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EU universities' entry models for the Chinese education market

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Terminology

ACA	Academic Cooperation Association
CEAIE	China Education Association for International Exchange
CIHE	Council for Industry and Higher Education
CIMO	Centre for International mobility (in Finland)
CSC	The Chinese Scholarship Council
EU	European Union
EUCC	Erasmus University China Centre (EUCC)
HEI	Higher Education Institution
ICT	Information and Communication Technology
NAFSA	National Association of Foreign Student Advisers (in North America)
NESO	Netherlands Education Support Office
NUFFIC	Netherlands organisation for international cooperation in higher education
OECD	Organisation for Economic cooperation and Development
WTO	The World Trade Organisation

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INTRODUCTION

There are global changes taking place on the higher education sector. The internationalisation of higher education has become a more important topic in the agendas of countries with knowledge-based society's ambitions and universities with the goal to become more international. The aim of internationalisation is to increase international recognition of universities, facilitate opportunities for skilled workforce to immigrate, generate additional income from export of education and build a positive brand for a country (Kubo 2010). Also due to rapid ageing in the European Union (EU), the aim to attract more international talented students and to have more international classrooms have become more relevant for the universities (Parsons and Söderqvist 2005).

The Bologna Process also has a major influence on the European higher education area. The aim of the Bologna Process is to create a European Higher Education Area and enhance the mobility of students. The process has a positive influence on making the higher education system in the EU more attractive and unified by adopting a system of easily readable and comparable degrees with two main cycles (undergraduate and graduate), establishing a system of credits (ECTS) and promoting mobility to overcome administrative and legal obstacles (Zimmermann 2010).

The Bologna Process has a major influence for non-English speaking countries. The aim to enhance cross-border recognition of academic qualification increases the risk for the universities in non-English speaking countries to lose the students to English-speaking countries. Universities are reacting in part to the potential loss of students by increasing the number of Master-level programmes in English. This on the other hand makes the universities more attractive for a wider scale of international students (De Wit 2010).

With the changes taking place for many EU universities internationalisation has become the top priority on their agendas and they are interested in finding opportunities how to achieve their internationalisation goals and make use of the possibilities internationalisation has to offer. To achieve these goals universities often set their focus on emerging markets in Asia and in particular China. Universities see great potential in the Chinese education market because of its size and the growth potential. Currently

about 20% of the Chinese people are 14 or younger - constituting a pool of 260 million potential university students for the near future (Tucker and Macready 2011).

Although there is great potential in the Chinese higher education market, entry into the market has been difficult for many universities and there is no theoretical model which would give a strong basis for universities' market entry. One of the reasons is that the topic has received little attention. The theoretical market entry models for companies have received great attention and have been studied quite often, with the Uppsala Model being one of the most recognised ones. However, the company market entry models are not directly applicable to the universities. The current paper aims to find out the best suitable market entry model for non-British EU universities entering the Chinese education market. The focus of the study is narrowed down to 'non-British European Union universities' in three small to medium-sized EU countries - the Netherlands, Finland and Poland. The term 'non-British' refers to EU higher education institutions, wherein the first official language is not English.

The research paper consists of five main tasks:

- 1) Analyse literature on the theories of internationalisation of education;
- 2) Make interviews with representatives from Dutch, Finnish and Polish universities and institutions;
- 3) Analyse the outcomes of the interviews;
- 4) Make conclusions about different market entry models for the Chinese higher education market;
- 5) Make proposals for non-British EU universities' entry models for the Chinese education market using internationalisation models.

To complete the tasks the research starts with the theoretical basis, which explains the internationalisation model in a thorough manner (chapter 1). This is followed by interview case studies in three countries, the Netherlands, Finland and Poland. All of these case studies have had experience with market entry into the Chinese higher education market and offer valuable insight to the work. The paper continues analysing the theoretical framework of internationalisation in the light of the empirical findings of the case studies. As a result of the analyses the author uses the best practice of the Netherlands, Finland and Poland and provides a market entry model for non-British EU countries.

The empirical information is collected from interviews with representatives of universities and national organisations and from relevant sources such as studies and official representative websites. Interviews with the representatives were conducted face to face, through Skype, phone or over email. For the interviews open-ended questions were prepared specifically for the representatives of institutional level or national level.

The interviews presented a valuable insight about different entry models to the Chinese higher education market and specific characteristics about the Chinese market. However, the length of the paper sets some limitations to the research and it would be valuable to further study the topic with extended list of country and university case studies. To have representative results the research was narrowed down to small and middle-sized EU country and universities case studies with different regional characteristics and profiles. Additional case studies with different cultural and regional backgrounds and experience in the Chinese higher education market would add value to the study.

1. THE THEORETICAL PERSPECTIVE OF THE INTERNATIONALISATION OF HIGHER EDUCATION

1.1. Understanding the internationalisation of higher education

Definition of the internationalisation of higher education

To understand what the internationalisation of higher education is about it is necessary to take a look at the definitions. The following part provides several approaches which aim to give a comprehensive definition to the internationalisation of education and its applicability. One of these definitions is proposed by Jane Knight (2004: 11) who states that the internationalisation of higher education is “the process of integration of international, intercultural and global dimension into the purpose, functions of delivery of post-secondary education.” Knight’s definition has received some positive feedback but also some criticism from other authors. De Wit (2011), for example, stated that Knight’s definition of the internationalisation of education is valuable as it takes into account the different dimensions where internationalisation is taking place, the interrelationships within the dimensions, and also the internationalisation activities taken at home and abroad. Van der Wende (2001) on the other hand is more critical about the approach and finds that the weakness of the definition is that it does not indicate any further goal of internationalisation. Zha (2003) states that internationalisation is a measure to develop higher education further and to accord with international standards to be more competitive in the globalised world. Parsons and Söderqvist (2005: 3) argue that the internationalisation of education is “a change process from a national higher education institution (HEI) into an international HEI, leading to the inclusion of an international dimension in all aspects of holistic management, in order to enhance the quality of teaching and research and to achieve the desired competences.”

It can be concluded from the above that all these different approaches and definitions of internationalisation of education give an insight that it is complicated to have a widely accepted understanding of the term. It is important that all authors agree that internationalisation is an intentional activity and it plays an important role in enhancing the quality of higher education in competitive market conditions and the globalised world. For the current research, the definition of Jane Knight will be adopted as the broad definition which explains the different case studies’ internationalisation.

The factors influencing the role of higher education

As the previous subchapter showed, internationalisation has become an important part in the higher education sphere. Studies have shown that with the development of the internationalisation process factors have emerged which influence the role of higher education and universities in the society. The following paragraphs explore these factors and give overview of the influences on higher education and the institutions. Several authors argue that global changes affect the higher education sector. Jane Knight (2004:7) has been one of the many authors to confirm the statement by saying that “the world of higher education is changing, and the world in which higher education plays a significant role is changing.” Several other authors and sources, such as Delgado-Márquez et al. (2011), Horta (2009), and the OECD report (2009) also indicate that universities’ traditional role has changed because of more entrepreneurial, cooperation and competitive activities in the internationalisation and globalisation frameworks. In addition, changes in higher education financial instruments affect the sector. Knight (2004) states that decreasing public funds and increasing private funds change the situation for the education sector and for student mobility.

As the OECD (2009) report brings out, the core motivations for internationalisation have changed from political, cultural, geostrategic and development aid motivations to economic motivations for governments and for being competitive at the institutional level. The report also shows that the role of international students for universities has changed and the role of international student recruitment has become more important (OECD 2009). Delgado-Márquez et al. (2011: 268) state that with the changed motives the universities take “more use of new public management tools, including market forces, financial incentives (competitive funding), increased autonomy and accountability, and deregulation.” Van der Wende (2007) states that new opportunities and approaches have led the universities to take advantage of tuition fees and to be more active in the foreign markets. Delgado-Márquez et al. (2011) say that the role of the government and policies has become more important because of the national interest to have more globally competitive and cooperative universities.

Delgado-Márquez et al. (2011) and Deem and Brehony (2005) continue the discussion about the changes taking place in the higher education sphere and state that higher education institutions’ management, culture, role and functions have changed

with globalisation and development of the knowledge economy. Altbach and Knight (2012) and Kirp (2003) also believe that the role of higher education has become more important in the free trade area and more often the constant reforms in the higher education sector at national and institutional level seek to respond to the global challenges (OECD, 2009). Altbach and Knight (2012) and Kirp (2003) claim that higher education is often seen as a commodity, which can be freely traded and which welcomes private and commercial counterparts. Altbach and Knight (2012) seek to explain the growing role of free trade further and say that the World Trade Organisation (WTO) plays important role in providing regulatory framework, which will guide the basic trade processes in education and service sectors within the General Agreement on Trade in Services (GATS).

Altbach et al. (2009) find that in the changing market conditions the role of universities has changed and postsecondary education has shifted from being a public good contributing to society to a private good benefiting individuals. The authors add that the commoditisation of education and political tendency towards privatisation has also set great financial responsibility on institutions to generate more revenue. The OECD (2009) report also states that public funds have been diminishing in countries which have been able to increase the income from various internationalisation activities. Knight (2004) also adds that in addition to the increasing independence the higher education institutions need to accommodate more competitive market conditions. The author explains that changing market conditions and increasing demand for higher education have given rise to new public and private educational providers globally. She adds that the greater number of players also require addressing policies in a conceptual framework. For the factors involved in internationalisation of higher education see Table 1.1.

It can be concluded that universities' traditional role, motivations, goals and instruments for reaching the goals have changed with international and globalised market conditions. Also, universities make more use of new financing structures, management tools and internationalisation activities to achieve their goals. The higher education market conditions have become more competitive and have given rise to new independent players on the market. Universities have become also more financially

independent. It is important that higher education institutions keep offering up-to-date, competitive and valuable education in fast changing global conditions.

Table 1.1 Factors influencing the internationalisation of higher education

Factors involved in internationalisation of higher education	
Academic	Curriculum development
	Change of a role of international students and staff
Economic	Economic motivations for government
	Globalisation
	Global competitiveness
	Decreasing national and increasing private higher education funds
	Development of information and communication technology (ICT) sector
	Focus on market economy
	Development of knowledge economy
	Development of free trade
	Privatisation and commodification of education
	Market forces
Financial incentives (competitive funding)	
Political	Government policies, planning and reviewing structures
	International regulatory framework
	Higher education reforms and new public management tools
	Deregulation of education sector, increased autonomy and accountability of universities
Social	Lifelong learning and increasing demand for higher education
	Mobility of labour force

Source: Author's table based on Altbach et al. (2009), Delgado-Márquez et al. (2011), Deem and Brehony (2005), Horta (2009), OECD (2009), Morris (2009), Wende (2001), Wende (2007), Wächter and Kemp (2010), Zha (2003).

Misconceptions of the internationalisation of education

Although in the previous part of the paper several authors (Knight 2004, Parsons and Söderqvist 2005, Zha 2003) pointed out definitions to explain the internationalisation of education, often the content of the internationalisation process has remained unclear and given some confusion. The following section will seek to clarify this confusion on the basis of several authors (Fielden 2007, De Wit 2011, and Knight 2011) by pointing out important characteristics of the terminology and aspects which are an important part of the internationalisation process and are not the process itself.

Internationalisation strategies of universities are often wrongly confused with the international strategy although these two ideas are not the same. The most important differences between the two strategies are that internationalisation is considered to be much more comprehensive. Internationalisation strategy combines many different activities and programmes through which a university achieves its initial aim – to become more international. International strategy, on the other hand, focuses mainly on recruiting international students (Fielden 2007).

De Wit (2011) and Knight (2011) also agree that internationalisation has become a central part of higher education at the national and institutional level, but the complexity of the term has led to several misconceptions about the internationalisation term. De Wit (2011) gives insight to the core of the problem by explaining that the internationalisation process assumes an integrated process-based approach in higher education but currently it is activity and instrument based. Knight (2011) adds that often the internationalisation term has been used to describe a variety of international, global, worldwide and intercultural events and activities.

Knight (2011) and de Wit (2011) state that often the internationalisation of higher education is wrongly considered as having only:

- international students in the classroom;
- international reputation and global brand;
- international accreditation;
- education in the English language;
- study abroad programmes;
- international subjects;
- variety of international partnership agreement.

The authors also add that it is not right to consider that higher education is international by nature, internationalisation is a goal in itself and there is no need to test intercultural and international competencies specifically (Knight 2011, De Wit 2011).

Based on the above, individual internationalisation activities and concepts should not be considered as internationalisation of education. Instead these are considered an important part of the wider picture of the internationalisation process, which is taking place at national and institutional level. It is important that internationalisation strategy

and goals are well articulated and understood by stakeholders to achieve expected national and institutional outcomes.

Globalisation versus internationalisation of higher education

In the following part, the relations of internationalisation and globalisation are explored. This part of the research is important because several authors (Altbach and Knight 2007 and Huang 2012) find that the meaning and function of internationalisation and globalisation have often been confused and misused. Huang (2012) starts off the discussion by pointing out that the term internationalisation has been discussed since the 1960s, while globalisation came into use only in the late 1980s. Brandenburg and de Wit (2011) have a different view as they claim that the modern understanding of internationalisation was taken into use and the importance of internationalisation started to grow only in the 1980s. Altbach and Knight (2007) and Denman (2000) give an explanation for the role of globalisation in society. This states that globalisation has a major role in integrating political, economic and socio-cultural aspects of society into the delivery of worldwide higher education, which contribute to knowledge society, economy and service sector development. Urry (1998), Huang (2012) and Scott (1998) add that globalisation plays a major role in mixing different cultures and traditions, dissolving national borders and structures.

Lee (1995) draws a distinction between globalisation and internationalisation by saying that globalisation facilitates cooperation and diminishing borders and defines internationalisation in terms of transnational economy scale and cooperation. Along with internationalisation comes competition among humans (Lee 1995). Huang (2012) adds that internationalisation is valuing the existence of different nations and seeks to encourage cultural exchange and globalisation and internationalisation very closely interlinked Knight (2004). Knight (2004:5) defines the relationship between globalisation and internationalisation by saying that “internationalisation is changing the world of higher education and globalisation is changing the process of internationalisation”.

Altbach et al. (2009) also inquire into the close but controversial relationship between globalisation and internationalisation of higher education. Altbach et al. (2009) find that globalisation is influenced by many factors, which are out of the control of the

academic sphere, such as development of information and communication technology (ICT), spread of English language, more integrated world economy and trade, and a widely spread international knowledge economy as influential factors. Van Vught et al. (2012) and Teichler (2012) have an opposite view about the two terms and draw a concrete line between the terms, saying that internationalisation is similar to traditional international cooperation, knowledge transfer and mobility and focuses on quality and excellence. Globalisation is about competition and puts education into position of a public good and a market-oriented, tradable commodity (Van Vught et al. 2002).

It can be concluded that the terms internationalisation and globalisation are often used interchangeably but they function differently. All the authors find that the terms are closely interlinked and have an influence on the role of higher education. This means that it is important to keep in mind the distinction when designing the strategy because internationalisation is a strategy for increasing competitiveness in a more interlinked and globalised world.

1.2. Rationales for internationalisation

National and institutional level goals

The following sections explore the rationales which drive the international process at national and institutional level. In the first part of the paper authors (Knight 2004, Zha 2003, and Söderqvist 2005) stated that the objective of internationalisation of education is to increase the level and quality of higher education. De Wit (2011) on the other hand argues that enhancing the quality of education is not the only motive for internationalisation. He identifies four categories of motives for internationalisation at national and institutional level: economic, social and cultural, political, and academic. He considers the economic rationales to be the dominant ones, but nevertheless thinks the motives are not mutually exclusive and actions are often derived from several different motives.

The economic motives have often received attention from many authors (Becker and Kolster 2012, De Wit 2011, Goodwin and Nacht 1988, Green, 2003, Jansen et al. 2007, Wächter and Kemp 2010). The authors have pointed out that important economic objectives are human resource development, commercial trade, additional income generation, developing the knowledge economy through research or high-end academic

programmes, preparing students to work in a globalised work environment, diminishing the deficit of workforce through attracting talented professors, students and researchers to the country, the role of the education system's direct contribution to a country's economy through education service trade, building up the university and country's international image through an alumni network and increasing the university's national and international competitiveness.

Social and cultural motives have been mentioned less often and these include developing understanding of social and cultural relations and intercultural communication skills to manage in an internationalised environment (De Wit 2011, Deardorff 2006 and Jansen et al. 2007).

For political motives, several authors and sources (Fielden 2007, Government Accountability Office 2007, Jansen et al. 2007, De Wit 2011, Knight 2004, Wächter and Kemp 2010) list supporting international cooperation and stimulating immigration of employees and students, strategic alliances, nation building, building up the institution and country's international image and reputation and educating students with knowledge of world political and cultural matters.

For academic motives authors (Wächter and Kemp 2010, Lim 2009) suggest the following: developing comprehensive international research and high-end academic programmes, equipping students with a wide and diversified worldview and critical thinking, increasing the university's national and international competitiveness and attracting talented professors, students and researchers. Knight (2004) and Fielden (2007) also give the following academic motives: knowledge production, quality and international standards enhancement for students.

There is a distinction between the goals of the research based universities and applied science universities. For the research based universities the internationalisation priority is to increase research cooperation between institutions, whereas applied science universities focus mainly on student exchanges, student recruitment and offer international study programmes (Wächter and Kemp 2010).

It can be concluded that there are four different kinds of motives, which explain internationalisation. These motives include economic, social and cultural, political, and academic motives, with economic motives often being the dominant ones. Based on the above the motives for different types of universities are also often different. This is

important because different universities and governmental institutions might have different internationalisation motives, however, for designing the most effective strategy nationally it is necessary to reflect and align the motives of all stakeholders in the strategy. This grants commitment of all parties and coordination of activities during the execution phase.

National and Institutional level push and pull factors

While the previous paragraphs explored the national and institutional motives for internationalisation, the following part is relevant because it explores push and pull factors. The push and pull factors are divided between the national and institutional spheres and these play a major role in the student decision-making process about studying in a specific country. Altbach (1998), Becker and Kolster (2012) and Mazzarol and Soutar (2002) explain international student mobility through the push-pull factor model. The authors argue that the push and pull factors influence students' decisions in choosing a particular country and university as their study destination. Mazzarol and Soutar (2002) explain that unfavourable conditions in the home country act as push factors and attractive conditions in the host country act as pull factors. Furthermore, if a country does not have pull factors, it may be regarded as a hindering factor, for example a country's strict immigration policy (Becker and Kolster 2012).

Although the push and pull model is very useful in explaining international student mobility and decision-making process, it also has its downsides. The push and pull factors have created an impact on the student's decision-making process but it is important to keep in mind that these are external factors, which influence the student's decision-making (Li and Bray 2007 and Chen 2006). The final decision will depend on the person's own preferences and individual characteristics such as the socioeconomic background, personal characteristics and preferences, but also academic ability, and social and creative capital (Li and Bray 2007). In general push factors can be divided into two main categories – personal push factors and environmental push factors (Becker and Kolster 2012). The personal push factor is directly related to individual preferences and motives, whereas environmental push factors are related to national characteristics. Furthermore, there is no clear definition that could explain personal push factors due to the large variety of personal preferences (McMahon 1992).

Overall student decisions have three main influences – student characteristics, significant others, and external push–pull factors (Chen 2006). For student personal pull factors to study abroad see Table 1.2.

National level pull factors are attracting students to choose a specific country as a host country for higher education (Chen 2006, Becker and Kolster 2012, Mazzarol and Soutar 2002). For national pull factors destination country's government has a major role in building up the country's attractive reputation and universities need to work on the institutions' outstanding image among international students. Pull factors play a relevant role in attracting international students to start studies in the destination country and influence student decision-making at the institutional level (Mazzarol and Soutar 2002). See Tables 1.2 for the list of pull factors which have been used to describe the student selection process of a host country, a city and an institution.

It can be concluded that push and pull factors play an important part in student decision-making about choosing to study abroad and making the choice about the destination country and the university. The above showed that push and pull factors can be divided into several different categories – personal push and pull factors, significant others and external push and pull factors – and all of these play an important role in student decision-making. From a university perspective it can be said that national and institutional level pull-factors overlap to a large extent. It is important that pull factors are understood when designing strategy and action plans on national and institutional level. Institutional and national action plans can have activities with similar goals since pull factors greatly overlap, which enable achieving superior results compared to individual efforts.

Table 1.2 List of personal pull factors and pull factors influencing the student decision-making process at a national (country, city) and institutional level.

The main pull factors at a country, a city and an institutional level	Pull factors for students to study abroad
The availability of information on the country, city and the higher education institutions, existing cultural/economic/educational/historical/linguistic/religious/strategic linkages, and active promotion or recruitment policies.	(Better) availability or better quality of specific programme in destination country.
The quality and reputation of education in the country and city (for instance, but not only, through rankings of institutions within a country), and the level of academic freedom.	Competitive advantage and better reputation for the future.
Recognition of degrees or other qualifications by the host institution and country of origin, and a high marketability of the degree/qualification.	Experience and understanding about different (western) culture.
Costs of higher education and living in a country and city (tuition fee, availability of financial aid, travel expenses, living costs).	Possibility to migrate to a new country.
The nature of governance and administrative procedures of a higher education institution (public vs. private, academic freedom, the speed of application procedures and student satisfaction with institutional communication).	Possibility to have better income in the future.
Safety levels within the country, city, institution/on campus (crime rate, racial discrimination).	Option to gain new experience and enjoy the process rather achieve any goals.
Internationalisation of a country, a country and an institution (number of foreign students and staff, availability and diversity of international programmes, stringency of immigration policies).	Contribute to common goal to change the world.
The living, study and work environment of a country, a city and an institution (climate, the quality of ICT and research facilities, study rooms, ambiance, employment and immigration opportunities/regulations during and after study, demographic growth/decline).	Increase personal network and connections.
Social and geographical linkages (friends/relatives living or studying in same country, city, institution, geographical proximity).	
A high perceived quality and reputation of the institution and its education and research (e.g. as expressed in rankings of the institution, its programmes/faculties and its academic staff).	

Source: Author's tables based on Chen (2006), Becker and Kolster (2012), Mazzarol and Soutar (2002) and Wächter and Kemp (2010) and author's own input.

Students' decision-making process

As the previous part of the paper discussed the push and pull factors and their influence on the student decision-making process about studying abroad, this part of the paper will look into the international students' decision-making process about studying abroad in more detail. The section will look at the decision-making students use in choosing the study destination and specific university. Mazzarol and Soutar (2002) claim that international students first make the decision about studying abroad and then about the specific programme. Then students make their decision about destination country and then choose an institution within that country, or in some cases they choose the institution first and skip the country selection process. Chen (2006) analysed Mazzarol and Soutar's (2002) initial findings and offered a new synthesis model to explain international students' decision-making process. Chen (2006) tested the model on Canadian graduate students and found that the order of choosing the institution, the host country and the city is different from what Mazzarol and Soutar (2002) claimed. The modified synthesis model offered by Chen (2006) claims that after the students make the decision about studying abroad and about the specific programme, they start searching for the country, city and institution simultaneously. For Chen's (2006) synthesis model see Appendix 1.

It can be concluded that in the majority of cases students first make up their mind if they want to study abroad, then they start looking for specific programme they are interested in and only then do students choose the country, city and institution simultaneously. It is important to understand the students' decision-making model for designing effective measures for attracting international students. This also means that the good reputation of universities alone is not enough to attract international students since a country's image plays a focal role for initial destination decision. This means that marketing of the destination country is equally important, if not more important, than the introduction of specific university and its programmes.

1.3. Internationalisation strategies and activities

Internationalisation strategies

The next paragraphs explore the importance of internationalisation strategies at institutional and national level. Fielden (2007) starts off the discussion by claiming that most universities have already completed or are working on their internationalisation strategies. Childress (2009: 306) also states “the development of internationalisation plans is critical to the operationalisation of institutions’ internationalisation goals.” The focus and content of internationalisation activities and strategies have changed and the nature of internationalisation has shifted from reactive to a pro-active strategy and has started to be more mainstream rather than an added value for institutions (Brandenburg and De Wit 2011). Also taking into account the complexity of the term internationalisation of education, it is important that the general definition of internationalisation strategy does not specify motives, benefits, outcomes, activities and interest groups because these characteristics differ by state and higher education institutions (Wächter and Kemp 2010).

Söderqvist et al. (2005) offer two kinds of internationalisation strategies for higher education institutions – deliberate strategy and emergent strategy. The deliberate strategy is based on long-term planning and guided by specific goals for developing long-term action plans. The emergent strategy does not focus on planning ahead in the long-term but rather emerges from a series of actions and is based on uncontrolled activities (Söderqvist et al. 2005). Knight (1994) approaches the internationalisation strategy by saying that the strategy consists of six development and implementation phases - awareness, commitment, planning, operationalisation, review and reinforcement. Childress (2009) and Olson et al. (2006) agree with Knight’s approach in general, but say that although the theory proposes that institutions go through the phases in sequences, in some cases institutions do not follow the same order. Institutions might start off with a review process and move forward to an internationalisation plan (Childress 2009 and Olson et al. 2006).

Childress (2009) points out the importance of the role of management and leadership in executing the plans and achieving the internationalisation goals of

university. It is important to find an internationalisation plan which best suits the organisation's culture and to have taskforces responsible for carrying out the internationalisation activities. The faculty engagement in campus-wide activities benefit further integration of development, implementation, and monitoring of university internationalisation plans (Childress 2009).

Fielden (2006) takes a very comprehensive and holistic view to internationalisation of education by saying that cooperation should not be only among universities but also integrated within government institutions, research organisations, funding bodies, private businesses and the alumni. An inclusive approach is necessary to take a look at the internationalisation strategy at the national, sectoral and institutional level, because internationalisation activities at all these levels are relevant but also differ to a large extent. The national and sectoral level influence the internationalisation process through different policies, measures, programmes, activities, laws and finances whereas at the institutional level internationalisation takes place mainly in a practical manner, with some exceptions (Knight 2004).

It can be concluded from above that for universities' to achieve internationalisation goals it is necessary to have an internationalisation strategy. The above also stated that to have an effective strategy it is necessary to update the strategy constantly with university plans and goals. An effective strategy should be part of the cooperation of different institutions and government bodies which play important role in internationalisation process. It is important because strategy sets down methods and activities how university will achieve its goals.

Activities at home and abroad

While the previous section of the paper concentrated on the importance of internationalisation strategy, the next parts will explore the internationalisation activities at institutional and national level as a tool to achieve the strategy. De Wit (2011) refers to Knight's (2004) definition of internationalisation and notes it is important to distinguish the two spheres in the internationalisation of higher education – internationalisation “at home” and “abroad”. The activities related to the “home” dimension are curriculum and study programme related and also integrated with teaching and learning process, research extracurricular activities and integration with

local culture. Activities related to the “abroad” dimension include cross-border mobility of programmes, projects, students, staff, etc. (De Wit 2011). De Wit (2011) comments that higher competition and commercialisation of education on a large scale have challenged traditional activities like partnership and student exchange and teaching and curriculum development, have become very important. Zha (2003) adds that it is important to look at academic and organisational programmes separately to ensure that academic and organisational elements are considered both equally relevant in the internationalisation process. For institutional activities at home and abroad to achieve goals in internationalisation strategy see Table 1.3.

It can be concluded from above that the activities undertaken abroad are closely related to the specific goals set for the destination country, whereas activities in the home country focus on the development of university programmes and cooperation with partners at home to carry out and support internationalisation activities abroad.

Academic cooperation

While the previous part of the paper focused on activities in general, the following part will take a look at academic cooperation as an important part of the university activity agenda. Several authors (Chan 2004, Kolster 2012, Zha 2003) find academic cooperation to be an important part of university activities.

Becker and Kolster (2012) and Zha (2003) believe that international research and academic cooperation and recruitment of international students have become an important part of universities’ every day activities. Chan (2004) agrees that in the changing world of borderless education, cooperation among universities has become more important. Zha (2003) also states that professional demands for university show the need for more international higher education and knowledge of the multicultural environment. The internationalisation process is costly and pushes independent institutions for collaboration. On the other hand the sustainability of institutional networks is rather unstable because these are based on personal connections and are strongly influenced by the stability of these relations, the parent institution objectives and conditions of financial support. There should not be too high expectations for the networks because these are easily being withdrawn and serve mainly as a tool to achieve personal interests (Gray 1996).

Table 1.3 Institutional activities to achieve goals in internationalisation strategy.

Section I - Activities at the country of institution	Section II - Activities abroad
Involvement of international students for short term exchange or for full degree programmes.	Increasing the number of international academic research projects.
Internationalising the curriculum and related materials;	Supporting international internships.
Offering courses in foreign language (English).	Facilitating home students studying abroad.
Offering internationally attractive courses (for example master programmes in English).	Sending academic staff overseas for teaching, research or consulting.
Cross-cultural training.	Research projects undertaken abroad.
Link between academic programmes and other strategies.	International volunteering and charity work.
Country and region specific courses and centres.	Establishing joint research centres abroad.
Facilitating community-based partnerships with non-governmental organisation groups or public/private sector groups.	Establishing an offshore campus delivering home degrees/awards.
Setting foundation for international linkages, partnerships, and networks.	Capacity building or technical assistance projects.
Increasing the number of joint programmes (in applied science) - split degrees, joint programmes and other accredited agreements.	Joint educational courses and programmes: Delivery of courses offshore jointly with partners, accreditation of partners' programmes as part of a home degree/award, establishment of cooperation relations/partnership.
Planning alumni-abroad programmes.	Promotion and marketing of universities.
Involvement and exchange of international lectures and researchers.	
Increasing the number of international academic research project.	
Facilitating international activities within the university campus.	
Hosting international events and conferences.	
Promoting international job opportunities for students, including non-profit activities.	
Involving university governance and internationalisation of management.	

Source: Author's table based on Wächter (2010), Morris (2009) and Knight (2004).

To sum up the previous section - academic cooperation is an important and relatively cost efficient tool for universities to achieve goals in internationalisation strategies. Academic cooperation has direct benefit in building up internationalisation competence among academic staff and contributes to relationship building between people in home and partner universities. However, it is important to keep in mind that academic cooperation might face some limitations because the success depends on the stability of personal relations. The role of academic cooperation is important for the current work because many universities, especially research universities, consider the role of academic cooperation as high priority in the internationalisation agendas.

Student recruitment

The next paragraphs will move on to the role of student recruitment and analyse the increasing importance of this activity in the internationalisation process. Several authors (Becker and Kolster 2012, Husband 1996, Levine 2000) believe education is becoming an even more transnational market-led concept with various players competing for students. Students will have more options among education programmes and higher education staff will become more independent and less tied to concrete higher education providers. In competitive market conditions, for a successful student recruitment process it is important to investigate the student decision-making process and understand the factors which influence the decision-making (Wilkins and Huisman 2010).

Pull factors play an important role in the student recruitment process. The role of pull factors has become more relevant in a student's decision-making process to study abroad but the push factors do not play such an important role anymore because overall living conditions and access to higher education in many countries have improved (Wilkins and Huisman 2010). Also an efficient recruitment strategy should emphasise and develop the national pull factors, such as marketing of quality of domestic programmes, university's reputation and ranking (Becker and Kolster 2012, McBurnie and Ziguras 2007 and Wilkins and Huisman 2010), or through policy instruments create new pull factors such as new scholarship programmes to attract international students (Gribble and McBurnie 2007).

International student recruitment has the best outcome if there is a national level student recruitment strategy, which has long-term purposes and is in correlation with destination country national policies and programmes. The student recruitment should be an integrated part of wider set of academic partnership programmes and activities, such as international double degree programmes, bilateral research and innovation collaborations. For an efficient recruitment strategy for attracting top-quality students it is also relevant to know what are the latest developments in other recruitment and recruiting countries and for student recruitment at postgraduate level the national strategy and scholarship programmes are very important (Becker and Kolster 2012).

It can be concluded from above that student mobility has contributed to the rise of student recruitment as one of most important tools of internationalisation. It has also currently received more attention due to the increasing economic motives of universities. In more competitive market conditions the universities are seeking to attract the best students and the recruitment strategy has often become an integrated part of overall internationalisation plans and activities in the destination country.

Evaluation of the internationalisation strategies and activities

While the previous paragraphs analysed the importance of internationalisation strategies and activities, the following section takes a closer look at different tools of how to measure and evaluate these internationalisation strategies and activities. Authors have suggested three distinctive ways to measure the level of universities' internationalisation. The first option is to measure internationalisation of universities on the basis on higher education ranking systems. The ranking systems are highly esteemed among institutional players, policy-makers and stakeholders active in the international higher education sector (Marginson 2007 and OECD 2009). The two main institutional ranking systems for evaluation are "World University Rankings" implemented by Shanghai Jiao Tong University Institute of Higher Education and the Times Higher Education Supplement of "World University Rankings" (Marginson 2007). The ranking systems differ considerably but have a good and trustworthy name on market. The Jiaotong University ranking does not measure the international elements but instead evaluates comparable aspects such as research performance (Liu and Cheng 2005). The Times ranking, on the other hand, measures more concrete indicators such as the

number of international staff and students (Marginson 2009). The methodologies use different criteria to rank universities and there is no single approach to measure the level of internationalisation (Usher and Savino 2006).

The second option for measuring the level of internationalisation on university campuses is to use the criteria created by the National Association of Foreign Student Advisers (NAFSA). The tool uses criteria consisting of three options and was created and studied by NAFSA, the American Council on Education (ACE) and two researchers, Jane Knight and Hans de Wit. The criteria offer a set of aspects for setting down cornerstones for internationalisation strategy and goals. The tool sets a good basis for evaluating the existence of components that universities need to undertake at home and abroad to achieve the success of internationalisation goals. For the NAFSA measurement criteria see Appendix 2.

The third option is to use a model suggested by Elkin et al. (2005) for evaluating the level and success of the internationalisation level of universities. The model measures 13 different internationalisation goals of university on a scale of 0-10. These goals include activities taken at home and also abroad. The model gives a visual overview of two aspects - the current internationalisation stage and the expected, ideal stage, of internationalisation. The mode is useful for universities to measure expected outcomes for a certain time period and make corrections and up-to-date decisions about future plans and goals. For the evaluation model see Appendix 3.

It can be concluded that the measurement tools play an important role for universities to evaluate the performance of internationalisation strategies. Periodical reviews provide necessary input for evaluating effectiveness of internationalisation activities and give feedback for reviewing and redesigning the strategy. For useful and applicable outcomes universities need to modify the measurement tools according to the specific country, environment and development stage of the internationalisation process.

2. THE EMPIRICAL STUDY OF NON-BRITISH EU UNIVERSITIES' ENTRY TO THE CHINESE EDUCATION MARKET

2.1. Methodology

In the empirical part the research uses case study evidence for analysing and building a model for market entry for the EU non-British universities to the Chinese market. Cameron and Quinn (1988) support theory building from case studies. They believe there is a greater likelihood of generating a new theory because the method combines different evidence and gives a basis for new approaches to a subject. Eisenhardt (1989) points out that a theory based on case studies is also testable with assessable format and hypotheses, does not require previous literature or prior empirical evidence and gives up-to-date insight into theoretical and empirical developments. Eisenhardt (1989) and Yin (2009) recommend cross-case techniques for analysing the case studies. Eisenhardt (1989) recommends using the cross-case technique for deep analyses through structured and diverse forms of data. The author suggests three techniques for analyses - comparing similarities and differences within different categories or dimensions, making comparison between different cases or analysing data by sources. Yin (2009) says an advantage of the cross-case synthesis is the technique to treat each case study separately and aggregate the findings across all cases, which allows the cases to be analysed at a variety of levels.

Case study evidence

The next section takes a closer look at the case studies chosen for the research. The focus of the study is narrowed down to small and middle-sized non-British European Union universities. The term 'non-British' refers to EU higher education institutions, wherein the first official language is not English. The focus on non-British universities was chosen for the research because the English speaking countries have advantages to attract international students because of their English programmes. De Wit (2011) says that after English became the dominant language of scientific communication in the world in the 21st century, the British universities have had a more competitive position. Becker and Kolster (2012) claim that the British higher education system is very well developed and is ranked as the second most popular study destination, mainly because of very good international reputation and English programmes. Macready and Tucker

(2011) also state that the UK is very attractive for many students because of the fact that all the courses are taught in English, and because of the very good higher education reputation, with many universities in the top 100 ranking and a great variety of programmes on many different degree levels and institutions. The focus is on the Chinese higher education market because of its size and relevance on the global higher education market. According to the Ministry of Education (2011) statistics there are more than 3,000 higher education institutions. Furthermore, about 9.1 million Chinese students took the college-entrance exam in 2011 whereas only 6.85 million Chinese students were admitted to higher education institutions (McDonald 2012). This means that the Chinese market is the top supplier of mobile students and continues to be an important source of students in the near future. Namely, in China about 20% of the people are currently 14 or younger - constituting a pool of 260 million potential university students for the near future (Tucker and Macready 2011).

Besides being an important source of students China has become also important destination among foreign students. This is mainly because of China's increasing economic importance. Foreign countries and students have become more interested in the China specific know-how, language and culture. In 2009 the number of foreign students studying in China was around 238,184, which was 6.6% more than in the previous year (Tucker and Macready 2011) and around 36% of these students attended a diploma programme (Mapping Mobility 2011).

Also, the role of the Chinese higher education sector has become more important and has started to influence the dynamics of the international higher education sector. The Chinese higher education sector has become more influential because the Chinese government has implemented several national level policies and measures, which play an increasing role in facilitating inbound and outbound student mobility in China. One of these measures is the Chinese government scholarship programme to support the studies of Chinese students abroad and international students in China (Tucker and Macready 2011).

Country case studies

The following section focuses on three research case studies chosen for the research: The Netherlands, Poland and Finland. These case studies were examined in-depth at an

institutional and national level. The specific country case studies were chosen because of their different higher education models, experience of internationalisation of education and on the Chinese higher education market. The case of the Netherlands represents a western European higher educational model, with tuition fees on the study programmes and extensive professional experience working on the Chinese higher education market. The case of Finland is relevant because of its Nordic higher education model without tuition fees on the programs and its extensive reforms on Finnish higher education sector. The reforms give more independence for universities and set more important focus on the foreign students and higher education markets, including the Chinese higher education market. The case of Poland on the other hand represents an Eastern higher education model with tuition fees on the study programmes, which has extensive high-level relations with the Chinese government.

It can be concluded that the case studies are similar because they have had experience working in the Chinese higher education market but their success, tools and development stage differ. For example, Finland and the Netherlands both have governmental representative offices for higher education in China. The representative office for the Netherlands is called Nuffic Neso China, which was established in Beijing in 2001, with the first director being Mr Robert van Kan and current Director being Mr Marrik Bellen. The Finnish representative office CIMO was established in 2009 and is run by Ms Lukia Yang. The Finnish Embassy has additionally appointed a Counsellor for Science and Education, Mr Mika Tirronen to China in the autumn of 2012. Poland, on the other hand, does not have a representative office for higher education and has not appointed a counsellor for educational matters specifically, although a counsellor, Mr Artur Wszyński, has been responsible for the China-Poland education related matters. The interviews with all the national level representatives gave insight into the countries' education system and offered historically and culturally different and complementary views from the Central, Eastern and Northern parts of Europe.

University case studies

The paragraphs below explore the institutional case studies chosen for the research. At the institutional level the aim was to choose for interviews the universities which have representative offices based in China, but the cases of Polish universities were an

exception as none of the Polish universities have so far established a representative office in the Chinese market. In the case of Poland, a number of applied science and research universities were approached and University of Gdansk and Gdansk University of Technology were chosen for the research because these universities have attracted the largest number of Chinese students to study in Poland during 2010-2011. Although the universities have not founded a permanent office outside the country they have experience of working in the Chinese market. In addition to the information received from the representatives of the universities, the research was supported with data received from Mr Wojciech Marchwica, working at the privately owned “Study in Poland” initiative.

For the Dutch case, Erasmus University Rotterdam, University of Groningen, Tilburg University and The Hague University of Applied Sciences were chosen for the interviews. These four universities were chosen according to their experiences of working in the Chinese education market. The varieties of case studies also give the option to set benchmarks for other European universities. The university selection was diversified among research and applied science universities. In total, eight Dutch universities have representative offices in China (Bellen email, 2012) and according to the Nuffic report (Mapping Mobility 2011) the University of Tilburg, The Hague University of Applied Sciences and Delft University of Technology attracted the largest number of Chinese students during 2010/2011. Delft University of Technology was excluded from the research because of its very specific focus on technical programmes (Delft 2012). The Hague University of Applied Sciences’ internationalisation agenda presents a good overview of applied science university activities. The University of Tilburg has attracted quite a large number of Chinese students through research cooperation even though they only recently created the internationalisation strategy for the Chinese market. Erasmus University Rotterdam and University of Groningen were also added to the research because of their active presence in the Chinese market.

In the case of Finland, Aalto University was chosen because it is the only example of a Finnish university with a permanent representative office in China. The university’s office is based in Shanghai and operated in cooperation with Tongji University. The case of Aalto University is also interesting because the university was founded in 2010 by merging three established Finnish universities: The Helsinki School of Economics,

Helsinki University of Technology and The University of Art and Design Helsinki. The new form of university is unique due to its focus on strong multidisciplinary education and research.

Questions for interviews

The paragraph above gives an insight about the interview of the research. The interviews with all the representatives were conducted either face to face, through Skype or phone. The only exception was Mr Marchwica from Study in Poland, who submitted the statistics and information through email. The average length of an interview was an hour and contained open-ended questions. All the questions were prepared specifically for the interviews with representatives of institutional level or national level according to the general methodology of the thesis.

During the interviews the Netherlands, Poland and Finland's representatives offered important insight which needs to be taken into consideration when entering the Chinese higher education market. For each country the list of aspects is very diverse and varies from recommendations to concrete action plan suggestions. Each interview section will be followed with the country specific list of suggestions. The interviews presented in the thesis are the reports of the original interview texts. For the interviews questions see Appendix 4 and for the original interviews see Appendix 5-13.

Developments in the Chinese higher education market

The following paragraphs investigate the developments and dynamics of the Chinese higher education sector. The section begins by studying the changes taking place in the higher education sector and finds that higher education has become one of the priority areas for the Chinese government. The Chinese government has been focusing on increasing the quality of education and the level of internationalisation of Chinese universities. For fulfilling these goals the government has started several initiatives. In 2010 the Chinese government introduced a National Outline for Medium and Long-term Education Reform and Development (2010-2020) (hereafter the Plan). The Plan has set out long-term goals and plans to modernise and increase the quality of education. According to the Plan, higher education is expected to become more international by attracting international students, higher education institutions, and scholars and

researchers to China (Wa 2012). According to the Plan the main goal for the Chinese higher education market is to become the largest destination country for international students (Wa 2012). Other government higher education initiatives are called Project 985 and Project 2011, the aim of which respectively are to give priority status to 40 universities to become world-class universities and to set a priority focus on 100 Chinese universities to become Chinese top universities during the 21st century. These policies have allocated additional resources and finances for the priority universities to increase the level of higher education quality and implement more activities to become more international within the institutions (China 2012).

Also, the size of the Chinese higher education market has been tremendous and it has been influencing the dynamics of international student mobility. According to the 2007-08 Nuffic statistics (Mapping Mobility 2011), the greatest number of international students came from China accounting for 15.3% of all international higher education students in the world. The statistics provided by the Chinese Ministry of Education considers the total number of Chinese students studying abroad in 2011 to be 339,700. Out of this total number, 12,800 students were sent abroad and sponsored by the State, and 12,100 students were sent abroad and sponsored by other organisations. The largest part, 314,800 Chinese students, made their own arrangements and covered their own costs to study abroad. The total number of outbound Chinese students increased in 2011 by 19% compared to 2010 and the total number of Chinese students studying abroad in 2011 was around 1.4 million (Australian 2012).

Although the Chinese market has faced an increasing number of mobile students, the rate is expected to face a decrease in the future because of the Chinese government's one-child policy. It is estimated that the number of 15-19 year old students is likely to drop from 117 million in 2005 to 85 million by 2020 (Tucker and Macready 2011). However, a dramatic decrease in the number of mobile students is not expected to happen in the near future due to the Chinese government policy which supports the outbound mobility with national grants (Mapping Mobility 2011), the deficit in higher education places and the increasing number of self-sponsored students (Tucker and Macready 2011).

In the light of these developments, institutional and national level cooperation with the EU universities has been very important for the Chinese government and the

Chinese government has been looking to increase the number of cooperation and exchange projects with the EU member states. So far the higher education cooperation has focused on student and delegation exchange, exchange of study materials, international conferences and research cooperation, although in the future the cooperation is expected to increase the number of joint programmes and agreements and also the number of agreements between China and the European countries on Mutual Recognition of Academic Degrees (Ministry 2012). The Mutual Recognition of Academic Degrees is an important Chinese government regulation which is used to recognise academic qualifications and degrees with other countries (Ministry 2012c).

It can be concluded that as the Chinese higher education sector is becoming more developed and the quality of higher education increases China becomes a more important study destination for international and Chinese students. Also, if in the long term the number of Chinese students is expected to decrease it is going to be more difficult for foreign universities to compete for Chinese students.

2.2. The case studies

The Dutch case

The Dutch higher education sector

The following section takes a closer look at the Dutch higher education sector. The Netherlands has a binary education system, which means that there are two main groups of education institutions: research universities and universities of applied science. A research university focuses on research oriented work in an academic or professional field whereas a university of applied science focuses on a professional programme in the applied arts and sciences field (Study in 2012a). There are 18 research universities and 43 applied science universities in the Netherlands (Study in 2012b, c) which offer education for 666,859 students (Nuffic 2012e).

For a comprehensive statistical overview of international students in the Netherlands several different measurement criteria have been used. According to the data provided by the OECD (2012), in 2010 about 49,137 international students were enrolled in the Dutch universities. The information from the OECD (2012) differs from the information provided by the Nuffic (Mapping Mobility 2011), which states that in 2010-2011 about 56,600 international students were enrolled for the diploma degrees

and about 8,400 students were studying for credits in the Dutch universities. Although the measurement criteria give different outcomes the number of incoming students has been growing annually with more than half of the international students coming from non-European countries (OECD 2012, Mapping Mobility 2011). According to the Nuffic statistics, the largest number of international students came to the Netherlands from Germany, accounting for 24,750 students, followed by 5,450 Chinese students (Mapping Mobility 2011). The OECD (2012) statistics showed that in 2010 the number of Chinese students in the Netherlands was 3,818, accounting around 8% of all international students. Although there are some statistical differences, both sources showed that the number of Chinese students enrolling to the Dutch universities faced a decline between 2006 and 2009. According to the OECD (2012) statistics, the decline was around 10%. However, from 2010 onwards the growth rate has started to increase again but the growth in 2011 was -0.5% compared to 2006 (OECD 2012).

Development of the Dutch international higher education expertise

The following part gives an insight about the historical development of the Netherlands' experience working in the international higher education markets. The Netherlands built its experience on internationalisation of education through extensive cooperation with developing countries in the 1950s; Nuffic was established in 1952 to help strengthen higher education cooperation in developing countries (Nuffic 2012a). Nuffic (Nuffic 2012b) has been driving the internationalisation process of the Netherlands' higher education and research at home and abroad in cooperation with the Dutch Ministry of Education, Culture and Science and the Dutch Ministry of Foreign Affairs. The goals of Nuffic Neso are "the general promotion of Dutch higher education and the enhancement of cooperation between higher education institutions in the Netherlands and institutions in Neso regions" (Neso 2012). The Dutch government supported the universities' initiatives to become more international for the first time in 1999 (the government 2012a). Although the diplomatic relations between the Netherlands and China started to develop already in the 1970s (Netherlands 2012) the government set strategic focus on the Chinese education market in 2001 when the Neso Office was opened in Beijing (Nuffic 2012c). According to the statistics, the Netherlands has now become China's second-largest trade partner in the EU (China Daily 2012).

Interviews at the national level

Interviews at the institutional level were conducted with Robert Van Kan (the first Director of the Nuffic Neso Beijing office) and Marrik Bellen (the current Director of Neso Nuffic China office)

Neso Nuffic China

The Netherlands' state-level initiative to start Nuffic Neso China office in 2001 was driven by a historical relation with developing countries, including China. Through the development cooperation projects the professors became aware of new markets and students who could pay for the education themselves. The government saw a role in supporting these universities, which want to be active in the international higher education market by providing them relevant facilities and shaping necessary conditions. The Dutch government made a proposal for Dutch universities that wanted to internationalise and participate in the programme. The universities had to cover one-third of the total programme costs, which included offering scholarships for students and setting up Nuffic Neso offices (Van Kan 2012).

The Nuffic Neso was very a valuable example of public-private partnership at the time because universities had little experience about entering foreign markets and were very willing to cooperate with the government to share their information and experience with other universities. The platform gave a good basis for cooperation between the representatives of the Embassy of the Netherlands and the Chinese partners. The national programmes and the government institution Nuffic Neso have had a major effect in developing an internationalisation strategy and have facilitated the entry of the Dutch universities to the Chinese higher education market. In addition to Nuffic Neso a marketing platform for education export was established which is still responsible for higher education marketing cooperation and has an advisory role for stakeholders. The current name of the organisation is DHENIM (Dutch Higher Education Network for International Marketing) (Van Kan 2012).

The case of the Netherlands was successful because the timing was right for universities to internationalise and enter the Chinese market. It was the time when the Chinese universities and students were looking for alternatives to the UK and the US and when the Netherlands came in with plenty of good quality English programmes. It

was also the time when there was not much information available and all the information that the government gave was considered valuable (Van Kan 2012).

Cooperation between the government and universities

The government also set down their own objectives and linked the policies with business interests, such as good future relations with upcoming markets. For the universities, the government gave tools but did not set down very specific guidelines for an action plan. The universities had to formulate their own policies of what kind of students they want, how they will get the students, which regions and universities they target, etc (Van Kan 2012). The most important government organisations involved in planning and executing the internationalisation process in the Netherlands were the Ministry of Education, which led the process, but the Ministry of Economic Affairs, the Ministry of Justice, and the Ministry of Social Affairs were also closely involved. Nuffic's role was to implement the internationalisation policy but it also served as an advisory body for the government and the Ministry of Education in policy making. Nuffic was also there to coordinate the discussions and developments between the different universities and institutions (Van Kan 2012).

Evolution of Nuffic Neso Office's role in Beijing since its establishment

In 2004 the Dutch government applied a new rule according to which all the Chinese students who want to study in the Netherlands need to apply for the Neso Certificate (Van Kan 2012). In 2010 the Neso Certificate was renamed the Nuffic Certificate (Nuffic 2012d). The Nuffic Certificate is used to assess the students' level of English language and authentication of students' documents such as degrees and diplomas (Nuffic 2012d). In 2010 Nuffic Neso office went through two main changes. The name of the Nuffic Neso Beijing Office was changed to China Office because other Neso offices had also the country name and the scope of Neso activities covered the whole of China. Furthermore, Nuffic Neso China changed its Chinese cooperation partner because of management and cooperation issues with the previous partner to the China Education Association for International Exchange (CEAIE). Currently the universities are not required to finance one-third of the activity costs of Nuffic Neso offices. All the costs are covered by the Ministry of Education through Nuffic from the state budget and

all the universities, which have joined the Code of Conduct, can enjoy the Nuffic Neso service free of charge (Bellen 2012).

Over time the Nuffic Neso activities have changed and although it is very important to provide value-added services for universities activities it can be challenging because the universities are at different levels of internationalisation. Nuffic Neso has started issuing Chinese education market research reports for the universities, uses more digital media for general promotion and attends education fairs. Institutional cooperation, setting up private-public scholarships and developing the alumni network through trainings and social events have also become important. Also, more private Dutch companies are starting to be interested in having access to the Dutch alumni network for business purposes. Nuffic Neso has also initiated a funding programme for Chinese students' scholarships. The scholarships themselves come from Dutch universities and private companies (Bellen 2012).

Measuring the success

It has been rather difficult to evaluate the outcomes of Nuffic Neso. There has not been a single measurement tool for assessing the direct effect of Nuffic Neso activities because universities collect and evaluate statistics on a different basis. The student mobility also depends on various activities and many of these are often out of scope of Nuffic Neso. The only activities Nuffic Neso is able to measure are related to effect of digital marketing activities and to evaluation surveys among the Chinese students going to the Netherlands (Bellen 2012). It is really difficult to make a distinction between successful and less successful examples of Dutch universities in China because there is no good basis of evaluation. One option for talking about successful examples in the Chinese market is to look at the universities' with an experienced representative on the Chinese ground (Bellen 2012).

Lessons learned

In the early days the most important lesson for Nuffic Neso was the admission of students, who were unqualified and did not meet the requirements. This led to students dropping out of schools or being in a constant flow of changing universities, which became a major social problem and led to establishment a Nuffic Certificate and a Code

of Conduct to improve the quality of students and to regulate the students' admission procedures. After the Certificate was applied the number of Chinese students applying for the Dutch higher education institutions dropped but the quality of the students increased (Van Kan 2012). The Code of Conduct (2009) is very concrete and protects the interests of the students and institutions. The documents regulates the information and support the institution should provide to the international students, principles of cooperation between institutions and agents, admission and the English language requirements for students.

Until recently the main focus of Dutch higher education institutions has been on Chinese student recruitment but now it has become a concern for the universities to attract more Dutch students to study in China. To stay competitive in the international market it is very relevant for the Netherlands to have people with relevant Chinese experience. Currently the overall Dutch student mobility is one of the lowest in Europe. There are several potential reasons for the low mobility and little interest towards China (Bellen 2012):

2. Little initiative to study abroad because of good quality of education in the Netherlands;
3. Under the Bologna Process the study pressure is greater and study period shorter, which limits the ability to go abroad;
4. Attractive social life in the Netherlands;
5. Financial incentive – fines for extending study period;
6. Little knowledge of Chinese universities.

Overview of the universities

The universities for the case studies have very different profiles, history and international reputation. The following section gives insight into the background, history, institutional focus and international rankings of the Dutch universities.

Tilburg University was founded in 1927 and has been a provider of high-quality education and research specialising in the social sciences and humanities. In 2012 Tilburg University ranked among the 201 to 225 best universities in the Times Higher Education World University Ranking (Tilburg University 2012, Times Higher 2012a).

Erasmus University of Rotterdam was founded in 1973 as a result of a merger of the Medical Faculty Rotterdam and the Netherlands School of Economics. The university focuses education and research in three main fields: Economics and Management, Medicine and Health Sciences, and Law, Culture and Society. The University also has a good reputation of being practically oriented. In 2012 Erasmus University Rotterdam ranked 72nd position in the Times Higher Education World University Ranking (Erasmus University 2012, Times Higher 2012a).

University of Groningen was founded in 1614 and enjoys an international reputation as one of the oldest and leading research universities in Europe. In 2012 the University of Groningen came in 89th place in the Times Higher Education World University Ranking (Groningen (2012a, Times Higher 2012a).

The Hague University of Applied Science was founded in 1987 as a result of a merger of fourteen smaller institutions of higher professional education in the Netherlands. The University offers mainly BA and MA programmes on applied research. The University was not in the list of Times Higher Education World University Ranking (Dream Foundation 2012, The Hague 2012a, Times Higher 2012).

For an overview of the range of tuition fees for English programmes for non-EU/EEA students, provides the numbers of the Chinese students studying in the universities and the English degree programmes offered by the universities see Appendix 14. Based on the Appendix 14 there seems to be no evidence of direct connection between the number of English programmes and the number of Chinese students. This means that the universities with wider selection of English programs do not have more Chinese students compared to universities with less English programmes.

It can be concluded that that The Hague University of Applied Sciences and Erasmus University Rotterdam are the youngest universities of all the case studies. Despite the universities' young age, the universities started to internationalise and cooperate in the Chinese market in their early days. The Hague University of Applied Sciences focuses on applied sciences studies whereas Erasmus University focuses on research in a practical manner. Out of the four case studies, the University of Groningen and Tilburg University have a longer history than the previously mentioned ones. The University of Groningen was founded almost 400 years ago and Tilburg University was founded about 85 years ago. Both of these universities are research oriented universities,

which are respected in Europe for their high quality. Tilburg University has been considered the best specialist university in the Netherlands and it has received high international recognition in the fields of economics, business, management and law by the Shanghai Academic Ranking of World Universities, the British QS World University Rankings and the Times Higher Education World University Rankings (Tilburg, 2012b).

Interviews at the institutional level

Interviews at the institutional level were conducted with Mr Jacques Van Vliet (Tilburg University), Mr Joseph Morrin (The Hague University of Applied Sciences), Ms Yaxian Wu (Erasmus University Rotterdam), and Mrs Xuefei Knoester-Cao (University of Groningen) (2012)

Objectives for Dutch Universities in the Chinese market

The main tool of The Hague University of Applied Sciences is cooperation with agents for active student recruitment. Through student recruitment the university wants to have more international students in the classroom and fee paying students to bring additional resources to the university. One interviewee said that at one point a larger focus was on the fee paying students whereas now it is more balanced between the two (Morrin 2012). Similarly to The Hague University of Applied Sciences, Tilburg University is also interested in recruiting Chinese students. Besides student recruitment Tilburg University is also interested in promoting and deepening the institutional cooperation in the Chinese education market, connecting Tilburg University stakeholders with relevant partners in the Chinese market, informing parties in the Chinese market about the University of Tilburg, and staying connected and maintaining active relations with the Chinese alumni (Van Vliet 2012). Erasmus University Rotterdam and the University of Groningen are also interested in attracting talented Chinese students to study in the universities, although these universities do not use agents for active recruitment. Both universities also undertaking active research cooperation with Chinese partner universities (Wu 2012 and Knoester-Cao 2012).

Target students for Dutch universities

The Hague University of Applied Sciences is actively focusing on recruiting students for English preparation, and there are also a large number of BA students and a smaller

number of MA students. The university's efforts are concentrated on recruitment of students for preparation and BA programmes because to enter the MA programmes students need to have work experience. The university has found a niche market because in China the largest demand for higher education is at BA level (Morrin 2012).

Tilburg University is targeting mainly MA students and PhD candidates, which are relatively smaller groups of people compared to BA students. The past experience has also shown that PhD students mainly go abroad through their professor's connections with other countries (Vliet 2012).

Erasmus University and the University of Groningen do not actively work with agents for student recruitment. The universities use educational fairs, social media, alumni network and partner universities for attracting Chinese students. For Erasmus University and the University of Groningen the largest numbers of Chinese students come to study in the MA programmes and to some extent they have been attracting some PhD candidates. Neither of the universities has been successful in attracting students for BA programmes. This is also due to university and state-level regulations, which sets unclear entry requirements for the BA students (Wu and Knoester-Cao 2012).

Pull factors for Chinese students to study in the Netherlands

All the interviewees acknowledged that the main pull factors for Chinese students to study in the Netherlands are competitive tuition fees, variety of English programmes and good living environment. Also, the quality of education and good reputation of the Netherlands was mentioned a couple of times (Morrin 2012, Vliet 2012, Wu 2012, Knoester-Cao 2012).

The development of an internationalisation strategy for the Chinese education market

The interviews revealed that all of the universities have long-term institution wide internationalisation strategies with China being an important target country. Mr Morrin (2012) pointed out the importance of China as a target market by stating: "China is important because it is big and powerful, important for the students in the future, easily accessible and has very straight forward market entry mechanisms such as agents and networks to recruit students." The strategies have been proved by the university

managements and evaluated regularly. For The Hague University of Applied Sciences, the University of Tilburg and the University of Groningen the internationalisation strategies are detailed containing specific yearly targets and action plans. For Erasmus University Rotterdam the policy of internationalisation is rather general, at faculty level there are detailed action plans (Wu 2012). Mr Morrin stated that: “For The Hague University of Applied Sciences during the past 15 years of the university’s internationalisation strategy has stayed the same. Only the tactics have changed.” Mr Vliet stated: “The internationalisation within the university very much depends on the people who are in charge.” (Vliet 2012)

All the universities’ representatives acknowledged the importance of institution-wide internationalisation activities. Each university also has central level internationalisation offices, which are responsible for managing and coordination internationalisation plans. Often other administrative and supportive offices, such as marketing and communication departments are also involved. At faculty level there are people responsible for internationalisation activities, but they do not necessarily have control over the policies. These people make sure that faculty level plans and goals accord with university overall internationalisation strategies. Mr Vliet mentioned: “synchronising the general policy from the top with the specific faculty goals is necessary because each faculty has different goals.”

All of the universities have specific China expertise within the institutions. In the University of Groningen each faculty has its own international relations office. In Erasmus University Rotterdam there is the Erasmus University China Center (EUCC), which coordinates all the activities related to China. All of the universities also have a representative in China to coordinate and carry out internationalisation activities. The EUCC is also responsible for coordinating the PhD programme and cooperation with the China Scholarship Council (CSC). Erasmus University Rotterdam is recruiting PhD students financed by the CSC. Erasmus University Rotterdam also has an international law research centre for Chinese Law. Mrs Knoester-Cao (2012) stated that: “the 10 year career in the University of Groningen has contributed great deal for developing long-term relations with partner universities and has had a major affect improving the quality of international students.”

The representative of the University of Tilburg, Mr Vliet, stated that even with a good internationalisation strategy for universities with little international reputation it is important to have support from and cooperation with the government to gain access to the Chinese education market. Mr Vliet stated that although there was an internal struggle between the research and applied science universities because research universities did not consider applied science universities as equals, it was important to cooperate with each other. Mr Van Vliet stated: “Our country is too small to export our internal problems between research and applied science universities.” (Vliet 2012)

Almost all of the universities evaluate the internationalisation process and success in the Chinese higher education market by measuring the number of Chinese students attracted yearly. Only Erasmus University Rotterdam does not specifically measure the number of Chinese students but looks at the number of Asian students studying in the university. Mr Morrin (2012) also said: “The process is monitored by looking at the numbers and making interviews with the students to get a response on the quality and evaluate the opinion from other faculties and departments.”

Programmes in the Chinese market

The Hague University of Applied Sciences has been building agent networks and working with Neso China office for active student recruitment, arranging promotional activities, social networking and digital marketing. It has also slowly started developing institutional cooperation for student exchange and joint programmes. In the future the university wants to send more Dutch students to China and for this it is important to have a network of partner universities (Morrin 2012).

The Tilburg University’s representative office in China on the other hand has been focusing on cooperation with the China Scholarship Council (CSC) for PhD candidate recruitment and relations building with cooperation partners. The universities’ China representative has also been organising a variety of events for building a solid basis for an alumni network (Vliet 2012).

The Erasmus University Rotterdam’s main focus is on building the university brand, developing the partnerships with Chinese counterparts, facilitating research cooperation, and organising activities for alumni chapters. The university is also working together with the CSC for recruiting Chinese PhD candidates. The Chinese

partner universities are also an important source of Chinese students for MA and PhD programmes but recruitment is never considered as an end goal itself for the cooperation. The representative in China also has great responsibility for developing the activities with Chinese partner universities and updating professor level contacts to the institutional level for student and staff exchange, research and cooperation projects, lectures, seminars, workshops. The university representative in Beijing is also responsible for giving updates of the latest Chinese higher education policies back to the Netherlands (Wu 2012).

University of Groningen is taking a variety of programmes to the Chinese education market. The programmes include international student fairs, joint programmes and double degree programmes for PhD students with Chinese partner universities. The university also set up the Tsinghua-Groningen Research Centre on European Studies and the Dutch Studies Centres in Fudan University. The university is also actively using its own alumni students to connect with the institutions and partners in the Chinese education market. The University of Groningen is only working with the top Chinese universities to attract students with the best merits for MA programmes. Similar to the Erasmus University Rotterdam, student recruitment is never an end goal of the cooperation projects with Chinese universities (Knoester-Cao 2012).

Recommendation for the market entry based on the Dutch experience

Based on the interviewed Dutch representatives' suggestions for universities entering the Chinese higher education market, the author suggests:

Agreements

- A Mutual Recognition of Academic Degrees;
- A clarity on regulations and on the visa procedures and screening.

Strategy

- To be on a list of recommended universities by Chinese Government;
- Institutional and national internationalisation strategies to prioritise the Chinese market for cooperation;
- A strategy to promote universities together;
- Cooperation of the ministries, the universities and the embassy in the home country and China;

- Solid relations with Chinese universities;
- Use of Chinese national policies;
- A focus on target students;
- Patience to see the results.

Product

- Greater image of a country by “hanging out with bigger friends”;
- Reasonable tuition fees;
- A solid infrastructure and trained staff to facilitate entry of international students;
- A clear understanding of the Chinese market and products to offer;
- A reputation of a good service and quality of programmes;
- Niche and unique selling points (USP) for the country;
- A scale to be more attractive;
- Information about the level of English language and programmes in the country and universities.

Instruments

- A central-level organisation based in China responsible to facilitate the market entry;
- An active embassy in China to brand the country and open the right doors for national agencies;
- An alumni network for promotion;
- The right recruitment agents on the Chinese market;
- A permanent representative for higher education cooperation in China;
- A team which can work in terms of relations and not in terms of procedures;
- Evaluation of the experience in the past and to make plans for the next steps.

The Finnish case

The Finnish higher education sector

The Finnish higher education system is divided between the universities and polytechnics. Universities focus on research and scientific and artistic learning whereas polytechnics focus on applied sciences (Higher Education 2012). There are 16 universities and 25 polytechnic universities (Institutions 2012), which hosted more than 300,000 students in 2007 (Statistics Finland 2008). The number of international students enrolled to higher education programmes in Finland in 2010 was 14,097 and it has been

growing constantly. Between 2006 and 2010 the growth rate of international students has been about 57% (OECD 2012). Out of all the international students around 14% (2,105 students) were Chinese and the statistics show that the number of Chinese students have double between 2000 and 2010 (Study in 2012c).

Governmental level relations with China

Diplomatic relations between China and Finland started in 1950 and already in 1953 the two governments signed an inter-governmental trade agreement, the first of its kind. The political, economic and trade relations between China and Finland have only been improving (Economic 2008). In 2010 it was reported that Finland became the second largest trade partner for China in the Nordic region (Economic 2011).

The diplomatic cooperation has also given impetus for educational cooperation. There are several initiatives at the Finnish government level towards Chinese education market. In 1995 a Nordic Centre was established in Fudan University. Currently six Finnish universities are also part of the Centre besides one Chinese University and 20 Nordic Universities. The Centre focuses on research cooperation and mobility (Nordic 2012). Another initiative is Finland's China Action Plan published by the Ministry of Foreign Affairs (Ministry 2010). The action plan puts more focus on deepening political, commercial, economic relations and also deepens cooperation with China in the following areas: energy, environment, climate change, education, research and innovation, cultural cooperation, development policy, law enforcement and border control authorities.

The Centre for International Mobility (CIMO) office was opened in 2009 in Shanghai, China to facilitate cooperation between Finnish and Chinese institutions (CIMO 2012). In addition to the China specific policies and programmes there is also a Strategy for the Internationalisation of Higher Education Institutions in Finland 2009–2015 published by the Ministry of Education and Culture (Ministry 2009). The aim of the strategy is to develop the knowledge economy through improving the quality of international higher education and research.

Interviews at the national level

The interviews at the national level were conducted with Mr Mika Tirronen (Finnish Counsellor for Science and Education in Beijing) and Mrs Lukia Yang (Project manager at CIMO Office in Shanghai).

For the Finnish universities the focus has been very important and activities in the Chinese market have been built on very specific niche areas, such as architecture, design and environments issues, etc. Research on environmental issues has been one of the key research areas and in 2009 the Sino-Finnish Environmental Research Centre was established in Nanjing University campus. Despite the variety of cooperation projects in the Chinese market there is still very much an overlapping of activities because universities are not willing to cooperate with each other (Yang 2012).

At the government level Finland has been investing into science cooperation with China. The first joint call for research funding cooperation was launched with the National Science Foundation of China in 2002. Since 2007 the calls have been on an annual basis and the last two calls were joint calls between China, Finland and Germany. Additionally, Finland has been promoting research cooperation between Finnish and Chinese universities. Research cooperation has been active in the fields of forestry and bio-medicine. There is the Sino-Finnish Life Science Forum, which goals are to stimulate research cooperation through a joint seminar for universities and it also serves as a tool to recruit students. Another tool for PhD candidate recruitment is a Summer School organised in several different parts of Finland. The Summer School is organised for international students interested in Finnish language and culture (Tirronen 2012).

The main concern for the government is the low student mobility between Finland and China. However, through recent reforms universities have become more independent and it has become more difficult for the government to take very concrete measures to influence university plans. It has also been very difficult to measure outcomes of institutional activities taken in the Chinese market because there is a lack of coordination in the activities. There is also a lack of coordination between the activities of universities and this is very inefficient (Tirronen 2012).

Overview of the university

Aalto University was established in 2010 from the merger of three Finnish universities: The Helsinki School of Economics, Helsinki University of Technology and The University of Art and Design Helsinki. The University combines six schools, which offer possibilities for strong multidisciplinary education and research. Aalto University wants to become one of the leading institutions in the world (Aalto 2012a). The following Table 2.1 gives an overview of the number of Chinese students and degree programmes in the Aalto University and also reveals that studying in Aalto University is free for the non-EU/EEA students.

Table 2.1 Tuition fees, number of Chinese students and degree programmes in the Aalto University.

FINLAND	Number of Chinese students for full programmes and preparation courses (yearly)	Tuition fee ranges per year for full-time programmes for Chinese students (in euros)	Number of full-time BA and MA degree programmes in English
Aalto University			
BA	366	No tuition fee or tuition fee covered by scholarship	1
MA		No tuition fee or tuition fee covered by scholarship	63

Source: Author's table based on Chang (2012), Aalto University (2012 b, c, d), Mervi Rantanen (2012)

Interview at the institutional level

The interview at the institutional level was conducted with Mrs Mervi Rantanen (a manager of international partnerships at Aalto University).

Goals and target students for Aalto University in the Chinese market

The main goals for internationalisation have been to increase the number of international students in the classroom, quality of education, research, and country's competitiveness globally. Aalto University mainly targets MA and PhD students.

The development of an internationalisation strategy for the Chinese education market

The case of Aalto University differs from the previous cases as the university has internationalisation integrated into the university's overall strategy and achieving the goals is delegated to the faculties. It means that the university does not have a separate internationalisation strategy and internationalisation is considered a strategic enabler, which facilitates the way to achieve strategy and key performance indicators. The university strategy consists of four main areas: research excellence, pioneering education, trend setting-art and societal impact. The main performance indicators of Aalto University are promoting international visibility better, international recruiting (staff and students), increasing mobility, and developing language strategy, improving the promotion of internationalisation of teaching, studying and learning, and promoting international partnerships.

The goals for the strategy are set and concrete plans to achieve the goals are made until 2020. The goals for the integrated strategy are rather general and focus on Asia but not on China specifically. Although China has been important target country for the university and university saw the necessity to establish a representative office in Shanghai to further develop cooperation on the Chinese market.

On a yearly basis the plans and goals are more concrete at school levels. At the top management level the Vice Rector for knowledge networks is responsible for internationalisation. Also, the international relations department and people at the faculty and school level have a major role in achieving the goals of internationalisation. Within the university there are a couple of research organisations focusing on the Chinese market and collaboration projects with Chinese institutions but there are no specific China experts working for the international relations department (Rantanen 2012).

Pull factors for Chinese students to study in Finland

The main pull factors for the Chinese students to study in Finland have been the country's good reputation, advancement in the technology fields (technology studies, science parks, many technology companies, including Nokia), a strong Chinese community and free education.

Programmes in the Chinese market

Aalto University in cooperation with Tongji University opened a representative office in Shanghai, which was initiated by the universities' professors who were undertaking research cooperation in China. The physical space is called the design factory and it is a platform for various kinds of activities, including teaching, learning, and research and company collaboration for design and product development. In cooperation with Tongji University there is also to some extent cooperation with local recruitment agencies in China. There are also student and professor exchanges, joint programmes and research collaboration with Tongji University and other partner universities in China. The most important activities are education and research collaboration.

Recommendation for the market entry based on the Finnish experience

Based on the interviewed Finland representatives' suggestions for universities entering the Chinese higher education market, the author suggests:

Strategy

- Combination of bottom up and top down market entry model;
- Solid relations with the Chinese universities;
- Commitment from the university leadership;
- A market research before a market entry;
- An extensive cooperation between universities interested in the Chinese education market.

Product

- Niche and unique selling points (USP) for the country.

Activities

- Large number of student and staff mobility programs.

Instruments

- A central-level organisation based in China responsible to facilitate the market entry.

The Polish case

The Polish higher education sector

The Polish higher education system is divided between the universities and institutes of higher education (Universities of Applied Sciences) (Baltic education 2012) and in Poland there are over 450 higher education institutions (Ministry of Science 2012). In Poland the total student population is almost 2 million, holding the fourth position in Europe (after the United Kingdom, Germany and France) for the number of people enrolled in higher education institutions (Ministry of Science 2012). According to the OECD statistics (2012) in 2010 the number of international students were 18,356 and by 2012 the number of international students had already reached 24,253 (Siwinska 2012). The number of Chinese students studying in Polish universities in 2010 was 405, which accounts about 2% of all international students.

Governmental level relations with China

The Polish government has had long historical ties with the Chinese government and in the 1950s there was an agreement for student exchange between the universities (Wang 2011). Taking into account the length of the relations, Poland has attracted a relatively smaller number of Chinese students. According to the Study in Poland platform, in 2010 and 2011 the number of students were 515 and 565 accordingly (Wojciech 2012).

Currently, the Polish Government does not have a national level strategy for the internationalisation of higher education. Despite the fact there is no governmental policy to support internationalisation the most active organisation for the internationalisation of education is a non-profit organisation called the “Perspektywy” Foundation. The “Perspektywy” Foundation owns the Study in Poland and Study in Warsaw trademark and their purpose is to promote and support education locally and internationally. Universities have set up another initiative called Boym Universities Consortium to facilitate the study opportunities for Chinese students in Poland (Perspektywy 2012).

Interview at the national level

The interview at the national level was conducted with Mr Artur Wyszynski (Polish Counsellor in Beijing).

Poland has no government level policy for internationalisation. The interest to be more international has started to emerge only recently. After joining the EU the government started to focus more on cooperation with European universities. Although the situation is currently changing because there are fewer students, the mentality has stayed quite the same. There is also a lot to improve because the procedures and regulations are quite difficult, including the visa process. Also, processing the paperwork is difficult because the rules are unclear. There is also no Mutual Recognition of Academic Degrees between the Polish and Chinese government, which is used to recognise academic degrees between the two countries.

There have been some cooperation activities at the government level. At the end of 2011 a joint forum between 20 Polish Universities and 40 Chinese universities took place, with the President of Poland also participating. In the summer of 2012 a Chinese delegation visited Poland to discuss further future cooperation, including the educational field. The most important achievements for Polish universities in the Chinese market have been the establishment of cooperation agreement between the University of Gdansk and Harbin University for a Polish language and culture programme. There have also been almost 60 years of Polish studies in Beijing and there was an agreement signed according to which every year 40 Chinese students study in Poland and 40 Polish students study in China with state sponsored scholarships.

Major responsibilities for internationalisation of Polish higher education lie with the Ministry of Education, but there are also privately owned organisations, such as the “Perspektywy” Foundation and Boym Universities Consortium to promote Polish universities in China. There is also cooperation with the CSC to find Polish and Chinese universities to create possibilities to meet and start cooperation.

Overview of the universities

The both universities, which have attracted the largest number of Chinese students are based in Gdansk. The Gdansk University of Technology was established in 1945. Today there are 26,000 students studying in nine faculties (Gdansk 2012b). The University of Gdansk was established in 1970. Currently there are 33,000 students in the eleven faculties (The university 2012c). The following Table 2.2 gives an overview of the

range of tuition fees for English programmes for non-EU/EEA students, number of Chinese students and degree programmes offered in the two Polish Universities.

Table 2.2 Tuition fees, number of Chinese students and degree programmes in Polish Universities.

POLAND	Number of Chinese students for full programmes and preparation courses (yearly)	Tuition fee ranges per year for full-time programmes for Chinese students (in euros)	Number of full-time BA and MA degree programmes in English
Gdansk University of Technology			
BA	46	4,000-4,800	2
MA		4,200-5,000	5
University of Gdansk			
BA	75	3,500-4,000	2
MA		2,500-3,500	5

Sources: Author's drawing based on University (2012a, b), Gdansk (2012), and Wojciech M. Marchwica (2012)

Interviews at the institutional level

Institutional level interviews were with Mrs Magdalena Popowska (representative of Gdansk University of Technology) and Adam Baczkowski (University of Gdansk).

Goals for internationalisation

The Gdansk University of Technology's main goal is to increase the international standard within the institution by attracting more international students and to give Polish students the chance to study abroad. The financial means and having more funds have been important for the university as well. For the University of Gdansk the initial goal for the Polish universities to become international was mainly related to a demography problem in the EU and the fact that Polish universities have fewer students each year. For both universities China has been one of the priority countries for internationalisation and universities have been recruiting the BA and MA students.

Both university representatives added that the Polish Government has not been able to provide universities with relevant support for internationalisation and promote cooperation between universities when entering the Chinese market. Instead, the

privately owned brand Study in Poland has been promoting the study opportunities for commercial purposes.

Pull factors

Both university representatives said that the main pull factors for international students to study in Poland are low tuition fees and low living cost because Chinese students are cost sensitive. They added that also the fact that universities are public institutions and offer good quality education has been an important pull factor for the students. Recommendations from alumni students also play an important role in attracting students.

The development of internationalisation strategy for the Chinese education market

For the Gdansk University of Technology the internationalisation strategy is rather general at the university level but faculties have a more concrete strategy. Mrs Popowska mentioned that the action plan and setting targets are rather vague and the university has had difficulty to follow it. Mrs Popowska commented that the university has not really taken concrete measures to achieve internationalisation goals. For the University of Gdansk, in practice there is neither internationalisation policy nor strategy on the university level and Mr Baczkowski is responsible for all the internationalisation activities within the institution. The initiative for international agreements comes from the faculties and the rector signs these but the execution of the agreements depends on the people.

Programmes in the Chinese market

The Gdansk University of Technology has signed two cooperation agreements with Beijing International Studies University and Shanghai Normal University. These two agreements have not really given the expected outcome. The additional activities taken for the Chinese market have included participating in education fairs, opening programmes in English and recruiting students from the Chinese market.

The University of Gdansk has participated in the international education fairs in Beijing. The first education fair did not have a direct effect on the number of Chinese students because no one was recruited. The visits to other provinces of China had more

effective results. The University of Gdansk has also signed a joint programme agreement with Harbin University for Polish language and culture studies at BA level. According to the agreement, Chinese students spend the first and fourth year in Harbin University and the second and third year in University of Gdansk studying the Polish language and culture. It is also relevant that the University of Gdansk website is also in Chinese and the university has agreements with agents who recruit students for the university. The interviewee said it is important to take part in the trade shows because the students want to see a real person.

Recommendation for the market entry based on the Polish experience

Based on the list of the interviewed Polish representatives' suggestions for universities entering the Chinese higher education market, the author suggests:

Strategy

Form an extensive cooperation between universities interested in the Chinese education market;

A strategy to promote universities together;

Institutional and national internationalisation strategies to prioritise the Chinese market for cooperation;

Set down a focus on the Chinese provinces for cooperation.

Product

Niche and unique selling points (USP) for the country.

Activities

Student and staff mobility programs.

Instruments

A central-level organisation based in China responsible to facilitate the market entry.

2.3. Analysis and synthesis

The analysis will compare and check the validity of the theoretical models of internationalisation with the empirical findings of case studies. The study will analyse if the empirical findings accord with the theoretical findings or offer a new insight into the models.

The Netherlands

The case studies showed that the Dutch higher education institutions have been very successful with the internationalisation process and with entry to the Chinese higher education market by attracting the largest number of Chinese students to study in the Netherlands. The case can be considered a benchmark for other countries looking to enter the Chinese higher education market. Although the case has been very successful it needs to be kept in mind that for the Netherlands the timing for the entry to Chinese higher education market was favourable. The timing was right because there was very little competition in the market and the Dutch universities had experienced working with developing countries through colonial ties. As the findings indicated, the competition in the Chinese market has been growing and several interviewees also mentioned that in the current area it is relevant to be more specific about the market niche and products.

Internationalisation of higher education in the Netherlands

The Dutch government and universities have made major steps to establish national and institutional internationalisation strategies to integrate international, global and intercultural aspects into the delivery of higher education. These efforts have been undertaken to have a globally competitive economy and attractive education system for international students. To achieve these goals the institutions and governments have undertaken action plans. The institutional and governmental plans and goals are comprehensive with goals and offer a wide range of activities which support increasing the level of international higher education. These actions are integrated at national and institutional level and cooperation has been playing important role in the process. Strong parallels could be drawn with the theoretical framework of internationalisation of higher education and especially with Jane Knight's (2004) definition.

The empirical findings confirmed the theory that globalisation has had an influence on the role of higher education and education is more often considered a private commodity (Altbach and Knight 2004, 2012 and Kirp 2003). The study showed that Dutch higher education has become more independent from the government and works as a private commodity - higher education is accessible for everyone, universities are very independent in their decision-making and have more freedom to decide over

tuition-fees and programmes. The empirical findings also showed that universities act in a very competitive environment, work proactively to be attractive internationally and are open to changing market situations. It can be concluded that the cooperation between the government and institutions remains to be important but institutions have become more independent in planning and executing the internationalisation activities.

Motives for internationalisation

As Jane Knight (2004) stated, the overall goal for the internationalisation of higher education has been the enhancement of the quality of higher education. This has been also the primary goal for the Dutch government and institutions although there have been other motivations. De Wit (2011) theorised that the driving rationales for internationalisation and entering new markets have been economic motives. The empirical findings of the Dutch universities case studies showed that universities want to increase the quality of higher education through internationalisation, and when entering new international markets universities and governments have more specific goals. These goals include additional income generation through attracting fee-paying international students and increasing international academic know-how within the universities. The study also showed that the Dutch government has found the internationalisation of education and institutional higher education cooperation in the Chinese higher education market to be an efficient tool for building high level political relations between the governments. It can be concluded that the Dutch case revealed that to achieve expected outcomes in the international higher education sector, institutional and national motives should be aligned and support each other.

Internationalisation strategy

The Dutch case proved the deliberate strategy for internationalisation offered by Söderqvist et al. (2005), which is about long-term planning and goal setting for the universities and the government. The study showed that the Netherlands' long-term political ambitions and economic plans are integrated into internationalisation strategy to support the development of international higher education. Fielden (2006) and Childress (2009) also mentioned the importance of faculty engagement in carrying out the internationalisation activities. The case of the Netherlands has been very successful

as the staff of the university has been involved in the internationalisation process and the universities have relevant Chinese market competence within the university for working in the Chinese market.

Wächter (2010), Morris (2009) and Knight (2004) offered an organisational strategy for carrying out a successful internationalisation strategy at institutional level. The empirical study showed that all of the Dutch universities active in the Chinese higher education market closely follow the theoretical framework, which pointed out the relevance of having central international relations office coordinating the work, collecting relevant know-how and carrying out the internationalisation activities.

In the case of Erasmus University Rotterdam there is also a specialised centre only for China related matters. The government-university cooperation for entering the international higher education market has received too little attention. Fielden's (2006) theory pointed out the importance of cooperation among different private and national institutions but the findings of the study revealed that cooperation within and among the Dutch universities and government has been the key for successful entry to the Chinese higher education market. It can be concluded from the above that well articulated and clear national and institutional motives play a relevant role for constructing comprehensive internationalisation strategies in the Netherlands. Measurable short and long-term goals play an important role in an efficient strategy for the Chinese higher education market. For achieving expected outcomes in the Chinese market all the national and institutional level counterparts have been aware of the goals set in the internationalisation strategy; also the Dutch national and institutional strategy goals have supported each other.

Activities in the Chinese higher education market

The interviews offered an interesting insight about the university activities taken on the Chinese market. The interviews seem to confirm the theory offered by Wächter and Kemp (2010) that applied science universities mainly focus on student recruitment and research universities on research cooperation. Representatives of the Hague University of Applied Science stated that the university has set a primary focus on student recruitment and the representatives stated that research universities (University of Groningen and Erasmus University Rotterdam) mainly focus on research cooperation.

The representative of the applied science university stated that to achieve the goal, the university is working directly with agents for student recruitment, and the representatives of the research universities stated that their universities are not working directly with agents because student recruitment is not their primary goal but research cooperation is instead. Further investigation showed that universities do not work with agents, but agents work with universities indirectly, and the universities might not know which students come through agents. The main agents in China are promoting the research universities among the Chinese students who are looking for study options abroad. Also, the research universities have been present in the major agents' fairs to promote their programmes among Chinese students (Bole 2012; Fu 2012; College 2012; Globeedu 2012 a,b,c; New 2012; Liuxue 2012). Also the figures of Chinese students studying in the Dutch universities give an indication that student recruitment is important for all the universities. It can be concluded here that for the research and applied science universities student recruitment is equally important but research universities are more successful in building up relations in the Chinese higher education market. The empirical research also revealed that in some cases the research cooperation is built on personal relations between professors, which gives a basis for Gray's (1996) scepticism about the long-term sustainability of research cooperation because the relations are often built on personal connections.

The empirical study revealed two important aspects about programmes taken in the Chinese market. First, some of the activities have become more important than others with the evolution of mass-communication tools. Second, not all the activities work well in the Chinese higher education market. The active presence in the student fairs has become less important but social networking and digital marketing have become more relevant with the development of ICT. Building a strong basis for an alumni network is very important in the Chinese market. The importance of an alumni network lies in the fact that personal recommendations are relevant in the Chinese market and an alumni network has been used as a marketing and recruitment tool for future students. For instance, Chen (2006), Becker and Kolster (2012) and Mazzarol and Soutar (2002) claim that students' friends and family have great influence on the student decision-making process on studying abroad. Another interesting finding in the empirical study showed that for successful entry to the Chinese education market it is

necessary to have permanent presence in the Chinese market through an active embassy, a person representing higher education institutions in the embassy, and an independent national higher education representative office or person representing the university. None of the theories specifically pointed out the relevance of an overseas higher education representative office but the study showed that Dutch universities with a larger number of Chinese students and active cooperation projects all have a person representing the university in the Chinese higher education market. Additionally, the Netherlands has set up the Nuffic Neso office in China and the Embassy is actively promoting the Dutch higher education system in China.

It can be concluded that Dutch universities' internationalisation strategies and the measurable goals have set the basis for specific activities in the Chinese market. Also, the Dutch government's support has been important for executing the activities in the Chinese market. Meanwhile, the focus of Dutch internationalisation activities, such as student recruitment, has been related to the increasing mobility of Chinese students.

Push and pull factors in the student decision-making process

The empirical study did not directly confirm or reject Chen (2006) and Mazzarol and Soutar's (2002) theory about the decision-making order for choosing the specific programmes, destination country and institution. However, the empirical study showed that the student decision-making process is very closely related to the Dutch push factors for attracting foreign students, as stated by Chen (2006), Becker and Kolster (2012), Mazzarol and Soutar (2002).

These push factors include competitive tuition fees, a variety of English programmes, good living environment, high level of education and the outstanding reputation of the Netherlands. These factors give an indication that for decision-making push factors at country and city level are equally important with institutional level pull factors.

As stated by Becker and Kolster (2012) that if a country does not have push factors then students are less likely to move away from that country. The empirical findings also showed that the Dutch students prefer to stay in the Netherlands for higher education because there are no strong push factors for them to move. Also, the quality of higher education and living conditions are very good. For the same factors

international students find it attractive to move to the Netherlands for higher education. It can be concluded that in the Dutch case universities have been successfully using their national and institutional pull factors to achieve its student recruitment related goals. However, the case showed that institutional image plays significant role in the student decision-making process as offered by Chen (2006).

Evaluation of the internationalisation process

At the national level the empirical findings showed that measuring the success of internationalisation has been rather difficult and there has not been one common approach as stated by a variety of authors (Liu and Cheng (2005), Marginson (2007) and institutions (OECD 2009, National Association 2012). The Director of Nuffic Neso China Office stated it is difficult to measure the level internationalisation of universities as Neso only plays a supportive role for universities and they do not have a very good basis to measure the data. In contrast, Nuffic has applied some measurement tools because the report on student mobility (Mapping Mobility 2011) stated the names of universities, (University of Tilburg, The Hague University of Applied Sciences and Delft University of Technology) which have attracted the largest number of Chinese students to the Netherlands.

At the institutional level, universities have been measuring the success of internationalisation with different tools, such as international rankings, interviews on the quality and feedback from the faculties and foreign students, and also by counting the numbers of Chinese students studying in the university. The representative of The Hague University of Applied Sciences claimed that the tool Nuffic is using for counting the number of Chinese students is controversial as it does not take into account the number of Chinese students studying in the preparation programmes. The empirical study proved that the Nuffic's techniques to measure the data is not always in correlation with the universities' techniques as the data provided by the Erasmus University Rotterdam about the number of Chinese students studying in the university does not accord the information provided in the Nuffic report on student mobility (Mapping Mobility, 2011). This shows that there is a great difference between the national and institutional level of how the success of internationalisation is evaluated and measured in the Netherlands.

It can be concluded that in the Dutch case use of advanced evaluation tools plays an important role in measuring internationalisation components for improving the strategy further. It is also important to measure several key performance indicators as provided in the NAFSA National Association (2012) model as measuring only the number of international students, as suggested by Elkin et al. (2005), only gives a quantitative input of the outcomes.

Lessons learned

An important lesson for the Netherlands came with the quality of students as the market entry model did not regulate the quality of the students who entered the Dutch higher education institutions. The government in cooperation with the higher education institutions applied rules to regulate the Chinese student admission to the universities.

Another relevant lesson in the Dutch case is that internationalisation is a two way process and government needs to facilitate student mobility from China to the Netherlands but also from the Netherlands to China. The Netherlands is currently facing a situation where there are too few Dutch people who would be able to provide the Dutch companies with necessary know-how about Chinese economy, politics, culture, etc.

The study also showed that the role of the government has been decreasing as the internationalisation process has become more mature. Also, the role of the government institution Nuffic Neso has become less relevant for the universities because there is much more experience and know-how on internationalisation and on the Chinese higher education market. Although the functions of Nuffic Neso have changed since its establishment it would be important to re-evaluate its role and functions.

Finland

Internationalisation of higher education in Finland

In the case of Finland internationalisation has been defined similarly to the definition of Knight (2004), Zha (2003) and Söderqvist (2005), who state that the objective of internationalisation of education is to increase the level and quality of higher education. For the Finnish government, the academic, political and economic motivations have also become more important initiatives for internationalising its higher education sector

as stated by De Wit (2011) and the OECD (2009) report. For achieving the motives, the Finnish government and Aalto University have also established national and institutional level internationalisation strategies with the purpose of integrating international and intercultural aspects into delivery of higher education. There have been great changes in the Finnish higher system and universities have become more independent in decision-making but the role of government is still important in supporting the universities. It can be stated that in the case of Finland the internationalisation process is still in the development phase and the government plays an important role in the internationalisation process of higher education institutions.

The empirical finding of the Finnish case proves the theoretical basis (Knight 2004) about the changing role of higher education and universities in the society. The Finnish case shows that the role of universities has become more independent through national level educational reforms and universities enjoy independence from the government. On the other hand, there are no tuition fees for most of the programmes in Finland and full scholarships are offered for programmes with tuition fees. The same regulation about the tuition fees applies for Finnish, European and non-European students. This finding contradicts the theory offered by Altbach and Knight (2012) and Kirp (2003) which claims that higher education has become a private commodity. Finland has the second highest proportion of public funding for tertiary education, which in 2005 was 99.4% (OECD 2009). Free education places Finnish universities in an attractive position for international students. For example, in Aalto University with less than 70 English programmes there are about 360 Chinese students for the academic year 2012/2013. In comparison, Tilburg University is a highly ranked university in Europe and has a little less than 100 English programmes and around 130-150 Chinese students yearly.

Motives for internationalisation

The study showed that for the Finnish government and Aalto University the main motives for internationalisation are well aligned and focus mainly on economic and academic areas. More specifically, the focus areas for the government and institutions are knowledge economy development through research or high-end academic programmes with Chinese universities and research institutions, preparing students to

work in a globalised work environment, diminishing the deficit of the workforce through attracting talented professors, students and researchers to the country, developing political relations with China as explained by Becker and Kolster (2012), De Wit (2011), Goodwin and Nacht (1988), Green (2003), Jansen et al. (2007) and Wächter and Kemp (2010).

Internationalisation strategy

The Finnish case is interesting as during the last few years, the Finnish government has been working on several national strategies for the internationalisation of higher education and for China specifically. This Aalto case presents a fundamentally different approach to the internationalisation strategy than the Dutch case as the university has not established a separate internationalisation strategy and the internationalisation activities and goals are an integrated part of the overall plans of the university. This is in great accordance with the authors' statement (Fielden 2007, Knight 1997, 2004, De Wit 1995, Brandenburg and De Wit 2011, Wächter and Kemp 2010, Morris 2009, Söderqvist et al. 2005) who pointed out the necessity for an internationalisation strategy for a government and institution and offered that internationalisation strategy should be constructed and integrated into overall plans and activities. Despite the different approach to the internationalisation strategy, the university has successfully created relevant institutional structures and involved relevant know-how and staff members to fulfil the motives and goals.

Activities in the Chinese higher education market

As indicated by Wächter (2010), Morris (2009) and Knight (2004), the importance of internationalisation activities in the destination and home country have been important also in the case of Finland, as the Finnish government in cooperation with research institutions and organisations has initiated several activities in the Chinese market. The government is also financing many joint calls for research projects and organising summer camps for Chinese students in Finland to introduce study opportunities in Finland. The findings show that although none of the theories pointed out the relevance of an overseas representative office it has played an important role in internationalisation at the national and institutional level. The government has opened a

national representative office in Shanghai, which represents Finnish universities and developing cooperation projects in China. Aalto University has also established a representative office in China, which serves a physical space and a platform for research cooperation with partner universities and companies. The cooperation between the Tongji University and Aalto University grew out of initial cooperation between professors and this gives basis for Gray's (1996) scepticism about the sustainability of institutional networks which are based on personal connections.

The university is also active in the student and professor exchange and recruiting students for MA programmes and candidates for PhD studies. In the Finnish case the empirical findings indicated that Aalto University is not recruiting students directly through agents but indirectly through research cooperation. This finding shows that student recruitment is also a priority for research universities and it is not something that only applied science universities are doing as offered by Wächter and Kemp (2010). The internationalisation activities are well planned and support the national and institutional goals and motives becoming a country with developed knowledge economy.

Push and pull factors in the student decision-making process

For Finland the external pull factors offered by McMahon (1992) are the dominant ones which influence Chinese students' decision-making and choosing Finland as their destination country for higher education. The main push factors include countries' good reputation, reputation for technological advancements, strong Chinese community and free education as also offered in the theoretical framework of Chen (2006), Becker and Kolster (2012), Mazzarol and Soutar (2002).

Evaluation of the internationalisation process

The Finnish government and universities calculate the numbers of Chinese students studying in Finland, the numbers of joint research and exchange projects with Chinese universities but they have not applied strategy as offered by Elkin et al. (2005) or NAFSA (National Association 2012) for evaluating the internationalisation process and components at an institutional and national level.

The university has also been evaluated on the basis of the Jiaotong University (Academic 2012) and the Times Higher Education rankings (Times Higher 2012b). The

position of the university has been among the top 151-200 universities and 251-275 universities respectively. When taking into account the early development phase of the internationalisation strategy and countries' ambition to be attractive for talented students, then in the future an efficient evaluation tool for measuring its achievements is necessary.

Lessons learned

The case of Finland also showed that the low student mobility has been a major concern for the Finnish government and as the universities have gained more independence the government has less impact on the universities' plans. The lack of coordination of activities and cooperation between the universities and government has also been major concern for the government. The lack of coordination also influences the measurability of internationalisation strategies and result of internationalisation activities.

Poland

Internationalisation of higher education in Poland

Poland has been the least successful in attracting Chinese students to Polish universities and Polish universities also offer the smallest number of programmes in English. Although Fielden (2007) stated that most universities have already completed or are working on internationalisation strategies it is difficult in the case of Poland. Out of the two university case studies, one has an internationalisation strategy but it is not followed. In other case there is no internationalisation strategy at all. In the case of Poland there is also no national strategy, which would integrate international, global and intercultural aspects on delivering higher education. The Polish case has strong similarities with Jane Knight's and Hans de Wit's theory of misconceptions of internationalisation because the universities' and the government level activities have been disintegrated, the internationalisation term has often been used to describe just activities like student recruitment and it is not an integrated process-based approach.

Poland has not reformed its higher education system recently, which would have given more support for independent decision-making to the hands of universities. The Polish universities have been looking for ways to work independently and they have made their own internationalisation plans in the foreign markets, such as China. Still,

national level regulations and guidelines are missing which would define the role of the government. This means that the Polish universities are in a less competitive situation and less able to compete with other universities when working in foreign markets. Knight (1997), De Wit (1995), Childress (2009: 306), Brandenburg and De Wit (2011), Wächter and Kemp (2010) all point out the necessity of internationalisation strategy and programmes for achieving internationalisation goals. In the case of Poland the long-term plan, vision and strategy is missing, which places the Polish internationalisation process in a very early stage of development.

Activities in the Chinese higher education market

In the Polish case there are no clear motives for internationalisation which would set a basis for an effective national or institutional internationalisation strategy or goals. Also, without the strategy there is no integrated action plan, as suggested by Becker and Kolster (2012). The university representatives found that there is no need for internationalisation strategy as the situation and the goals often change. The activities at the national level mainly involve scholarship programmes for students to study either in China or in Poland. At national level joint forums with Chinese officials also play an important role. Universities have been mainly attending education fairs, doing marketing activities, setting up joint degree programmes and working with students for student recruitment. However, academic cooperation has also been part of internationalisation theory, it has been working in the case of the Netherlands and Finland but the Polish universities have found it difficult to apply in practice. The possible reasons might be that Poland has no permanent office in China and no clear understanding of the Chinese culture. There is no tool to evaluate the effectiveness of these activities as the long-term goals and motives are not clearly articulated nor aligned at the national and institutional level, as stated by several authors (Fielden 2007, Knight 1997, 2004, De Wit 1995, Brandenburg and De Wit 2011, Wächter and Kemp 2010, Morris 2009, Söderqvist et al. 2005).

Push and pull factors in the student decision-making process

The main triggers for the Chinese students to come to study in Poland have been related to the low tuition fees and living costs, and the fact that the universities are public

institutions. As the income of the Chinese middle class grows, the price sensitive decrease and low tuition fees is not going to be attractive for the students. Also, the fact that Polish universities are public is not unique compared to the other case studies. It can be concluded that the list of Polish pull factors is quite limited compared to the ones offered by Chen (2006), Becker and Kolster (2012) and Mazzarol and Soutar (2002).

Lessons learned

The Polish case is a good example to prove that for a successful internationalisation process it is necessary to have defined goals and set down an institutional and national plan and strategy how to achieve these goals. The case also showed that in the case of China the role of government is an extremely important for market entry.

Components of the market entry model

The following part takes a closer look at the component of the market entry models of the Netherlands, Finland and Poland. The models represented some similarities and differences depending on the institutional and national priorities of internationalisation and development stage of the model. Although all of these countries had an outstanding reputation in China, the market entry models of the Netherlands was the most comprehensive with the theoretical framework and also in the most complete development stage. The level of development reflected in the clear motives, goals and national and institutional level internationalisation strategy. The different development stage of the Dutch, Finnish and Polish models might be caused by little support from the national government and also because of the different time period during which the universities have been devoting to internationalisation.

The study revealed several findings about important components of market entry models. As for activities student recruitment plays an important role in all cases. As the Finnish case showed, although no tuition fees play role, the success of student recruitment does not only depend on the level of tuition fees in the destination country. Instead, the income of the Chinese middle class has been increasing and several other pull factors, such as countries' overall image in China, play a more important role in student recruitment. A rather important component in the market entry model is the internationalisation strategy, which defines the goals and activities taken in the Chinese

market. Also, the number of English programmes offered plays an important role. The Netherlands and Finland, with a variety of English programmes, have attracted a larger number of Chinese students than the Polish universities. As English is not the primary study language for any of the universities then additional effort needs to be made to be attractive for international students. Important components in market entry model are also the evaluation tools and the agreement called “Mutual Recognition of Academic Degrees” and regulations, which control degree recognition and the level of the Chinese student quality. The study showed that universities pay less attention to the evaluation instruments, regulations and agreements in the earlier development stages, but the importance grows when the development stage matures. A reason for this might be that on the one hand problems increase with the growing number of degree seeking students and for foreign universities it is important to keep up the competitive quality of the programmes by regulating the requirements for student admission. Also, with the growing number of Chinese students demand for degree recognition increases as for Chinese students’ future career it is relevant to study in universities which are recognised by the Chinese government.

All three market entry models reflected the importance of diplomatic relations with the Chinese government. The case studies revealed that in Chinese culture, government level relations have a more important role for market entry than in other European countries. The market entry models showed that well planned activities and instruments play a major role in achieving the university and government’s goals and motives in the Chinese higher education market. As stated earlier, in the cases of the Netherlands the internationalisation goals and motives were well articulated and strategy well planned. Also, the universities’ instruments and activities accord well with overall internationalisation goals and motives. The market entry models revealed that the more developed the market entry model is and the better articulated the goals are, the more universities and institutions take use of instruments, which are specific for the Chinese higher education market. These instruments include national and institutional representative and marketing offices, agreements and regulations, scholarship programmes and recruitment agents. A possible reason for this might be that general internationalisation tools and activities do not fulfil expected internationalisation goals

and more competitive instruments are necessary. For the Dutch, Finnish and Polish market entry models see Appendix 15.

Conclusion

The first chapter of the paper concluded that internationalisation is an intention to increase the quality of higher education. Although it also showed that universities' traditional role has developed in globalised market conditions from offering higher education on national scale to competing on international market conditions to attract global talent. Also, more often national governments have started using the benefits of internationalisation of higher education to realise national economic and political interests. The theoretical finding showed that often the economic motives have been the dominant ones. Also for comprehensive strategy the university and government motives should support each other.

Universities have become more independent actors due to the changed motives and wider role in the society and have started to use wider set of instruments to be competitive and to achieve internationalisation goals. Also with the developments in the internationalisation area the sector has become much more professional and the area does require more in-depth strategic and long-term planning. This has initiated among authors a discussion that for achieving internationalisation goals it is necessary to have a strategy, which serves the interest and goals of universities and government simultaneously. Several authors also found that aligned national and university level pull factors are important part of students' decision-making process when choosing the destination country, which also lead the authors to a discussion about outstanding role of country's image in student decision-making process.

The authors also found that for achieving internationalisation goals universities need to execute variety of well-planned activities at home and abroad, based on their internationalisation strategies. The study showed that research cooperation and student recruitment related activities are one of the most important instruments in carrying out well planned internationalisation strategy. Authors found that it is vital to integrate evaluation tools into strategy and execution plans in order to receive feedback on performance of the internationalisation activities, gain efficiency and refocus the efforts if necessary.

The empirical study showed that the entry models of the Netherlands', Finland and Poland are each in a different development stage. The Dutch market entry model is the most developed and is reflected in the well-planned strategy, which accords with their long-term goals and motives. In the Dutch case the market entry model is more developed than the other two cases because the Dutch government has been supporting the development of internationalisation process and the time period devoted to the process has been longer.

The study revealed several important components which play a great role in the market entry model for the Chinese higher education market: 1. The role of universities' home government is significant for market entry. The study showed that the government plays a key role in creating necessary preconditions for universities to enter the Chinese higher education market through establishing high-level diplomatic relations and a national level internationalisation strategy, including setting China as a priority country. 2. Cooperation among the universities and national organisations is absolutely relevant to be able to attract attention and have a scale in a large market such as China. Therefore, the national and university spheres are very closely interlinked and it is very important to examine them simultaneously. 3. The competition in the Chinese market has been increasing and universities need specific goals and market entry strategies more than before. 4. When working in the Chinese market it is increasingly important to have a permanent representative or an office based in the market. Without a constant and active presence it is very difficult to achieve national and university goals. 5. Student education fairs are not as important as they used to be for the student recruitment. 6. Digital media and marketing have become important student recruitment tools. 7. Student recruitment through recruitment agents has become an important activity in the Chinese market, including research and applied science universities. The dominant activity for universities in the Chinese higher education market has been student recruitment despite the fact whether the universities had a contract with agents or not. Therefore, it is recommended for the universities to have a strategy for cooperation with agents for student recruitment. The study indicated that a student recruitment strategy, which is also a part of an institutional internationalisation strategy, is much more effective than an independent student recruitment strategy. 8. It is necessary to apply competitive tuition fees as Chinese students are often looking for

quality education rather than low tuition fees. Also, the fees should compensate the costs related to internationalisation. 9. An alumni network has great power in student recruitment in the Chinese higher education market. 10. The control and regulation of student admission is absolutely necessary to avoid unqualified students. 11. To be attractive for Chinese students it is necessary to have Mutual Recognition of Academic Degrees according to which the Chinese government recognises the foreign university certificate.

The following section provides a list of components which are necessary for the market entry into China. The governmental strategy, product, agreements, activities and instruments are necessary for creating preconditions for market entry for universities. These aspects have been extremely important for successful Chinese market entry as high-level governmental relations play a much more important role in China than anywhere else.

Based on the empirical and theoretical findings the author offers a list of components which are necessary for the market entry into China:

Strategy

Articulate national and institutional goals and create a necessary strategy for the internationalisation process;

Make China a priority country.

Cooperate with the government and universities to support achieving national goals in China;

Build a strategy for working with agents.

Product

Build a country's good image and reputation in China;

Apply reasonable tuition fees to cover internationalisation costs;

Offer good quality education;

Offer a variety of English programmes.

Agreements

Conclude a Mutual Recognition of Academic Degrees with the Chinese government;

Make agreements and regulations to control the quality of incoming international students and services offered for the students;

Have a high-level diplomatic relations with Chinese counterparts.

Activities

Recruiting BA students;
Recruiting MA students;
Recruiting PhD candidates;
Research cooperation with partner universities;
Research cooperation with companies;
Building an alumni network;
Institutional cooperation with partner universities;
Attending education fairs;
Marketing strategy (including digital marketing plan).

Instruments

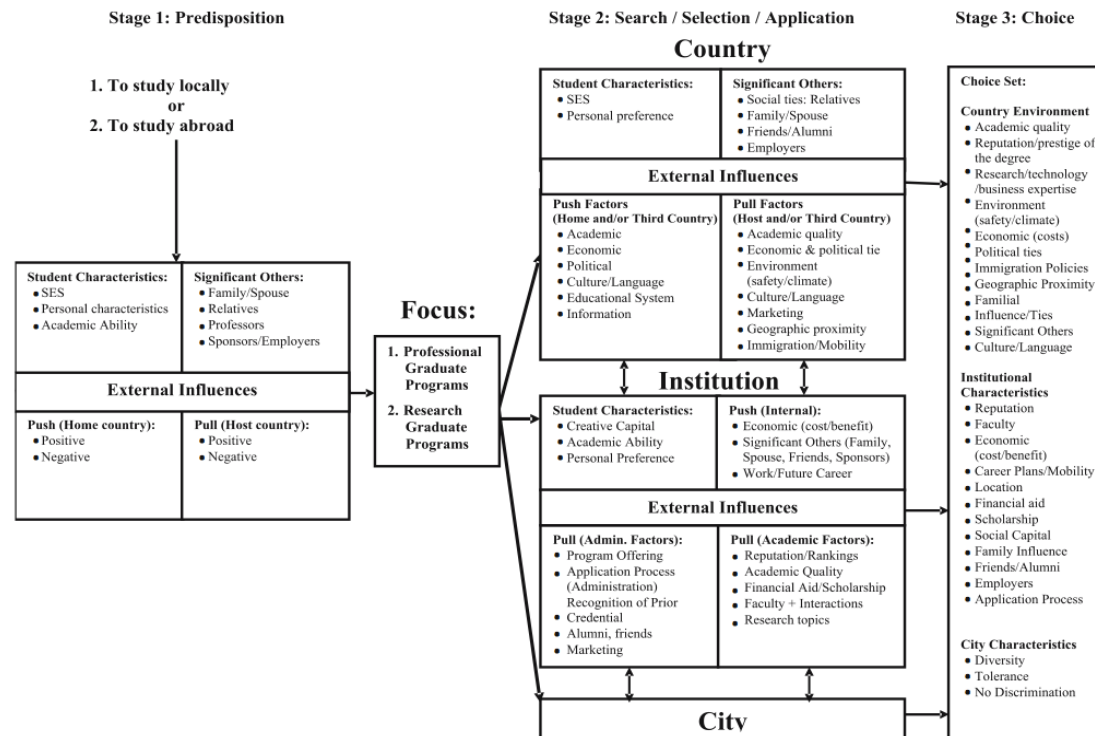
Establish a university's representative office or have a person in China;
Build relations with the Chinese Scholarship Council;
Build relations with the recruitment agents;
Establish a national level marketing and cooperation office in the home country;
Make scholarship programmes available for students;
Establish a national level higher education representative office or a representative position in China;
Arrange joint forums with Chinese partner organisations.

The author would recommend further investigating the specifics about the entry to the Chinese higher education market by studying more country and university case studies. Also additional attention would need the university and government's cooperation and national policies as important tools for successful market entry. To further develop and to use the findings of the current work the author would propose constructing and enhancing the Chinese market entry strategy of the Estonian universities and government.

Appendix

Appendix 1

The Synthesis Model to explain international graduate students' choice and decision-making process on studying abroad.



Source: Chen (2006: 777)

Appendix 2

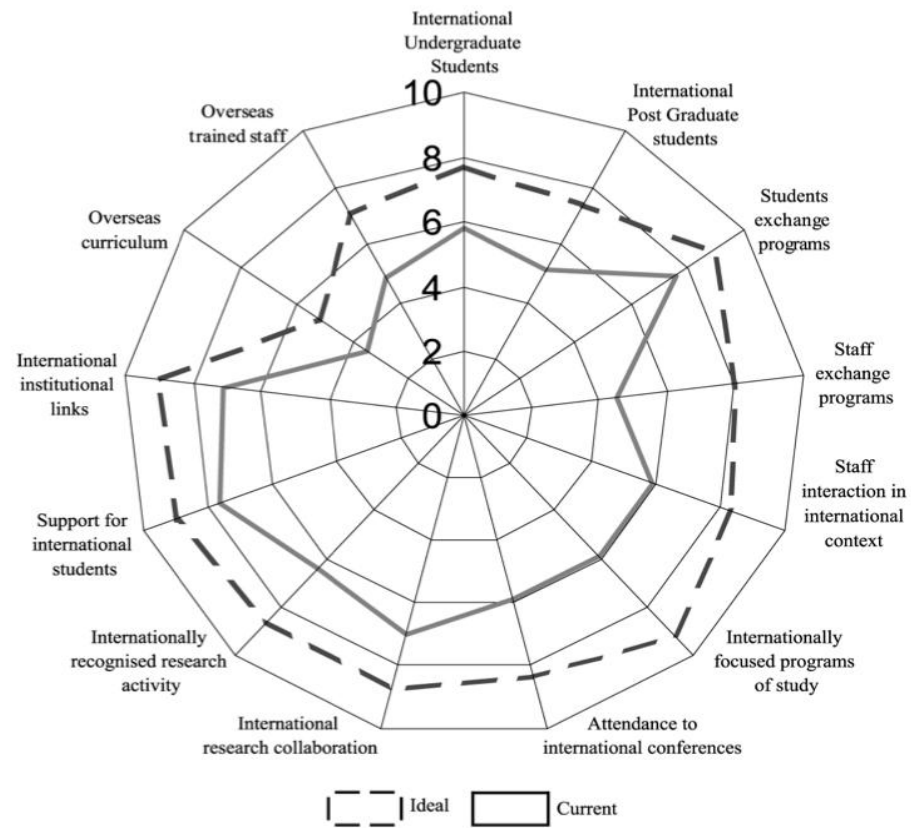
Criteria to measure the internationalisation of a university.

NAFSA	ACE	Jane Knight and Hans de Wit
<ol style="list-style-type: none"> 1. International linkages through connections with universities; 2. Study abroad by U.S. students; 3. Teaching and working abroad; 4. Study by international students and scholars in the United States; 5. Faculty exchanges; 6. Curricular initiatives; 7. Co-curricular activities; 8. International visitors; 9. Foreign language training; 10. Corporate/university partnerships; 11. Campus/community interaction; 12. International development projects. 	<ol style="list-style-type: none"> 1. The efforts being made at the local and state level for international education; 2. Relevant strategy; 3. Relevant structures, policies, and practices; 4. The synergy and connections among activities, policies and strategies; 5. International components on campus; 6. Curriculum and co-curriculum development; 7. Study and internships abroad; 8. Institution's engagement with institutions in other countries (instruction, research, service learning, and development cooperation). 	<p>Programme strategies:</p> <ol style="list-style-type: none"> 1. Strategies in this category include activities to enhance student, staff, or faculty-oriented academic programmes; 2. Curriculum development; 3. Collaboration on research or scholarly projects; 4. External relations (domestic and cross-border); 5. Extracurricular activities. <p>Organisational strategies:</p> <ol style="list-style-type: none"> 1. Integrating internationalisation into the governance structure of the institution through support from top administrators; 2. Operations that ease implementation of international activities; 3. Human resources involvement through recruitment and ongoing professional development efforts; 4. Support services including academic and student life areas.

Source: National Association (2012)

Appendix 3

Model to evaluate the level of internationalisation of universities.



Source: Elkin et al. (2005: 323)

Appendix 4

Questions for Mr. Robert van Kan (The first Director of Nuffic Neso Beijing office)

Whose initiative was it to start Nuffic Neso in China?

In the early days what was the role of Dutch government developing and executing the internationalisation policy for the Netherlands' universities?

Which government organisations were the main ones involved in developing the internationalisation policy for the Netherlands' universities?

Which policies and measures have had the greatest effect in China?

Which policies and measures have not had the desired effect in China?

What are the major steps a country or a university needs to take to have successful entry to the Chinese market?

Questions for Mr. Marrik Bellen (The current Director of Nuffic Neso China Office)

How have the role and activities of Nuffic Neso China office changed since its establishment?

Could you name actions of Dutch universities, which have had successful entry to Chinese market? Why do you think they have been successful?

Which policies and measures have not had the desired effect in China?

What are the major steps a country or a university needs to take to have successful entry to the Chinese market?

Questions for Mr. Mika Tirronen (the Finnish Counsellor for Science and Education in Beijing) and Mrs. Lukia Yang (Project manager at the Centre for International mobility (CIMO) Office in Shanghai)

What was the role of your government in developing and executing the internationalisation policy for the universities?

What have been the main policies and measures taken in the Chinese market to promote higher education cooperation? Have these measures been successful?

How do you evaluate the efforts of the national government to promote the country's higher education system abroad?

How is the cooperation between the government organisations and universities organised?

What are the major steps a country or a university needs to take to have successful entry to the Chinese market?

Questions for Mr. Artur Wszyński (Polish Counselor in Beijing)

Does your country have internationalisation policy for universities? Is China a target country?

What was the role of your government in developing and executing the internationalisation policy for the Polish universities?

How do you evaluate the efforts of the national government to promote the country's higher education system abroad?

How is the cooperation between the government organisations and universities organised?

What have been the main policies and measures taken in the Chinese market to promote higher education cooperation? Have these measures been successful?

What are the major steps a country or a university needs to take to have a successful entry to the Chinese market?

Questions for the Dutch, Polish and Finnish universities

What was the initial goal for the university to become (more) international? How has this goal changed or evolved over time?

Who are your target students for recruitment? (BA, MA, PhD)

What are the main pull-factors for Chinese students to study in your university?

How was the internationalisation policies developed, by whom and through what sort of process (top down or bottom-up). Is the policy general in nature, or very concrete and detailed? Is China a priority for the university? How is it arranged within the university?

Which kind of activities have you taken to the Chinese market?

What are the major steps a country or a university needs to take to have successful entry to the Chinese market?

Appendix 5

Interview with Mr. Robert van Kan (the first Director of Nuffic Neso in Beijing)

The history of internationalisation for many Dutch universities dates back to the 1950s. The process of internationalisation of higher education in the Netherlands was started by providing international education programs to developing countries. These programs were paid by the Dutch government and Nuffic was created in 1952 to coordinate the development cooperation projects. The Dutch government had long-standing relations with these countries, including China.

Through the development cooperation projects the professors became aware of new markets and students who could pay themselves for the education. At the end of 90's several universities started to explore the international education market further. The first universities involved in the internationalisation process were more academic research based universities and specialised institutions for social development, engineering and agriculture and less applied science universities. The Netherlands' government first recognised the universities' efforts by issuing a policy initiative on education in 1999. The policy stated that education market has become global and that there are a number of students who want to go abroad to acquire education by paying themselves and that there is a shortage of education in number of countries.

Important factors, which have helped the Netherlands to enter the Chinese education market

From the experience of the Dutch universities, the policy measures are crucially important, but the market situation is also relevant. The case of the Netherlands was successful because the timing was right for universities to internationalise. Chinese universities and students were looking for alternatives to the UK and the US and this was the time when the Netherlands came in with plenty of English programs. The Netherlands was also one of the very few small-sized countries to enter the Chinese market, it was the time when there was not much information available and all the information that the government gave was considered valuable. Now there is much more information available about studying opportunities abroad and the role of

government has become less important. Then the great advantage of the Netherlands was, and currently still is, the large variety of English programs available for students. Also, it was not difficult to modify these programs for the Chinese market demands. The availability of these programs benefited the Netherlands universities in building up an internationally recognised brand for higher education. Currently the competition is higher and people are more selective about the programs.

Main objectives for the Netherlands's universities to become more international

The main objective for the Netherlands's universities to become more international was to increase the quality of education and to create internationalisation in the classroom. People with international degrees will most likely accept jobs that are international and different professions such as engineering, business administration, etc., need international communication skills. The universities have an obligation to teach students international skills and one of these ways is to attract more international students by creating an international class room but also sending students to study or do their internship overseas, have programs in English, etc. If universities evaluate the outcome after few years, they see that they have reached the goal but the path to the end goal has been quite different. It is difficult to measure the outcome and to make the direct relationships between different activities taken to achieve the objective. Additional income has also been an important objective but it has not been very often publicly mentioned. In the early days, international student paid the same tuition fee as the Dutch students and they were subsidised by the Dutch government and this was very motivating for the universities. In the beginning, when the universities started off the cooperation on the Chinese market, it was fairly easy for the Chinese students to enter the Dutch universities because of low admission requirements and low tuition fees. In recent years admission has become much more difficult because of extensive paperwork and higher tuition fees but the educational market has not collapsed because the quality of education is good, so clearly money was not at the heart of the issue.

Whose initiative it was to start Nuffic Neso in China?

The government saw a role in supporting these universities, which want to be active in the international higher education market by providing them relevant facilities and

shaping necessary conditions. This was an important wake up call for many other universities to become international. The Dutch government published a research paper in where 10 different prospective partner countries for future cooperation were examined - China was one of these countries. This policy paper lead to the establishment of the representative offices for the Dutch Higher Education in the target countries. The national programs and government institution Nuffic Neso have had a major affect developing internationalisation strategy and have facilitated the entry of the Dutch universities to the Chinese higher education market. When the government understood their importance in shaping the conditions for universities to enter the Chinese education market the government wanted to see that the universities also took advantage of the opportunity and would appreciate the support. The Dutch government made a proposal for Dutch universities, which wanted to internationalise and take part in the program. The universities had to cover one-third of the total program costs, which included offering scholarships for students and setting up a Nuffic Neso offices. Nuffic Neso was responsible for forming a consortium of universities, which wanted to participate in the program. In return for the financial contribution the universities had access to the Nuffic Neso resources, Chinese higher education market information, representation by the Nuffic Neso office, also got a vote in policy making and a place in the advisory board for international export for education. It was a very valuable platform at the time because universities had little experience about entering foreign markets and were very willing to share their information and experience with other universities. It was also unique that the universities made their decisions collectively with Nuffic Neso chairing the meetings and later arranging to support the universities to accomplish their plans in China.

Nuffic Neso has been a successful example of public-private partnership because the cooperation between the universities and government worked very well. There was also good cooperation between the representatives of the Embassy of the Netherlands and the Chinese partners. The cooperation in the educational sphere had also great affect relations between Chinese and Dutch governments and when the Nuffic Neso Beijing office was opened then the high level officials and representatives from the Netherlands flew in to Beijing.

Today this situation has somewhat changed and at the moment the universities are less willing to cooperate. In the beginning, Nuffic was the only organisation of its kind and there was no real good structured knowledge about internationalisation and about entering the Chinese education market. The universities' visions about internationalisation have matured a lot and there are many ways how to achieve the goals. Universities make their own decisions and they do not feel compelled to agree with the decisions of the other universities. Certain groups have formed among the universities based on the level of internationalisation, previous experience and non-competing interests on the Chinese education market.

Which were the main organisations involved in developing the internationalisation policy for the Netherlands' universities?

The main government organisations involved in planning and executing the internationalisation process in the Netherlands were: the Ministry of Education, which lead the process, but also the Ministry of Economic Affairs and the Ministry of Justice were closely involved. Another institution involved in the internationalisation process was the Ministry of Agriculture because Agriculture universities were part of the Ministry, whereas other universities were part of Ministry of Education. The Ministry of Social Affairs was closely involved with the Nuffic Neso target countries because the Netherlands were interested in building up long-term relations with the target countries by giving the students an opportunity to stay for another year to find a job and work and to find a place in the society after graduation. A marketing platform for universities was established, with the current name DHENIM (Dutch Higher Education Network for International Marketing). Nuffic's role was to implement the internationalisation policy but it also served as an advisory body for the government and Ministry of Education in policy making. Nuffic was also there to coordinate the discussions and processes between the different universities and institutions.

The government set down their own objectives and linked the policies with business interests, such as good future relations with upcoming markets. For the universities, the government gave tools but did not set down very specific guidelines for action plan. The

universities had to formulate their own policies of what kind of students they want, how they will get the students, which regions and universities they target, etc.

Measuring the success of outcomes

Nuffic has a rather general evaluation of the outcomes. The policy plan is for 4 years and after each phase the Nuffic board evaluates the offices established in number of countries and the amount of money allocated for the scholarships. On the Nuffic Neso level, the evaluation has also been rather vague. There are couple of reasons of why Nuffic Neso has not been very actively focusing on measuring the success of attracting international students to the Netherlands:

- The Dutch education system does not support measuring the outcomes and turnover in hard numbers.
- There is no single good instrument to measure the outcomes. There are several different measurement tools, which all focus on different categories and even the data from Nuffic Neso is not complete. In the Netherlands educational degree programs are registered and each has a code, which is used in collecting statistics (also the number of students). This statistics does not include the preparation courses and foundation programs because these programs are not registered as degree programs. Some universities measure the data of number of visas issued. This method has its own flaw because there are differences between the visa types: long-term study visa or a visa for 1 year for preparation programs. As all the universities have different requirements for the student entry and the preparation programs give students good basis to have successful entry to universities, it is not the best tool to evaluate the data.
- There is no clear data on the international students at the institutional level. Many universities do not have a centralised system of student registration and students are registered only on the faculty level.
- There is no clear data of the nationality of students on the institutional level. Some universities have a policy not to ask for student's nationality.
- There is difference between registration system of full-time students and exchange students.

There is always an endless discussion of how to measure the number of international students and level of internationalisation and the numbers play a role but this is not the most significant issue.

The situation has changed and the universities have built their own basis in China and the function of Nuffic Neso has also changed. The biggest question Nuffic Neso is facing today is how to reinvent itself because currently it does not have better knowledge than the universities. Nuffic is suffering from a great level of bureaucratic thinking and lacks real understanding of the market. This has led to some drawbacks in the actual work of Nuffic. Even though the first period was very successful the level of satisfaction with the organisation has decreased with time.

Lessons learned

Important lessons, which Nuffic Neso has learned from the Chinese market includes the admission of students, who were not qualified and did not meet the requirements. This led to a situation in where the students were dropping out of schools or in some cases the students were in a constant flow of changing universities, creating a major social problem for all parties involved. Also, quite often it was hard for the international students to adapt to the Netherlands culture and society as well as it was hoped in theory- easily. In the second phase the Ministry of Education required establishing a Code of Conduct to regulate the students' admission and regulation procedure to avoid future problems with student admission. The paper was very concrete and specific, declaring which kind of information, service and support universities need to provide for the international students, rules about entry requirements (also the English language requirement for the preparation, BA and MA programs). This brought up great discussion among the universities in the Netherlands because it touched directly on the autonomy of the universities and all universities have different requirements. It has also specific requirements about using agents and coordinating finances, stating that if university uses agents, then the tuition fee needs to be paid directly to the school. It also regulates how commission fees needs to be transparent and contains complaint procedure for students. The complaint procedure would be looked over by an independent commission and it will be used to measure the universities quality.

Major steps a country or a university needs to take to have successful entry to the Chinese market:

- A single state-level policy, which would prioritise the Chinese market for cooperation - a very strong signal and a sign of security to the Chinese students, who are looking for opportunities to study abroad and their parents.
- A central-level organisation responsible for executing the government policies in China.
- A Chinese market specific goals and products - a specific focus on goals and products is relevant.
- Evaluation of previous experience and planning next steps. If certain activities have been in existence for a while, it is time to evaluate which of them have been successful and what should be modified in the future.
- Choose the right recruitment agents for the Chinese market. Small states with little international recognition need to cooperate with big and trustworthy agents to achieve desired goals.
- An extensive cooperation between universities. A small state is able to achieve a lot more when working together.
- Reasonable tuition fees. Low tuition fees limit the universities capability in the market because the university does not have additional resources to market the university internationally and pay money to the agents.
- A Mutual Recognition of Academic Degrees with Chinese the Ministry of Education. Students want to study in a country and receive degrees that will also be recognised in China.

Appendix 6

Interview with Mr. Marrik Bellen (the current Director of Neso Nuffic China office)

Evaluation of Nuffic Neso Office's role in Beijing since its establishment

In 2010 Nuffic Neso office went through two main changes. The name of the Nuffic Neso Beijing Office was changed to China office because the Neso activities cover all China and not only Beijing. Furthermore, Nuffic Neso China changed its Chinese cooperation partner because of management and cooperation issues with the previous partner. The new partner for Nuffic Neso China is China Education Association for International Exchange (CEAIE). On policy level there have been also some changes compared to the period when Nuffic Neso offices were started and explained that currently the universities do not have to finance one-third of the activity costs of Nuffic Neso offices. Now all the costs are covered by the Ministry of Education from the state budget through Nuffic and all the universities, which have joined the Code of Conduct, can enjoy the Nuffic Neso service.

Evolution of Nuffic Neso Office's activities in Beijing since its establishment

With the time the Nuffic Neso activities have changed also. It is very important to give universities added value in their activities but it can be challenging because the universities are on different levels of internationalisation. Nuffic Neso has started issuing market research reports for the universities and to show potential opportunities on the Chinese education market. The generic promotion through digital marketing, education fares and the Study in the Netherlands and Study in China platforms are still important. Institutional cooperation, setting up private-public scholarships and developing the alumni network through trainings and social events have also become important. More private Dutch companies are interested in having access to the Dutch alumni network for business purposes. On voluntary basis Nuffic Neso is training alumni ambassadors to help Nuffic Neso in all kinds of activities and spreading the word about studying in the Netherlands all around China. Nuffic Neso has also started initiating funding program through which the office provides scholarships for Chinese students. The scholarships come from Dutch universities and private companies.

Sometimes the scholarships come with a precondition like a traineeship or internship in a company or are just part of the Corporate Social Responsibility activities. There has been also major shift in student recruitment. When 10 years ago about two-third of international students came through individual recruitment then now most of the students come from agreements between universities. Most of the Dutch institutions have become to a conclusion that long-term cooperation should be on institutional basis.

Measuring the success in the Chinese market

A difficulty with the influence of measures and policies is that there is no good tool to measure the direct effect of Nuffic Neso activities. The student mobility depends on various activities and many of these are often out of scope of Nuffic Neso. The only activities Nuffic Neso is able to measure are related to effect of digital marketing activities and conducted evaluation surveys among the Chinese students going to the Netherlands. It is really difficult to make distinction between successful and less successful examples of Dutch universities in China because there is no good basis of evaluation. Some of the universities have been just more active and visible on the market. A possible option to talk about successful examples in the Chinese market is to look at the universities, which have experienced representative on the Chinese ground. Most of the representatives of Dutch universities are part of the Chinese alumni. Currently there are 8 Dutch universities with representatives in China: These Universities are university of Groningen (successful in setting up joint programs); Delft University of Technology (established a campus in China), Stenden University of Applied sciences, Wageningen University, Tilburg University, University of Twente, The Hague University and Erasmus University Rotterdam.

Recently it has become more important to attract more Dutch students to study in China. Many Dutch companies are active in the Chinese market and need Chinese specific expertise on such fields as marketing, law, finance, management, human resources and Chinese language, etc., but currently there are not enough Dutch students who would have this kind of expertise.

The Dutch student mobility is one of the lowest and there are several potential reasons for that:

- Good quality of education in the Netherlands, so that students do not want to leave;

- Under the Bologna process the study pressure is greater and study period shorter, which limits the ability to go abroad;
- Attractive social life in the Netherlands;
- Financial fines to extend study period;
- Little knowledge of Chinese universities.

Major steps a country or a university needs to take to have successful entry to the Chinese market:

- To form a cooperation platform with other universities interested in the Chinese education market.
- To set down your focus on students you would like to attract.
- To have a clear view on your market and product.
- To have an integrated and recognised strategy to brand the country in China.
- Join the forces of Ministries of Education, Economic Affairs, Embassy and Counsellor in China.
- Come up with niche and unique selling point (USP) for the country.
- To have clarity on regulations and on the visa procedures and screening.
- To have an agreement of Mutual Recognition of Academic Degrees with the Chinese government.

Appendix 7

Interview with Mr. Jacques Van Vliet (the representative of Tilburg University in Beijing)

The main goals for the Chinese education market are:

- To promote and deepen the institutional cooperation on China education market, also recruit qualified PhD candidates;
- To enrol qualified students for MA & BA programs;
- To connect Tilburg University stakeholders in the Chinese market and to inform parties in the Chinese market about Tilburg University;
- To stay connected and maintain active relationship with the Chinese alumni of Tilburg University.

Before Tilburg University set up their office in Beijing the main programs they had on the agenda of internationalisation was the participation of the academic fares, recruiting Chinese students and research cooperation on the academic level. Tilburg University is the top university in Europe in management sciences and the university wanted to have more aggressive approach in China and make its name more visible and famous. Currently the main activities in the Chinese market are recruiting more students and establishing soled contact with the Tilburg University's alumni in China.

Target students

The current focus of Tilburg University in the Chinese market is research cooperation and recruiting the PhD candidates. The PhD sector is much smaller because there are fewer PhD students than BA and MA students. The experience has shown that if PhD students go abroad then they go abroad mainly through their professor's connection in other countries. Important source for PhD students is the Chinese Scholarship Council (CSC), which each year finances around 3000 Chinese PhD students to go study abroad. The Netherlands is currently the fourth receiver of CSC financed students after UK, France and Germany and around 360 Chinese PhD students study in the Netherlands. The Netherlands is interested in attracting CSC sponsored Chinese PhD students because the local PhD students get 100,000 EUR support from the Netherlands'

government after they get their degree and this is a large amount of money for the Dutch government. The Chinese PhD students study in the Netherlands and they are financed by the Chinese government. The number of PhD students at Tilburg University has increased after 9 months of work from 0 to 12 students.

With Tilburg University's office on the ground in China it is much easier to network with the Chinese organisations, Dutch companies and the Embassy moreover be able to better recruit the Chinese students and to have more alumni events.

Pull factors for attracting international students

- Great number of English-taught programs;
- 12 universities out of total 14 universities in the list of top 200 universities;
- Safe environment for the students to live in;
- Lower tuition fees compared to the big countries.

It has been important for the Dutch universities to have support and cooperation from the government to gain access to the Chinese education market because the Netherlands had good universities but is not world-famous. There was also internal struggle between the research and applied science universities because research universities did not consider applied science universities as equals. Mr. Van Vliet stated: "Our country is too small to export our internal problems between research and applied science universities."

The development of Tilburg University's internationalisation strategy for the Chinese education market

Tilburg Universities has been active in the Chinese market for academic cooperation for some time. The internationalisation strategy for the Chinese market became more important when the representative office was set up in Beijing. The idea to have an internationalisation strategy for China came out from the faculty of Economics and Management and it was presented to the board. After the board confirmed it, the policy became a university wide initiative. Some other faculties joined immediately, whereas others needed to be persuaded to join in. The internationalisation within the university very much depends on the people, who are in charge.

All the activities are built around 4 main goals and explained in the targets that the university wants to reach on a faculty level because their goals are different. There are differences between the numbers of students each faculty wants to recruit on the BA and MA level. University's annual plan has very specific targets formulated. The main target countries of the University for international cooperation outside of the European Union are China, India, Turkey, and the USA.

Arrangements within the university

There is an international relations office, which is responsible for carrying out internationalisation policies in coordination with the university board. On each faculty level there are people responsible for internationalisation and these people meet every two weeks to synchronise the general policy from the top to very specific faculty goals. It is necessary because each faculty has different goals. The university had to develop specific internationalisation competence within the university. Many of the experienced internationalisation professionals came from other universities and took their staff along to build competence within the institution.

There have been various objectives for the Netherlands' government and universities to become more international:

- The need to attract talents to internationalise the classroom;
- Research PhD's in the field of Science and Technology, and IT. The Dutch students go to work for companies after getting their MA degree. It has been relatively difficult to find PhD students interested in research in the Netherlands;
- Important to share the knowledge and understanding of the culture and society of the Netherlands within international students. When the students return to their country, they will share their knowledge about the Netherlands;
- A country and a university need talents to move forward to a new stage of development;
- The Netherlands' universities do not recruit students for the money. The UK and the Australian universities are recruiting students for the money and if the international students would all go home then their system would collapse.

Agreements important for entering the Chinese education market

There is an agreement which has been very important for the Dutch universities when cooperating with the Chinese universities. The agreement is called the Mutual Recognition of Academic Degrees, which states that diplomas and degrees in the Netherlands are also recognised in China. This is important because it gives security to the Chinese students so that after they return to China they can find a job with a recognised degree. The Chinese Ministry of Education makes a list of universities, which are officially recommended and suggested. If a university is not on this list, it is very difficult to get students because students and their parents always take a look at the list when choosing their destination country and university.

Good timing for entering the Chinese education market

The timing for new countries to enter the Chinese education market is perfect because China is developing very fast and the government policy in China is to make a certain number of universities qualify as world class universities. Mr. Van Vliet referred to the Chinese government policies 985 and 211 and stated “if Chinese government says something, it will happen!” The applied science universities should cooperate with the 211 group of Chinese universities whereas the research universities should cooperate with the 985 group of Chinese universities.

Policies, which need to be taken into account

Universities should consider taking into account Chinese policies such as China’s National Plan for Medium and Long-term Education Reform when making their own plans. The policy puts more emphasis on the cooperation with the universities in the Western part of China by giving them extra funds from the China Scholarship Council. These universities have also less contacts and agreements with foreign universities and are more interested in cooperation. This is a good opportunity for the foreign universities, which are looking for partner universities in China. The policy is also putting more emphasis on developing knowhow in the IT sector and applied sciences because practical experience and internship is highly favoured in Chinese society.

Major steps a country or a university needs to take to have successful entry to the Chinese market:

- Create single state-level policy, which would prioritise the Chinese market for cooperation;
- Have integrated state and institutional-level strategy and goals to brand your country in China;
- Come up with niche and unique selling point (USP) for the country;
- Have a permanent representative for higher education cooperation in China;
- Choose the right recruitment agents on the Chinese market - preferably bigger agencies with reliable quality;
- Be patient to see the results - to see the first results it might take 2-3 years;
- Make your country bigger by “hanging out with bigger friends”;
- Build up your personal connection in China - personal relation play major role in Chinese market.
- Build on your alumni network for word of mouth promotion;
- Have a Mutual Recognition of Academic Degrees
- Follow and make use of Chinese national policies.

Appendix 8

Interview with Mr. Joseph Morrin (The Hague University of Applied Sciences)

The initial goals of the university have stayed the same it is rather the balance between the goals, which have changed. The goals are to have international students to have more international classroom and to have more fee paying students to bring money to the university. At one point bigger focus was on the fee paying students whereas now it is more balanced between the two.

Target students

The university is mostly focusing on recruiting students for preparation programs, but there is also large number of BA students and smaller amount of MA students. The main reason to recruit BA students lies on the fact that in The Hague University most of the MA students need to have a working experience which makes the target market smaller. In China the biggest demand for higher education is on BA level. The university started recruiting Chinese students about 15 years ago and each year the total number of Chinese students to enrol to the different programs is about 220-240. The university has a representative in China. The Hague University is among the top 3 universities for the number of Chinese students. For reports and statistics Nuffic has different data about the number of Chinese students studying in The Hague University. Nuffic uses a methodology, which do not take into account students in the preparation programs.

Pull factors

The main pull factors for the University are relatively low level of costs, great number of English programs and fairly big city. Big group of alumni is very beneficial because word of mouth is very powerful marketing tool.

During the past 15 years the university's internationalisation strategy has stayed the same, only the tactics have changed. The target countries, which were chosen according the type of school and the market potential, have also stayed the same. The main

development occurred over the last 10 years is that the internationalisation is happening more on university level rather than on faculty level. Also making more use of the agents now than in the past. The University has 20 priority countries which divide between group 1 and group 2 and China is in group 1. Group 1 gets more time and resources than group 2. There has to be very good reason to go off the list. Mr Morrin (2012) stated: “China is important because it is big and powerful, important for the students in the future, easily accessible and has very straight forward market entry mechanisms such as agents and networks to recruit students.” In the beginning the agents were small and less developed but they grow bigger with the time and the university grew with the process. The best strategy for choosing the agencies is to balance between couple of bigger ones and 1-2 small agencies, which might grow bigger in the future.

The internationalisation strategy is very concrete and thick document, which is confirmed by the board. There is a plan for 3 years and targets go for each year and the document also contains of how to implement the action plans. The action plan is implemented within the organisation by central bodies such as communication and marketing department which is responsible for front end and back end execution. The programs itself come specific faculties. On each faculty level there is a contact person for internationalisation activities, they necessarily do not have control over the policies. Mr. Morrin is an expert on China related matters for the whole university and he is responsible for checking that the marketing and internationalisation goals are integrated and implemented in China. The University monitors the process by looking at the numbers and interviews the students to get feedback on the quality and evaluate the feedback from other faculties and departments.

The main activities taken on the Chinese market so far have been recruiting students, working with the Neso on recruiting activities, finding and developing the agent networks and promotional activities, social networking and digital marketing and slowly started developing institutional cooperation for student exchange and joint programs. In the future the university wants to send more students abroad and for this it is important to have more partner universities or have students to go through

international classrooms, which requires increasing the number of international students in the classrooms and study materials in English.

Major steps a country or a university needs to take to have successful entry to the Chinese market:

- Follow and make use of Chinese national policies;
- Develop cooperative approach for the Chinese market;
- Develop scale to be attractive;
- Develop agent network for recruiting students;
- Make sure to have people in a team who can work in terms of relations and not in terms on procedures;
- Be patient to see the results;
- Have a strong Embassy in China to brand a country and open the right doors for national agencies.

Appendix 9

Interview with Mrs. Yaxian Wu, (the representative of Erasmus University Rotterdam in Beijing)

There were many reasons of why the Erasmus University Rotterdam started to internationalise. On national level it was important to attract more international students and to develop business and trade connections. Rotterdam has very good trade relations also with Shanghai, which gave good basis for the university to have closer relations with the Chinese market. The size of the Netherlands is very small and it is relevant for the Dutch universities to attract international students.

Even though the first plan was to have an office in Shanghai but was opened in Beijing 10 years ago because it is the capital, to be close to the Dutch Embassy and to the top universities. Although the university still has very good relations with Shanghai universities.

Target students

The university is not focusing on student recruitment but is just promoting its programs among partner universities, in the education expo and on internet. Each year there are about 5000 international students. The university does not exactly measure the number of Chinese students but counts the Asian students but Chinese are approximately 10% of the international students. For 2012 there was about 4500 international students and 450 Chinese students. The number is increasing because the university brand is getting more known among Chinese students.

Marketing for BA and MA programs is very different and requires different techniques. The university would need more efficient strategy to recruit BA students. There are several aspects, which influence the recruitment of BA students. For example on the BA program level mostly the parents make decision for the students, but also in the Dutch higher education system the entry requirements for the BA students are more complicated than for the MA students. Additional on the university level it is important to check what kind of previous degree the students have and not all the students have

can access the university. Often the BA students do not know what they exactly want to study and the main focus is on MA students because it is easier to target them.

Pull factors for attracting international students

The main pull factors for the Chinese students to study in the Netherlands are the English language, relatively low tuition fees and high quality of the medical, economics and management program.

Internationalisation activities

The main activities on the Chinese market are building the university brand, developing the partnerships with Chinese counterparts, and support research cooperation, also organise activities for alumni chapters because the alumni is the important source for future students. Great responsibility relies on developing the activities with Chinese universities and updating professor level contacts to the institutional level for student and staff exchange, research and cooperation projects, lectures, seminars, workshops. Often the professors need contact with the local universities or want to find partners for research cooperation. Student recruitment is never an end goal of the cooperation projects with Chinese universities. The office is also responsible for giving updates of the latest policies and agreements on Chinese higher education market.

The development of Erasmus University Rotterdam's internationalisation strategy for the Chinese education market:

The internationalisation policies for the university were developed by the President. An advantage of the Erasmus University Rotterdam is very innovative, young and dynamic staff. The policy of internationalisation is rather general, on faculty level there are detailed action plans. The priority on target countries has shifted in recent years the cause of the crises in Europe. China has remained important target country for cooperation and is the only country which has a local office and active participation of the education expo.

Specific China expertise within the university

All the activities related to the Chinese market go through the Erasmus University China Center (EUCC). Beijing office is the extension of the EUCC to follow-up and communicates with the local counterparts. The EUCC has very close ties with departments. If departments or professors want to come to China they consult with the EUCC people. The EUCC is directly under the president. In the Law Faculty there is also an international law research centre for China, which specifically studies Chinese law. The EUCC is also responsible for the PhD program and for exploring the cooperation opportunities on the Chinese market. The PhD program focuses cooperating with the China Scholarship Council (CSC) by recruiting PhD students financed by the CSC. The Centre is responsible for collecting the applications and evaluating the students. There is also international relations office but it is responsible for other activities and other markets.

Major steps a country or a university needs to take to have successful entry to the Chinese market:

- Form an extensive cooperation between universities interested in the Chinese education market;
- Have a central-level organisation, similar to Nuffic Neso responsible to facilitate the market entry for the universities;
- Have integrated state and institutional-level strategy and goals to brand your country in China;
- Come up with niche and unique selling point (USP) for the country;
- Have a strategy to promote universities together and not one by one;
- Inform Chinese students about the level of English language and programs in your country and university.

Appendix 10

Interview with Mrs. Xuefei Knoester-Cao (a policy advisor on internationalisation for University of Groningen)

The main aim of University of Groningen to become more international was to attract more talented international students. The main problems with the Dutch universities are that they are small and it is necessary to attract students from outside to study in the Netherlands. Thanks to variety of programs in English the country had great advantage in becoming more international. The goal to attract the best students has not really changed over the years. For the best universities it is important to be international. One of the aims for the university it is relevant to stay among the top universities in the Time ranking. The University entered the Chinese market first in 1993 when they signed the first agreement with Chinese university.

Target students for recruitment

The university is attracting students on all levels but the biggest number of international students are PhD students and many students come for MA's degree, because the university offers more than 100 MA programs. The BA student recruitment started only several years ago and the BA programs are coming along now as well. Out of the total number of international about 130 are Chinese. About 70% are the Chinese MA students, 20% are the Chinese BA students and the rest Chinese PhD students.

Pull factors for attracting international students:

The country needs to be attractive for the students at the first place because before the students make their decision about the university they choose the destination country. The Netherlands has become more known for its quality of education and for the competitive tuition fees compared to the English speaking countries. Groningen is also known as a student city with relatively lower cost, which also makes role in decision-making about the destination university among students and their parents. Also the University of Groningen is one out 4 Dutch universities to offer comprehensive programs. In the past years economics and law were the most popular study programs,

whereas recently science and medicine related study programs have become more popular among students.

The development of University of Groningen's internationalisation strategy for the Chinese education market:

The University has general strategy for internationalisation, which is renewed in every 5 years. In the document the university sets down the main goals, means and instruments. The policy is concrete in goals, actions to achieve the goals and aspects, which need improvement within the university to facilitate the studying of the international students. There are specific target countries in every region with China being the one in Asia. Cooperation with Chinese education market became more active in 2003.

Mrs. Knoester-Cao's 10 years of experience in University of Groningen has contributed great deal for developing long-term relations with partner universities. This has had major affect improving the quality of international students. For the university it is not the question of attracting international students because there are many students already but the main concern is how to attract the best students.

Arrangements within the university:

University of Groningen has developed China specific expertise in many aspects. Each faculty has its own international relations office and people familiar with the Chinese education market and system. There is also central international relations office for international students. The central office has built great expertise on handling different practical and study questions of Chinese students and their paperwork. The international relations department also regularly visits China.

The main way to analyse the process is to look at the number of students and participate all kinds of evaluations on national and the European level to get feedback on the services provided to international students and improve the parts which are not positively evaluated. For specific activities it is very difficult to give evaluation, which activities have not been very successful. There has been also less miscommunication and misunderstandings because her Chinese nationality, cultural background and Chinese language skills. For her it is much easier to communicate with partners because of her Chinese language skills.

For University of Groningen research is important. International relations office people meet once a month to discuss problems and opportunities, exchange ideas and information.

Constant communication is important and this way all the people responsible can also stay informed.

University of Groningen's activities in China:

There are many activities on the university and faculty level. The main activities are participating international student fares, doing joint programs and double degree programs for PhD students with Chinese partner universities. University of Groningen also set up representative office in China to locally facilitate things. The University also set up European studies centre at Tsinghua University and the Dutch studies centres in Shanghai Fudan University. The purpose of the centre is to organise conferences and offer programs to promote University of Groningen in China and to attract students from the best universities to study in the Netherlands. There is also important role in using the own alumni students to connect with the institutions and partners in the Chinese education market. The strategy of University of Groningen is to work directly with the best Chinese universities to attract the students with the best merits for MA programs. University of Groningen does not work with agents because they are targeting very specific MA students. The Dutch system does not favour the recruitment of BA students because in many cases the students need to go through one year preparation course which is not very favourable for the Chinese students.

Major steps a country and a university needs to take to have successful entry to the Chinese market:

- Form an extensive cooperation between universities interested in the Chinese education market;
- Build your relations with Chinese universities;
- Build on your alumni network for word of mouth promotion;
- Build solid infrastructure and train the staff to facilitate entry of international students;
- Build the reputation in good service and quality of programs;

- Build solid infrastructure and train the staff in the university to facilitate entry of international students;
- Apply reasonable tuition fee - too low tuition fees can be as harmful as too high tuition fees;
- Inform Chinese students about the level of English language and programs in your country and university.

Appendix 11

Interview with Mika Tirronen (the Finnish Counsellor for Science and Education in Beijing) and Mrs. Lukia Yang (the Project manager at the Centre for International mobility (CIMO) Office in Shanghai)

The main concern for the government is the low student mobility between Finland and China. Although through recent reforms universities have become more independent and for the government it has become more difficult to take very concrete measures to influence university plans. It has also been very difficult to measure outcomes of institutional activities taken on the Chinese market because there is lack of coordination in the activities. There is also lack of coordination between the activities of universities and this is very inefficient.

On the government level Finland has been investing into science cooperation with China. The first joint call was launched with the National Science Foundation of China in 2002 and in the first round total 4 research teams got financed. From 2007 the calls are on annual basis and the last two calls were joint calls between China, Finland and Germany. Additionally Finland has been promoting research cooperation between Finnish and Chinese University. Research cooperation has been active in the fields of forestry and biomedicine. There is Sino-Finnish Life Science Forum, which goals are to stimulate research cooperation through joint seminar for universities and it also serves as a tool to recruit students. Another tool for PhD candidate recruitment is a Summer School in China organised. The Counsellor for Science and Education Mr. Mika Tirronen has a priority to widen the research cooperation to also other areas and universities. In the future there should be more cooperation between China and Finland on national level through education export, exchange of successful education programs, joint PhD training and joint funding for research projects

Recommendation for the market entry based on the Finnish Counsellor experience

Combination of bottom up and top down models for cooperation with China: from top down: High level agreements between China and European governments and from

bottom up: What has been done on institutional level and how we can apply this to national level. CIMO in Shanghai was established by the Finnish Ministry of Education and Culture with the purpose to improve international mobility and cooperation between China and Finnish universities and other national institutions active in the education field. The purpose is carried out through student exchange, researcher and training programs. The main tool to improve the cooperation is carried out through scholarship program. Another important task for CIMO is to follow the Chinese policies, and give important updates back to Finland. For the Finnish universities focus has been very important and activities on the Chinese market have been built on very specific niche areas such as architecture, design and environments issues. Environmental have been one of key research areas and in 2009 Sino-Finnish Environmental Research Centre was established. Despite variety of cooperation projects taken on the Chinese market there is still very much overlapping of activities because universities are not willing to cooperate (Yang 2002).

Recommendation for the market entry based on the CIMO experience:

- Come up with niche and unique selling point (USP) for the university;
- Do a market research before entry;
- Form an extensive cooperation between universities interested in the Chinese education market;
- Have a central-level organisation based in China responsible to facilitate the market entry for the universities;
- Increase student and staff mobility programs;
- Set down focus on similar Chinese universities and develop cooperation.

Appendix 12

Interview with Mrs. Mervi Rantanen (the manager of international partnerships at Aalto University)

Aalto University was established in 2010 from the merger of three Finnish universities: The Helsinki School of Economics, Helsinki University of Technology and The University of Art and Design Helsinki. The University combines six schools, which offer possibilities for strong multidisciplinary education and research.

Goals for Aalto University in the Chinese market

The main goals for internationalisation are having been to increase the quality of education and research, and country's competitiveness globally.

Target students for Aalto University

Aalto University is mainly targeting MA and PhD students. Most of the international students are Chinese students and the total number of students is about 366.

Pull factors for Chinese students to study in Finland

The main pull factors for the Chinese students to study in Finland have been the country's good reputation, advancement in the technology fields (Technology studies, Science park, Nokia, many technology companies), a strong Chinese community and free education.

The development of internationalisation strategy for the Chinese education market:

There is no separate internationalisation strategy for Aalto University but internationalisation is a strategic enabler, which facilitates the way to achieve strategy and the key performance indicators.

The strategy consists of four main areas: research excellence, pioneering education, trend setting-art and societal affect.

The main performance indicators of Aalto University are promoting international visibility better, international recruiting (staff and students), increasing mobility, and

developing language strategy, improving the promotion of internationalisation of teaching, studying and learning, and promoting international partnerships.

The goals for internationalisation strategy are set until 2020 and the schools also have made their plans up to 2020. The goals for strategy for internationalisation are rather general and it focuses on Asia but not on China specifically. Although China has been important target country for the university and university saw the necessity to establish a representative office in Shanghai to further develop the cooperation. On the yearly basis the plans and goals are more concrete on school levels. On the top management level the Vice Rector for knowledge networks is responsible for internationalisation. Also the international relations department and people on the faculty and school level have major role in achieving the goals of internationalisation. The structure at Aalto University is still in making and might change. Within the university there is couple of research organisation and collaboration with Chinese institutions but there is no specific expert for the Chinese market.

Activities in the Chinese market

Aalto University opened in cooperation with Tongji University a representative office in Shanghai. The initial idea to open the office came from cooperation of the two universities' professors. The physical space is called design factory and it is a platform for various kinds of activities, including teaching, learning, and research and company collaboration for design and product development. In cooperation with Tongji University there is also to some extent cooperation with local recruitment agent in China. There are also students and professor exchange, joint programs and research collaboration with Tongji University and other partner universities in China. The most important activities are education and research collaboration.

Recommendation for the market entry based on the Finnish university's experience:

- Commitment from the university leadership;
- Form an extensive cooperation between universities interested in the Chinese education market;
- Have a permanent representative for higher education cooperation in China.

Appendix 13

Interview with Mr. Artur Wysynski (a Counsellor at the Embassy of the Republic of Poland in Beijing)

Poland has no government level policy for internationalisation. The interest to be more international has started to emerge only recently. After joining the EU the government started to focus more on cooperation with European universities. Although currently the situation is changing because there is less students but the mentality has stayed pretty much the same. There is also a lot to improve because the procedures and regulations are quite difficult, including the visa process. Also processing the paperwork is difficult because the rules are unclear. There is also the Mutual Recognition of Academic Degrees between the Polish and Chinese government.

There have been some cooperation activities one the government level, where at the end of 2011 joint forum between 20 Polish Universities and 40 Chinese universities. Also the President of Poland participate it. In summer 2012 Chinese delegation visited Poland to further discuss about future cooperation, including education field. The most important achievements for Polish universities on the Chinese market have been establishing cooperation agreement between University of Gdansk and Harbin University for Polish language and culture program. There have also been almost 60 years of Polish studies in Beijing and there was an agreement signed according to which every year 40 Chinese students study in Poland and 40 Polish students study in China with state sponsored scholarships.

Major responsibility for internationalisation of Polish higher education is on Ministry of Education, but there is also privately owned organisations, such as "Perspektywy" Foundation and Boym Universities Consortium to promote Polish universities in China. There is also cooperation with the China scholarship council to find Polish and Chinese university to create possibility to meet and start cooperation.

Recommendation for the market entry based on the Polish Embassy experience:

- Have a central-level organisation, similar to Nuffic Neso responsible to facilitate the market entry for the universities;
- Cooperate with China Scholarship Council (CSC);
- Have a strong Embassy in China to brand your country and open the right doors for national agencies;
- Set down focus on provinces you want to cooperate;
- Build solid infrastructure and train the staff to facilitate entry of international students;
- Have integrated state and institutional-level strategy and goals to brand your country in China;
- Come up with niche and unique selling point (USP) for the country;
- Develop English language programs;
- Form an extensive cooperation between universities interested in the Chinese education market.

Appendix 14

Tuition fees, the number of Chinese students and degree programmes in the Dutch universities.

	Number of Chinese students for fulltime programmes and for Chinese students preparation courses (yearly)	Tuition fee ranges per year for full-time programmes (in euros)	Number of full-time BA and MA degree programmes and the Preparation Courses in English
The Hague University of Applied Sciences			
BA	220-240	7,785	9
MA		15,200-17,750	3
The Academic Preparation Course		3,950-7,890	1
Tilburg University			
BA	130-150	6,408	5
MA		10,590	More than 30
Erasmus University of Rotterdam			
BA	450	5,500-14,000	4
MA		10,000-15,500	25
Groningen University			
BA	130	7,500-32,000	19
MA		13,000-32,000	More than 70

Source: Author's table based on University (2012b, c), Erasmus (2012a, b, c), Hague (2012b, c, d), Tilburg (2012a), Yang (2012), Yaxian (2012), Joseph (2012), Xuefei (2012).

Appendix 15

The Dutch, Finnish and Polish Chinese market entry models

The Chinese higher education market entry models				
		The Dutch Model	The Finnish Model	The Polish Model
STRATEGY	Development stage of internationalisation process	In a matured stage.	In a developing stage.	In an early developing stage.
	National strategy for internationalisation	Yes	Yes	No
	Effective institutional strategy for internationalisation	Yes	Yes	No
	Cooperation between universities and government	Yes	No	No
PRODUCT	Image and reputation of the country in China	Good quality of education; Competitive tuition fees; Variety of English programs; Good living environment; Country's good reputation.	Country's good reputation; Good reputation for technology advancements; Strong Chinese Community; Free education.	Low tuition fees; Low living cost; Reputation of universities as public institutions.
	Tuition fees per year	€6 408- 15 500	No tuition fee or tuition fee covered by scholarship	€2500-5000
	Programs in English	Ranging from 13 up to 100 English programs per university	More than 60 in Aalto University	Less than 10 per university
AGREEMENTS	Mutual Recognition of Academic Degrees	Yes	No	No
	Other regulations and agreements	Code of Conduct and Nuffic Certificate, to regulate the quality of incoming international students and services offered for students.	No	No

ACTIVITIES	High-level diplomatic relations	Very good	Very good	Very good
	Activities taken in the Chinese market	Recruitment of BA students; Recruitment of MA students; Recruitment of PhD candidates; Research cooperation with partner universities; Building alumni network; Preparation courses for the BA students; Institutional cooperation with partner universities; Attending education fairs; Marketing and PR activities (including digital marketing).	Research cooperation with universities and companies; Student and professor exchange; Recruitment of PhD candidates; Recruitment of MA students; Sino-Finland joint calls for research cooperation.	Attending education fairs; Joint degree programs; Cooperation with agents; Recruitment of BA and MA students; Research cooperation.
INSTRUMENTS	Tools to achieve goals	University's representative office in China; Recruitment agents; The Chinese Scholarship Council; National level marketing and cooperation organisation in the Netherlands, DHENIM (Dutch Higher Education Network for International Marketing); National level representative and cooperation office in China, Nuffic and Nuffic Neso; Scholarship programs.	Summer Schools to introduce studying opportunities in Finland; National level cooperation and representative office in China and Finland, CIMO; University's representative office in China, the Design Factory;	Private organizations promoting Polish higher education abroad; Joint forums on g government level; Scholarship programs;
	Tool for evaluation of internationalisation process	No	No	No

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Resüme

ELi ülikoolide sisenemise mudelid Hiina haridusturule.

Globaalsel tasandil on kõrgharidusmaastikul toimumas olulised arengud. Hariduse rahvusvahelistumine on muutunud lahutumatuks osaks rahvusvaheliselt konkurentsivõimeliste ülikoolide ja teadmispõhise majandusega riikide pikaajalistest eesmärkidest. Rahvusvahelistumine mängib olulist rolli ülikoolide rahvusvahelise tuntuse suurendamisel, talentide riiki meelitamisel, hariduse eksporditulu kasvatamisel ja riigi rahvusvahelise maine kujundamisel (Kubo 2010, Parsons and Söderqvist 2005). Samuti mõjutab Euroopas toimuvaid olulisi arenguid Bologna protsess, mille tuumaks on ühtse kõrgharidusruumi loomine ja tudengite mobiilsuse suurenemine (Zimmermann 2010). Ühtse haridusruumi loomise tulemusena on riigid, mille igapäevaseks keeleks ei ole inglise keel, sunnitud suurendama inglisekeelsete õppeprogrammide arvu, et püsida konkurentsivõimelisena riikidega, mille igapäevaseks keeleks on inglise keel. Selle muutuse tulemusena suurenevad tudengite valikuvõimalused pakutavate ingliskeelsete programmide hulgas (De Wit 2010).

Maailmas toimuvate arengute taustal on hariduse rahvusvahelistumine muutunud ka oluliseks prioriteediks Euroopa ülikoolide jaoks. Üha sagedamini otsivad ülikoolid võimalusi rahvusvahelistumise eesmärkide saavutamiseks ning rahvusvahelistumisest tulenevate võimaluste kasutamiseks. Tihti näevad ülikoolid võimalusi Aasia ja konkreetsemalt Hiina mastaapsel ja suure kasvupotentsiaaliga haridusturul, kus kõrgharidust vajavad lähitulevikus 260 miljonit potentsiaalset tudengit.

Hiina haridusturu suurest potentsiaalst hoolimata on sellele sisenemine osutunud ülikoolide jaoks tihti keerukaks. Üheks põhjuseks võib pidada vähest teemakäsitlust. Samas on mitmed autorid uurinud põhjalikult rahvusvahelistumist laiemalt ja pakkunud välja mudeleid, mis seletavad rahvusvahelistumise protsessi nii globaalsel, riiklikul kui ka institutsiooni tasandil, kuid konkreetsetelt ülikoolide turule sisenemine on leidnud vähem akadeemilist kajastust.

Käesolev töö uurib Hiina haridusturule sisenemise mudeleid võttes fookusesse väikese ja keskmise suurusega Euroopa Liidu liikmesriigid, mille esimeseks keeleks ei ole inglise keel. Töö valimisse on võetud kolme riigi - Hollandi, Soome ja Poola ülikoolide kaasused.

Käesoleval töö on viis peamist ülesannet:

1. Analüüsida hariduse rahvusvahelistumist käsitlevaid mudeleid;
2. Läbi viia intervjuud Hollandi, Soome ja Poola organisatsioonide esindajatega;
3. Analüüsida intervjuude tulemusi;
4. Teha kokkuvõtte Hiina kõrgharidusturule sisenemise mudelistest;
5. Pakkuda välja Hiina kõrgharidusturule sisenemise mudelid Euroopa Liidu liikmesriikide ülikoolidele, mille esimene keel ei ole inglise keel.

Uuringust selgus, et Hollandi, Soome ja Poola mudelid Hiina haridusturule sisenemisel erinevad oma arenguastme poolest. Hollandi ülikoolide turule sisenemise mudel on tänu Hollandi valitsuse pikaajalisele rahvusvahelistumise valdkonna toetamisele kõige paremini välja arendatud.

Töö teoreetilisest osast selgus, et rahvusvahelistumine on eesmärgistatud tegevus kõrghariduse kvaliteedi parandamiseks. Seejuures on oluline, et ülikoolide roll on väga palju muutunud ja seda eelkõige globaalsete muutuste taustal. Ülikoolide roll ei keskendu enam ainult kõrghariduse pakkumisele riiklikul tasandil vaid püüab olla turutingimustes konkurentsivõimeline, et meelitada riiki rahvusvahelisi talente. Ühe enam on ka valitsused hakanud kasutama rahvusvahelistumisega kaasnevaid võimalusi, et riigi majanduslikke ja poliitilisi eesmärke ellu viia. Teoreetilised mudelid on näidanud, et kõige dominantsemad on majanduslikud huvid on majanduslikud, kuid pikemas perspektiivis on oluline, et riiklikud ja institutsionaalsed huvid toetaksid üksteist.

Ülikoolide roll on muutunud ka palju iseseisvamaks tänu hariduse rolli ja riiklike motivatsioonide muutumisele ning üha enam võtavad ülikoolid kasutusele turupõhiseid instrumente ja tegevusi, et olla konkurentsivõimelised ja saavutada pikaajalisi rahvusvahelistumise eesmärke. Tänu viimastele dünaamilistele arengutele rahvusvahelise kõrghariduse maastikul on valdkond kiiresti arenenud ja professionaalsemaks muutunud ning seoses sellega vajavad valdkonnapõhised tegevused pikaajalisi eesmärke ja strateegiat. See on ärgitanud rahvusvahelistumist käsitlevad autorid diskussioonile, mis arutleb ülikoolide ja riigi integreeritud rahvusvahelistumise strateegia vajalikkuse üle. Mitmed autorid on ka leidnud, et riigi ja ülikooli ülesed tõmbetegurid on olulised talentide riiki meelitamiseks ning lisaks mängib riigi hea maine tähtsat rolli tudengi otsustusprotsessi juures.

Autorid leidsid ka, et rahvusvahelistumise eesmärkide saavutamiseks peavad ülikoolid ellu viima mitmeid tegevusi kodus ja välismaal ning parima tulemuse saavutamiseks peaksid need tegevused toetama ülikooli rahvusvahelistumise pikaajalise

strateegiat. Tegevusvaldkondades on laialdast tähelepanu saanud tudengite värbamine ja teaduskoostöö kui peamised instrumendid rahvusvahelistumise strateegia ellu viimiseks. Autorid leidsid ka, et strateegia edukaks ellu viimiseks on oluline lõimida hindamisprotsess strateegia ja tegevustega, et saada tagasisidet tulemuste osas ning vajadusel muuta tegevussuunda.

Empiirilise uuringu tulemusena selgus, et Hiina turule sisenemisel mängivad olulist rolli järgmised komponendid: 1. Ülikooli koduriigi valitsuse tugi Hiina turule sisenemiseks. Selliste oluliste eeltingimuste hulka kuuluvad kõrgtasemelised diplomaatilised suhted ja riiklik rahvusvahelistumise strateegia, sh. Hiina seadmine prioriteetseks sihtriigiks. 2. Ülikoolide ja riiklike organisatsioonide vahelise koostöö tähtsus selleks, et olla võrdsem partner suurele turule nagu Hiina. Seega riiklik ja ülikooli tasandid on rahvusvahelistumise protsessis tihedalt seotud ja nende rolli tuleb analüüsida paralleelselt. 3. Konkurents Hiina turul on kasvanud ja sellega seoses on veelgi olulisem ülikoolide seada Hiina turule konkreetsed eesmärgid ja strateegiad. 4. Hiina turul edukaks tegutsemiseks on vaja alalist esindust või esindajat kohapeal. Ilma pideva kohalolekuta on keeruline saavutada riiklikke ja ülikoolidele olulisi eesmärgi. 5. Tudengi haridusmesside tähtsus tudengite värbamisel on vähenenud. 6. Digitaalmeedia ja turunduse roll on muutunud oluliseks tudengite värbamise vahenditeks. 7. Tudengite värbamine läbi kolmandate osapoolte (ehk nn. agentide) on muutunud Hiina turul teadusülikoolide ja rakenduslike ülikoolide hulgas oluliseks rahvusvahelistumise tegevuseks. Efektiveks tudengite värbamiseks on soovitatav ülikoolidel valmistada strateegiliseks koostööks nn. agentidega. Tudengite värbamise strateegia on märgatavalt tulemuslikum, kui see on osa laiemast rahvusvahelistumise strateegiast. 8. Hiina tudengite värbamisel mängivad olulist rolli konkurentsivõimelised õppemaksud, sest tudengid eelistavad tihti kvaliteetset programmi madalatele õppemaksudele. Õppemaksudel on samuti oluline tähtsus rahvusvahelistumisega seonduvate tegevuste kulude katmisel. 9. Hiina turul mängivad tudengite värbamisel olulist rolli vilistlaste soovitused. 10. Eelnevalt hästi läbi mõeldud regulatsioonid ja korraldused on vajalikud vältimaks alakvalifitseeritud tudengite vastuvõtmist. 11. Selleks, et olla atraktiivne sihtriik Hiina tudengitele on vajalik sõlmida vastastikkune kraadide tunnustamise leping Hiina valitsusega. Leping on oluline, sest lepingu alusel tunnustab Hiina valitsus teiste riikide ülikooli kraade.

Autor pakkus käesolevas magistritöös välja Hiina haridusturule sisenemiseks vajalikud riiklikud ja institutsionaalsed sisenemismudeli komponendid. Need põhinevad töös käsitletud teoreetilistele ja empiirilistele tõenditele. Olulised eeltingimused ülikooli

turule sisenemiseks on: riiklik ja institutsiooni strateegia, toode, kokkulepped, tegevused ja instrumendid. Mainitud komponendid on äärmiselt olulised edukaks Hiina kõrgharidusturule sisenemiseks, sest need on ühtlasi vajalikud kõrgtasemelise diplomaatilise diskussiooni arendamiseks ja see mängib Hiinas märksa olulisemat rolli, kui teistes riikides.

Teoreetiliste ja empiiriliste leidude põhjal pakkus autor välja listi Hiina haridusturule sisenemise komponentidest:

Strateegia

Selged riiklikud ja institutsionaalsed eesmärgid ja rahvusvahelistumise strateegia, kus Hiina on prioriteetne riik.

Koostöö riiklike organisatsioonidega ja ülikoolidega eesmärkide saavutamiseks Hiinas; Strateegia tudengite värbamises ja agentide töötamiseks.

Toode

Väljapaistev riiklik maine ja reputatsioon Hiinas.

Konkurentsivõimeliste õppemaksude rakendamine;

Kvaliteetne haridus;

Mitmekülgsed inglisekeelsed programmid.

Kokkulepped

Vastastikkune kraadide tunnustamise leping Hiina valitsusega.

Kokkulepped ja regulatsioonid, et kontrollida tudengite kvalifikatsiooni ja tudengitele osutavate teenuste taset.

Instrumendid

Riiklik turundus- ja koostöö organisatsioon koduriigis;

Riiklikud stipendiumiprogrammid tudengitele;

Riiklik alaline esindaja või esindus Hiinas;

Koostööd toetavad programmid Hiina partnerorganisatsioonidega;

Ülikooli esindus või esindaja Hiinas;

Koostöö Hiina Stipendiumi Organisatsiooniga;

Koostöö värbamisagentidega.

Tegevused

Tudengite värbamine bakalaureuse programmidesse;

Tudengite värbamine magistriprogrammidesse;

Doktoriõppe kandidaatide värbamine;

Teaduskoostöö partnerülikoolidega;

Teaduskoostöö firmadega;

Tugev vilistlaste programm;

Institutsioonlaane koostöö partnerülikoolidega;

Haridusmessidel osalemine;

Turundusstrateegia (sh. digitaalturundusplaani) loomine.

Hiina turule sisenemise mudeli edasiseks arendamiseks soovib autor laiendada riikide ja ülikoolide hulka valimis. Samuti vajaks lähemat uurimist ülikooli ja riigi vahelise koostööroll ning riiklikud poliitikad Hiina turule sisenemisel. Konkreetse töö edasi arendamiseks ning uuringu leidude praktiliseks rakendamiseks soovib autor kasutada töös esitatud infot riikliku ja ülikoolide Hiina haridusturule sisenemise strateegia loomiseks ja täiendamiseks.