Internationalisation and the European Higher Education Area.

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1 Introduction

This piece was commissioned by the Flemish government, as an input into its Bologna Process Seminar *Bologna 2020: Unlocking Europe's Potential - Contributing to a Better World.* The request was such: to write an 'essay' about the impact of the Bologna Process on internationalisation in the European Higher Education Area.

The first I was happy to comply with. This is an essay, not a scientific treatise. Despite the occasional footnote and other signs of scholarly spirit, I have taken the liberty to occasionally utter judgements and draw conclusions even in cases where empirical evidence could be interpreted in various ways and directions. The second part of the request turned out to be difficult. It proved possible to trace, in broad lines, the development of internationalisation in Europe, or of important elements thereof. It also proved possible to explore the interrelationship between the Bologna Process and internationalisation in the European Higher Education Area. But it turned out to be – in many cases – impossible to identify clear causal relationships. This is why this essay is entitled 'Internationalisation *and* the European Higher Education Area'.

2 The many faces of internationalisation

Internationalisation has become a key element of the policy discourse in European higher education. This has not always been so. Until the mid-1980s, if not later, the international dimension of higher education was a marginal concern in the higher education debate, in education policy and in institutional reality. Internationalisation was not perceived as an indispensable element of higher education, but rather as an interesting, if not exotic, add-on, to which homage was paid mainly in Sunday speeches. In parallel with the move from marginality to centrality, the meaning of internationalisation has also undergone a massive broadening. Twenty years ago, internationalisation was, for most observers, almost, if not fully, identical with the mobility of students (and, to a lesser extent, faculty) across country borders. The phenomena referred to as internationalisation today are legion. Internationalisation at the beginning of the 21st century has very many faces indeed. The inflationary use of the term has made some observers wonder whether it is

really the phenomenon as such which has gained in importance, or if this is a misleading impression created by the trend to label higher education policies and practices of all sorts as 'international' which would not have been awarded this attribute two decades ago. So what is internationalisation?

There has been no shortage of attempts to define internationalisation. Of the many definitions, the most often-quoted is by the Candadian scholar Jane Knight, for whom internationalisation is

> *The process of integrating an international, intercultural, or global dimension into the purpose, functions and delivery of postsecondary education.* [1]

In its – necessary – abstractness, this definition is comprehensive indeed. Its main claim is that internationalisation is a process of change, from an original state of affairs where higher education institutions are basically national, to one where they gradually become international. One very important question which this definition – nor any other – does not answer is what exactly constitutes the international nature of the 'international dimension'. It implies that there is consensus. But this is not the case. In the absence of an agreement on what different observers refer to as international, it might make sense to create an inventory of activities and themes most often labeled as belonging to internationalisation. There appear to be at least six clusters of phenomena the term is used for in Europe today.

- *(Physical) Mobility* across country borders, of students in the first place, and faculty in the second, is certainly still the most frequently-cited example of internationalisation. Mobility is thus the category which creates a certain degree of continuity between earlier and present-day concepts of internationalisation. This applies even though there are different forms of mobility, and different ones of them have been more prevalent than others in different historical phases. In student mobility, it is useful to differentiate, first, into degree and non-degree mobility ('credit' mobility, 'short-term' mobility', 'exchange' mobility) and, second, into mobility between countries with similarly developed higher education systems ('horizontal' mobility), and mobility from countries with a quantitavely or qualitatively less developed higher education system into developed systems ('vertical' mobility). An example of 'horizontal' mobility is the Erasmus Programme. An example of 'vertical' mobility is the movement of students from the developing world to universities in OECD-type countries.

  In both cases, the 'international' nature is made up by the fact that a student moves from country a to country b for purposes of study, and thus crosses a national boundary, and, more implicitly, that the 'international (meaning: foreign) education' he or she gets is different from the one to be had in the home country,

[1] Cf. Jane Knight, "Updating the Definition of Internationalization", *International Higher Education*, Fall 2003. http://www.bc.edu/bc_org/avp/soe/cihe/newsletter/News33/text001.htm.

in terms of language, teaching and learning styles, cultural setting, etc, and, in the case of 'vertical' mobility, also in terms of quality.

- The *recognition* across country borders of, first, degrees and other qualifications and, second, of study periods and sub-qualification entitlements (courses, modules, etc) is generally perceived as an 'international' activity. It is evident that recognition derives its international status from its function as a facilitator of mobility between countries, and that it would not otherwise be regarded as belonging to 'internationalisation'. Recognition has a long history in Europe, starting with a number of recognition conventions of the Council of Europe in the 1950s and UNESCO (global) since the 1970s, and leading to an erstwhile culmination point with the adoption of the landmark UNESCO/Council of Europe 'Lisbon Convention' of 1997. In an EU and, later, in a Bologna context, the ECTS system (first introduced on a small-scale trial basis in 1989) marked a major milestone, as did the Diploma Supplement (which, however, has its origins in a UNESCO context) and, very recently, the European Qualifications Framework (EQF). The Bologna Process has turned the theme and practice of recognition into a very prominent internationalisation issue. The understanding of internationalisation in recognition is the same as the one in mobility, due to its nature of a 'mobility facilitator': that of a physical move to another country.

- *Curricular reform* with the aim of injecting an international element into the content and delivery of programmes is a third internationalisation activity. This category comprises a wide variety of cases.

  The most prominent (though, possibly, not the most frequent) form of curricular internationalisation is the delivery of a programme in a language other than the one of the country where this programme is offered. In the vast majority of all cases in Europe, this language is English. English-medium provision in Europe has seen strong growth in the last five years, even though it still constitutes only a fraction of all provision in European higher education. What makes this form of education international is, first and foremost, the language of delivery, and, second and only related, the (usually) international composition of the student body.

  Various forms of country-comparative and international studies (e.g., International Law) and 'regional' or 'area studies' (European Studies, South-East Asian Studies, etc) also fall into the category of curricular internationalisation. The international dimension of this form of education is its 'foreign' or internationally comparative content. This is also the case with very established forms of internationalisation, earlier not so labeled, such as the study of the literatures or languages of 'foreign' countries, as well as more modern offerings, such as 'intercultural' studies. Some experts classify this type of offerings, together with English-medium programmes, as 'internationalisation at home.'

A further group of international curricula are those which are jointly delivered by two or more higher education institutions in at least two countries. The most prominent form in this category today is the so-called joint degree, as, for example, in the Erasmus Mundus Programme. Others emanations are the older double degrees, and the fully integrated and recognised study abroad periods. Even though the joint degrees now enjoy a much higher prestige than the two other forms, the difference is in certification rather than substance. From the point of view of the educational offer, the joint degree is only one more manifestation of an integrated curriculum delivered by institutions in more than one country. The earliest of these were created already in the late 1970, in the course of the Erasmus predecessor scheme, the Joint Study Programme. In this form of curricular internationalisation, the nature of the international dimension is obviously the same as in international mobility.

- A more recent arrival among internationalisation consists of what is alternately referred to as '*transnational education'*, *collaborative*' or '*cross-border provision*. These terms cover a variety of manifestations, from branch or off-shore campuses, to delivery abroad of programmes with the help of a (licensed) foreign tertiary institution, and various forms of distance (usually online) education offerings, to name only some. The common feature of all these is a particular form of mobility, in which not the student moves across a country border, but the educational offering.

- *Marketing and promotion* of higher education offerings, institutions and whole countries abroad is another theme which has recently been added to the inventory of internationalisation. The concrete activities under this heading comprise 'branding', promotional websites, road shows and the participation in or the organisation of education promotion fairs. *Recruitment* is a closely related activity. Again, this international activity derives its raison d'être from mobility, or, to be precise, from inbound degree mobility of the vertical kind. It is most common in such host countries where a financial incentive exists for attracting foreign students, usually in the form of tuition fees.

- For some observers, *the entire agenda of the European Higher Education Area* seems to have become part of internationalisation. Thus, they would count the adoption of the (by now) three-cycle degree structure, the adoption of common guidelines in the area of quality assurance and accreditation (and the recent creation of the European Register), and similar mainly structural measures as an internationalisation move.

  It is obvious that the (implicit) concept of internationalisation behind this latter categorisation is very different from, say, the one behind mobility. The justification to categorise these structural reforms as 'international' is derived from the fact that they were jointly developed and agreed upon at an international level. Some would also claim that the models chosen, for example the Bachelor-Master-PhD degree architecture, are 'international' on the grounds that they

represent the most accepted degree architecture world-wide. This is obviously a very wide interpretation of the concept of internationalisation, and, in the opinion of the author, a dangerous one: for it potentially turns every issue in the by now largely globalised higher education discourse, and certainly in the widespread attempts at joint international system reform, into one eligible for the inventory of internationalisation. But a concept of internationalisation which comprises all higher education issues obviously loses all of its power of demarcation.

The above inventory is of course not complete. First of all, it concentrates on the education function of higher education, as this essay does throughout, and therefore excludes all aspects related to the internationalisation of research. But it also does not give a separate mention to such activities as international partnerships of tertiary institutions, or services for international students, to name but two activity forms.

3. Internationalisation and the Bologna Process

What is true of the concept of internationalisation – a considerable broadening – can also be said of the Bologna Process. Not a slim agenda from the start, it today comprises the majority of items in the higher education policy debate. The ten Bologna Action Lines (in the form published on the website of the current Bologna Secretariat) give an indication of the considerable range:

- Three-cycle degree structure (and the European Qualifications Framework, which might also be listed under 'recognition')
- Recognition
- Mobility
- Quality assurance
- Social dimension
- Joint degrees
- Employability
- Lifelong learning
- Stocktaking
- The global dimension of the EHEA

Of the ten action lines, four could be categorised as belonging to a more traditional understanding of internationalisation which excludes activities in the area of 'joint system reform'. These are 'mobility', 'recognition', 'joint degrees' and the 'global dimension'. The first one, mobility, implies a physical move to another country for purposes of study (or teaching). The second one, recognition', as a set of mobility-facilitating mechanisms and tools which reduce mobility barriers by the creation of equivalences, has the same underlying internationalisation concept. The joint degrees belong into the category of curricular internationalisation (the sub-category with a mobility element). The 'global dimension' is a relatively late action line, created by the adoption of ministers in London in 2007. The *Strategy for the European Higher Education Area in a Global Contex*t, which stands behind this line, comprises a mixed set of items, among them the provision

of information on the Bologna Process outside the EHEA, activities of marketing and promotion of European higher education in other parts of the world, a policy dialogue with higher education outside of Europe, and recognition between the EHEA and the rest of the world.

Five of the remaining six action lines – quality assurance, the social dimension, employability, lifelong learning, and the three-cycle degree architecture – belong to the category of 'joint system reform', which only a very wide – not to say diluted – concept of internationalisation would still cover. The 'stocktaking' action line is of an altogether different nature: it concerns an aspect of self-administration, the regular evaluation of progress towards the achievement of the Bologna objectives.

None of the action lines address, in any explicit and major way, internationalisation in the form of transnational education. As already stated, marketing and promotion have found inclusion in the list, even though this activity was only introduced at a late stage, and only as one sub-item of the 'foreign policy' action line (global strategy) of the Bologna Process. Important areas of curricular internationalisation, such as programmes taught in foreign languages (English-medium provision) do not explicitly figure on the Bologna agenda.

It is also interesting to note that internationalisation in the Bologna Process has, until recently, mainly been focusing on mobility and cooperation inside the EHEA, and not very much on extra-EHEA relations. This is somewhat surprising in the light of the fact that the genesis of the original Bologna Declaration is closely linked to the realisation on the side of education ministers of the reality of a globalisation of higher education around the world, and thus to developments outside the EHEA. The response to this realisation was of course the attempt to more closely cooperate inside Europe than had been the case in the past, and to do so by means of joint reforms. But the actual motive behind the drive for increased intra-EHEA cooperation was to be able to better stand up to extra-European competition.[2] The imperative of creating an enhanced 'attractiveness'[3] and 'competitiveness' of the EHEA, which was to result from the joint reforms, could therefore have been expected to result at least as much in an externally oriented internationalisation approach as in one with an intra-EHEA orientation. Yet, for a long time, the internationalisation agenda of the EHEA, as evidenced by the main documents on mobility and recognition, was almost exclusively an internal one. Through their link to the Erasmus Mundus Programme, with its (initially) robust competitive orientation, the joint degrees marked the beginning of an opening up to the non-EHEA world. But only

[2] It is the author's firm belief that the Sorbonne and Bologna Declarations were, in the main, sparked off by the globalisation of higher education and directed first and foremost at the non-European world. In order to enhance intra-European cooperation, it would have been sufficient to continue on the Erasmus path. By the late 1990s, Erasmus had attained the seemingly unattainable in the area of intra-European mobility and cooperation. Instead, the ministers did the unthinkable: they threw over board their longtime mantra that Europe's strength was the diversity of its higher education systems, and opted for 'harmonised' structures.

[3] The original Bologna Declaration states "a need to ensure that the European higher education system acquires a world-wide degree of attraction…" and the Prague Communiqué (2001) stresses the need for "enhancing attractiveness of European higher education to students from Europe *and other parts of the world.*"

after some strong advocacy of stakeholders and with the adoption of the *Strategy for the European Higher Education Area in a Global Contex*t did the global perspective finally (re-)enter the Bologna internationalisation agenda. And it is far from clear if this partial re-orientation will remain a temporary diversion, or turn into a permanent feature.

4 Internationalisation in the European European Higher Education Area

The remainder of this essay will address the question if and how the Bologna reforms have furthered internationalisation in the EHEA. In particular, it will deal with

i. mobility;
ii. selected aspects of the internationalisation of curricula, i.e. programmes taught in a foreign language and programmes taught by two or more tertiary institutions in two or more countries;
iii. Transnational education; and
iv. Promotion and marketing

Why are these internationalisation themes chosen rather than others?

'Mobility' is the object of a separate action lines of the EHEA. International curricula, at any rate in the guise of joint degrees, also have been devoted an action line of their own. Promotion and marketing is now covered, together with other internationalisation elements, in the 'global dimension' action line. The fourth action line with an incontestably international orientation, recognition, is left out here because it has been the object of numerous studies already, and progress on recognition can thus easily be traced somewhere else.

The two remaining internationalisation elements above – foreign-language-taught programmes and transnational education – do not figure (prominently) in official Bologna documents, but they stand in a close relationship to the global now (re-) emerging 'attractiveness' and 'competitiveness' agenda of the Bologna Process. Foreign-language-taught provision attempts to boost mobility into Europe, by reducing the language barrier. Transnational education offerings are a way to reach out beyond the EHEA as well. It can also be argued that these offerings, which in the vast majority are designed within the framework of the Bologna degree architecture, will benefit from the (alleged) world-wide 'readability' of the Bachelor-Master-PhD structure.

4.1 Mobility

4.1.1 Assumptions and expectations

Despite the considerable widening of the meaning of 'internationalisation', one of its core features has remained the mobility of students (and, to a lesser extent, of faculty and staff) across country borders. In fact, the Bologna Declaration, the subsequent

communiqués of the Ministerial Meetings, and all other 'official' Bologna documents mention mobility much more often than any other form of internationalisation. What were the expectations for mobility created by the Bologna Process?

With regard to *intra-European short-term (Erasmus-type) mobility*, the original expectation seems to have been that the creation of a single space of education would give a further mobility boost. This assumption appears slightly naïve today. First of all, Bologna introduced a competitive element into intra-European higher education relations as well. But if institutions really went into open competition, a hierarchy would finally emerge, with the potential to undermine the 'all-are-equal' hypothesis on which recognition of credits earned abroad rested. Erasmus-type mobility, however, stood and fell with the principle of recognition. Second, and admittedly not closely related to Bologna, it was realistic to assume that the attractiveness of intra-European exchanges would wane over time. As a form of 'horizontal' mobility, its prime results are, as many evaluations have shown, less of an academic gain, but rather personal development in the form of intercultural and linguistic learning. In an age of massively increased (non-academic) mobility in Europe, these gains could be expected to lose in currency, since they could also be acquired by non-academic stays in other European countries. Third, one might expect that shorter degrees would make it more difficult to integrate a study-abroad period. This latter argument started to massively influence the debate about short-term mobility under the conditions of Bologna during the last years. Expectations regarding short-term intra-European mobility have turned by almost 180 degrees. Expectations of growth have turned into expectations of decrease.

With regard to *intra-European degree mobility*, the positive expectations remained in place. The belief here is that the existence of one and the same degree structure would make mobility from one country to another easier. We would thus see more cases than in the past of a student who studied for a Bachelor degree in, say, Portugal, went on to Master studies in Denmark, and, possibly, to earn a PhD in a third country. It must be stressed, though, that the concern with European degree mobility has not been nearly as strong in the Bologna debate as that with short-term non-degree mobility inside Europe. [4]

A third assumption, mostly voiced more implicitly than directly, was that the Bologna reforms would attract larger numbers of *degree students from other continents* into the EHEA. As indicated already earlier, this expectation rested on the conviction that the structural changes, such as the new degree structure, but also quality assurance measures, would increase the value of European qualifications. At a first glance, this appears to be a reasonable expectation. However, it must be stressed that there is no safe knowledge yet how the Bologna reforms impact on student destination choice behaviour. An ACA study of 2006[5] found that potential students from outside of Europe base their choice on criteria

[4] This is not only true of the discussions in the framework of the EHEA. Since the introduction of Erasmus at the latest, public attention has almost exclusively focused on short-term non-degree mobility. This stands in striking contrast to the fact that, in any given European country, the number of foreign degree students from elsewhere in Europe has far exceeded that of non-degree students.

[5] European Commission, Perceptions of European Higher Education in Third Countries, Luxembourg: Office for Official Publications of the European Communities, 2006.

such as the perceived 'reputation' of the tertiary institution, and that, anyway, they are largely unaware of the Bologna reforms. The same study found that students saw language barriers as a big European disadvantage and were not aware of the offer of English-medium programmes in continental Europe.

4.1.2 Evidence

Is it possible to measure the effect of the Bologna reforms on mobility, and thus put the above assumptions to the test? The data to be presented further on in this essay give some indications, but, as will be seen, they cannot fully answer the question. This is so for mainly three reasons:

- The Bologna reforms, and, above all, the three-cycle degree structure, are not yet fully in place in all EHEA countries. And even in those countries where they were introduced earliest, there are hardly any student cohorts yet who have fully proceeded through both the first and the second cycle. It is thus, in almost all countries, too early to measure the Bologna impact on mobility.
- As indicated above, student decisions to study in a foreign country, and destination choice, are influenced by a host of factors. It is doubtful if structural reform ranks high in this regard. But even if it did, it would be almost impossible to isolate the influence of the Bologna reforms from other factors.
- Student mobility data leave much to be desired. As will be seen further on, even attempts at improvement can sometimes result in the opposite.

Intra-European non-degree mobility

There is no single source from which a Europe-wide overview of non-degree mobility could be obtained. The three large international gatherers of student mobility data, UNESCO, OECD and EUROSTAT, explicitly ask their national data providers to *exclude* mobility of a duration of under one year. The standard international comparative statistics thus tell us nothing about short-term mobility at all. Some experts claim that short-term intra—European mobility is, in quantitative terms, largely identical with Erasmus mobility. It is unclear which evidence (if any) this assessment is based on. Additionally, one would expect that a share of this mobility is also generated by nationally-financed mobility programmes[6], and, in some countries at any rate, through state student loan and grants systems. The number of self-paying students not supported by any programme is everybody's best guess. Whatever will be presented further on in this section is therefore likely to be partial at best.

Erasmus statistics (see Table 1 below) show that overall numbers of grantees are still on the rise. In the academic year 2006/07, there was a total of around 159,000 Erasmus grantees. Numbers have increased steadily, in every single year since the creation of the

[6] Even though a survey conducted in the context of ACA's *EURODATA* project identified rather small numbers.

scheme in 1987/88, although the most recent years have seen a strong flattening of the growth curve. Looking only at student numbers under the Socrates II Programme (2000/01 – 2006/07), i.e. in a Bologna-relevant period [7], numbers went up from about 111,000 to about 155,000 grantees, or by roughly 40 percent. The picture is more diverse with regard to single countries: Almost all new member states (who are all relatively late arrivals in the programme) still show clear increases, which could be attributed to 'catch-up potential'. But some old EU countries are loosing grantees: Denmark has, over the last two years, lost about 11 percent, and Sweden went down by roughly six percent. In those countries which implemented the Bologna degree structure relatively early and in which therefore an impact could be expected, the picture is uneven: in Norway, numbers in the last year fell, compared to a year before, by 11 percent. In the Netherlands and in Italy, they were roughly stable. It must, of course, be borne in mind that per-capita funding over the years rose in Erasmus, so that the incentive power of the programme also increased, and that numbers might be lower if that had not been so. By and large, however, Erasmus statistics provide no evidence of a decline in intra-European non-degree mobility. But they can also hardly be used to underpin the opposite assumption, that of a boost to student mobility.

[7] and excluding Turkey, which started to participate in Erasmus mobility only in 2004/05

Table 1
Erasmus outgoing mobility by country 1987/88-2006/07 (absolute numbers)

	SOCRATES II - Erasmus						
Country of home institution	2000/01	2001/02	2002/03	2003/04	2004/05	2005/06	2006/07
BE - Belgium	4.427	4.521	4.620	4.789	4.833	4.971	5.119
BG - Balgarija	398	605	612	751	779	882	938
CZ – Česká republika	2.001	2.533	3.002	3.589	4.178	4.725	5.079
DK – Danemark	1.750	1.752	1.845	1.686	1.793	1.682	1.587
DE – Deutschland	15.872	16.626	18.482	20.688	22.427	23.848	23.884
EE – Eesti	255	274	304	305	444	511	572
GR – Ellas	1.868	1.974	2.115	2.385	2.491	2.714	2.465
ES- España	17.158	17.403	18.258	20.034	20.819	22.891	22.322
FR – France	17.161	18.149	19.365	20.981	21.561	22.501	22.981
IE – Eire / Ireland	1.648	1.707	1.627	1.705	1.572	1.567	1.524
IT – Italia	13.253	13.950	15.225	16.829	16.440	16.389	17.195
CH -Switzerland							0
CY – Kypros		72	91	64	93	133	129
LV – Latvija	182	209	232	308	607	681	807
LT - Lietuva	624	823	1.002	1.194	1.473	1.910	2.082
LU – Luxembourg	126	104	119	138	116	146	170
HU – Magyarország	2.001	1.736	1.830	2.058	2.316	2.658	3.028
MT – Malta	92	129	72	119	130	149	125
NL – Nederland	4.162	4.244	4.241	4.388	4.743	4.491	4.502
AT – Österreich	3.024	3.024	3.325	3.721	3.809	3.971	4.032
PL – Polska	3.691	4.323	5.419	6.276	8.390	9.974	11.219
PT – Portugal	2.569	2.825	3.172	3.782	3.845	4.312	4.424
RO – Romania	1.899	1.964	2.701	3.005	2.962	3.261	3.350
SI – Slovenia	227	364	422	546	742	879	972
SK – Slovenská republika	505	578	653	682	979	1.165	1.346
FI – Suomi / Finland	3.286	3.291	3.402	3.951	3.932	3.851	3.773
SE – Sverige	2.726	2.633	2.656	2.667	2.698	2.530	2.532
UK - United Kingdom	9.020	8.475	7.973	7.539	7.214	7.131	7.235
IS – Island	134	147	163	221	199	194	189
LI – Liechtenstein	18	17	7	19	26	30	44
NO – Norge	1.007	970	1.010	1.156	1.279	1.412	1257
TR – Türkiye					1.142	2.852	4.438
Total	111.092	115.432	123.957	135.586	144.037	154.421	159.324

Source: data delivered by the European Commission, DG Education and Culture

A study entitled *Transnational Mobility in Bachelor and Master Programmes*[8], carried out by INCHER and GES in Kassel/Germany in 2006, explored issues around incoming

[8] published in DAAD (ed.), *Transnational Mobility in Bachelor and Master Programmes*, Bonn: 2006.

and outgoing non-degree mobility in 11 European countries[9]. The study, which had to be produced in a very short time, is based on a questionnaire survey completed by around 200 universities and 150 Bachelor and Master programmes and thus has a slightly slim empirical basis. It attempted to capture the *de facto* development of mobility in the last five years prior to the study and it enquired into expectations as to the future development of mobility.

Concerning the *de facto* development, 70 percent of all respondents experienced an increase of outgoing[10] non-degree mobility to European destinations, and most of the remaining 30 percent reported a stable picture. Only the Netherlands and the United Kingdom had experienced a decrease. It must be pointed out that these findings say nothing about the extent of the increase (or decrease). Respondents were not asked to provide numerical data, but only answer if mobility had increased, decreased or remained stable.

However, the picture is different when one only looks at the sub-sample of respondents from institutions in transition from a 'traditional' to a Bologna degree structure. There, the development of mobility had been predominantly negative. Three percent of Bachelor programmes and four percent of Master programmes experienced an increase in outgoing mobility. 61 and 56 percent respectively experienced unchanged levels. 35 and 40 percent experienced a decrease.

The above findings would seem to indicate that mobility under the Bologna degree architecture is actually falling. In contrast to this, the findings on the future expectations of outgoing mobility to European destinations in Bachelor and Master degrees point in the opposite direction. In Bachelor programmes, the expectation of respondents is in 55 percent of cases one of increase, in 34 percent an unchanged level, and only in 10 percent a decrease. In Master programmes, the corresponding percentages are 58, 33 and eight percent.

The German Academic Exchange Service (DAAD) carried out a questionnaire survey among 1,601 Master and Bachelor programmes (respondents) in Germany in 2006[11]. When comparing mobility between traditional degrees and Bachelor programmes which had replaced them, 45 percent of respondents saw no change, 18 percent perceived an increase and 17 percent a decrease. In Master programmes, 24 percent perceived unchanged mobility levels, 24 percent experienced an increase, and only seven percent a decrease. Respondents' future expectations were also predominantly that of an increase. As in the earlier-quoted study, what was measured is an impression of the quantitative development ('felt mobility') and not actual data.

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[9] Austria, France, Germany, Hungary, Italy, Poland, Norway, the Netherlands, Spain, Switzerland, United Kingdom

[10] Like the Erasmus data, these are data of *outgoing* mobility. In the case of intra-European non-degree mobility and with a view to possible Bologna effects, the use of outgoing student data is justified or even desirable. First, in intra-European mobility, every outgoing student is also an incoming one (elsewhere) in Europe. Second, if a shorter duration of programmes should be a threat to mobility, the problem lies at the source institution, and not at the receiving end.

[11] DAAD, *Auslandsmobilität von Studierenden in Bachelor- und Master-Studiengängen*, Bonn: 2006.

The latter study is particularly interesting with regard to the provisions curriculum designers in Bachelor and Master degree programmes take to safeguard student mobility under the conditions of the Bologna degree structure. 21 percent of all responding Master programmes and 15 percent of all Bachelor programmes entail a mandatory period abroad. 65 percent of all programmes foresee a period abroad at least as an option (which is used by between a fifth and a quarter of all students). If these German findings on the curricular integration of study abroad periods are representative of Europe, worries about a future decrease of intra-European non-degree mobility are unfounded. But it is doubtful if they are representative of the entire EHEA.

Another German study, *Internationale Mobilität im Studium*, was conducted by the Hochschul-Information System GmbH (HIS) in early 2007. Like the previously quoted one, it does not only cover outgoing non-degree students to Europe, but also to other continents. But in both studies, the vast majority of mobility is into Europe. The HIS study comes to different conclusions than the DAAD survey. It is the only one which does not measure 'felt mobility', but actually surveyed students, and is thus based on quantitative mobility data. Master programmes have a higher share of mobility (30%) than some traditional 'long' programmes (Diplom/University and Staatsexamen 23%, Diplom/Fachhochschule 21%,), but a lower one than others (Magister 34%). Bachelor programmes, on the other hand, have low mobility values (15 at universities and 9% at Fachhochschulen). The study, however, has a slightly eccentric methodological design and is thus not easily comparable with the others. It surveyed students who had not yet finished their degree, and thus provides only an interim snapshot picture at that stage, and, in the case of Master programmes, it also counts mobility in a previous Bachelor programme (and even mobility taking place between the two programmes).

In conclusion, it can be said that the empirical evidence for a drop in intra-European temporary mobility is slim, if non-existent. It is, however, also impossible to conclude from these data that the Bologna degree architecture is likely to give intra-European non-degree mobility a major boost. The quoted studies were probably also undertaken too early after the introduction of the new structure to draw safe conclusions. However, the point in time when this will be possible is coming close. In order to come to safer findings about the impact of the EHEA on intra-European mobility, it would be worthwhile to carry out a solid, country-comparative study in 2009 or 2010.

Intra- and into-Europe degree mobility

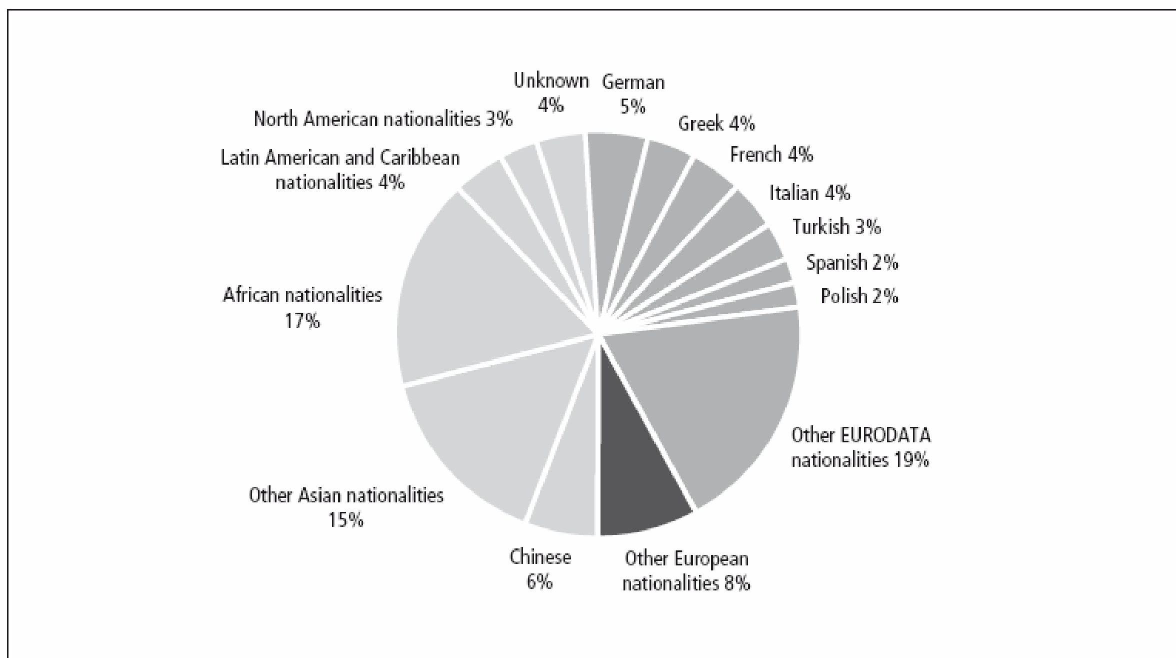
Europe has a high share of the global number of international students. The *EURODATA* study, which the Academic Cooperation Association (ACA) carried out in 2004 and 2005, based on data for the year 2003, found slightly over 1.1 million international students in the 31 countries it covered (the now 27 EU member states, the four EFTA countries, and Turkey). This number corresponds to about 2.1 million foreign students worldwide in the same year. Thus, more than half of all students worldwide studying outside their country of nationality study in Europe. In other words, at a first glance,

Europe was, already in the early years of the Bologna Process, a strong player in international mobility.

Since 1985, when the number of foreign students in Europe amounted to roughly half a million, Europe has seen its foreign student population more than double. This impressive growth is somewhat put into perspective by the fact that total enrolment in Europe grew in the same period by about three quarters, so that the percentage of foreign students in Europe rose only slightly, from four to five percent. [12]

Of the roundabout 1.1 million foreign students enrolled in the 31 *EURODATA* countries in 2003, about 470,000, or 43 percent, came from the same 31 countries. About eight percent came from other European countries, bringing the total share of Europeans to slightly more than half. 46 percent, or some 510,000 were non-Europeans, and four percent of unknown origin. Of the total, the largest non-European group is made up of Asians (21%), followed by Africans (17%). North and Latin Americans have a relatively small share, with three and four percent respectively. The most frequent single nationality of foreign students in the *EURODATA* region was Chinese (6%), followed by German, Greek and French (all about 4%).

Figure 1
Nationalities of foreign students in *EURODATA* countries



Source: *EURODATA*

[12] Cf. Kelo, Teichler, Wächter, *EURODATA*, op.cit.

Looking at overall European trends, two conclusions can be drawn. First, Europe is highly successful on the international 'student market'. Second, a large share of Europe's students is made up of Europeans. This makes for a strong record in intra-European mobility, but it makes Europe's record look less impressive in terms of into-Europe mobility. Irrespective of these two observations, the data overstate the real extent of mobility. UNESCO, OECD and EUROSTAT have, until recently, used the foreign nationality of students as a proxy of mobility. Comparisons with data based on the criterion of 'country of prior residence' and 'country of prior education' in those countries which collect both showed that, in a substantial share of cases, a foreign nationality does not indicate a physical move into the country for purposes of study. In the case of some countries, the foreign student total is about one third higher than the number of genuine mobile students. The author has no information on how large the discrepancy between data on nationality and genuine mobility is in other world regions outside of Europe. But the high labour migration in Europe and number of other factors speak for it that the discrepancy in Europe is higher than elsewhere in the world, and that the UNESCO data therefore probably comparatively overstate the degree of mobility in Europe, particularly the degree of intra-European mobility.

The above averages also say little about mobility with regard to single European countries. To speak of European strength in student mobility is therefore treacherous. The United Kingdom, France and Germany together account for almost two thirds of all incoming degree mobility in Europe. Countries with a similarly large overall student population (of around two million), such as Italy, Poland and Spain, have comparatively insignificant numbers, and therefore much lower foreign student shares, as Table 2 displays.

Table 2: Domestic and foreign students in selected European countries

Country	Tertiary students	Foreign students	Proportion of foreign student among all students in %
United Kingdom	2 287 833	255 233	11.2
Germany	2 242 379	240 619	10.7
France	2 119 149	221 567	10.5
Italy	1 913 352	36 137	1.9
Spain	1 840 607	53 639	2.9
Poland	1 983 360	7 617	0.4

Source: *EURODATA*

Likewise, the regional origin of students in Europe differs dramatically from country to country. While the share of non-Europeans reaches over 80 percent in Cyprus and Portugal, it is in the one-digit area in Slovenia and Greece.

How has mobility developed in the very recent past? Worldwide, the number of students studying outside their country of nationality has gone up, tremendously, from 1.8 million in 2000, via 2.1 million in 2003 (*EURODATA* year) to 2.7 million in 2005[13]. This marks an increase of 50 percent in a period of just six years.

The recent development in Europe can – to a degree – be seen in Table 3**.** The data in this table have been extracted from the online database of the UNESCO Institute of Statistics, which makes them available for the years from 2002 to 2006, i.e. a period of five years (instead of six, as in the OECD comparison). The table shows a mixed picture, with some countries making gains of close to or even over 100 percent, while others experience a drop in numbers and a majority gains between 20 and 50 percent.

[13] OECD, *Education at a Glance 2007*, Paris: 2007.

Table 3: Incoming degree mobility in Europe

Country	2002 T	2002 E	2003 T	2003 E	2004 T	2004 E	2005 T	2005 E	2006 T	2006 E	Growth T in %	Growth E in %
Austria	28 452	23 394	31 101	25 505	33 707	27 529	n.a.	n.a.	39 329	32 244	+38.2	+ 37.8
Belgium	40 354	24 091	41 856	22 631	26 202	7 168	21 054	11 234	24 854	13 220	*- 38.4*	- 45.1
Bulgaria	7 998	6 031	8 025	6 009	8 286	5 874	8 550	5 935	9 361	6 377	+ 17.0	+ 5.7
Cyprus	3 058	785	5 282	852	6 679	974	4 895	998	5 309	n.a.	+ 73.6	+ 27.1
Czech Rep	9 753	6 474	10 338	8 786	14 923	9 929	18 522	13 339	21 395	18 518	+ 119.4	+ 186.0
Denmark	14 480	6 445	18 120	7 640	9 829	7 286	10 251	7 374	12 182	8 706	*- 15.9*	+ 35.1
Estonia	454	436	1 090	940	830	695	884	772	1 061	793	+ 133.7	+ 81.9
Finland	6 760	3 719	7 361	4 050	7 915	4 258	8 442	4 473	11 514	n.a.	+ 70.3	+ 120.3
France	165 437	42 415	221 567	51 120	237 587	51 582	236 518	48 433	247 510	51 544	+ 49.6	+ 21.5
Germany	219 039	110 621	240 619	119 855	260 314	128 455	259 797	127 760	n.a.	n.a.	+ 18.6	+ 15.5
Greece	8 615	986	12 456	1 514	14 361	1 971	15 690	2 271	16 558	5 041	+ 92.2	+ 411.3
Hungary	11 782	9 494	12 226	9 997	12 913	10 463	13 601	11 027	14 491	11 713	+ 23.0	+ 23.4
Iceland	472	378	580	467	489	374	n.a.	n.a.	715	564	+ 51.5	+ 49.2
Ireland	9 206	4 291	10 201	4 470	12 698	4 868	12 887	4 300	12 740	4 627	+ 38.4	+ 7.8
Italy	28 447	20 611	36 137	25 781	40 641	28 539	44 921	29 841	49 090	32 644	+ 72.6	+ 58.4
Latvia	3 261	1 028	2 390	1 069	1 298	1 037	1 677	1 407	n.a.	n.a.	*- 48.6*	+ 36.9
Liechtenstein	n.a.	n.a.	n.a.	n.a.	412	401	n.a.	n.a.	573	538	n.a.	n.a.
Lithuania	684	252	689	299	738	420	857	520	n.a.	n.a.	*+ 25.3*	+ 106.3
Luxembourg	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	1 137	1 014	n.a.	n.a.
Malta	350	275	409	207	442	183	605	n.a.	n.a.	n.a.	+ 72.9	n.a.
Netherlands	18 874	10 775	20 531	11 814	26 154	7 434	26 387	10 894	27 037	13 023	+ 43.2	+ 20.9
Norway	9 505	5 195	11 060	5 486	12 392	6 092	13 400	6 215	14 297	6 500	+ 50.4	+ 25.1
Poland	7 380	5 367	7 608	5 650	8 118	5 757	10 185	7 078	11 365	7 647	+ 54.0	+ 42.5
Portugal	15 692	2 797	15 483	2 809	16 155	2 874	17 010	3 034	17 077	3 173	+ 8.8	+ 13.4
Romania	10 608	8 203	9 730	7 329	10 486	7 414	10 812	7 666	8 587	5 681	*- 19.1*	- 59.3
Slovak Rep	1 643	1 092	1 651	1 043	1 548	1 050	1 607	1 114	1 613	1 169	*- 1.8*	+ 7.0
Slovenia	951	916	963	915	888	845	1 088	1 042	1 089	1 056	+ 14.5	+ 15.3
Spain	44 860	27 661	53 639	31 220	15 050	6 895	17 675	7 345	18 206	7 099	*- 59.4*	- 74.3
Sweden	28 664	17 211	32 469	18 786	17 253	7 475	19 966	7 872	21 315	8 254	- 25.6	- 52.0
Switzerland	29 301	23 078	32 847	25 530	35 705	27 294	36 792	28 329	28 016	19 745	*- 4.4*	- 14.4
UK	227 273	103 085	255 233	102 812	300 056	102 920	318 399	104 522	330 078	109 287	+ 45.2	+ 6.0

Source: UNESCO Institute of Statistics

However, there are reasons to mistrust at least some of the data.

- A number of countries, such as Belgium, Romania, Spain, Sweden and Switzerland, display a sudden drop of numbers from one year to the next amidst an otherwise upward-directed trend. As a result of this, their overall balance is negative. Spain, for example, drops between 2003 and 2004 from about 54,000 to 15,000 foreign students from all over the world (and from roughly 31,000 to 7,000 foreign students from Europe). This is almost certainly due to a change of definition of a mobile student, who was earlier understood as one with a foreign nationality and is then defined as having been mobile in a genuine sense. As desirable as it is to base mobility reports on genuine mobility rather than nationality, the fact is that incomparable data now appear in a time series, which is therefore useless.
- The increase in the case of at least one European country, Greece, where the number of foreign students from Europe skyrocketed by over 400 percent, is suspicious and probably also due to a change in statistical practice.

With a view to possible links to the implementation of the Bologna degree structure, it might be justified to look at the development of student mobility into Italy, the Netherlands and Norway, who were amongst the first ones to introduce the new degree architecture. The data for these three countries appear 'unsuspicious'. All three countries experienced gains, and increases of mobility into Europe exceed those in intra-European mobility in each country. Gains are most marked in the case of Italy (which, however, has very modest absolute numbers in relation to its size): overall mobility into the country increased by 72.6 percent, while mobility from Europe grew by 58.4 percent. Growth in the Netherlands, on the other hand, was very modest, with overall inbound mobility going up by 43.2 percent and mobility from Europe by 20.9 Percent. The figures for Norway range somewhere in-between Italy and the Netherlands. It would, however, be very daring to attribute these developments only or mainly to the Bologna reforms. Non-degree student mobility is heavily influenced by a host of other influence factors, such as the provision of scholarship programmes, visa policies (in the case of non-European students) and promotion and marketing measures.

4.2 Curricular internationalisation

Next to mobility, curricular internationalisation has for a long time been high on the European agenda. Some of the provision in this area, such as internationally comparative studies and the study of foreign languages and literatures, has always existed and therefore only very late been classified as 'international'. This is also true of special programmes for students from the third world, in subject areas of particular relevance for developing countries.

In a wave starting in the 1970s, area studies, mostly with a European focus, were being introduced across Europe, often in combination with language studies[14]. A number of these programmes owed their existence to an Erasmus predecessor scheme, the Joint Study Programme. The joint study programmes also played the role of a midwife in the birth of programmes with an integrated (and often mandatory) study abroad phase at a partner institution in Europe. These were the nucleus of the structurally identical double degree programmes (which awarded graduates the degrees of the two tertiary institutions where they studied), which later sprang up in larger numbers, and today's much-hailed joint degrees. Since about the turn of the century, programmes taught in English in non-English-speaking European countries started to be developed. This section will specifically address English-medium education as well as double and joint degrees.

4.2.1. English-medium provision

In 2001, and again in 2007, the Academic Cooperation Association produced a study devoted to the provision of English-taught programmes in European countries where English was not (one of) the domestic languages. The 2007 study [15] surveyed 2,218 higher education institutions in 27 European countries[16]. 851 tertiary institutions responded to the survey. Of these, 401, or 47 percent, reported that they offered (one or more) English-medium programmes, the rest did not. Between themselves, these institutions offer a total of close to 2,400 programmes, i.e. on average almost three per institution. It is estimated that, on a European average, this number constitutes about seven percent of all programmes offered (in the domestic language *and* in English).

As is usually the case, averages say little. The largest absolute number of programmes was found in the Netherlands (509), followed by Germany (214), Finland (208) and Sweden (128). Together, these four countries offer almost half of all provision in Europe. In relative terms, that is controlling for the different sizes of national higher education systems, the Netherlands emerged at the top, followed by Finland, and, astonishingly, Cyprus. All Nordic countries came out as strong performers. Among Dutch responding institutions, for example, the share of English-taught programmes of all programmes was 34 percent. It was 21 percent in Denmark and 15 percent in Finland. Southern Europe (with the exception of Cyprus), on the other hand, reported extremely few English-taught programmes.

The largest number of identified programmes is offered in the subject cluster of engineering and technology (27%), followed by business and management studies (24%) and the social sciences (21%). This constituted a reversal of the finding of the 2001

[14] In some cases with the only thinly-veiled motive to avoid closure of language departments do to falling enrolments in more traditional language studies.
[15] Bernd Wächter, Friedhelm Maiworm, *English-Taught Programmes in European Higher Education. The Picture in 2007*, Bonn: Lemmens 2008.
[16] All EU member states apart from the UK, Ireland, Malta and Luxembourg, all EFTA countries apart from Liechtenstein, and Turkey.

study, in which business and management studies had still led – by a wide margin - engineering and technology.

In the context of a possible 'Bologna relevance', two findings are particularly striking. First, English-taught programmes are, in their vast majority, offered in the form of genuine Bachelor and Master Programmes. Second, the introduction of the lion's share of these programmes took place since the adoption of the Bologna Declaration.

Only four percent of all identified provision consists of 'traditional' single-cycle programmes (concentrated, moreover in two countries mainly, Turkey and Poland). 79 percent of the offer is at the Master level, and only 16 at the Bachelor level. Moreover, all Bachelor programmes are of a duration of a minimum of three and a maximum of four years, and all Master programmes last between one and two years.

79 percent of all English-medium degrees were introduced since the year 2000. Of the few long 'pre-Bologna degrees', over half (57%) were created in the years up to and including the 'declaration year'. Growth has remained strong, and more or less 'linear' overall, fuelling the expectation of steady future increases in provision. At any time, Master programmes have far outnumbered Bachelor degrees, and this tendency has grown stronger over time.

Table 4
Year of introduction of English-taught programmes – by level (percentages)

	Course type/level of study			Total
	Bachelor	Master	Bachelor + Master	
Up to 1999	37	16	57	21
2000 - 2003	29	27	17	27
2004 - 2005	17	26	17	24
2006 - 2007	17	30	9	27
Total	100	100	100	100
Count (n)	(126)	(652)	(35)	(813)

Source:
Wächter/Maiworm, English-Taught Programmes in European Higher Education. The Picture in 2007.

Further Bologna characteristics are typical of English medium programmes. For example, 85 percent of all degrees award the Diploma Supplement. The use of ECTS is standard practice. However, English-taught degrees rarely entail a mandatory study abroad period. But this is understandable since most students enrolled in these offerings are already 'abroad'.

English-medium instruction is predominantly, but not exclusively created for international students. In the earlier study (conducted 2001 and published 2002), on a Europe-wide average, 60 percent of the student population was foreign, and 40 domestic.

The 2007 survey showed a trend towards a higher share of foreign students, who now make up 65 percent of enrolment. Of the foreign student population, slightly over one third are Europeans (27% EU/EFTA and 9% 'other' Europe), 34 percent Asians (of whom over one third Chinese), and the rest from other world regions. To the extent that enrolment patterns reflect the desired regional composition of those offering the programmes, English-medium degrees are mainly instruments for attracting international, non-European students. What speaks for this is also the dominance of Master programmes, which internationally mobile non-European students predominantly seek.

In conclusion, one is tempted to state a far closer relationship between the creation of a strong offer of English-medium provision and the EHEA than between the development of mobility flows and the Bologna Process. It is safe to say that the designers of the English-taught programmes have created their programmes in a 'Bologna-compatible' way. It is also striking that the emergence and growth period of this phenomenon coincides time-wise with the creation of the EHEA. At the same time, English-medium degrees also respond to the emergence of a global higher education market, and coincide with strong marketing efforts that the tertiary institutions and national bodies of the leading countries in English-medium provision (Netherlands, Finland, Sweden, Denmark) have put in place. In the Netherlands at least, an entrepreneurial motive, in the form of no longer symbolical tuition fees, also comes into play.

4.2.2 Double and joint degrees

The history of curricular cooperation across country borders in Europe is much older than generally assumed today. In 1976 the then European Community launched its first 'Education Action Programme', and, as part of it, the Joint Study Programme scheme. This initiative was essentially a pilot of the later Erasmus Programme. Like Erasmus, it promoted the exchange of students in partnerships of institutions from two or more countries and it required partners to recognise learning undertaken abroad. The most advanced of these programmes structurally embedded the study abroad period through curricular agreements. They were, in the parlance of these days, 'integrated study programmes'. Such programmes became more common after the creation of the Erasmus Programme, which offered a separate funding line for their introduction and operation. Under Erasmus, a larger number of them also awarded double (and sometimes) multiple degrees of the two or more universities by whom the programme was delivered. The double degrees were not structurally different from the other forms of integrated study programmes. The difference was in certification, not in substance. The motive to award a second degree was to facilitate student access to the academic and labour market of a second country. To jointly award one single degree was at that time (perceived as) legally impossible. This option only came into play at the beginning of the new millennium, when the Prague Ministerial Meeting (2001) explicitly endorsed this formula, and later in 2004, when the then new Erasmus Mundus Programme introduced the 'joint masters' as its curricular backbone. The Bologna Process thus inherited rather than introduced curricular cooperation and integration across national borders in Europe. Its own contribution is the progress in certification (if one sees it that way) in the form of the joint

degree, and, of course, the fact that these programmes now award the new Bologna-type degrees.

The *2007 Stocktaking Report*[17] found that all Bologna signatory countries have legislation in place which either explicitly foresees the possibility of joint degrees (32 countries), or does at least not prohibit them. Of the 12 indicators used in the 2007 stocktaking, this is the one with the best score. From this, one would be tempted to conclude that joint degrees are becoming very common in the EHEA. But empirical evidence on the provision of joint degrees (and also double degrees and other 'integrated' programmes) is in short supply. The data situation is best with regard to programmes created in the framework of the Erasmus Mundus Programme: there are, to date, 103 Joint European Masters. By the middle of 2007, the programme had awarded some 4,100 scholarships to non-European students. With the continuation of the programme, the numbers of joint degree programmes and grantees are bound to grow.

The *Trends V Report* [18], in the framework of which a large (but unquantified) number of universities in the EHEA were surveyed in 2005 and 2006, found that 60 percent of all responding institutions offer at least one joint degree. According to the same study, the majority of joint degrees are offered at the Master level. 15 percent of responding universities offered joint degrees in all three Bologna cycles. But like the *Bologna with Student Eyes* publication[19], the assessment of the Bologna Process by the European Students Union, the report concludes that student numbers in joint programmes are small and that it is "unlikely that joint programmes will be able to deliver the significant increase in international mobility that was perhaps expected by Bologna reforms".[20] It also raises doubts as to the sustainability of many joint degrees, due to their need for considerable financial and staff resources.

A study commissioned by the German Rectors' Conference (HRK) and the German Academic Exchange Service (DAAD) of 2006 supports the impression that the supply of double and joint degrees in Europe is not abundant.[21] The study, which entailed a survey of institutions and programme directors in 26 Bologna signatory states, identified 303 integrated programmes in 24 countries, among them (suspiciously) 40 percent from Germany. Of these programmes, 17 percent awarded joint degrees, 71 percent double or multiple degrees, and 13 percent one single degree (which, however, entailed an integrated and mandatory study-abroad period). As did *Bologna with Student Eyes* and *Trends V*, the study found that the number of students enrolled was small – 24 on a European average. It confirms that integrated programmes are predominantly offered at the Master level (66%). With a view a view to the impact of Bologna on the creation of these programmes, Table 5 is revealing.

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[17] Cf.
http://www.ond.vlaanderen.be/hogeronderwijs/bologna/documents/WGR2007/Stocktaking_report2007.pdf
[18] EUA, *Trends V: Universities Shaping the European Higher Education Area*, Brussels: 2007.
[19] ESIB, *Bologna with Student Eyes*, London: 2007.
[20] *Trends V*, op.cit., p. 34.
[21] GES, *Results of the Survey on Study Programmes Awarding Double, Multiple or Joint Degrees*, Kassel: 2006.

Table 5
Year of introduction joint; double and multiple degrees

	Course type/level of study			Total
	EU-15/EFTA Bachelor +	New EU Member States	Non EU/ EFTA	
Up to 1999	25	15	22	24
2000 - 2002	21	9	17	19
2003 - 2004	26	41	39	29
2006 - 2007	28	35	22	29
Total	100	100	100	100
Count (n)	(235)	(34)	(18)	(287)

Source: Survey on Study Programmes Awarding Double, Multiple or Joint Degrees

The majority of integrated programmes identified by this study have been introduced in the years after the Prague Ministerial Meeting first put joint degrees onto the Bologna agenda.[22] This is so across Europe, but in particular in the then "new member states", which had not enjoyed for the same duration the EU (Erasmus) support that helped create the earlier one of these programmes in the "old member states".

Despite the lack of satisfactory data, the following conclusions about integrated programmes can probably be drawn.

First, integrated programmes are not the invention of the Bologna Process. They were 'inherited' from an earlier phase of European educational cooperation, at any rate in the "old EU member states" in the West of Europe. The contribution of the Bologna Process is a) the growth of their numbers over time, b) the 'joint' certification model, and, of course, c) the (re-)design of the programmes according to the new degree structure.

Second, and despite the above surveys, there is no reliable information on the quantities of this sort of provision in Europe. A comprehensive EHEA-wide survey would be needed to provide reliable and differentiated data.

Third, and notwithstanding the uncertainties about the quantitative extent of provision, the numbers of students enrolled in these programmes appear to be low. ESU and EUA are therefore right to conclude that, at present levels, these programmes are very unlikely to give a strong boost to mobility – whether into the EHEA or inside of it.

Fourth, given the low student numbers, it is almost futile to speculate if the motive to introduce these programmes is in the first place linked to the Bologna Process, and an

[22] It can of course not be totally excluded that respondents stated the year in which a given programme was introduced *as* a Bachelor of Master degree, but that it had existed prior to that as a 'traditional' long programme. In this case, we would be confronted with a re-introduction rather than a new creation.

intra-EHEA agenda, or if they owe their existence more to the 'globalisation' of higher education and an attempt to be able to successfully compete on the world-wide student market.

5 Reaching out: the external dimension

Internationalisation in European higher education has a long history. In a first and quite long period after WWII, activity levels were low, and, internationalisation was mainly characterised by inbound 'vertical' mobility, from developing countries. With the onset of closer European cooperation in the context of Erasmus and related schemes, the focus was on intra-European cooperation, although some countries, mainly former colonial powers, never lost their 'outward look'. Roughly since the beginning of the new century, the globalisation and global competitiveness agendas have partially refocused attention to the wider world. In a sense, the Bologna Process would not have come into existence without this changed environment. But, ironically, in its early years, the Bologna Process paid little attention to the world beyond the EHEA. This changed only, and only partially, with the adoption of the strategy paper *The European Higher Education in a Global Context* of 2007. Two internationalisation developments are particularly interesting in this respect: the emergence of European higher education promotion and marketing, and of 'transnational education'.

5.1 Promotion and Marketing

Promotion, marketing and recruitment would not have been viewed as a serious internationalisation activity only 15 years ago. Worse, it was regarded as commercial, and thus deeply un-academic. The chief actors in the Bologna Process appeared to endorse exactly this when they stated, as late as 2003 (Berlin Communiqué) that 'academic values' should prevail. That was to be understood as: we are not into selling. Marketing and promotion is, at least in its finality, just that. What changed the attitude to marketing was, ultimately, the arrival of the reality (or the rhetoric?) of global higher education competition in Europe. The focus of marketing is not on the EHEA, but on the countries outside of it.

The key actors in the international promotion of higher education are (or should be) the higher education institutions themselves. According to widely shared marketing wisdom, nothing can substitute their own efforts to convince potential students (and faculty) around the world of the attractiveness of their programme offerings (and research prowess, where applicable). There is, however, no systematic European overview of institutional promotion efforts known to the author. Anecdotal evidence – mostly gathered by participants of education fairs – would suggest that British tertiary institutions are very and Dutch universities quite active. Following, there would be a middle group, of German, Austrian and Nordic higher education institutions, and some, especially private institutions from Central Europe and Cyprus. Activity of most institutions from other countries in the EHEA would be negligible. But no one knows this

safely. In the absence of any systematic knowledge about institutional engagement, this section will be largely devoted to national-level and European marketing campaigns, and the respective actors.

National-level initiatives

International higher education promotion is a fairly new phenomenon in Europe, with a history of some ten years in the more ‘advanced’ countries, and much less elsewhere. Certainly, governments and specialised internationalisation agencies working on their behalf have for a long time engaged in providing information on study in their countries. But these information-provision activities should not be confused with promotion and marketing as such. National-level promotion and marketing in the sense of a proactive, coordinated and larger-scale effort aimed at attracting international students (mainly from non-European countries) started in Europe in the second half of the 1990s, when the UK set up its *Prime Minister’s Initiative*, when Germany launched its *Hi! Potentials* campaign, when France created its international promotion agency EduFrance (now: CampusFrance), and when NUFFIC started to market the Netherlands as a study destination, to name only some of the most important initiatives at the time. The first thing to state is therefore that higher education marketing had arrived in a number of European countries before the Bologna Declaration.

Most national marketing efforts in Europe have been government-induced or, at any rate, government-supported. In most cases, governments felt that it had become necessary to encourage their higher education institutions to proactively seek to enrol a larger number of international students, and to therefore support the institutions’ efforts by a national umbrella campaign which would enhance the international visibility and attractiveness of the country’s higher education as a whole. In the overwhelming majority of cases, national governments out-sourced the task to specialised organisations. In countries where there was already an established ‘internationalisation agency’ for the administration of scholarship programmes and like measures, this organisation was usually entrusted with the development and the implementation of the promotional campaign. Examples are Germany’s DAAD, the UK’s British Council, the Netherlands’ NUFFIC, or Finland’s CIMO, Sweden’s Swedish Institute and Denmark’s CIRIUS. In countries where such structures were lacking or deemed inappropriate by the government, new entities were set up, for example in France, where three government departments created EduFrance in the late 1990s. There have also been – rare – cases where organisations were set up without any government initiative. This has recently been the case in Poland, where the Perspektywy Foundation was set up by a publishing house in cooperation with the national rectors’ conference.

National promotion activity across Europe differs enormously in scale. While a few countries apply the whole arsenal of promotional possibilities, others use only selected means (and yet others are of course wholly ‘abstentious’). The following is an overview of the various instruments and means employed.

The core element of any more developed promotion campaign is a *higher education brand*. [23] This brand creates a unique 'identity' of the particular country's higher education. It consists of a set of key messages and a logo.

The second element of most campaigns is a central *website*. The website ('Study-in…..') is the key instrument for guiding potential international students to the information they seek in order to make their destination decision and later enrol. Typically it contains a section about the country itself (and its unbeatable charm) and its higher education system, as well as practical information about immigration, visas, work, accommodation and the like. One of the functions of the website is to serve as a portal to the websites of individual institutions and their offers. A well-developed website also contains an overview of scholarship programmes and 'international' (English-medium programmes). Advanced websites exist in a range of languages more frequently spoken at a global level and in country-specific variations.

The third element of a developed campaign consists of *events* of various kinds, such as. higher education fairs, which create a forum for the direct encounter with potential students (and their parents). Some fairs are organised by (the promotion agency of) one single country (e.g. a Polish higher education fair in India). Others are events organised by country-neutral (and often commercial) organisations and open to all paying participants. In the minimalist case, only the promotion agency of a country is present, and represents its higher education institutions. More frequently, it organises, next to its own presence, that of the individual institutions, who are present with their own booths. Other types of events comprise smaller seminar-type get-togethers, often of a subject-specific sort, or meetings between representatives of higher education institutions from the host and the promoting country.

A fourth element are *communication (media) campaigns*. Typically, these target a particular country and transport their messages via advertisements on television and in widely-read newspapers and magazines, amongst others. It is common to combine a media campaign with a physical presence (through fairs or other events) in the country.

Fifth, some organisations organize their own *permanent presence in key countries*, in the form of *information offices*. These offices are service points for potential students (and support structures for events, media campaigns and the like), whom they inform and counsel. Only larger organisations (British Council, DAAD, NUFFIC to an extent) make the – considerable – investment into such a permanent physical presence. In other cases, this task is delegated to the embassy or a cultural institute of the country in question.

Sixth, there are *further promotion-related activities*, in which only countries with a very advanced promotion campaign are active. One activity is to work with (selected) private agents. Others are competence building offers intended to equip the institutions of one's

[23] There have also been attempts by some sub-national regions in Europe, such as Baden-Württemberg, to create their own brand. Likewise, there have been attempts at joint marketing by groups of European countries (the Nordic countries, for example), and also of transnational European university networks, but hardly any of these latter measures have developed a clear brand.

country to better position themselves internationally. A few countries also invest in background research, for example marketing studies to explore the potential of their country's higher education institutions in a given country or region.

Very few countries in Europe apply the whole set of the above instruments. In fact, national higher education promotion is very unevenly developed across Europe. In terms of activity intensity, Europe can be tentatively divided into three country categories.

The first type is categorised by a high degree of involvement, in terms of resources available and activities engaged in. This group is led by the UK, which most likely outperforms any other country by a considerable margin. Other countries in this group are Germany, France and the Netherlands, who have also invested considerably. Given their (smaller) size, Finland and Sweden also belong to this group. After Denmark's recent decision to invest considerably in international promotion, this country will probably soon join the group too.

A second category consists of countries which are active in only a few of the above activity categories or where an infrastructure (organisation) for international promotion has only very recently been created. In some countries, these are fledgling organisations whose sustainability must still be demonstrated. In others, established 'internationalisation agencies' have been entrusted with the task, but at a modest level of engagement. This category is led by countries such as Austria (Austrian Exchange Service), Switzerland (CRUS), Poland (Perspektywy Foundation), Ireland (International Education Board Ireland) and possibly Spain (EduEspana). Hungary (Campus Hungary) and Italy (the very newly created EduItalia) have shown some signs of becoming active in the field, too. [24]

In a third category of European countries, the author has not been able to identify any form of national higher education promotion. This group forms the majority of all countries in the EHEA. Of course, the National Agencies or National Structures of almost all the countries eligible to participate in the Lifelong Learning Programme and the Erasmus Mundus Programme of the European Union engage, in one form or another, in promotion-related measures. However, this activity is usually small-scale and most of it consists of the provision of information rather than marketing as such.

European (EU) initiatives

European-level promotional efforts have been only very recently started. The chief actors are the European Commission's Directorate General for Education and Culture with its *Global Promotion Project* (GPP), which was launched at the beginning of 2007, and the EuropeAid Cooperation Office, which has been funding, since 2004, the *European Higher Education Fairs* (EHEFs). Beyond these projects, some of the European Union's Delegations (embassies) conduct local activities, often of an *ad hoc* sort.

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[24] Campus Hungary seems, however, to be in a difficult situation right now, and many universities in Italy apparently challenge the legitimacy of EduItalia.

The GPP contains, in nucleus, all elements of a fully-fledged marketing campaign. It has created a 'brand' (a set of key messages about European higher education and a logo) and a web portal ('Study-in-Europe'). It will organise two European higher education fairs, it is to test a network of 'European higher education promoters', it trains European higher education multipliers in promotional methods, based on a 'tool-kit' it has developed, and it is developing a media campaign. In its next phase after 2009 (if any), the GPP might establish information offices in key countries.

The European Higher Education Fairs are funded from the Asia-Link Programme and are organized by a consortium of four major national actors in international higher education promotion, CampusFrance, the British Council, NUFFIC and DAAD. Being financed from the budget of the Asia-Link Programme, the fairs target exclusively Asian countries eligible to participate in this scheme. After a pilot fair held in Bangkok in late 2004, the series of EHEFs proper started in late 2006 and will run until the autumn of 2008. By then, eight fairs will have been organised in seven Asian countries. The fairs target (potential) students (as well as their parents). Each fair is accompanied by an "Asia-Link Symposium", a one-day conference in which higher education representatives and policy-makers from the host country and from Europe discuss ways of enhancing higher education cooperation. Even though organised by the four above-mentioned organisations, the EHEFs are open to higher education institutions (as well as national organisations and other education providers) in all European countries which may participate in Asia-Link.

Promotion and marketing clearly belong to the 'external' non-European internationalisation agenda. Very few European 'marketeers' are active in Europe (Russia and Eastern Europe apart). Promotion and marketing is driven by the motive to attract non-European students, and often, by a felt or genuine 'economic imperative'. The Bologna Declaration was certainly not 'the prime mover' behind these activities (even though the spirit out of which it was born is clearly favourable to it). More visible links exist to the Lisbon Strategy and the discourses about the knowledge society and 'brain gains'. But the course of the Bologna Process itself could be shifting in this direction.

5.2 Transnational education

'Transnational education', or 'cross-border provision', 'export of education' or 'collaborative international provision', as it is alternatively called, is usually described as the mobility of education which moves to the student, and thus the mirror image of physical mobility, where the student moves to the education. In fact, the term covers a wide variety of delivery modes. The most common forms are those where single programmes are delivered 'cross-border', usually, but not necessarily in collaboration with a local provider. Distance learning, mostly, but not only, in the form of online education, is also covered by the range of meanings. Branch campuses and 'foreign-backed universities' are examples which the layman perhaps understands best, but they are the least common form (due to very high costs).

It is impossible to correctly estimate the exact extent of European involvement. In no European country is there a complete register of all cross-border operations. There is some literature on the issue, but it usually covers only parts of the whole picture. In addition, the speed of developments in this area makes attempts to keep up-to-date registers an almost impossible task. Operations start and – in some cases – also close, change delivery mode or partnership arrangements, to name just a few possibilities. This short section is based on the findings of an ongoing study that the Academic Cooperation Association is conducting on behalf of the European Commission. Based on the findings of a prior mapping of European countries and the perusal of available literature, five European countries were chosen as the target of a more detailed research. It turned out that in two cases, the Netherlands and particularly Spain, the expectation of a major supply of transnational education was not well founded. Therefore, the findings reported here concern only the United Kingdom, France and Germany.

The original mapping demonstrated that the supply of cross-border education is even more unevenly spread across Europe than that of other forms of internationalisation. We are therefore talking about a phenomenon which is large-scale in at least one country, quite developed and apparently fast developing in two others, and rare to non-existent in most other EHEA countries.

The United Kingdom is the biggest European supplier by far, and also the biggest world-wide, measured by the number of students enrolled in programmes delivered by the country. According to a British Council estimate of August 2007, a total of 246,000 students were enrolled in UK degree programmes in the academic year 2005/06. This number corresponds to three quarters of all foreign students in the UK. 65 percent of all UK degree-awarding tertiary institutions are involved in transnational education. The overall number of UK-delivered programmes world-wide is unknown. The orders of magnitude, however, must be considerable, given that there are 628 in Hong Kong, 247 in Malaysia and 148 in Singapore. The key ‘markets’ of UK engagement are China, Malaysia, Singapore, Hong Kong, India and Russia.

Next to a concentration on Asia, which is common to all exporters of education, the choice of target countries seems to be also influenced by historical ties, as the comparison with France shows. About 60 percent of the French offer is estimated to target North Africa, and other former colonies or (formerly) francophone countries like Vietnam also figure high. In terms of numbers, France is far behind the UK. The 2006 inventory of courses supported by the French Ministry of Foreign and European Affairs contains 242 programmes with an enrolment of 40,000 students. But this is almost certainly an undercount, since there are also non-subsidised programmes. But even the 40,000 students correspond to about one sixth of the number of foreign students in France.

Germany is a country whose cross-border provision seems to originate to a considerable extent from start-up funding provided by the federal government through the DAAD. In 2007, the DAAD funding scheme supported 34 projects, with 85 programmes. Outside of the DAAD funding scheme, there are two large-scale projects, the creation of the German-Chinese University of Applied Science in Shanghai and the Swiss-German

University in Indonesia. The roughly 8,000 students recorded on DAAD-funded programmes outside of Europe (there are further German programmes in Eastern Europe) are probably an undercount of total enrolment, but it is clear that Germany does not reach the numbers of France, let alone the UK.

It should be added that Europe is not only an exporter of transnational education. Europe is also a ‘target’, of US operations, but also of European ones. The latter is particularly true in parts of Southern and in Eastern Europe.

It is clear that the main impetus for this sort of education is not the result of the Bologna Process, but of the parallel globalisation of higher education. Cross-border education has not figured high anywhere on the Bologna agenda, and where it figured at all, it appeared almost as a thing to be discouraged. But the Bologna agenda is in constant flux and it has lately shown signs of incorporating a part of the globalisation agenda.

6. Conclusions

Reviewing this essay, what are the main relationships between the Bologna Process and internationalisation in the European EHEA? They are complex and multi-dimensional.

First, the Bologna Declaration was not the ‘big bang’, before which there was nothing but a void. In a number of areas, and notably those in the area of internationalisation, Bologna was built on the foundations of earlier policy initiatives of European or even global actors (European Union, Council of Europe, UNESCO). The themes of mobility and recognition (ECTS, Diploma Supplement and the intentionally vague, and therefore very adaptable, ‘European dimension’) are obvious examples. The Bologna Process integrated this ‘heritage’ into its own wider policy framework, and it partially adapted it to its needs.

Second, it is difficult, to say the least, to measure the impact of the Bologna Process on internationalisation in Europe. The key elements of the EHEA, such as the degree structure, have not, in most countries, at any rate, been in place long enough for the first cohort of students to have graduated from it, and it is therefore early days to measure ‘impact’. And even at a later stage it will be difficult to evaluate the ‘Bologna’ impact’ in separation from all the other influences at work.

Third, the priorities of internationalisation, and the stages of development of it, are very different in the countries of the EHEA. It is therefore difficult to make generalisations about internationalisation in the EHEA. There is, with regard to internationalisation (and much else), more than one Europe.

Fourth, and speaking of these ‘other influences’, it is clear that internationalisation in Europe is being shaped as much by global trends as by home-made policies. The emergence of a global market of higher education (or, at least, the perception of such an

emergence) is clearly at the root of some emanations of European internationalisation, such as English-medium provision, international marketing or ‘transnational education’.

Fifth, the Bologna Process itself is in constant development. At its roots lay a combination of the above-mentioned ‘heritage’ *and* the realisation that globalisation had arrived, and that a joint European response to the challenge was necessary. This second shaping force was almost lost out of sight during the first Bologna years. And even today the Bologna agenda contains items which, in a radical interpretation, could be viewed as ‘anti-globalist’ (parts of the ‘social dimension’, for example). But the indications are that we are in a phase where the globalisation agenda is making its mark on the Bologna Process. This becomes also clear when we look at European internationalisation concerns. We are worried that intra-European mobility might decrease, and we continue in the spirit of cooperation (‘on trust’) with Erasmus and like endeavours. At the same time, we are after ‘brain gains’ on extra-European ‘hunting grounds’ (and not only there) and display a robust competitive behaviour.

Sixth, and for all of the above reasons, the end is very open indeed.