998 survey appears to have been maintained in 2004.

The regions of the world identified as a major focus for a range of international activities (including staff exchange links, marketing of offshore education, delivery of distance education programmes, consultancy and technical assistance programmes, and staff participation in development assistance programmes) are Asia (including China) and South-East Asia, the Mekong Region, and the Pacific Islands/Pacific Rim. There was little evidence from the survey of country- or region-specific strategies being developed for these international activities. This dimension could benefit from further attention.

A complementary survey of offshore education by Education New Zealand concluded that there were significant opportunities for tertiary education providers and other organisations to develop offshore education, although the risks inherent in this activity would need to be carefully managed. This conclusion is broadly consistent with the conclusions of the 1998 survey. In general, offshore education activity by New Zealand providers has been maintained since earlier surveys. Numbers of providers and courses offered offshore have been increased, although student enrolments have not shown a corresponding increase.

The focus of institutional activity appears to have concentrated on developing strategic alliances with overseas partners. There are opportunities for further development of offshore education, not only through delivery of educational qualifications offshore, but through provision of other educational products and services such as education consultancy work or the export of publications and educational software. The development of an overall strategy for delivery of offshore education is recommended, as is better co-ordination and a sector-wide approach to collaborative activity.

The most common type of offshore education delivery model was bilateral academic credit recognition and matching arrangements with offshore institutions allowing students to undertake a substantial portion of their programmes offshore before enrolling at the New Zealand institution.

Slightly less than a third of the institutions surveyed reported that they were involved in the delivery of distance education to either international students or to New Zealand students offshore.

The use of the World Wide Web as a means of delivery of courseware, course administration and student communication was also highlighted by a number of these institutions involved in distance education. The patterns of response suggest that institutions working in the field of distance education need to have clear arrangements and protocols in place in respect of dimensions such as credit transfer with partner institutions, and the use of internet technology, to ensure that quality is maintained.

The 1998 internationalisation survey noted that New Zealand's tertiary education institutions had missed opportunities to develop offshore and distance education. At that point only six tertiary institutions maintained offshore or twinning programmes, and 380 international students were enrolled. In terms of off-campus students, courses or programmes were offered to extramural students overseas by 11 institutions. In 1998 there were 247 distance education students.

There has been a significant increase in delivery of distance education by New Zealand providers since 1998, a marked increase in the number of agreements between New Zealand and overseas tertiary education institution partners, and an increase in the number of providers offering offshore education. It nevertheless remains the case that the offshore aspect of international education has the potential to be much further developed by New Zealand tertiary education providers.

Australian university student enrolment data in 2003 (Department of Education Science and Training 2004) indicates that 28% of higher education foreign students in that country were enrolled offshore. New Zealand does not currently participate in offshore education to anything like this extent. The Australian statistics (as an example of performance by a similar competitor country) suggest that New Zealand in 2005 had yet to take full advantage of the opportunities that are offered through offshore education.

In her paper on the new world of crossborder education Knight (2005), notes that:

> *A scan of trends, issues and new developments in programme and provider mobility allows a diversity of new types of education providers, new delivery modes, innovative forms of public/private and local/foreign partnerships. New courses and programmes are being designed and delivered in response to local conditions and global challenges, and new qualifications/awards are being conferred. The growth in the volume, scope, and dimensions of crossborder education has the potential to provide increased access, and to promote innovation and responsiveness of higher education, but it also brings new challenges and unexpected consequences.*

These issues are the ones New Zealand institutions need to grapple with. Progress has been made in the intervening years between 1998 and 2004, but much more remains to be done.

In general, the extent of international outreach activities by New Zealand tertiary education institutions has been extended quite significantly since the 1998 survey, although there remains considerable scope for improvement and extension in areas such as alumni activity, and distance and offshore education.

9   Summary of survey findings

1. Overall, 45% of New Zealand tertiary institutions believe internationalisation is 'extremely important' and a further 35% believe it is 'very important'.

2. Slightly more than half of the sample have in place a committee or working group specifically focused on internationalisation, chaired as high as the CEO or DVC levels.

3. The major benefits of internationalisation are considered to be revenue and funding, followed by staff and student exchange. The major challenges are gaining internal 'buy-in', cost and a lack of diversification. The major obstacles are funding and cost, staff resistance and strength of the dollar.

4. Generally, using the institution profile as the key reference point for internationalisation, the majority of strategies are determined centrally. The remainder use a combination of centralised and devolved structures. About half of academic and business units have strategic plans to include internationalisation goals and objectives.

5. Seventy percent of business plans specify targets for internationalisation activities and 79% of institutions have planned targets for international students, but only 53% have procedures or costing models to determine the cost of places. Almost 60% do not allocate fees from international student programmes to faculties in accordance with a formula.

6. There is a high level of dependence on international fee-income reported in the public institutions, ranging from 10% to 50%. Most public institutions ranged between 5-20% of their students being international. Private institutions indicated that between 7-80% of their fee income is derived from international students.

7. The plans, organisation, resourcing and performance targets for internationalisation appear still to be dominated by a focus on education export, largely in the form of incoming international students.

8. Only a third of institutions reported that performance targets were a feature of senior executive performance measures. Only half of that number had associated performance incentives, though this was double the proportion that reported such schemes in the 1998 survey.

9. Most institutions indicated the existence of quality assurance processes for internationalisation activities. However, less than a third had international benchmarking processes in place, whereas two-thirds said they had risk management strategies for their international activities.

10. Six institutions have a co-ordinated strategy for pursuing international research funding, research collaboration and the commercialisation of research with international partners.

11. Four out of five institutions have student satisfaction or exit surveys in place and 90% systematically gather data to monitor the attitudes, outlooks and academic performance of international students.

12. More than 80% of institutions said they actively monitor government policy and programme development though Education New Zealand and the Ministry of Education. However, 58% of the institutions believe New Zealand tertiary education policy documents do not place enough emphasis on internationalisation.

13. More than half believe there is no explicit link between their internationalisation strategy and the government's national policies.

14. Institutions believe that the most significant aspects of domestic tertiary education policy impacting on their capacity to internationalise activities are funding and Ministry of Education policy.

15. Around 84% are members of international or regional networks including ITPNZ, Education New Zealand and Study Auckland. All institutions, aside from four, nominated a different network as being the most effective.

16. There has been a marked increase in the number of agreements between New Zealand providers and overseas institutions, but no apparent corresponding increase in international mobility of staff.

17. There has been a marked increase since 1998 in student mobility in all respects, including student exchanges and study abroad programmes, although relatively few New Zealand students participate in student exchange programmes. By 2004 institutional links had increased to at least 495 and the numbers of incoming students had at least doubled.

18. Thirteen institutions provide scholarships of some sort for student exchange or study abroad students. This is just a slight increase on the 1998 picture when nine offered scholarships or travel grants. A total of 422 students were supported for student exchange programmes in 2005, the institutional budgets ranging from $5,000 to $300,000.

19. The five major countries for international student exchange links/experience programmes are the US (15.9% of responses), Japan (10.6%), Australia (6.2%), Canada (8.0%) and China (8.0%). Altogether, 29 countries were listed covering all continents except Africa.

20. Half of the institutions provided support for the establishment and maintenance of alumni chapters, although opportunities exist for developing strategies that involve alumni in ways that benefit New Zealand institutions.

21. In 1998, the 'hard lessons' of increasing numbers of international students included: the underestimation of the financial resources required for international programmes; the importance of developing niche markets; problems of obtaining academic credit for joint venture courses; and the need for 'leadership from the top'. In the current context these 'lessons' are mostly no longer a central concern.

22. Less than one in five of the institutions surveyed provide seed funding for internationalisation of teaching and learning and about half have in place courses where international dimensions are specifically included in the design and delivery of the curriculum.

23. The benefits from these initiatives are cultural diversity, broadening domestic student experiences and different learning perspectives in the classroom.

24. It is not clear just how much the institutions actually add value to the experience of all students by using the international students as a resource. Eleven (33.3%) providers said they had specific programmes in place on campus or in the community, and 15 (41.7%) said they did not. About one in five (21.2%) did not consider this question applicable to their context.

25. Large universities and ITPs typically have a specialist group or unit with responsibility for professional development and the support of innovations. Of the 24 institutions that considered it applicable to their context, 14 have a unit dedicated to the development of teaching and learning, including innovative practices in the internationalisation of the curriculum and the provision of related professional development.

26. While the study of foreign languages ought to be a strong indicator of internationalisation it is quite problematic for many institutions. Eight have well-established language programmes – beyond that, the profile is quite uneven.

27 Some 15 fields of study were listed by the institutions as accounting for most of the international research. Science and cognate disciplines were the most common (30.8%). The other areas of relative strength in the international profile included: Business, Economics, Commerce; Education; Engineering; Design; and Arts, Film and Television.

28. International research collaborative activity is occurring with the US, Australia and UK, primarily in the disciplines of Science and related fields, Business, Economics and Commerce although there has also been growth in research links across the globe.

29. The number of institutions with formal links or memoranda of understanding involving research has remained about the same as 1998. However, there was a major increase of almost 400 in the number of formal links or memoranda of understanding involving research to a total of 547, of which 505 were in the universities. About half of those are at the University of Auckland. These agreements involved 449 overseas institutions.

30. The overall impact of the Performance Based Research Fund is perceived as very positive. However, the major obstacles to the internationalisation of research remain funding, teaching workloads and travel costs.

31. The proportions of students at New Zealand institutions offshore and onshore appear to have changed little since the 1998 Survey. Of the 30,000 (plus) international students encompassed in the 2005 Survey (5,800+ in 1998), 95% (93% in 1998) were studying onshore on-campus, and just over 400 were onshore off-campus. Around 510 students were offshore on-campus and around 210 at an offshore off-campus in 2005. This compared to a total number of around 290 offshore students reported in 1998.

32. The 1998 survey reported that: 'Overwhelmingly, tertiary institutions use new technologies such as e-mail or a home page on the Internet to provide information to potential international students'. From the survey responses there appears to be, at best, a 50% uptake of technologies that should extend the reach of institutional marketing and recruitment and its efficiency.

33. In 1998 nearly 25% (2,348 students) of all international students at New Zealand tertiary institutions were on scholarships. In 2005 this was around 3% (980), of which more than half were funded or sponsored from overseas, around 15% (150) were funded by the host institution, and a third were funded by the New Zealand government, roughly the same proportion found in the 1998 survey.

34. The five markets considered most important for international students in New Zealand are China, India, Korea, Japan and Thailand. In response to diminishing levels of student diversity, institutions expressed concerns about the growing reliance upon a small group of source markets and the need to broaden and diversify into what is an increasingly competitive and mobile student market. However, just 56% of institutions have country-specific business plans for regions of interest.

35. China is considered the most important in terms of student numbers, comprising more than 60% of the total international market, international humanitarian activities, marketing programmes and international alumni chapters. China is also ranked in the top five countries for international student exchange links and exchange programmes.

36. The next highest ranked source countries in terms of student numbers, namely Korea, Japan, US and India, collectively make up less than a third of the Chinese market. The proportion of international students with Chinese citizenship reaches as high as 70% in many institutions, including universities.

37. Institutions rate offshore recruitment agents, Education New Zealand and NZ Trade and Enterprise as the most effective, and offshore feeder schools the least effective, in supporting marketing and recruitment.

38. In 1998, two-thirds of institutions claimed a specialised international student centre, now three-quarters have centres dedicated to the study and welfare support of international students. Over half manage international student administration centrally and around one-third spread the role among functional units.

39. In 1998, 31 institutions reported a total of 94 staff FTE dedicated to the support of international students; in 2005 this number in central units had grown to 167 supplemented by uncounted faculty or other functional unit staff. In the same period tertiary international student numbers have quadrupled.

40. Twenty-two of the providers outlined significant efforts embracing a diverse range of activities supporting English as a second language and/or English as a foreign language, the most common being English Language Centres that teach ESOL and English for academic purposes. There are many short and bridging courses and various forms of academic support for international students.

41. Most institutions offer English language programmes for international students (enrolled in or enrolling in award courses) on a fee-paying basis, with two-thirds offering these programmes as taught for credit, and three-quarters offering programmes in learning centres or as safety nets run centrally. Half indicated that these were also provided at the faculty level.

42. Overall, the Code of Practice for Pastoral Care of International Students is considered effective and the vast majority of institutions provide training specifically to staff involved in the support of international students.

43. Three-quarters of the institutions have programmes to promote interaction between New Zealand students and international students and the same proportion has created formal links with community organisations to provide support for international students on campus.

44. Nearly half the sample provide special facilities for international students such as places of worship, but most do not make these facilities available to the broader community. Only around 10% of institutions provide financial assistance to generic international student associations or country-specific groups within their institution.

45. Almost all (94%) institutions provide orientation programmes but only 20% offer a return-home programme.

46. There has been an increase in the number of courses offered offshore, and an increase in offshore activity, especially in the development of strategic alliances with overseas institutions. The most popular model for offshore education delivery involves agreements about bilateral academic credit recognition and matching arrangements with offshore partners.

47. While the institutions that deliver distance education offshore generally still use traditional postal or courier services, the majority also use new technology such as the World Wide Web to deliver courseware and course administration, and for student communication with peers and tutors.

48. The participating institutions in the sample reported 44 international commercial ventures that were initiated in 2004 and 2005.

10 Stakeholder invitational forums

10.0 Introduction

Invitational forums were held in Wellington (27 March 2006) and Auckland (29 March 2006) to seek stakeholder comment on the interim findings from the 2005 survey. The forums also provided an opportunity to obtain some input from the sector on ways of advancing the international preparedness and standing of New Zealand tertiary education.

A discussion paper was provided to participants with an outline of the major findings from the 2005 survey. The paper included questions for discussion around 12 themes distilled from the interim report. The main focus was on immediate practical issues as well as national and institutional strategic options. Participants were invited from the full range of tertiary education providers, the Ministry of Education and other government agencies, and key organisations with an interest in internationalisation.

The forums were attended by representatives with particular interests in internationalisation of education; most had specific responsibilities for these activities within their institutions. Some of the comments reported below were presented as personal observations rather than institutional or organisation policy or perspective. Differences within the sector emerged in the forums more strongly than had been apparent in initial policy stakeholder interviews or from the analysis of survey responses. This is particularly the case for some private providers which, given the diversity in size and nature of their operations, felt they had a limited opportunity to voice their particular views through the survey questionnaire. A list of the 27 forum participants is provided in Appendix G.

A caveat is important at this point. The perspectives of the participants are reported in this chapter as they arose in discussion. We focus largely on areas where there was broad consensus and shared concerns and identify individual perspectives that differ from the group where appropriate. We have not attempted to qualify or correct the views of the participants in relation to the government agenda or performance. While the participants came from a range of contexts across the sector, they are not a stratified sample and cannot be claimed to represent the views of others in the sector. Nevertheless, on the basis of our survey and targeted interviews, we are confident that the observations reflect useful insights and perspectives to inform policy.

10.1 The imperatives of internationalisation

It was not possible from the survey to establish whether the commitment of the tertiary sector to internationalisation is informed by a deep appreciation of the changing international context. Nor was the need for a co-ordinated and collaborative national strategy entirely clear. The key questions for discussion at the forum were: 'What are the most potent global trends likely to affect the competitive international position of New Zealand tertiary institutions?' and, 'Is significant institutional and sector adjustment inevitable?'

There was unanimous agreement amongst the forum participants that global trends were placing increasing pressure on New Zealand institutions to become more internationally competitive, not only in attracting international students, but also in what they actually offered New Zealand students. It was also agreed that major adjustment was inevitable, and indeed, desirable.

Forum participants confirmed assessments of a growing trend for students, especially from the larger Asian economies such as China, to remain in their home country to be educated.

These students still expected that education to be high quality and provide strong English language skills. If this trend continues, adjustment and innovative responses would be required from New Zealand providers to maintain the competitive advantage that New Zealand currently derives as an English-speaking country.

Overall, there was a strong sense that New Zealand society remained relatively insular. Forum participants felt that its increasingly diverse and multi-lingual population is not sufficiently acknowledged internally as an asset in strategies to deal with global trends. 'Why don't New Zealanders think and act internationally?' asked one participant. The apparent lack of interest by New Zealand students in studying overseas, possibly for reasons of cost and geographic isolation, and the sometimes negative attitudes of employers towards graduates with international experience, were cited as examples of the undervaluing of international perspective, knowledge and skills. Only anecdotal evidence was given to support these impressions, but there was general consensus that this was the case and that new patterns that combined study and work experience opportunities might be required in future.

There was also strong support for the notion that New Zealand should see itself as an Asia-Pacific country and moderate its domestic education offering accordingly. Notwithstanding significant advances in the area of Māori and Pacific education and cultural appreciation, current education policy and practice was characterised as still essentially mono-lingual, mono-cultural and Euro-centric.

10.2 Perceptions of policy impact

As the survey results show, most institutions believe that New Zealand tertiary education policy documents do not give sufficient emphasis to internationalisation. Moreover, they do not generally see a link between their institutional strategy and national policies. The forum participants were asked: 'What are the key factors underlying this perceived disjunction?' and 'What can be done to strengthen the links between institutional strategies and national policies?'

There was a strong view at the forums that 'internationalisation' is largely missing from the Tertiary Education Strategy. Coping with the rapid changes in the New Zealand policy environment – one that did not 'recognise the world in which institutions were now required to operate' – was a serious concern. One participant said, 'Internationalisation is something that happened to us – now the tide has gone out.'

It was felt that most policy seems focused on issues concerning marketing support, or on quality assurance regulations concerned with process. The current framework has constrained the ways of thinking about internationalisation, and there is a pressing need for long-term strategic views to shift the focus from shaping education programmes to positioning New Zealand to participate competitively in the global knowledge economy, including through the export of education services.

Echoing the findings of the survey, and the preliminary interviews, the forums concluded that there was a need for more vision and a coherent framework to guide the internationalisation of the tertiary sector. It was suggested that an integrated whole-of-government approach would see immigration policy and practice better synchronised with education internationalisation policy and would look more explicitly at interdependencies and different roles played by institutions within the sector. For example, since a significant portion of their business is in providing feeder programmes to New Zealand universities, private institutions expressed concern about the medium-term viability and direction of universities' international recruitment performance.

The forums called for an enabling national policy, one that can be reflected directly in the strategic plans of institutions. At the same time, there was some concern that this should not stifle institutional initiatives. The private sector felt it was penalised by policy, especially in relation to caps on numbers and the New Zealand Qualifications Authority (NZQA) policy settings and processes designed to ensure quality.

It was suggested that government needs to set strategic priorities, including the establishment of centres of expertise of strategic importance such as for the development of language capabilities. Of particular concern, mostly from the ITPs, was the belief that 'competitiveness' between New Zealand institutions had destroyed the culture of sharing 'best-practice'. This is particularly so with respect to internationalisation activities. A national facility for sharing such practice within sub-sectors could be developed.

The collaborative work of existing sub-sector international committees (under the auspices of the New Zealand Vice-Chancellors' Committee and the Institutes of Technology and Polytechnics of New Zealand, for instance) was supported in this context, but the small size of many New Zealand institutions relative to their overseas competitors, the high cost of development, and the need to differentiate the institution in the marketplace were seen as factors that limited the ability of most New Zealand institutions to compete internationally. Forum participants also suggested there may be merit in pursuing the development of collaborative joint ventures involving two or more institutions.

10.3 Strategic planning and management capabilities

The survey findings reported that institutional strategic planning documents were generally seen as giving little practical guidance for implementation. The perceived significant gap between rhetoric and action was blamed on the absence of centrally driven strategies or processes designed to ensure that internationalisation is embedded in practice. It was felt that serious investment in the full range of skills and knowledge, and in new technologies, is needed for this to occur.

Two questions were posed: 'What specific strategic and business planning capabilities are needed within institutions?' and, 'How should these capabilities be developed or accessed by institutions?'

The forums again drew attention to the resource constraints that inhibited institutional investment in the measures needed to be internationally competitive. It was felt that revenue from internationalisation activities should be used more directly to develop such capabilities. This was not occurring.

The private providers reminded the forums that the flows of international students were their core business; some reported distinctly internationalised workforces and dedicated international business operations with planning and relationship management capabilities. Some university participants claimed that their student-place costing models were robust; PTEs noted that getting this right was critical to their business survival, however, ITPs seemed less certain about their international student costing models.

Nonetheless, all participants saw the need for increased availability of training in a range of international management skills for institutional staff. Support structures should be in place to assist the 'international' skill development of executive, academic and administrative staff, and for the judicious recruitment and management of external expertise. The required staff skill, knowledge, and experience sets include an appreciation of the different approaches to the acquisition of knowledge, the culturally determined protocols in communication, interpersonal relationship management, and also the ways these are manifested in the use of new technologies.

10.4 International networks and outlooks

The forum participants considered the survey findings that showed a significant increase since 1998 in the number of institutions involved in international networks. They were asked if the benefits of the various networks, links and staff and student mobility were sufficient to warrant greater support and co-ordination at a national level, and whether strategic alliances between New Zealand and overseas institutions should be prioritised and supported by government to deliver maximum benefit to institutions and to New Zealand.

The discussions highlighted variations in how international exchange agreements are used. Some institutions are highly selective about international partnerships and linked them to strategic positioning objectives and what can be leveraged for offshore study and experience for students. Others were less systematic and many agreements were derived from serendipitous connections.

Overall, strategic alliances were considered valuable and it was agreed that they should be supported financially by government, but only insofar as the agreements could be shown to add value. In particular, agreements should enable institutions to do collectively what they cannot do alone. There was general agreement that incentives are needed to encourage collaborative work other than research.

The importance attached to staff and student mobility varied. University participants believed they already had a high level of staff mobility by international standards. In contrast, ITPs felt constrained by lack of resources and accorded student mobility lower priority. The ITPs that did see it as important have had to find innovative ways of funding such mobility. It was suggested that the ITPs might benefit from a Fulbright-type exchange scheme funded by government. PTEs do not see this as a critical part of their offering to staff or students – in some institutions most are international students.

10.5 Internationalising the student experience

There was debate among the forum participants about what internationalising the student experience actually meant in practice, and what the educational and social benefits of such internationalisation were. Outcomes mentioned included broadening horizons of students, extending their understanding of different cultures, appreciating that people in different countries have different cultural norms, beliefs and modes of operation, becoming aware that knowledge and modes of learning are shaped by cultural, ethnic or gender roles and components, and understanding that a European, Asian or Polynesian perspective, for instance, may illuminate experience and provide insights that a New Zealand student had not hitherto considered. In addition, it was also seen to have economic benefit in preparing students to deal with the increasing prospect of working for international companies in New Zealand and as internationally mobile workers.

The extent to which the institutions have actually internationalised the design, organisation and delivery of the curriculum is not clear from the surveys. Forum participants were invited to suggest what institutions need most to assist their efforts to internationalise the learning experience of all students, domestic and overseas.

Distinguishing between the undergraduate and postgraduate experience was considered essential for any meaningful discussion of the internationalised experience. Interestingly, participants questioned the assumption that the postgraduate experience was truly internationalised to the extent commonly claimed. The indicators that would support this contention were not considered all that clear.

Picking up again on the earlier theme, participants saw strong cultural barriers to international mobility by New Zealand students who appeared to show little interest in incorporating offshore study in their award programmes. Others thought that costs were a major inhibitor for students. Student debt levels were more generally a cause for concern and seen as a specific obstacle to the take-up of international opportunities. Universities, ITPs and colleges pointed to the quite different origins and nature of their international networks. The universities were most concerned at the low numbers of their students who travel overseas for part of their study: they felt a particular obligation to 'make them global'.

The lack of appreciation of the broader benefits of learning other languages was considered a major deficiency of the New Zealand tertiary system. This reiterated similar responses to the national survey. There was unanimous and strongly expressed concern at the forums about the decline in foreign language learning generally, and Asian languages in particular. The forums noted the imminent demise of Indonesian, and the decline of Japanese and Chinese language programmes. They called for a national languages policy framework that avoided the 'faddism' of the latest 'economic' language.

Building a culture of 'language learning' in the New Zealand education system again also means valuing and accessing the skills and experience of New Zealand residents with non-English-speaking background. This was seen as a core and essential investment to develop a population with the competencies to engage productively with 'other cultures' in New Zealand and overseas. It was considered naïve to assume that the worldwide adoption of English will obviate the need for significant engagement with other languages by New Zealand graduates.

There was general agreement that the curriculum is internationalised 'by default' and that there was, broadly speaking, a failure to make a virtue of the presence of international students in the classroom. The forums also identified a serious absence of meaningful interaction between New Zealand and international students. The cultural barriers were viewed not simply as a result of language differences, but were also the product of major limitations in student worldviews and expectations. One participant remarked that there was a need to 'help young people feel comfortable with Asia'.

Related was the general concern that, across the sector, there was insufficient internationalised course programme content or encouragement for international experience as part of study programmes. This was considered true for all fields of study: it was remarked that 'even business studies' where an international perspective would be expected as routine, did not appear to be sufficiently international in content.

Some participants noted that the standard of physical facilities was less important for student outcomes than the capacity of institutions to help international students transition into new teaching, learning and living cultures. It was suggested that both NZQA and the Tertiary Education Commission (TEC) focused on the former, as they did not have the capacity to assess the latter. Participants felt there was little evidence that public institutions were reinvesting international student revenues in improved services for international students or in the internationalisation of domestic student programmes and experience.

10.6 Collaborative research activity

A key finding from the surveys is that there is little apparent awareness at the institutional level of the significant role research might play in the internationalisation process. The forums considered the questions: 'How important is research as a driver of the internationalisation process for the tertiary education sector as a whole?' and, 'Are the current research policy

settings appropriate to build and sustain the international standing of New Zealand research?'

There was sector-wide agreement in the forums that the international standing of the New Zealand tertiary education is greatly assisted by international research benchmarking processes. It was argued strongly that international links and twinning arrangements enhanced the quality of New Zealand research, and promoted a national research reputation.

The universities' representatives noted that the research dynamic is driven by peer-peer co-operation, and less by institution-institution agreements. The key challenge is to set up sustainable partnerships. The group requested case study examples of successful relationship-building to guide their efforts.

10.7 Marketing

Only half of the tertiary institutions sampled appear to have in place structured international marketing plans, or used new technologies to support their marketing and recruitment activities. This raised the question for the forums: 'Do institutions have the appropriate capabilities to distil market intelligence into medium- to long-term international student strategies vs annual sales/recruitment operational plans?' Moreover, 'Is it feasible to consider replacing labour intensive marketing processes with new technologies and procedures that would allow the redeployment of staff resources to more strategic marketing and/or service quality improvement activities?'

There was general agreement that the relevant market analysis capabilities were not well developed at the institutional level. Strategies for student recruitment lacked detailed intelligence and appropriate staff expertise. Participants saw opportunities for significant innovations with new technologies. They also noted that while skills and technological development would improve effectiveness, the capacity for establishing and maintaining high level institutional relationships was still an important ingredient of successful marketing. They saw marketing as closely tied to trust-building processes and therefore diverse strategies are needed - including technology. Developing personal relationships in a cultural context is considered vital to institutional success.

Participants also acknowledged the importance of establishing partnerships with city and local governments to enhance the location's attractiveness as a destination for international students. In relation to this they commented on the lower government marketing support given to the tertiary education sector relative to other sectors, in particular, tourism.

There was general support for Education New Zealand's activities in building marketing networks, although some noted that the subscription was costly for smaller providers. The role of Ministry of Education offshore counsellors was seen as crucial, reinforcing the positive response to this initiative from the survey. This was considered to be useful also in sending a signal to potential partners and markets wishing to engage with them in long-term co-operation, and not just focusing on commercial activities. At the same time, there was also a view that the NZTE network seems inordinately focused on base operational matters such as creating a bank of scholarships for market positioning. It was noted that the local viability of these networking activities depended on committed individuals whose time is underwritten by their employer, usually public institutions.

The private providers saw only a marginal impact on their recruiting from government-led networks compared to the benefits of their own business-driven networks. They also expressed concerns about 'over-regulation'. They saw the NZQA policies and procedures as a constraint on innovation and their particular need to be highly responsive to shifts in

market through the timely creation of new education and training programmes. In their view, the primary source of policy disjunction was between the 'domestically orientated and skilled NZQA and TEC staff'' and the international nature of the PTEs' business. They suggested there was a lack of 'world view' in these government agencies.

10.8 Offshore activity

The survey results identified a significant increase in offshore activity since 1998, but also noted that the offshore aspect of international education has the potential to be much further developed by New Zealand tertiary education providers. Forum participants considered the suggestion that New Zealand might be currently taking too narrow an approach to offshore education, and they were asked whether the national interest would benefit from a more strategic approach such as identifying and supporting offshore internationalisation activities directed at specified countries.

More extensive and innovative approaches would be needed if offshore international students were to be encouraged to participate in greater numbers in New Zealand offshore education programmes. That is, in modes of education delivery or provision of education services, or combinations of these where the student or intended class is located outside New Zealand. It was generally agreed that campus-based delivery is the superior and demanded mode for students both in New Zealand and offshore, and that an implication was the need to foster and promote strategic alliances with offshore partners as the most effective means of growing a commitment to international education outside New Zealand.

10.9 Information management

A recurrent theme in this report is the issue of information management at both system and institutional levels. Forum participants were asked: 'What information would it be useful for institutions to collate and document centrally in order to be able to observe trends in internationalisation?'; 'What sort of databases would it be useful for institutions to develop in order to be able to store centrally and locate information about trends in internationalisation?'; and, 'How can government best support institutional management of such databases?'

There was general agreement that a single source of data from existing databases is needed for consistency and ease of access by institutions. There was some interest in the idea of developing a single student database and the sharing of data between institutions to monitor trends across the whole education system, and perhaps also for the purposes of fraud control. It was suggested that the New Zealand immigration database on students needs sharpening. It was also remarked that national expectations drive institutional data management and there was a strong call for consistent methodology in the collection and comparison of national trend data.

However, some reservations were raised about the extent to which government support is needed to assist information management at the institutional level. No specific suggestions were offered as to how government can support institutional database management but this would bear further investigation.

10.10 Internationalisation and the quality of the domestic system

The interim report findings proposed that, given the issue of relative scale, the quality and sustainability of New Zealand's domestic tertiary system depends ultimately on the scope and competence of the sector's international engagement. Two questions were posed at the forums: 'What needs to be done to ensure that the broad internationalisation objectives are integrated into the fabric of domestic tertiary education policy?' and, 'How can government best provide encouragement and support for the integration of high quality international, intercultural or global dimensions in the domestic education offered?'

It was recognised that New Zealand's reputation internationally depends on the ability to deliver a quality product, and that international benchmarking assists in raising the quality of education delivered to domestic students. Conversely, New Zealand's reputation in a much broader sense is at risk if international students do not receive a high quality educational experience.

While there was some agreement with the findings, the discussion essentially returned again to the issue of the absence of national policy direction, tempered by some ambivalence about the role of government. There was general agreement that government policy does not provide a clear sense of direction for internationalisation. Indeed, there was considerable uncertainty as to the prevailing operational definition of internationalisation. Participants observed that internationalisation does not feature in the *Tertiary Education Strategy and Statement of Tertiary Education Priorities* documents and argued for a united national approach. A particular concern was that the domestic policy settings encouraged competition between institutions that inevitably pushes out possibilities for collaboration and the development of capabilities. Some participants called for a return to a focus on student outcomes for all categories of students, rather than a focus on the economic value to the institution of each student-unit.

With respect to Bologna developments in Europe (and as they are now central to Australian policy discussions), the participants saw a need for more aggressive action to obtain international recognition of New Zealand qualifications, particularly in professional and vocational areas.

10.11 Cultivating concentrations of excellence

As reported earlier, the relatively limited capacity of New Zealand to spread innovation investment across the knowledge industry poses critical questions about the extent to which government resources should be concentrated on single institutions, or groups of institutions, that stand out as nodes of excellence. Specifically, the key questions for the forums were: 'Does New Zealand's ability to move strategically beyond its dependence on the sales relationship, depend on having several lead institutions that define and pursue their internationalisation objectives in broader terms?'; and 'Should the government directly promote the development of a core group of best practice pacesetting institutions in each sector to establish internationally recognised nodes of New Zealand excellence, especially in research and scholarship?'

There was clear support for the concept of New Zealand developing nodes of excellence, but importantly, this was not seen as restricted to universities. As the earlier note on research indicates, most forum participants agreed that research reputation was a significant driver of institutional, city, and national reputation as a study destination. However, there was a strong argument that several ITPs might develop specialisations and world reputation in a particular industry, but still sustain broader vocational programmes to meet

domestic regional skill demands. Examples were provided of flagship polytechnic-industry programmes: these were used at international student fairs by a range of other providers as indicators of New Zealand's excellence in tertiary education. Some support was given to the idea that international developments could see rationalisation of the international activity of a number of New Zealand institutions. This might be condensed to a more limited inventory of key centres, possibly through collaborative specialisation.

There was also support for the idea that having nodes of excellence and strong sector-wide outcomes-based quality assurance should be made more of in any projection of the New Zealand education and training system into international markets. The option of funding related to contestable plans for the development of specialisation and centres of excellence was thought promising.

However, a number of stakeholders saw the notion of government cultivating concentrations of excellence as potentially divisive. Others thought it was inevitable that there would be a 'melt-down' of providers, and in the process some organisations should be encouraged to develop as centres of special expertise.

There was agreement that lessons could be learned from the responses of New Zealand institutions to Maori and Pacific people's needs and cultural modes. These could well be translated into the kinds of adjustments and adaptations appropriate for best practice in working with international students. Most success in these programmes occurred where these issues were addressed intensively for smaller cohorts. Following this line of thinking, it was thought that New Zealand should retain its special role in the Pacific Islands and build on this as an area of international excellence in research, teaching and practice.

10.12 Strategic management of internationalisation

As proposed in the findings, to deal with increasing competition in knowledge development and transfer, New Zealand will need to develop innovative and strategically managed responses at the institution, sector and inter-sectoral levels. The key questions in this instance were: 'Do New Zealand institutions have the executive skills and experience to undertake strategic and business analyses to anticipate global developments and undertake timely change management? If not, what needs to be done to ensure these skills are developed quickly?'; and 'Further, what needs to be done to strengthen New Zealand policy agencies or processes to support these responses?'

The participants highlighted the difference between executive strategic capabilities and functional strategic capabilities. Often the planning was adequate, but the capacity to implement initiatives was underdeveloped.

Participants saw considerable need for training and toolkits to develop strategic skills at the senior levels of institutions. It was noted that such skills 'do not come cheap' and are not widely available in New Zealand. The ITPs saw themselves as less internationalised in terms of staff capabilities, student services and curriculum development than universities. The ITPs had until now typically regarded international students as a revenue stream to meet growing budget demands.

One member of the forums commented that the internationalisation of institutions had not occurred as a result of a conscious policy of change management, but 'it was done to us'. There is a need for a more proactive approach to develop the skills required for the strategic management of internationalisation.

11 Challenges and conclusions

11.0 Overview

This chapter summarises the outcomes of the 2005 survey, targeted stakeholder consultations, and invitational forums. It is also informed by the MoE experts' workshop that addressed the impact of global developments on how New Zealand institutions defined, and consequently configured policies and operations to achieve their objectives through, 'internationalisation'.

It was clear that more fine-grained analysis of institutional performance than was possible via the 2005 survey is required if conclusions are to be based on principles of internationalisation actually enacted rather than those espoused by institutions.

The 2005 survey had the primary purpose of setting the context for a strategic approach to internationalisation across the sector based on a re-conceptualisation of the major elements. It started with a different set of assumptions about the nature of internationalisation and the perspectives evolved further with the rapidly changing international education context over the last six months. The 1998 findings provided the basis for some indication of the extent of change in the New Zealand tertiary education sector.

The 1998 study drew the conclusion that there appeared to be a lack of a culture of commitment to internationalisation across the system, although there were many examples of best practice on a range of dimensions of international activity at the time. The fundamental conclusion we draw from the 2005 data is that there has been a substantial and positive shift towards a broader and deeper response to the imperative to internationalise. New challenges emerging from the study, and the rapidly changing context, are summarised in the following sections.

11.1 Key challenges

The primary challenge identified in the 2005 survey, and in the stakeholder consultations, is the belief that tertiary education policy documents do not give sufficient emphasis to internationalisation. Indeed, one of the strongest messages from the sector is that there is considerable uncertainty as to what is meant by internationalisation. A consequence of this lack of a shared definition is that a majority of the institutions surveyed do not see a link between their institutional strategy and the national policies. Linking the two will require improved communication at all levels to reduce the lack of consensus about national purposes across the diverse range of institutions. It also means embedding these understandings at all levels within the institutions. This project is intended to contribute to the dissemination process. A critical challenge underpinning these developments is clarifying the roles of the government agencies with direct responsibility for advancing the internationalisation process.

Notwithstanding the ambiguity of purpose, there is clear recognition of the importance of internationalisation across the sector. This is acknowledged in the existing and emerging organisational structures. While revenue and funding are nominated as the primary benefits of internationalisation, educational benefits are also recognised as significant. A major challenge at the institutional level is getting internal commitment. The key obstacles to the development of initiatives at the institutional level are the costs and staff resistance. This is partly attributed to the perceived insularity of some sections of the population and an underlying reluctance to embrace the social, cultural and economic opportunities presented by the presence of an increasingly diverse community in New Zealand.

Developing skills for strategic planning and management across the sector needs direct support from government. Finding the appropriate vehicle for this will require some thinking about ways of delivering professional development to a diverse audience and providing resources that can build a critical and self-sustaining mass of expertise. There are also sensitivities about providing support without undermining diversity, autonomy and entrepreneurial initiative. Related is the relative lack of academic and administrative international experience, referred to more generally as staff mobility, which presents a significant challenge for the ITPs. Devising and resourcing incentive programmes to encourage staff to take up international experiences first requires a shared understanding of the benefits of mobility for the system as a whole, for institutions and for individuals.

The level of student mobility is also a problem widely acknowledged in the surveys and consultations. There are multiple challenges facing the sector. While not intractable, the problem of small numbers involved in student mobility programmes relative to other countries has complexities that will test the ingenuity of policymakers. The reluctance of New Zealand students to break their course sequences for a learning experience overseas, immediate and opportunity costs, and the lack of languages other than English, are just three examples of the factors contributing to the low numbers of outbound domestic students. At the core of this is a fundamental challenge of making the advantages of a global outlook known and valued.

Likewise, internationalising the curriculum challenges basic assumptions underlying course design and delivery. It is notoriously difficult to get consensus as to what an internationalised curriculum looks like, and a major programme may be required involving the development of long-term system-wide strategies to internationalise the curriculum to the point where it is no longer considered problematic. The call to address the decline in language learning as a matter of national importance has similar underlying problems. Developing policy to reverse this trend is a formidable task since it is not only a matter involving significant resources; it also requires a major shift in attitudes across the community.

Among the issues identified in relating to the international marketing of New Zealand's tertiary education, the need for more informed and efficient strategies was raised. A key challenge for New Zealand is to find innovative approaches to marketing that strike a balance between the possibilities of new technologies and the need for labour intensive trust-building processes. With respect to offshore activity, the challenges are similar in that strategic alliances with offshore partners are needed but they too place heavy demands on many institutions. Ensuring they actually add value is a significant issue. A key challenge for offshore education identified in this report is the need to broaden the nature of the activities using these alliances. As indicated previously, a further identified need is how best to establish a study abroad dimension as an integral component of the curriculum within New Zealand qualifications.

The issues of difficulties in the collation and management of information about internationalisation activities at the institution level are raised at a number of points in this report. This issue is significant in a number of ways. It is not simply a matter of capacity and resources although that is undoubtedly important. Problems with information management are obvious in the survey responses, even in the research-oriented institutions. Overall, there seemed to be a surprising lack of readily accessible information for those delegated responsibility for completing the questionnaire.

Finally, a major challenge flagged throughout this report, is the extent to which the government can and ought to promote nodes of international excellence beyond the research reputations of universities. As we note in the previous chapter, while there is agreement that it is highly desirable for the system overall to support concentrations of

excellence across a range of institutional types and specialisations, there is also a strong concern that this could be quite divisive.

11.2 Recent policy responses

The *Briefing for the Incoming Minister of Education* (2005e) refers to the current challenges as well as other points raised throughout this project. Under the heading 'Tertiary education and knowledge creation' the MoE points to the significant role tertiary education increasingly plays in New Zealand's international relations (2005e:63). It also emphasises the significance of the credibility of graduates in relation to the international labour market and the attractiveness of New Zealand (2005e:64). Moreover, it points to the need to frame national policy settings with the international context in mind. The briefing paper also notes (2005e:80) that the international context now permeates all levels of decision-making and reinforces the view that the 'quality of New Zealand tertiary education is critical for the country's international reputation' and needs to focus on forming international tertiary alliances. The strategic approach MoE proposes has three parts:

* improving the quality of teaching and learning in the international context;
* developing government to government education relationships; and
* supporting the development of links between education providers.

We pursue these themes again in the final chapter where we note that this broader perspective on international education has not yet manifested itself in the policy agenda or programmes.

11.3 Research and the internationalisation agenda

It was beyond the scope of this investigation to examine the extent to which an underlying culture of internationalisation exists specifically in the research programmes of the tertiary education organisations. Nevertheless we have singled out research at this point since its treatment is perhaps indicative of an absence of a sufficiently explicit valuing of internationalisation. Internationalisation in research should be at the very centre of plans and programmes. Indeed, as we have indicated, it may be pivotal to advancement of New Zealand's aspirations. The international standing of leading national institutions has an impact on the entire tertiary education system. This is not simply a matter of 'trickle down' effect. The valuing of internationally successful research institutions can create a dynamic that better positions the reputation and outlook of all tertiary institutions.

None of this overlooks the fact that New Zealand researchers, individually and collectively, are internationally prominent. There is nothing to suggest that they are not internationally active. The publication and citation rates attest to that, although there are problems with citation rates. What does appear to be missing is a sense of the significance of aspirations for international recognition; it is perhaps assumed, and it is certainly not all that well articulated.

The statistics support the view that New Zealand has been very cost-efficient in terms of research output for dollars invested and on a per capita basis. A Ministry of Research, Science and Technology (MoRST) analysis shows New Zealand as ranked second of 22 countries assessed in terms of the number of papers for every million dollars or research investment. However, as the *Briefing for the Incoming Minister* observes, New Zealand ranks tenth when measured by person and twentieth when measured by citations (2005a:69). Quoting the MoRST citations analysis, the MoE's *2004 Profiles and Trends Report* rightly notes, 'Collaboration is of particular importance in research...papers that result from collaboration between authors receive more citations on average than those

with a single author.' Moreover, it points out that papers of a collaborative nature produced in the tertiary education sector were more likely to involve overseas organisations than with Crown Research Institutes (CRIs) or other New Zealand institutions (2005a:188). Almost two-thirds of collaborations were with overseas authors although there may be issues about the quality of the outcomes of those joint efforts.

Objective 32 of the *Tertiary Education Strategy (2002/07)* is noted as the most directly relevant to the CoREs, that is, 'a more focused tertiary research investment through world-class clusters and networks of specialisation' (MoE 2002). Nevertheless, even a cursory review of the websites of the seven CoREs reveals little evidence of the imperatives of internationalising of research. There may well be considerable references to international activities further into the websites – indeed this may be common to similar sites in similar centres elsewhere – but the point is they are by no means front and centre. The notable exception is the Institute of Mathematics and its Applications, where international visitors and programmes involving overseas universities are featured.

We are aware of prominent activities such as the partnership 'Towards a Future Focused Equine Industry' involving Massey, Lincoln and Otago universities that includes a research programme with overseas partners such as Colorado State University, the Royal College, London, the University of California, and Davis and Utrecht (Netherlands). Since we did not ask specifically about collaboration with CRIs it is not surprising that collaboration with CRIs did not come through in the survey responses.

The variations in the culture and performance of the institutions and the sectors are to a large extent an outcome of their identity. Perceptions of the impact of the PBRF are as indicated, very positive, regardless of the level of research activity. The process has the potential to encourage international perspectives. The observation from one respondent that New Zealand research is 'relatively insignificant in global terms' and therefore there is little incentive to pursue research, is obviously self-defeating and perhaps not too much should be made of it. Nevertheless, it may be worth investigating if it is an underlying negative set of values more widely shared.

Likewise, the range of incentives for internationalising research could be examined further. It would be useful to know what incentives are appropriate for which groups and under what conditions, specifically in the New Zealand context. It is not possible to get from the survey a strong assessment of the ways in which the status attached to research of international significance encourages or dampens interest.

Community expectations drive and sometimes constrain the behaviour of institutions and of the individuals who work in them. For example, the public tertiary education institutions differ in important respects concerning expectations about internationalisation. Universities are 'expected to have well-established international links and to meet international standards of scholarship' (MoE 2005e:26) and academics are employed on the assumption that they can meet that expectation.

The *Profiles and Trends Report 2004* (MoE 2005a) summarises the challenges for research, but this is more generally at the heart of the issue of internationalisation for New Zealand:

One of the challenges facing a small country is how to create greater focus in its research effort as a means of increasing the benefits deriving from a limited investment in research. Research also tends to flourish where there is a critical mass of people active in common research areas. Inevitably, creating world-class research performance in the New Zealand context poses a challenge – because we have a small and widely dispersed population and because most of the tertiary education organisations are small by international standards. (2005a)

11.4 Next steps

The survey instrument was never going to elicit the depth of response that is needed to understand the institutional cultures and policy settings that drive internationalised behaviour. One key person suggested that: 'the funding regime has caused many institutions to behave in strange ways', and while it is beyond the brief of this project to investigate these sorts of responses it indicates the need for some fine-grained work to be done to identify the factors that lead to the internalising of internationalised outlooks, skills and behaviours for individuals and organisations.

We also observed that that there was no shortage of reports, mapping exercises, and surveys such as this, over recent years. The comment from one institution quoted at the conclusion of Chapter 4 bears repeating:

> 'Outward looking', 'world class capability', 'international links', 'global connectedness' are the sorts of phrases we often hear but there does not appear to be any centrally driven strategy or process which is designed to ensure that internationalisation becomes embedded in what we do on an ongoing basis.

What seems to be needed most are not more surveys or reviews but some practical 'how-to' guides distilled from best-practice, and substantial support for enhancement of institutional international strategic and business planning. Just as urgent is the need for practical whole-of-government policy integration aimed at strategically targeted inputs by the government that have credibility at the institutional level.

There are, of course, some underlying issues to deal with. For example, given global developments, is rationalisation of the New Zealand education export industry inevitable? If so, what role is there for the New Zealand government in:

- formulating an industry adjustment policy to minimize the adverse impact on the economy (all stakeholders including domestic students) of any such rationalisation?

- maintaining and enhancing the international reputation of providers that have the potential to remain internationally competitive?

The relatively limited scale of the New Zealand economy and its capacity to spread innovation investment across the full range of knowledge/industry sectors poses critical questions. For example, what is the right balance between seeking to undertake a broadly based internationalisation of the New Zealand education offering, or focusing resources on a few streams and institutions to build internationally competitive centres of excellence?

There is a risk that ownership of the non-export-related principles in recent government documents may be diffused and less likely to be pursued with the same vigour and focus as the export activities. Is it partly that ownership of the education export issues is clearly vested in a partnership between Education New Zealand and the International Division of MoE whereas, in respect of the tertiary sector, the domestic internationalisation agenda is very much in the hands of the TEC? It is apparent from the surveys and interviews that there are issues embedded in these relationships that are shaping the potential of government policy to implement a new internationalisation agenda.

11.5 Conclusions

A key finding of this study is that the quality and sustainability of the domestic system will ultimately depend on the nature and extent of international engagement.

The challenge for New Zealand policy agencies, education, research and training institutions and their stakeholders is to determine the extent to which New Zealand institutions need

to further integrate high quality international, intercultural or global dimensions into the purpose, functions and delivery of education and training. How the government can provide more effective encouragement and support for these activities is also a challenge. This includes, but goes well beyond, the international sale of education and training services.

The dependence of the tertiary sector on in-New Zealand feeders is of concern given the 2004 trend analysis (MoE 2005a) that notes the decline in numbers in secondary schools and English language schools. The report puts a brave face on the impact of this decline on overall fee revenues by noting that tertiary institutions and universities in particular increased their revenues in 2004, despite fee increases, and maintained the economic contribution of international education. This perhaps ignores the loss of non-fee expenditures from reduced numbers of incoming students and that the decline is a harbinger of a subsequent decline in tertiary intakes from schools, English language providers and other feeder PTEs.

As international-standard facilities, such as English-language-medium schools, in-country feeder pathways to international tertiary study, and undergraduate programmes become more available in traditional source countries, or are provided at less cost and in culturally aligned environments (e.g. Singapore), the demand for onshore education places in New Zealand, and other like providers, is likely to decline. New Zealand institutions are likely to come under pressure to recruit more and more of their students from offshore sources. One submission was emphatic in its vision of what was possible and desirable:

> *In a digitally savvy world, international alliances and partnerships with institutions across the world enables learners to create their own knowledge portfolio. They can select from a world-class menu of learning. New Zealand educational courses should be on that menu! (S3)*

The most persistent underlying issue concerns identifying ways of developing a deeply embedded 'culture of internationalisation'. That is, not confined to policy makers and leaders but penetrating all layers of New Zealand's education and training policy machinery/ framework and its intersections with trade, diplomatic and cultural relations policies, and the executive management of institutions.

Most institutions will need assistance to undertake these reassessments. There is a need for an institutional professional development strategy to assist those who are teaching, administering and marketing an international education programme.

In the area of marketing, some Education New Zealand/MoE institutional co-operation could be developed to undertake 'diagnostic audits' of actual practice. This could involve 2 or 3 institutions representative of each the different classes of tertiary provider (universities, ITPs, PTEs and English language centres). This may well include schools, given their importance as feeders. A useful outcome of this could be 'how to' handbooks and professional development to bring about performance improvement across the sector. Associated with this initiative could be introduction of new technologies into the student marketing and recruitment cycle. A handbook and related programmes could cover, for example:

- capturing and distilling market intelligence into institution specific business plans and marketing strategies;
- turning market intelligence into practical and effective business plans that are meaningful at the level of departments and units;
- enhancing strategic/business planning capabilities within institutions to undertake macro trend analysis; and
- initiating and managing the process of institutional adjustment to deliver the internationalisation outcomes set out in mission statements and strategic plans.

New Zealand's ability not only to sustain but to move strategically beyond its dependence on the sales relationship, depends on having several lead institutions that define and pursue their internationalisation objectives in the broader terms foreshadowed in the 2001 report, *Export Education in New Zealand: A strategic approach to developing the sector*, and alluded to in the statements, *An International Education Framework* (2004) and *Strengthening International Education* (2005d). This will require institutions that, in addition to producing quality research, teaching and training, are attuned to global developments, capable of adjusting their strategic and operational plans accordingly, and staffed by individuals with the competencies for effective practical global engagement.

Having internationally recognised 'nodes of New Zealand excellence', including research and scholarship, will also provide collateral marketing and sales momentum for other high quality, but lower profile providers. The importance of government directly promoting the development of a core group of best practice pacesetting institutions in each sector cannot be underestimated.

In summary, national competitiveness in knowledge transactions depends on the total impact of the international knowledge transfers undertaken by each nation's institutions. This in turn depends on the policy context within which institutions operate, the extent to which national policies have accurately mapped and responded to relevant global developments, the related international strategic and business planning capabilities within institutions, and the skills and expertise of the staff who implement these plans, deliver the internationalising teaching and learning experiences for students, and sustain international research collaboration.

These international education interactions are pivotal points for achieving New Zealand policy objectives across a wide agenda as they build New Zealanders into key global academic, technological, cultural, business and political networks. This involvement provides critical access to trade intelligence and opportunities, political influence over global matters impacting upon New Zealand, and the latest technological and social innovations. An economy the size of New Zealand needs to maximise the returns from the combined weight and synergies all of its international relations assets. Strong, substantive and dynamic institutional alliances with strategic offshore counterparts are a core international relations asset.

The findings suggest that without developing nodes of education, training or research excellence and leveraging these through strategic alliances with institutions in the 'macro' societies, smaller economies, such as New Zealand, will find it increasingly difficult to sustain an international profile for their education programmes and their research activities. In this context, New Zealand's internationalisation agenda for the next decade and beyond should focus strategically on growing and projecting internationally the higher value components of its tertiary sector.

This approach was generally well received by participants in the policy consultation forums and resonates with changes to the tertiary education strategy and funding arrangements proposed by the Minister for Tertiary Education on 4 April, 2006.

12 Setting a policy framework for 2012

12.0 Why is a new education internationalisation policy framework needed?

As indicated earlier in this report, the US has been shaken by its declining influence in higher education, a dilution of its global research dominance and the global competition for talent (Florida 2005). The National Association of International Educators (NAFSA), and the Alliance for International Educational and Cultural Exchange (2006) recently called for a concerted American response, which starts from the same perspective voiced in this report:

Globalisation is obliterating the distinction between foreign and domestic concerns. Today, most domestic problems are also international problems. (National Association of International Educators 2006:1)

In arguing the case for '*Why America needs an international education policy*' these groups cite the failure of the US system to produce graduates with the knowledge and skills required for a global workforce as their foremost concern. They argue that a globally literate citizenry is crucial to the US's global leadership, security and economic objectives. They see study abroad programmes being integrated into the higher education curriculum and the government ensuring that at least 50% of American students receiving college degrees will have studied abroad. Three core elements of a proposed new framework are the:

- promotion of international, foreign-language, and area studies;
- creation of a comprehensive strategy to restore America's status as a magnet for international students and scholars; and
- creation of a comprehensive strategy to establish study abroad as an integral component of undergraduate education.

The call for action includes the creation of an interagency working group to 'ensure that policies and recommendations affecting international education are consistent and coherent.' Issues of scale and the relative emphasis on global objectives aside, similar challenges face New Zealand.

Clearly, a major challenge is to set the foundations for a profoundly different world of globalised and internationalised education a decade or more from now – one that cannot be predicted with any certainty. The Bologna Process has generated discussion in Europe and beyond that now almost dominates domestic education policy thinking in the 45 signatory countries.

In that context Van Vught, Van der Wende, and Westerheijden (2002) observed that: 'in terms of both practice and perceptions, internationalisation is closer to the well-established tradition of international cooperation and mobility...whereas globalisation refers more to competition, pushing the concept of higher education as a tradeable commodity and challenging the concept of higher education as a public good'. The conflation of the two is common in policy discussion, and in the setting of strategic goals. While it is 'too simple to align internationalisation with the public and globalisation with the private' (Scott 2006), the robustness of strategies for internationalisation depends on a clear understanding of the distinct but complementary market and human values defining the potential contribution of New Zealand in a globalised tertiary education environment.

A key focus of the new Biennial Education Forum established at the recent Asia-Pacific Ministers Meeting is 'maintaining cognisance of future possibilities for compatibility' with

initiatives such as Bologna (Brisbane Communiqué April 2006). At the same time, European developments have also generated a discussion paper from the Australian Minister, *The Bologna Process and Australia: Next Steps* (Bishop 2006), considering how best to respond to the possibility of the 'profound effect on the development of higher education globally' of the reforms. New Zealand cannot afford to be isolated from these developments and needs to move with some urgency beyond the prevailing paradigms of internationalisation.

12.1 The context of the 2006 policy reforms

The Minister's recent Cabinet paper, *Tertiary Education Reforms: The Next Steps* (2006), raised issues also discussed in this report concerning the relative roles of institutions and government agencies in setting strategic frameworks and priorities. While there is little specific reference to 'internationalisation' in the Cabinet document, it highlights the need for strong central policy leadership. This is affirmed by the Treasury's comments in the Minister's paper:

> *The approach outlined in this paper firstly requires central government to clearly outline specific priorities for the tertiary system and for these to be used to discriminate in making funding decisions for providers. A higher degree of specificity will be required from central government than in the past if provision on the ground is to change from current offerings. (Cabinet Policy Committee 17 March 2006)*

Treasury also acknowledges that central decision-making needs to be strategically informed and managed so that it does not 'reduce the potential responsiveness of the system when changes are required or desired'.

This development mirrors a consistent theme that has emerged from our analyses of the survey results, discussions at stakeholder forums, interviews with relevant government agencies, and policy and planning documents made available to us. There is almost universal agreement that New Zealand tertiary institutions would achieve better international outcomes if they were able to plan within a clear and integrated national internationalisation strategy. There was an emerging acceptance of the need for a policy framework that encourages institutions to develop strategies that build specific strengths and roles in order to support a more clearly calibrated set of domestic and international objectives. This report in other places points to the kinds of short- and long-term actions that would assist institutions to tailor approaches to internationalisation that are consistent with and reinforce their domestic contribution, and the reform processes proposed by the Minister.

The core premise of this report is that effective internationalisation is about the fundamental internationalisation of the domestic education offering to all students, not just to international students. Its internationalising impact is determined by the extent to which that education is internationally informed and engaged, and its responsiveness to international developments, including changes in the international marketplace for trade in education services.

The report proposes, therefore, that the optimal internationalisation policy framework for New Zealand tertiary education is one that:

- gives primacy to the internationalisation of the domestic student experience and outcomes;
- encourages the development of world-class specialisation, leveraged internationally by strategic marketing competencies in institutions and cognate government agencies; and is

- supported by policies that create a welcoming environment for international students, researchers and knowledge workers.

This proposed framework will prepare New Zealand better for the local impact of global developments, advance the international mobility and competitiveness of the New Zealand workforce and present New Zealand as a preferred settlement destination for skilled international workers and international investment. It will also consolidate New Zealand's standing internationally as a preferred source of quality research, education and training expertise and services.

To achieve these outcomes the internationalisation element of the tertiary reform framework needs to be deep-seated. It needs to be pursued in ways that build the capacity of the tertiary sector to anticipate rather than produce lagged reactions to global challenges. This requires significant investment by the government and institutions in acquiring capability in international policy analysis and programme development.

As remarked elsewhere in this report, the balance of 'international education' policy and programme effort has focused on maintaining New Zealand's performance in the sale of its education and training services internationally. It has essentially been an export policy proximate to the education portfolio, but not essentially of it. The lack of integration between domestic and international tertiary education policy is evident in the almost total absence of attention given to internationalisation by the Tertiary Education Commission, and in the relatively perfunctory treatment given to internationalisation objectives in the current *Tertiary Education Strategy*. A number of institutions and observers in our initial consultations felt that the Tertiary Education Commission to date has given little attention to the intersection between domestic funding models, objectives and priorities, and the maintenance of internationally 'literate' and competitive institutions.

The potential impact of closer integration of internationalisation criteria and outcomes into domestic policy and funding processes is reflected in the impact of the PBRF on institutional behaviour. Its weightings have reportedly influenced institutional research investment to give higher priority to research activities that are demonstrably benchmarked and connected internationally, and give early indications of the consolidation of quality New Zealand research.

Many tertiary sector stakeholders pointed to apparent dissonance between the policy objectives of a number of agencies that regulate education export activities. These ranged from slow or adverse visa processes, to mixed messages about the role of – and government support for – local international education networks, to concerns about the lack of business understanding of those managing the quality assurance and licensing functions. A number called for a governance arrangement that would allow more expeditious and transparent handling of interrelated policy and programme management issues now handled separately, 'and slowly', by different agencies.

The *Briefing for the Incoming Minister of Education* (2005e:81) argues for a more integrated agency approach in response to the State Services Commission review of education agencies. 'Building the conditions for transformation' means, as the briefing says, a changing role for the MoE and other agencies. Most institutions surveyed and consulted in this project would welcome a joint-agency mechanism that would encourage the easier tabling of current policy frictions and emerging issues, and facilitate joint action to address them. It would provide the forum for co-ordinating agency action to both enhance the attractiveness of New Zealand as a study destination and improve international education opportunity for New Zealanders. It could see 'education diplomacy' more closely linked to the achievement of New Zealand's international relations, trade and cultural development objectives and the closer integration of education export with the development of other export sectors.

12.2 Preparing for a 2012 stocktake: a framework for change

The brief for this project does not extend to identifying specific aspects of improvement or to provide advice on implementation processes. Some propositions to improve the preparedness of the sector, and provide it with the capabilities needed to move to a new phase of internationalisation, are canvassed elsewhere in this report.   Nonetheless, it may be useful to suggest one mechanism to assist in advancing this internationalisation agenda. This is to begin now to set outcomes to be assessed by a further internationalisation stocktake in 2012 and to identify milestones that would be measured in the interim to assess progress towards those outcomes.

While there are several pointers that can be derived from the body of this report, the specification of those outcomes and the nature of the milestones are matters for more detailed development by the Ministry of Education, and particularly the Tertiary Education Commission, in the context of the tertiary reform agenda and consultations with other portfolios and key stakeholders.

The framework for the 2012 stocktake, in addition to institutional indicators, might include systemic issues that, for example, assess the international fit and interdependency of the New Zealand tertiary sector overall, such as:

- the extent to which New Zealand institutions are aligned to international course protocols such as those generated by the Bologna agreement;

- the proportion of institutional funds generated directly and indirectly by international activities, for example, collaborative research projects, industry development activities, and gifts from international alumni;

- the alignment of national and institutional internationalisation policies;

- the nature and extent of international operations and strategic alliances engaged in by New Zealand institutions; and

- the extent to which any targeted investment in the development of high performing centres of excellence has been successful.

Each point above assumes an underlying, but explicit, policy objective, which in turn needs formulation or redevelopment, and promulgation.

As we have noted, the Bologna Process is clearly attracting attention from countries such as China, Japan and Asia-Pacific Education Ministers (International Education Forum 2006). Although there is a tendency to risk avoidance on the part of European policy makers, the development of this comprehensive policy framework has at least established a framework for action. While it may be useful to draw on the experiences of other countries, the dynamics that generate and contribute to a culture of internationalisation in the New Zealand context need closer investigation. It may not be appropriate to rely on supposedly generic factors from research and policy responses elsewhere. Rather, it should be possible to establish just what kinds of incentives and performance measures work, and for which parts of the tertiary sector, to achieve the specific international outcomes sought by New Zealand.

The stakeholder forum discussions suggest they understand the value of, and would be happy to benefit from, the enhanced and distinctive international standing of the other providers. They clearly expect central government to give a lead in supporting flagships in each sector. The Minister's proposed focus on clarifying the roles of ITPs presents an opportunity for the identification of those ITPs that can make distinctive contributions to an internationalised tertiary education sector. Similarly, a more structured approach to defining the international research roles of the universities would advantage the New Zealand system as a whole, and would promote further research investment.

The process of measuring progress towards these objectives would be most effective if it was an integrated element of national quality assurance processes, where internationalisation-specific performance incentives and measures were derived from the policies developed above. They might, for example, audit:

- progress in developing internal commitment to internationalisation across all levels of institutional operations;

- the extent and quality of staff training offered and undertaken on strategic and business management aspects of internationalisation; and

- evidence of a shared institutional interpretation of the concept of internationalising the curriculum and its practical expression in teaching and learning practices.

It is more likely that New Zealand tertiary education will continue to perform above its weight if it looks to innovative and high profile responses to globalisation and addresses the challenge of internationalisation on its own terms. Setting an overall policy agenda to achieve this might be a priority item for consideration by the cross-agency mechanism mooted above and the agreed elements incorporated into the *Tertiary Education Strategy*.

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Appendix B   Tables

The data here was extracted by Justin Brown of PhillipsKPA from the Ministry of Education website in consultation with Tertiary Sector Performance Analysis and Reporting, Ministry of Education. The data selected was intended to indicate the extent to which the student profiles at system and institutional levels had become internationalised, since 1998 wherever possible. The data reported here are from the *July Snapshot* and the *Full Year Collection* with some slight variations between the two as a result of timing and definitional differences.

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Table 1: Formal Student Enrolments by Sector July Snapshot (2000 – 2004)

Sector	2000	2001	2002	2003	2004	02 vs 01	03 vs 02	04 vs 03
Universities	122,727	125,668	132,396	137,007	138,583	5%	3%	1%
ITPs	87,436	87,965	95,782	98,072	117,514	9%	2%	20%
Private Training Establishments	39,173	51,666	53,385	49,897	59,158	3%	-7%	19%
Wānanga	2,972	11,278	27,535	41,200	41,644	144%	50%	1%
Colleges of Education	12,045	10,884	10,788	10,828	11,107	-1%	0%	3%
Total	264,353	287,461	319,886	337,004	368,006	11%	5%	9%

Table 2: Formal Student Enrolments by Sector July Snapshot (2000 – 2004) [% of Total]

Sector	2000	2001	2002	2003	2004
Universities	46	44	41	41	38
ITPs	33	31	30	29	32
Private Training Establishments	15	18	17	15	16
Wānanga	1	4	9	12	11
Colleges of Education	5	4	3	3	3
Total %	100	100	100	100	100

Table 3: Formal International Students by Sector Full Year (1999 – 2004)

Sector Name	1999	2000	2001	2002	2003	2004	02 vs 01	03 vs 02	04 vs 03
Universities	4,716	6,778	10,664	16,638	23,118	26,268	56%	39%	14%
ITPs	3,764	4,628	7,588	11,804	13,081	13,500	56%	11%	3%
Private Training Establishments	1,690	3,340	6,335	9,390	10,467	9,876	48%	11%	-6%
Colleges of Education	112	90	82	160	371	561	95%	132%	51%
Wānanga		2	2	1	2	8	50%	100%	300%
Total	10,282	14,838	24,671	37,993	47,039	50,213	54%	24%	7%
y/y growth rate		44%	66%	54%	24%	7%			

Table 4: Formal International Students by Sector Full Year (1999 – 2004) [% of Total]

Sector Name	1999	2000	2001	2002	2003	2004
Universities	46	46	43	44	49	52
ITPs	37	31	31	31	28	27
Private Training Establishments	16	23	26	25	22	20
Colleges of Education	1	1	0	0	1	1
Wānanga	0	0	0	0	0	0
Total %	100	100	100	100	100	100

Table 5: Foreign Fee-Paying Students enrolled in Public Tertiary Education Full Year (1994 – 2004)

	1994	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004
Total	4,692	5,240	6,727	8,089	7,750	8,592	11,498	18,336	28,603	36,572	40,337
Y/y Growth		12%	28%	20%	-4%	11%	34%	59%	56%	28%	10%

Table 6: Foreign Fee-Paying Students enrolled in Public Tertiary Education, By Sector Full Year (1994 – 2004)

Sector	1994	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004
Universities	2,483	3,299	3,967	4,460	4,459	4,716	6,778	10,664	16,638	23,118	26,268
ITPs	1,445	1,940	2,369	3,494	3,166	3,764	4,628	7,588	11,804	13,081	13,500
Colleges of Education	17	43	43	141	135	112	90	82	160	371	561
Wananga								2	1	2	8
Total	3,945	5,282	6,379	8,095	7,760	8,592	11,496	18,336	28,603	36,572	40,337

Table 7: Foreign Fee-Paying Students enrolled in Public Tertiary Education, By Region Full Year (1994 – 2004)
[% of Total]

Sector	1994	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004
Asia	71	78	83	83	81	78	79	82	84	85	85
North America	4	4	4	4	56	6	5	4	5	5	
Europe	4	4	4	4	5	6	7	6	5	5	5
Pacific	7	7	7	7	8	7	7	6	5	4	3
Africa	1	1	0	0	1	1	1	1	1	1	1
Middle East	0	0	0	0	0	0	0	1	0	0	1
Central and South America	0	0	0	0	0	1	1	1	0	0	0
Not Stated	13	6	1	1	1	2	0	0	0	0	0
Total %	100	100	100	100	100	100	100	100	100	100	100

Table 8: Foreign Fee-Paying Students enrolled in Private Tertiary Education, By Region July Snapshot (1997 – 2003) [% of Total]

Sector	1997	1998	1999	2000	2001	2002	2003
Asia	85	73	80	86	83	86	93
Europe	0	1	6	4	5	5	3
Pacific	2	4	6	6	8	6	2
North America	1	0	3	2	2	1	1
Africa	0	0	0	1	1	1	0
Middle East	0	0	0	0	0	0	1
Central and South America	0	0	0	1	1	1	1
Not Stated	0	0	1	0	0	0	0
Other	12	22	4	0	0	0	0
Total %	100	100	100	100	100	100	100

Table 9: Formal International Student Enrolments by Level July Snapshot (2000 – 2004)

Category	2000	2001	2002	2003	2004	02 vs 01	03 vs 02	04 vs 03
Degree Level	5,488	7,493	10,390	16,293	20,156	39%	57%	24%
Diploma Level	1,604	2,182	5,309	8,396	9,467	143%	58%	13%
Certificate Level	3,544	6,748	9,008	7,928	6,713	33%	-12%	-15%
Post-Graduate Level	1,445	1,685	2,171	3,008	3,36	29%	39%	12%
Total	12,081	18,108	26,878	35,625	39,704	48%	33%	11%

Table 10: Formal International Student Enrolments by Field of Study July Snapshot (2001 – 2004)

Field	2001	2002	2003	2004	02 vs 01	03 vs 02	04 vs 03
Management and Commerce	5,712	10,305	15,979	18,852	80%	55%	18%
Mixed Field Programmes	4,657	5,501	6,147	6,326	18%	12%	3%
Society and Culture	2,946	4,668	4,267	3,903	58%	-9%	-9%
Natural and Physical Sciences	1,169	1,510	1,954	2,322	29%2	9%	19%
Information Technology	1,035	1,676	2,799	2,309	62%	67%	-18%
Engineering	765	949	1,240	1,702	24%	31%	37%
Creative Arts	532	791	1,082	1,268	49%	37%	17%
Health	472	580	826	1,105	23%	42%	34%
Food, Hospitality	120	208	405	710	73%	95%	75%
Education	223	255	403	536	14%	58%	33%
Architecture and Building	203	228	321	362	12%	41%	13%
Agriculture	274	207	202	309	-24%	-2%	53%
Total	18,108	26,878	35,625	39,704	48%	33%	11%

Table 11: Formal International Student Enrolments by Field of Study July Snapshot (2001 – 2004) [% of Total]

Field	2001	2002	2003	2004
Management and Commerce	32	38	45	47
Mixed Field Programmes	26	20	17	16
Society and Culture	16	17	12	10
Natural and Physical Sciences	6	6	5	6
Information Technology	6	6	8	6
Engineering	4	4	3	4
Creative Arts	3	3	3	3
Health	3	2	2	3
Food, Hospitality	1	1	1	2
Education	1	1	1	1
Architecture and Building	1	1	1	1
Agriculture	2	1	1	1
Total	100	100	100	100

Table 12: Foreign Fee-Paying Students in Public Providers, by Citizenship Full Year (1994 – 2004)

Country	1994	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004	02 vs 01	03 vs 02	04 vs 03
China	55	61	82	88	127	720	2,894	7,422	15,660	22,616	25,823	111%	44%	14%
USA	144	191	236	289	354	441	589	789	1,101	1,507	1,932	40%	37%	28%
Korea	154	218	352	585	427	533	702	1,133	1,429	1,389	1,526	26%	-3%	10%
India	25	24	23	36	60	80	241	535	1,035	1,426	1,402	93%	38%	-2%
Japan	643	546	806	1,240	1,175	1,103	1,159	1,305	1,363	1,267	1,220	4%	-7%	-4%
Malaysia	1,191	1,844	2,508	2,769	2,332	1,913	1,630	1,454	1,136	1,032	1,121	-22%	-9%	9%
Fiji	159	181	240	291	276	256	315	461	600	547	570	30%	-9%	4%
HongKong	311	312	343	408	437	479	456	557	520	514	509	-7%	-1%	-1%
Thailand	242	297	420	504	435	459	494	572	612	573	502	7%	-6%	12%
UK	52	46	67	81	112	138	175	197	275	368	501	40%	34%	36%
Vietnam	13	16	34	7	70	83	87	213	320	440	451	50%	38%	3%
Taiwan	160	213	334	423	462	475	515	528	502	427	396	-5%	15%	-7%
Tonga	59	73	67	56	84	86	139	176	290	300	343	65%	3%	14%
Germany	61	81	89	73	60	89	133	187	297	354	342	59%	19%	-3%
Indonesia	195	210	267	342	312	359	382	414	396	363	333	-4%	-8%	-8%
Singapore	243	265	255	203	213	241	172	232	230	280	274	-1%	22%	2%
Sweden	22	15	23	37	57	99	146	162	213	195	185	31%	-8%	-5%
Sri Lanka	19	19	25	31	40	56	71	88	134	155	154	52%	16%	-1%
Philippines	11	4	26	15	22	23	36	61	89	140	124	46%	57%	11%
South Africa	8	10	7	22	27	34	31	65	74	94	110	14%	27%	17%
Cambodia		1	7	5	32	34	54	80	103	87	81	29%	16%	-7%
Pakistan	10	7	10	13	7	8	38	77	107	80	55	39%	25%	31%
Brazil	4	6	12	11	22	24	33	50	45	30	27	-10%	33%	10%
Other	164	642	146	566	617	859	1,004	1,578	2,072	2,388	2,356	31%	15%	-1%
Total	3,945	5,282	6,379	8,095	7,760	8,592	11,496	18,336	28,603	36,572	40,337	56%	28%	10%

Table 13: Foreign Fee-Paying students enrolled in Private Tertiary Education, By Region July Snapshot (1997 – 2003)

Sector	1997	1998	1999	2000	2001	2002	2003	02 vs 01	03 vs 02
Asia	1,087	1,023	987	1,833	2,737	4,171	6,663	52%	60%
Europe	3	9	68	84	167	225	187	35%	-17%
Pacific	32	50	69	119	268	276	125	3%	-55%
North America	7	5	31	47	56	56	68	0%	21%
Africa	0	0	6	16	23	36	29	57%	-19%
Middle East	0	0	5	5	5	22	44	340%	100%
Central and South America	0	0	2	13	41	59	41	44%	-31%
Not Stated		10	3	2	1	1	-50%	0%	
Other	153	305	49						
Total	1,282	1,392	1,227	2,120	3,299	4,846	7,158	47%	48%
Not Asia	*195*	*369*	*240*	*287*	*562*	*675*	*495*		

Table 14: Formal International Student Enrolments by Level (2000 – 2004) July Snapshot [% of Total]

Category	2000	2001	2002	2003	2004
Degree Level	45	41	39	46	51
Diploma Level	13	12	20	24	24
Certificate Level	29	37	34	22	17
Post-Graduate Level	12		8	8	8
Total %	100	100	100	100	100

Appendix C   Excerpt from Request for Proposals

Internationalisation in New Zealand Tertiary Education Organisations

Purpose of this Study

In 1997 a study was undertaken to determine the extent to which New Zealand tertiary education institutions had become internationalised. The results of this survey were published the following year as *Internationalisation and Tertiary Education Institutions in New Zealand*, Ministry of Education, Wellington, 1998.

The New Zealand tertiary education system is becoming increasingly internationally focused. The present study will identify the developments and trends in internationalisation across the New Zealand tertiary education sector since the previous study. The study will also identify the plans and priorities of tertiary institutions in this area, and the incentives and obstacles affecting their progress.

The broader purpose of the study is to support dialogue among providers and policy makers about best practice in, and the strategic objectives of, internationalisation. Data from this study will also be used to inform a three-year programme of projects with the broad aim of promoting internationalisation in New Zealand tertiary institutions.

Background and Context

This survey is part of a wider commitment by the New Zealand government to support developments in international education. The 2004 Budget included a package of initiatives extending over four years (2004-2007). One component of the package is targeted at 'building quality'. The Ministry of Education, in co-operation with a sector Advisory Committee, is developing a three year programme of initiatives designed to assist the efforts of tertiary education organisations in international education. This survey of current policy, practice and plans is the first element of this three year programme.

The project also links to the *Tertiary Education Strategy 2002/07*, particularly to the strategy to *Strengthen System Capability and Quality*, and to the objective around *Increased Global Connectedness and Mobility*.

Research Questions

The research task is to study and report on internationalisation within New Zealand tertiary educational organisations, and in particular to identify trends since the last study of this kind published in 1998. It is anticipated that the research team selected for this project will need to design appropriate data gathering instruments for this task, taking into account existing sources (i.e. not all data collection will be primary). It is also anticipated that the research team may wish to negotiate the kinds of data they collect.

In the first instance, however, the research team should be guided by the following research questions. These have been abstracted from the earlier New Zealand study (*Internationalisation and Tertiary Education Institutions in New Zealand*, Ministry of Education, Wellington, 1998) and from similar studies carried out in Canada (*Progress & Promise: The AUCC Report on Internationalisation at Canadian Universities*, Association of Universities and Colleges of Canada, Ottawa, 2000) and Australia (*Internationalisation of Higher Education: Goals and Strategies*, DEETYA, Canberra, 1996).

1.   Importance, rationale, impact and benefits of internationalisation

    1.1.   What importance is being given to internationalisation by New Zealand tertiary institutions?

    1.2.   How is this put into effect at a strategic and leadership level?

1.3. What is the rationale for this effort?

1.4. What are the benefits of this focus and effort?

1.5. What progress is being made?

2. Environmental factors affecting internationalisation

   2.1. What are the key elements of the international environment influencing institutional policy and practice in internationalisation?

   2.2. What are the key elements of the New Zealand environment and specifically the tertiary education environment influencing policy and practice in internationalisation?

   2.3. What are the key elements of government policy influencing institutional policy and practice in internationalisation and what future developments would be of assistance?

3. Organisational factors affecting internationalisation

   3.1. How are these internationalisation strategies supported by appropriate:

      3.1.1. organisational structures and processes?

      3.1.2. human resources policies and practices?

      3.1.3. policies and processes for costing and resourcing?

4. Teaching and curriculum

   4.1. What strategies and processes are in place, and what level of activity can be demonstrated in efforts to:

      4.1.1. internationalise the curriculum and teaching?

      4.1.2. internationalise the teaching staff?

      4.1.3. internationalise the student experience?

5. Research

   5.1. What proportion of research activity has an international focus?

   5.2. What policies and systems are in place to encourage the internationalisation of research activities? How effective do institutions consider these policies and systems?

   5.3. How many international partnerships and linkages are in place to further research? How active are these?

   5.4. How active are institutions in sourcing research funding internationally?

6. Student mobility

   6.1. What efforts are New Zealand institutions making to encourage their students to undertake some of their study offshore; what policies and procedures are in place to support these efforts; and with what outcomes?

   6.2. What efforts are New Zealand institutions making to encourage international students to undertake study abroad or student exchanges in New Zealand; what policies and procedures are in place to support these efforts; and with what outcomes?

7. International students at New Zealand tertiary education organisations (TEOs)

   7.1. How does the recruitment of international students fit with the strategic direction of the institution?

   7.2. How are institutions recruiting international students?

7.3. How many international students are being recruited, where do they come from and what are they studying?

7.4. How are TEOs organising the administrative and support services required by these students?

7.5. How are TEOs assessing the quality of these efforts?

7.6. In what ways are the quality of outcomes for international students being assessed?

8. Educational programmes and services delivered outside New Zealand

8.1. What are the institutions' objectives and goals for offshore delivery?

8.2. What programmes and services are being delivered offshore?

8.3. How many programmes and students are involved?

8.4. What delivery and service models are being used?

8.5. How do institutions assure the quality of offshore offerings?

9. Educational services and programmes sourced overseas

9.1. What educational services and programmes are being sourced overseas?

9.2. What delivery and service models are being used?

9.3. What are the institutions' objectives and goals for sourcing services and programmes from overseas?

Appendix D   Advisory Committee

Deirdre Dale	Whitireia Community Polytechnic
Richard Goodall	AIS St Helens
Andrew Holloway	The University of Auckland
Paul Lister	Ministry of Education
Graeme Oldershaw	Association of Colleges of Education in New Zealand
Tom Prebble	Ministry of Education (Massey University)
Neil Quigley	Victoria University of Wellington (replaced in February 2006 by Rob Rabel)
Rob Rabel	University of Otago

Appendix E   Consultations

Contacts	*Agencies and Institutions*
Pamela Barton	Director, Education Asia NZ Foundation
Tony Davies	Group Manager Policy International & Research, NZQA
Jim Doyle	Executive Director, Institute of Technology & Polytechnics New Zealand
Howard Fancy	Secretary of Education, Ministry of Education
Ken Heskin	Deputy Vice-Chancellor (Wellington and External Relations), Massey University
Nick Hurley	Director, Economic Division, Ministry of Foreign Affairs and Trade
Paul Lister	Policy Manager International Division, Ministry of Education
Russell Marshall	Chair, Tertiary Education Commission
Nikki Reid	Policy Officer, Economic Division, Ministry of Foreign Affairs and Trade
Neil Scotts	Senior Manager International Division, Ministry of Education
Graeme Somerville-Ryan	Export Education Innovation Programme Manager at Education New Zealand

Appendix F   Definitions

Foreign Fee-Paying Student

An international student who meets full tuition costs on their own or from funds provided to them by sponsors other than the New Zealand Ministry of Foreign Affairs and Trade.

Formal Student

For statistical purposes, a tertiary student is considered to be a formal student when enrolled in a formal programme of study at a tertiary education provider with an aggregated EFTS consumption value greater than 0.03 (i.e., more than one week's full-time duration).

Institution

The term 'institution' is used in the survey instrument in a generic sense to include the full range of tertiary provider organisations surveyed: universities, ITPs, colleges and private training establishments.

International Student

A student who is not a New Zealand citizen, New Zealand permanent resident, or Australian citizen.

Onshore On-campus Student

A student, enrolled by the New Zealand institution as one of its students, undertaking a programme of study at a New Zealand campus of the institution. Units of study are undertaken through regular attendance at the institution as an integral and compulsory component of the course; or, where the student is studying towards a higher degree and regular attendance is not required, the student attends the institution for supervision and/or instruction as agreed with the supervisor. This includes any international student who is studying on campus in New Zealand as a component of a programme that involves study at campuses both in New Zealand and offshore.

Onshore Off-campus Student

A student, enrolled by the New Zealand institution as one of its students, undertaking a programme of study using materials provided by the institution in New Zealand, where lesson materials, assignments etc are delivered to the student off campus, and any associated attendance is of an incidental, special or voluntary nature.

Offshore On-campus Student

A student, enrolled by the New Zealand institution as one of its students, undertaking a programme of study provided by an offshore campus, study centre, or twinning partner of the institution, where attendance is required. The programme is undertaken through regular or intensive attendance or supervision.

Offshore Off-campus Student

A student, enrolled by the New Zealand institution as one of its students, undertaking a programme of study using materials provided by an offshore campus, study centre, or twinning partner of the institution, where lesson materials, assignments etc are delivered to the student off campus, and any associated attendance is of an incidental, special or voluntary nature.

Study Abroad

An *Incoming Study Abroad Student* is a student who is not a New Zealand citizen, a New Zealand permanent resident or an Australian citizen, and who is studying at a New Zealand institution (for one or two semesters) on a fee-paying programme such as *Study Abroad*. A *Study Abroad student* would not normally intend to obtain a completed qualification from the New Zealand institution.

Exchange Student

An *Incoming Exchange Student* is a student who is not a New Zealand citizen, a New Zealand permanent resident or an Australian citizen, and who is studying at a New Zealand institution (usually for one or two semesters) under an exchange, reciprocal or joint programme or research project which does not involve the payment of an overseas student fee. An *Exchange Student* would not normally intend to obtain a completed qualification from the New Zealand institution.

An *Outgoing Exchange Student* is a student at a New Zealand institution who is studying at an overseas institution (usually for one or two semesters) under an exchange, reciprocal or joint programme or research project that does not involve the payment of an overseas student fee. An *Exchange Student* would normally intend to count the study at the overseas institution towards a qualification from the New Zealand institution.

Appendix G   Forum participants

Wellington 27 March 2006

Grace Campbell-Macdonald	Senior Policy Analyst Tertiary Education Outcomes, Ministry of Education
Karen Chalmers	Manager – International New Zealand Qualifications Authority
Scott Davidson	Professor and Pro Vice-Chancellor and Dean, School of Law, University of Canterbury
John Fisa	President, Pacific Island Tertiary Providers of NZ
Bruce Graham	Director International, Massey University
De Xiaodan Gao	Executive member, ISANA NZ
Moira Hagenson	International Manager, Massey University
Nigel Healey	Professor and Pro Vice-Chancellor College of Business and Economics, University of Canterbury
Nick Hurley	Director, Economic Division, Ministry of Foreign Affairs and Trade
Kay Nelson	Head, Centre for Hospitality, Tourism, Hair & Beauty Professionals, Wellington Institute of Technology
Bryan Patchett	Senior Strategic Advisor – Economic Development Strategy Unit, Strategy and Planning Wellington City Council
Shayne Quick	Professor and Pro Vice-Chancellor (International), University of Waikato
Neil Scotts	Senior Manager, International Division, Ministry of Education
Rob Stevens	CEO, Education New Zealand Trust
Colleen Sweeney	CEO, Universal College of Learning
Sue Thompson	Academic Manager, Otago Polytechnic
Matua Whatarangi	Te Wananga o Raukawa

Auckland 28 March 2006

Pim Borren	CEO, Waiariki Institute of Technology
Andrew Brownlee	CEO, New Zealand Institute of Education
Andrew Codling	Deputy President, Academic UNITEC
Johanna Cogle	Principal, NZ Institute of Studies
Sarah Coleman	Marketing and Student Services Manager, NZ Management Academies
Darren Conway	CEO, Languages International
Chris Hawley	Director of International Relations, Auckland University of Technology
Ewen MacKenzie-Bowie	Campus Director, Wollongong College
Tricia Reade	Director International Education, Manukau Institute of Technology
Nick Shackleford	Head of the School of Language Studies and Board Member, UNITEC
James Ward	Deputy Director Student Services, Manager International Relations, AIS St Helens

Appendix H   Submissions received

Submission 1	Student Learning Support Service, Victoria University of Wellington
Submission 2	Deirdre Dale, Chair, International Committee ITP New Zealand
Submission 3	Anonymous

Appendix I   Institutions participating in survey

Universities

Auckland University of Technology

Lincoln University

Massey University

University of Auckland

University of Canterbury

University of Otago

University of Waikato

Victoria University of Wellington

ITPs/Colleges of Education/Wānanga

Aoraki Polytechnic

Bay of Plenty Polytechnic

Christchurch College of Education

Christchurch Polytechnic Institute of Technology

Eastern Institute of Technology

Manukau Institute of Technology

Nelson Marlborough Institute of Technology

Otago Polytechnic

Southern Institute of Technology

Tai Poutini Polytechnic

Tairawhiti Polytechnic

Te Whare Wānanga o Awanuiārangi

The Open Polytechnic of New Zealand

UNITEC Institute of Technology

Universal College of Learning (UCOL)

Waiariki Institute of Technology

Waikato Institute of Technology

Wellington Institute of Technology

Whitireia Community Polytechnic

Private Tertiary Institutions

AIS St Helens

Bible College of New Zealand

Christchurch International College

Institute of Applied Learning

Languages International

New Zealand Institute of Studies

Pacific International Hotel Management

The New Zealand School of Travel and Tourism

Whitecliffe College of Arts and Design

Appendix J   Survey questionnaire

PhillipsKPA

Internationalisation in New Zealand tertiary education organisations

Ministry of Education

Section 1
Institutional strategy and responses

This section seeks your input to creating a national picture of:
- how New Zealand institutions develop and communicate their internationalisation strategies,
- the factors, including government policies, impacting upon those strategies,
- how institutions resource and organise their internationalisation activities, and
- whether performance targets are set and the accountabilities and incentives for achievement.

It also seeks views on innovation and future developments.

It is designed for response by persons with senior strategic responsibility for these issues.

Institution	
Name of person completing this section	
Position	
Email/Phone	

Craig McInnis, Roger Peacock and Vince Catherwood for PhillipsKPA
Please direct enquiries about this survey questionnaire to Vince Catherwood
(vincec@xtra.co.nz)

Please mark response boxes with an 'X' where applicable

Development and Communication of Internationalisation Strategies

1.1   Does your institution have in place a committee or working group specifically focused on internationalisation?

Yes	No	N/A	Comment

1.2   At what level is this group chaired?

Level	

1.3   Is internationalisation strategy at your institution determined:

	Yes	No	N/A	Comment
Centrally?				
Devolved to faculties or schools?				

1.4   Is your 'internationalisation' policy or strategy explicitly referred to in your institution's:

	Yes	No	N/A	Comment
a. Charter?				
b. Mission Statement?				
c. Business Plans?				
d. Profile?				

1.5   Which, if any, of the above documents is the key reference point for your internationalisation strategy? Check one.

a	b	c	d	Comment

1.6   Does your institution have country specific business plans for those regions of interest to you in your internationalisation strategy?

Yes	No	N/A	Comment

1.7   Does your institution have in place a strategy or medium for communication of information about your international activities to administrators and academics?

Yes	No	N/A	Comment

1.8 How important are the following elements in influencing your institution's internationalisation policy and practices?

	Extremely Important	Important	Slightly Important	Not at all Important
International competition				
Funding incentives				
Benchmarking against international quality standards				
Pressure for institutional diversification				
Advance of new technology				
Increasing mobility in the student market				
Other (please specify)				

1.9 Do New Zealand's national tertiary education policy documents give adequate emphasis to internationalisation? For example: *Tertiary Education Strategy 2002-07, the Statement of Tertiary Education Priorities 2005/2007*

Yes	No	Comment

1.10 How influential are the following documents in shaping your institution's internationalisation policy and practices?

	Extremely influential	Influential	Slightly influential	Not at all influential
The Tertiary Education Strategy 2002-07				
The Statement of Tertiary Education Priorities 2005/2007				
Other (please specify)				

1.11 What aspects of domestic tertiary education policy most impact on your capacity to internationalise your activities?

1.12 Does your institution actively monitor related government policy and programme development to anticipate possible constraints on, or incentives to pursue, new international opportunities?

Yes	No	N/A	Comment

1.13 If yes, what are your main sources of information on these developments?

1.14 Is there an explicit link between your institutional strategy on internationalisation and the Government's national policies on internationalisation?

Yes	No	N/A	Comment

1.15 Is your institution considering the establishment of a campus or campuses overseas?

Yes	No	N/A	Comment

Organisation and Resourcing for Internationalisation

1.16 Please summarise the reporting arrangements and estimated staff (FTE) involved in the following activities at your institution.

	Position title	Reports to	No. of Staff	N/A
Development and Promotion of Internationalisation				
Planning/Coordinating Internationalisation of Teaching				
Planning/Coordinating Internationalisation of Staff Development				
Planning/Coordinating Internationalisation of Research				
Planning/Coordinating International Student Recruitment				
Planning/Coordinating International Student Support Programmes				
Assessing and Monitoring International Commercial Ventures				
Other (please specify)				

Section 1 **Institutional strategy and responses**   4/7

1.17 What was your institution's gross fee income (including GST) from international students in 2004, and what percentage of the institution's total fee income did that comprise?

Gross fee	$	Comment
% of total fee income	%	

1.18 Does your institution allocate fees from the international student programme to faculties (or schools or academic departments) in accordance with a formula?

Yes	No	N/A	Comment

1.19 If yes, what are the key factors? (eg per capita funding loading for international students; funding for achievement of or exceeding recruitment targets)

1.20 In the allocation of fees from your international student programme, what portion do the Faculties (or Schools or Academic Departments) receive?

Minor portion	About half	Major portion	Other (specify)	N/A

1.21 Does your institution have in place:

	Yes	No	Neither	Comment	N/A
Procedures or costing models to determine the cost of international student places?					
Planned targets for a number or percent of international students?					

1.22 What is the 2006 target number for international students and what proportion is this target of the expected total student population?

No.	% of all students	By (date)	Comment	N/A

1.23 Is your institution concerned about an over reliance on a particular country or small group of countries as sources of international students?

Yes	No	N/A

1.24   If yes, then what steps has your institution taken or planned to take to address this issue?

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│                                                                       │
└─────────────────────────────────────────────────────────────────────┘
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1.25   What role does your institution's commercial arm have in international activities?

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┌─────────────────────────────────────────────────────────────────────┐
│                                                                       │
└─────────────────────────────────────────────────────────────────────┘
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Internationalisation Performance Targets and Accountability

1.26   At what level (for example Chief Executive, Director, Manager) is the senior person in your institution with substantial responsibility for internationalisation?

Level	

1.27   Does your institution have the following in place for its internationalisation activities:

	Yes	No	N/A	Comment
Formal quality assurance processes?				
International benchmarking arrangements?				
Risk management arrangements for current programmes?				

1.28   Does the institution's business plan specify targets for internationalisation activities?

Yes	No	N/A	Comment

1.29   Do most academic and business units have strategic plans that include internationalisation goals and objectives?

Yes	No	N/A	Comment

1.30   Are internationalisation targets a common feature of senior executive performance measures?

Yes	No	N/A	Comment

1.31 Does your institution have in place any incentive or reward programmes for staff/departments/faculties in respect of initiatives involving internationalisation?

Yes	No	N/A	Comment

Internationalisation Innovation and Future Developments

1.32 Please describe up to three examples of innovation in any aspect of internationalisation being developed or implemented at your institution which might be used as a case study of 'good practice' for the next stage of this project:

N/A	

1.33 What impact is the presence of foreign institutions in New Zealand likely to have on your institution?

1.34 From the perspective of your institution, what are the major:

Benefits of internationalisation?	
Challenges in the pursuit of internationalisation?	
Obstacles to internationalisation?	

1.35 Overall how important is internationalisation for the future of your institution?

Extremely Important	Very Important	Somewhat Important	Not Important

Comment

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Internationalisation in New Zealand tertiary education organisations

Ministry of Education

Section 2
Teaching, learning and the student experience

This section addresses some key developments in the internationalisation of the student experience. Of particular interest are the changing patterns of student mobility via international exchange and study abroad programmes, both outgoing and incoming. The section invites you to provide examples of initiatives specifically designed to internationalise the curriculum and teaching for the benefit of all students, domestic and international.

Institution	
Name of person completing this section	
Position	
Email/Phone	

Craig McInnis, Roger Peacock and Vince Catherwood for PhillipsKPA
Please direct enquiries about this survey questionnaire to Vince Catherwood (vincec@xtra.co.nz)

Please mark response boxes with an 'X' where applicable

2.1 This table is concerned with institutional arrangements to encourage student international mobility. Please provide numbers where possible.

	No.	N/A
Agreements		
Number of agreements or memoranda of understanding for student international mobility in 2004		
Institutions		
<u>Incoming</u> Number of overseas institutions sending students to your institution in 2004		
<u>Outgoing</u> Number of overseas institutions which your students attended in 2004		
Students		
Number of <u>incoming</u> students from the overseas institutions in 2004		
Number of <u>outgoing</u> students on exchange or study programmes to overseas institutions in 2004		
Targets (number and %) for exchange/study programmes in <u>2005</u>	(%)	
Targets (number and %) for international experiences in <u>2005</u>	(%)	
Number of your students involved in other international experiences in 2004 e.g. study tours, clinical experience, collaborative projects		
Number of students taking all or part of an international qualification at your institution		
Number of international business/industry practice placements at your institution		
Comment		

2.2 What are the five major countries for the focus of your international student exchange links/experience programmes?

2.3   Please provide up to three examples of courses or programmes where students are <u>required</u> to complete part of their studies at an overseas institution:

Course/ Programme Name	N/A

2.4   How many programmes or parts of programmes in your institution are taught by, or on behalf of, an overseas institution?

No.	
N/A	

2.5   If your institution has in place any programmes to provide scholarships or financial support to your own students, or to overseas students, who wish to participate in internationalised teaching initiatives such as ***Student Exchange*** or ***Study Abroad*** programmes, please provide numbers and budgets.

	No. of Students	Annual Budget	Comment
Student Exchange		$	
Study Abroad		$	

2.6   How many teaching and research centres does your institution have that are specifically focussed on other countries or regions?

No.	N/A	Comment and/or provide the name(s) of the centre(s)

2.7   What are the areas of major focus of these centres as indicated by the number of teaching programmes and research activity?

2.8   Does your institution provide seed funding for innovation in the internationalisation of teaching and learning?

Yes	No	N/A	Comment

2.9   Does your institution have a unit dedicated to the development of teaching and learning, including innovative practices in internationalisation of the curriculum and the provision of related professional development?

Yes	No	N/A	Comment

2.10   Does your institution have in place courses or programmes where international dimensions are specifically included in the design and delivery of the curriculum?

Yes	No	N/A	Comment

2.11   If yes, please identify up to 3 examples to illustrate this.

2.12   What are the major benefits and challenges of international students on the teaching, learning and community environments at your institution?

Benefits	
Challenges	

2.13   How much emphasis does your institution give to the study of foreign languages? Please describe any relevant policy initiatives, programmes or incentives.

2.14   How much emphasis does your institution give to the study of English as a second language and/or English as a foreign language? Please describe any relevant policy initiatives, programmes or incentives.

2.15   Does your institution have in place any programmes that use international students as a resource, on campus or in your community, for example to provide assistance on campus to local students studying languages or to address community concerns about race?

Yes	No	N/A	Comment

2.16   Does your institution offer scholarships targeted specifically at New Zealand students for study offshore?

Yes	No	N/A	Comment

2.17   If yes:

	No.
Number of scholarships available	
Number of students funded by your institution who travelled overseas on scholarships in 2004	

2.18   Please list the three major countries where the scholarships are taken up.

2.19   Who are the major funders of these scholarships?

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Internationalisation in New Zealand tertiary education organisations

Ministry of Education

Section 3
Internationalisation of research

This section reflects the view that research collaboration and international research entrepreneurship by New Zealand institutions will grow in importance as a key determinant not only of the international standing of New Zealand institutions, but also for the economic, social and cultural development of New Zealand as a nation. It seeks your institution's contribution to developing a broad picture of these research interactions.

It is designed for response by persons with senior strategic responsibility for these issues.

It will be more relevant to some institutions than others. If it is not at all relevant please indicate below and complete this page only.

Institution	
Name of person completing this section	
Position	
Email/Phone	

N/A	

Craig McInnis, Roger Peacock and Vince Catherwood for PhillipsKPA
Please direct enquiries about this survey questionnaire to Vince Catherwood (vincec@xtra.co.nz)

Please mark response boxes with an 'X' where applicable

3.1   The following concern the range of international research activities at your institution:

	No. or %	N/A	Comment
How many formal links or agreements or memoranda of understanding or partnerships involving research are active between your institution and institutions overseas?			
With how many overseas institutions do you have such links?			
How many split/joint research degrees or programmes does your institution have in place that require part of the research to be completed at an overseas institution?			
How many students are participating in these courses or programmes?			
How many research centres with formal international research links does your institution have?			
How many international commercial research ventures does your institution have?			
Approximately what percentage of research activity involves international collaboration?	%		
What percentage of research funding at your institution is sourced internationally?	%		

3.2   What are the five major countries in which your international research activity occurs?

3.3 Which disciplines or fields of study account for most of the international research activity in your institution?

3.4 Does your institution have a coordinated strategy for pursuing international research funding, research collaboration and the commercialisation of research with international partners?

Yes	No	N/A	Comment

3.5 If yes, please describe the office and function of the unit responsible.

3.6 Does your institution have an active programme of interaction with New Zealand industry to identify and pursue international research and development opportunities?

Yes	No	N/A	Comment

3.7 Which of the following purposes for international research collaboration feature in your institution's research policy and programmes? (Mark with an X those purposes that apply):

International benchmarking	
Links with overseas experts	
Creation of an international reputation	
Improvement of research quality	
Other (specify)	

3.8 Please describe three key areas of significant research activity that involves international research collaboration in your institution, including the funding source, the lead research groups and the location:

3.9 What three key indicators are used to measure the scope and outcomes of your institutions's international research activity?

3.10   What are the three major obstacles to the internationalisation of research in your institution?

3.11   What are the three major incentives in place to encourage the internationalisation of research in your institution?

3.12   Please describe any major elements of current national or institutional research policy that <u>encourage</u> researchers to pursue international opportunities.

National	
Institutional	

3.13   Please describe any major elements of current national or institutional research policy that <u>impede</u> international collaboration or research commercialisation.

National	
Institutional	

3.14   What impact has the introduction of Performance-Based Research Funding had on internationalisation in research in your institution?

PhillipsKPA

Internationalisation in New Zealand tertiary education organisations

Ministry of Education

Section 4
International student programme

This section provides the basis for the analysis of trends over the last five years in the numbers, enrolment types and backgrounds of international students. In addition to the stock-take of numbers, the section also seeks information on the current and emerging patterns of recruitment and marketing for international students, the support given to international students, and your views of the resources available from government and other agencies.

It is designed for response by persons with responsibility for the leadership and administration of the international student programme.

Institution	
Name of person completing this section	
Position	
Email/Phone	

Craig McInnis, Roger Peacock and Vince Catherwood for PhillipsKPA
Please direct enquiries about this survey questionnaire to Vince Catherwood (vincec@xtra.co.nz)

Please mark response boxes with an 'X' where applicable

Stocktake of International Student Programme Numbers

4.1   Numbers of undergraduate and postgraduate international students in 2004. Please rank the marketing and recruitment priority that your institution is giving to these groups (1 – 5 with 1 as the highest).

	No. of international students	**% of international students**	**% of all students**	**Priority rank**
Postgraduate degree students				
Postgraduate diploma students				
Undergraduate degree students				
Undergraduate diploma students				
Certificate students				
Other, please specify				
Total				

4.2   Numbers of international students in 2004 on campus, off campus, offshore on campus and offshore off campus. Please rank the marketing and recruitment priority that your institution is giving to these groups (1 – 5 with 1 as the highest).

	No. of international students	**% of international students**	**% of all students**	**Priority rank**
Onshore on campus				
Onshore off campus				
Offshore on campus				
Offshore off campus				
Other, please specify				
Total				

4.3   What was the average number of international students in tertiary preparation and English language courses in 2004?

	No.	**N/A**	**Comment**
Tertiary Preparation			
English Language			

4.4   Number of international students incoming on fee-paying Study Abroad Programmes (not exchange programmes) in 2004.

No.	

4.5   How many international students are attending your institution on scholarships?

Scholarships	No.
Funded by your institution	
Funded by the New Zealand Government	
Funded jointly by your institution and the New Zealand Govt	
Funded from elsewhere in New Zealand	
Funded or sponsored from overseas	
Other, please specify	
TOTAL	

Focus of Recruitment and Marketing

4.6   What are the five major countries on which your current international student marketing programme is focussed?

4.7   Does your institution use the following electronic technologies for marketing for international students?

	Major feature	Minor feature	Not used
Marketing e.g. dedicated international student portal			
Recruitment e.g. automated e-mail enquiry responses			
Admissions e.g. electronic transfer of documents			
Other, please specify			

4.8   For all international students (on campus, off campus, offshore on campus and offshore off campus) please indicate the <u>total number of students</u> in 2004 by country of permanent residence, and source country of recruitment (including New Zealand).

	Country of citizenship (No.)	Source country of recruitment (No.)
Australia		
China		
Fiji		
Germany		
Hong Kong		
India		
Indonesia		
Japan		
Kiribati		
Korea		
Malaysia		
New Zealand		
Philippines		
PNG		
Samoa		
Singapore		
Solomon Islands		
Sweden		
Taiwan		
Thailand		
Tonga		
UK		
USA		
Vanuatu		
Vietnam		
Other (specify)		

Note: New Zealand and Australian citizens would be classified as 'domestic students' not 'international students' for the purpose of this question. But it may be the case that international students are recruited from within New Zealand or Australia.

4.9 Please assess the effectiveness of the following in supporting your marketing and recruitment:

	Highly effective	Effective	Partly effective	Not effective	N/A
Education New Zealand					
NZ Missions /Trade Offices					
NZ Immigration Services					
NZ Trade and Enterprise					
Offshore recruitment agents					
Feeder institutions /schools in NZ					
Feeder institutions /schools offshore					
Direct recruitment at education fairs					
Other (please specify)					

Administration and Support for International Students

4.10 How effective has the *Code of Practice for the Pastoral Care of International Students* been in improving support for international students?

Highly effective	Effective	Unsure	Partly effective	Not effective
Comment				

4.11 Does your institution provide a specialist centre specifically for the support of international students?

Yes	No	N/A	Comment

4.12 This section refers to the structure of your institution's International Office and/or International Students Office and/or International Programmes Office. There may of course be overlapping responsibilities – please indicate where this is the case.

N/A [ ]

	Position title	**Reports to**	**No. of Staff**
Person with primary responsibility for International Office			
Person with primary responsibility for International Students Office			
Person with primary responsibility for International Programmes Office			

4.13 How many staff (FTE) working in these central offices are involved in the functions listed below?

N/A [ ]

	International Office	**International Students Office**	**International Programmes Office**
Marketing			
Admissions			
Enrolments and scholarships			
Education abroad			
Student services			
Other, please specify			
TOTAL			

4.14 How does your institution co-ordinate the management of international student administration? e.g. grouped under one office or spread among functional units?

[ ]

4.15 How many student administration or student support staff (FTE) are dedicated to the support of international students in faculties or schools or departments?

	Faculty/School	**Department**
Student Administration		
Student Support		

4.16 Does your institution provide training specifically to staff involved in support of international students?

Yes	**No**	**N/A**	**Comment**

4.17 Does your institution (alone or as part of a consortium) offer any pre-departure seminars for international students about to travel to New Zealand?

Yes	**No**	**N/A**	**Comment**

4.18 Does your institution (alone or as part of a consortium) offer meet and greet services to international students arriving in New Zealand?

Yes	**No**	**N/A**	**Comment**

4.19 Does your institution offer orientation programmes in New Zealand for international students about to commence their courses?

	Yes	**No**	**N/A**	**Comment**
Prior to arrival				
On arrival				

4.20 Does your institution (alone or as part of a consortium) offer returning home programmes for international students about to leave New Zealand on completion of their courses?

Yes	**No**	**N/A**	**Comment**

4.21 Does your institution offer English language programmes or assistance for international students enrolled in or enrolling in award courses?

	Yes	No	N/A	Comment
On a fee paying basis				
As courses taught for credit				
As learning centres or safety nets offered by Faculties				
As learning centres or safety nets offered centrally				

4.22 Does your institution offer academic bridging or preparation programmes for international students enrolled in or enrolling in award courses?

	Yes	No	N/A
On a fee paying basis			
As courses taught for credit			
As learning centres offered by Faculties			
As learning centres offered centrally			

4.23 Does your institution offer study methods programmes or assistance for international students enrolled in award courses or pre commencement?

	Pre Commencement			Award Courses		
	Yes	No	N/A	Yes	No	N/A
Offered by faculties						
Offered centrally						

4.24 Does your institution offer specific support programmes, involving peer support, mentors, pairing or buddy systems or other similar systems to international students enrolled in award courses at faculty or institutional levels?

	Yes	No	N/A	Comment
Institution				
Faculty				
Department				

4.25 Does your institution have in place programmes to promote interaction between New Zealand students and international students?

Yes	No	N/A	Comment

4.26 Does your institution have in place formal grievance procedures that may be accessed by international students?

Yes	No	N/A	Comment

4.27 What accommodation assistance does your institution provide for international students?

	Yes	No	N/A	Comment
Short term (on arrival) accommodation				
Long term accommodation				
Assistance in finding accommodation				

4.28 Does your institution make cross-cultural training programmes available for staff?

	Yes	No
Programmes available based around New Zealand student population		
Programmes available based around international student population		

4.29 Does your institution have any formal links with community organisations to provide support for international students on your campus?

Yes	No

4.30 Has your institution provided physical facilities such as places of worship specifically to meet the demands of your international students?

Yes	No	Describe

4.31 Does your institution make available to the broader community facilities established for your international students? (As an example, does the broader community actively use any places of worship established by your institution for your international students?)

Yes	No

4.32   Does your institution provide financial assistance to generic or country specific international student associations within your institution?

	Yes	No	N/A	Comment
Assistance to generic associations				
Assistance to country specific associations				

4.33   Does your institution have in place any satisfaction survey or exit survey procedures targeted at international students?

Yes	No

4.34   Does your institution systematically gather data that enables you to monitor the attitudes, outlooks and academic performance of your international students during their course?

Yes	No

PhillipsKPA

Internationalisation in New Zealand tertiary education organisations

Ministry of Education

Section 5
International outreach

This section seeks your contribution to developing a picture of the ways in which New Zealand institutions interact with various international constituencies (including counterpart institutions, alumni, offshore students), humanitarian and technical assistance programs, and international commercial opportunities.

Institution	
Name of person completing this section	
Position	
Email/Phone	

Craig McInnis, Roger Peacock and Vince Catherwood for PhillipsKPA
Please direct enquiries about this survey questionnaire to Vince Catherwood (vincec@xtra.co.nz)

Please mark response boxes with an 'X' where applicable

International Networks and Agreements

5.1   Is your institution a member of international/regional networks?

Yes	No	N/A

Please list major active networks

5.2   Of these networks, which do you regard as the most effective in promoting the internationalisation of your institution and why?

Network	Comment on effectiveness

5.3   How many formal arrangements does your institution have in place involving the international movement of staff? Please exclude research projects, study or sabbatical leave.

	Involving academic staff	Involving administrative staff	Total
Number of programmes, exchange agreements or memoranda of understanding			
Number of individuals participating in these programmes in 2004			
Number of institutions formally linked with your institution in these arrangements			

5.4   What are the five major countries for your international staff exchange links?

5.5   How many formal links or agreements, or memoranda of understanding, or articulation arrangements, with overseas institutions does your institution have in total?

No.	N/A	Comment

5.6   How many of these are currently operational, that is, activities are actually taking place in 2005?

No.	N/A	Comment

5.7   Does your institution have an established cycle and set of criteria for reviewing the effectiveness of exchange agreements and network memberships against the strategic plan?

Yes	No	N/A	Comment

5.8   In the last 3 years how many such agreements were:

	2003	2004	2005	Comment
Commenced?				
Renewed?				
Lapsed?				
Terminated?				

International Alumni

5.9   Does your institution support the establishment and maintenance of international alumni chapters?

Yes	No	N/A	Comment

5.10   If yes, which are the three locations that have the largest chapters and the most active chapters?

	Location 1	Location 2	Location 3
Largest chapters			
Most active chapters			

5.11   Does your institution:

	Yes	No	N/A
Have an annual calendar of international alumni events?			
Regularly conduct fundraising with international alumni?			
Seek the support of eminent alumni in promoting your institution?			
Regularly publish a print or electronic publication/newsletter?			
Have a website dedicated to international alumni?			
Provide 'lifelong' alumni services?			

5.12   Does your institution actively engage your international alumni in:

	Yes	No	N/A
Student recruitment?			
Student pre-departure briefings?			
Student career mentoring?			

Humanitarian and Technical Assistance

5.13   Is your institution (currently or in 2004) managing consulting or technical assistance projects overseas?

Yes	No	If yes, how many?

5.14   How many staff did your institution provide for participation in consultancy or technical assistance projects in overseas countries in 2004?

No.	N/A

5.15   How many person months or person days were provided in 2004?:

Person months	
Person days	

5.16 Does your institution have an active policy of engaging staff and students in institutional responses to international humanitarian events and programmes?

Yes	No	N/A

5.17 The following table concerns the three countries and/or regions that are the major focus for your institution for a range of international activities.

	Specific country	General region	N/A
Staff exchange links	1.	1.	
	2.	2.	
	3.	3.	
Major market for offshore education	1.	1.	
	2.	2.	
	3.	3.	
Delivery of distance education courses or programmes	1.	1.	
	2.	2.	
	3.	3.	
Consultancy or technical assistance projects	1.	1.	
	2.	2.	
	3.	3.	
Staff participation in development assistance projects	1.	1.	
	2.	2.	
	3.	3.	

5.18 Of these countries/regions, which are the most significant for your institution's overall activities?

5.19 How many short courses or customised training courses did your institution provide under technical assistance programs in 2004 and how many students participated?

No. of courses provided	
No. of students participating	
N/A	

Distance Education and Offshore Programs

5.20   Is your institution participating with any onshore or offshore consortia for the delivery of distance education programmes? If yes, briefly describe the extent of your institution's contribution.

Yes	No	Description

5.21   Are the quality assurance programmes that your institution has in place specifically developed for your offshore campuses, or the same as those on your New Zealand campuses, in respect of:

	Specific	Same	Comment
Teaching and learning at your offshore campuses			
International delivery of distance education			

5.22   Does your institution deliver courses or programmes to:

	Yes	No	N/A
Distance education students (please refer to the definition of off campus student)?			
New Zealand distance education students overseas (students with domestic student status living overseas, including permanent residents and Australian students)?			
Foreign (international) distance education students overseas?			

5.23   How many international distance education students are enrolled in 2005?

No.	N/A

5.24   Does your institution have in place pastoral care arrangements for offshore students?

Yes	No	Comment

5.25   This item concerns the numbers of distance education students:

.

Category of distance education students	No.
New Zealand (domestic) distance education students resident in New Zealand	
New Zealand (domestic) distance education students resident overseas	
International (foreign) distance education students resident in New Zealand	
International (foreign) distance education students resident overseas	

5.26   Which of the following models of offshore education delivery does your institution make use of?

	Yes	No
Bilateral academic credit recognition and matching arrangements with offshore institutions allowing students to undertake a substantial portion of their programmes offshore before enrolling at your institution		
Delivery of your institution's qualifications, or components of those qualifications, at your own offshore campuses using your own staff		
Delivery of your institution's qualifications, or components of those qualifications, at other sites but using your own staff		
Commissioning or franchising offshore institutions to deliver your qualifications or components of those qualifications on your behalf		
Delivering your programmes primarily by distance education media (print, telecommunications, web, multimedia)		
Marketing your institution's distance education programmes and courseware to offshore institutions		

5.27   Which of the following media and services do you make use of in your offshore distance education programmes?

	Yes	No
Postal or courier services to deliver printed or digital study material		
Web to deliver courseware and course administration		
Web for student communication with peers and tutors		
Teleconferencing (voice and/or video) to support realtime tutorials		
Regional tutorials/block courses to enhance the distance learning		

Section 5 International outreach   7/8

International Commercial Consultancies and Ventures

5.28   Are academic staff encouraged to undertake international commercial consultancies/ventures aligned to institutional strategic objectives by:

	Yes	No	N/A
Providing additional remuneration?			
Providing study/research leave in lieu?			
Recognising such work in promotion considerations?			
Other (please specify)			

5.29   How many material international commercial ventures has your institution initiated in the last 24 months?

No.	

5.30   Has your institution developed and promulgated policies and procedures for undertaking business case/risk assessments of proposals for international ventures?

Yes	No	N/A

5.31   Are the skills needed for these assessments available from:

	Yes	No	Comment
Within the institution?			
Externally procured?			