Minna Söderqvist

THE INTERNATIONALISATION AND STRATEGIC PLANNING OF HIGHER-EDUCATION INSTITUTIONS

AN ANALYSIS OF FINNISH EPS STRATEGIES

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Helsinki School of Economics and Business Administration

ISSN 0356-889X
ISBN 951-791-623-X
E-versio
ISBN 978-952-488-173-9

Helsinki School of Economics and Business Administration -
HSE Print 2007

ACKNOWLEDGEMENTS

Studying and doing research is a lonely activity for those who usually enjoy sharing experiences by speaking. However, it is also very interesting as an intellectual exercise. I would like to thank all those who have helped me during my study. I am indebted to many, and here I can only acknowledge a few. Nevertheless, I wish to sincerely thank all those people who have made it possible for me to enjoy myself this way over the past five years.

First, I would like to thank my supervisor, professor Reijo Luostarinen. Without his strong support by giving me the place to finalise my research in the Centre for International Business Research, I would probably still be sitting at home and feeling bad about not completing the study. I would also like to thank him for the academic freedom to do my project as I wished to – it was probably one of the best ways to keep me motivated enough to continue with the same theme for the whole study period. I am also grateful to him for his insightful comments that helped to improve the manuscript. I am equally grateful to professor Hannu Seristö for all the practical help he has given me on behalf of the Department of International Business; and of course for his valuable comments and support during the seminars.

I am fortunate to have as examiners two individuals who are both skillful and knowledgeable in my research area. Therefore my warmest thanks go to professor Jussi Koivisto and Dr. Heli Penttinen.

The psychological importance of two incidents that took place last autumn cannot be emphasised too much. After a long, lonely period, I finally found a colleague who is studying the same phenomenon – the management of internationalisation in higher education - but using another theoretical and empirical approach. Thank you, Chris, for all your friendship in sharing the good and bad days of research! The second really notable issue for me was my participation in Kataja's Case Course, and meeting the "Tampere-trio", Dr. Hanna Lehtimäki, Dr. Heidi Keso and especially the researcher Tarja Pietiläinen, and one colleague from HSEBA, the researcher Anne Äyväri. Without your support and encouragement to satisfy my

hunger for finding out more about different types of scientific knowledge and their influence on methodology, Ladies, I would never have matured enough to have the courage to finalise what I was doing. THANK YOU!

Moreover I am grateful to all HSEBA, CIBR and FIGSIB colleagues who have given valuable comments and support in the many seminars over the years. Especially I would like to thank the researcher Kalevi Euro for the many discussions we had last autumn when we shared an office. I would like to thank the following persons for their comments and support: Dr. Zuhair Al-Obaidi, Dr. Mika Gabrielsson, Mervi Hietanen, Birgit Kleinmann, Jukka-Pekka Luostarinen, Dr. Rebecca Marschan, Dr. Marjatta Maula, Viveca Sasi, Dr. Marja Tahvanainen, and Professors Ingmar Björkman, Sten-Olof Hansén, Asta Salmi and Eero Vaara.

I am equally grateful to Director Juha Arhinmäki from the Ministry of Education, and to Pirjo Aalto, Senior Advisor from CIMO, for all their help in giving me access to real life. I wish to thank the informal CAMPO group for letting me keep up-to-date with polytechnics internationalisation during two one-day seminars this academic year. I am grateful to my present employer, Helsingin liiketalouden ammattikorkeakoulun säätiö, and my former employer Espoon Hotelli – ja ravintolaoppilaitos, for giving me the opportunity to live through internationalisation in higher education. I would like to thank Joan Nordlund for her valuable help with checking my English in a very careful manner within limitations of a tight schedule.

Finally, but most of all, I would like to thank my family and the other significant people of my private life for their love and support. I cannot name you all, but you know, my friends, that I am really happy you exist! Thank you Päivi, for having been a super friend. Thank you, my dear Ari, for all the time you have let me have with my studies and for all the IT help in finalising the work. I sincerely wish to thank my parents, Marita and Heikki P.S. Leivo – without you I would not be writing this now: you have supported me in so many ways all my life. I am privileged to be your daughter. Thank you Katri, Kari and Katja – finally the first one of "Äidin kirjat" is done, and I can see the moment when I can give you more of my time!

This research has been partially supported by financial help from Wallenbergin säätiö, HSO-kannatusyhdistyksen säätiö and Helsingin liiketalouden ammattikorkeakoulun säätiö. I wish to express my gratitude to these organisations.

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ABSTRACT

THE INTERNATIONALISATION AND STRATEGIC PLANNING OF HIGHER-EDUCATION INSTITUTIONS – An Analysis of Finnish EPS Strategies By MINNA SÖDERQVIST

This licentiate study examined different understandings of the internationalisation of higher-education institutions (HEIs) and presented a holistic model of planning for internationalisation. The internationalisation of higher-education institutions has expanded because of EU programmes such as Erasmus, Socrates and Leonardo. Completely new processes have emerged and new professional groups have been born. Earlier research has been quite dispersed, and no concensus of the meaning of internationalisation has existed. On the other hand, management studies on the internationalisation of higher-education institutions are few.

This study analysed the *concept of internationalisation* in the context of higher-education institutions, and according to the concepts of Knight, van der Wende and Luostarinen & Pulkkinen. The differences from the neighbouring concepts of internationalism, international education, international business, Europeanisation and globalisation were highlighted.

A pragmatic way of thinking was adopted. It was argued that, in order to fulfil the aims of internationalisation, the process must be planned systematically and holistically, but this cannot be done if the nature and characteristics of the process of the internationalisation of higher-education institutions is not understood. A framework of holistic strategic management was presented and adapted to the internationalisation of HEIs. The Finnish European Policy Statements (EPS strategies) were chosen as an example of the clearly present planning function. They offered material that was more or less the same for all of the institutions. The EPS strategy documents of the whole population of Finnish higher-education institutions, i.e. 20 universities and 24 polytechnics, each 1 – 4 pages, drawn up in 1996 and 2000, were analysed.

This study makes three types of theoretical contributions. First, it contributes to our understanding of the concept of internationalisation in itself, and with reference to the neighbouring concepts. Second, it proposes a theoretical framework

for the internationalisation process of higher education, consisting of the definition of internationalisation and of an integrated understanding of the phenomenon and its planning, as part of holistic management. This understanding is split into eight propositions, of which the first one proposes that recent internationalisation seemed to evolve through five stages, and the other seven concern the different aspects of the holistic planning of internationalisation as part of holistic management.Third, the empirical contribution of the study was the population analysis of internationalisation planning, the unit of analysis being the European Policy Statements drawn up by the higher-education institutions. This analysis contributed to our understanding of the holistic situation of internationalisation in Finnish HEIs. It was found that the strategic thinking shown in the plans is not very extensive, or very deep.

As a managerial implication it is claimed that it is of vital importance to have a common understanding of internationalisation in order to be able to plan it. The integrated framework could be of help in developing the procedures of internationalisation.

1 INTRODUCTION

To succeed internationalisation must be internalised, it must be "owned" by institutions. But before it can be internalised, it must be made explicit. In the long run only by encouraging this sense of institutional "ownership" and by developing clear institutional strategies on internationalisation, can its quality be assured." (Scott 1992, p. 31)

1.1 Research Design

The research plan is introduced in this introductory chapter. First, the research design is developed in terms of the research phenomenon, the research gap, the problems, the objectives and the research questions. Second, the main methodological choices and the methods used are explained. Third, the structure of this study is described.

1.1.1. Research Phenomenon and Research Gap

The Research Phenomenon

In this subchapter the phenomenon under study, namely different understandings of the internationalisation of higher-education institutions, and the problematics of the management of internationalisation in higher education are briefly presented. Different important international and national actors, school development, the influence of the European Union, earlier studies in the field and the conceptual confusion related to this phenomenon are touched upon.

The internationalisation of higher-education institutions is a recent and significant phenomenon, not least, as Scott[1] says, since such institutes are "a key

[1] Scott 1998, p.123

institution of the knowledge society" or as Sadlak[2] puts it, "because higher education institutes have become central in modern society and their role has shifted from being a reflection of social, cultural and economic relationships to being a determinant of such relationships". Gibbons continues on these lines by claiming that the massification of higher-education institutes has given them a competitive advantage in today's society that not all of them are even aware of.[3] Specialist knowledge is often a key factor in determining a firm's comparative advantage. The internationalisation of higher education is a remarkable development. According to Sadlak, it is not too presumptuous to claim that there is more international content within an average university than within a transnational, globally operating organisation because of the very nature of tertiary-level learning.[4]

In the 1990s, the increasing interest in the internationalisation of the whole school system, and higher education in particular, was evident, for example, in the number of regulations, instructions and publications effected by the European Union, the Finnish education authorities, and international and European organisations such as the OECD, EAIE, ACA, CIMO and its sister organisations. Many authors[5] have stated that international activities have proved to be a popular challenge for institutions, teachers and students, and that the time, money and effort invested, especially in higher education in polytechnics, have been beneficial. Activities have increased and become more and more diverse every year[6].

The internationalisation of higher-education institutions could be seen as school development, which has had many faces in the past. The targets have been different at different times: the professional skills of a teacher, a class or the whole school organisation have been developed. The school has been developed as an action organisation, as a social structure and as a societal institution. All of these aspects have not been fully conscious, or mutually exclusive.[7] In the Nordic countries, the aim has been to ease and lessen state school administration and to

---

[2] Sadlak 1998 p.106
[3] Gibbons 1998 p. 72 -82
[4] Sadlak 1998 p.104
[5] e.g. Hytönen Synnöve, OPH 10/1998 s.21, Aholainen, in Ammatillisten oppilaitosten kansainvälinen toiminta vuonna 1996 p.4-5
[6] See e.g. CIMO reports from 1995 - 2000
[7] Koulun kehittämisen kansainvälisiä virtauksia s.10

increase local decision making, whereas in the UK and US developments have been towards a centralised curriculum system.[8]

The importance of the internationalisation of higher education can also be seen in the harmonisation attempts inside the European Union.[9] As a reaction to this, and also in order to fulfil the needs of working life and the numbers of students desiring to go into higher education after passing the matriculation examination,[10] a whole new school level was introduced in Finland in the late 1980s and early 1990s. Polytechnics, professional universities or universities of applied sciences, however way named, were founded. This was not unique to Finland, since according to Sadlak[11], for example, "all societies, whether modern or modernising, post-industrial or developing, are experiencing increasing demand for access to higher education, foremost in order to respond to an increasing requirement for trained citizens for an economy which more and more depends upon knowledge-related skills and the ability to handle information...only higher education institutions can produce such citizens in big numbers and of varied kinds." Seven countries out of twelve with the most foreign studies are situated in Europe.

However, there is no consensus as to what school internationalisation means, and not many studies on the issue at the European level. Internationalisation through the teaching of International Business has generated a wide range of studies, especially in the United States.[12] The first comprehensive study of the state and dynamics of international business education in Europe concerned the years 1989-90[13]. A recent attempt to tackle the internationalisation of higher education was made by Johansson[14] in her licentiate thesis in which se sought to clarify the international- education concept. In her licentiate study Sartonen[15] looked for an acceptable interpretation of internationalism[16]. Reichert and Wächter[17] studied the concept in order to be able to analyse EU co-operation outside Europe. Various

[8] Koulun kehittämisen kansainvälisiä virtauksia s.9
[9] Sorbonne, Bologna declarations from 1988, 1998, 1999
[10] see e.g. Ammattikorkeakoulut, vaihtoehto yliopistoille ed. by Osmo Lampinen in 1995
[11] Sadlak 1998, p.101
[12] Arpan 2001
[13] Luostarinen & Pulkkinen 1991
[14] Johansson 1997
[15] Sartonen 1999
[16] Sartonen p. 18, kansainvälisyys in Finnish

components of internationalism, international education and internationalisation have also been studied. As can be seen from the themes of these studies, it is important to clarify what internationalisation is and what is merely related to it, in order to be able to contribute to its management.

Earlier studies have been carried out along many different dimensions of internationalisation in higher education, including the different regional and national comparisons[18], Europeanisation[19] and globalisation[20]. Even "internationalisation at home" has generated some scholarly discussion[21]. Many publications have concentrated on different years[22], different school levels, or even on particular schools or institutions[23]. Various aspects of internationalisation have been studied, such as curriculum internationalisation[24], work placements abroad[25] and teaching through a foreign language[26]. A few scholars have studied employer needs from the schools' point of view[27], or in terms of the global job market[28], students' attitudes and perceptions of international business[29], and internationalisation at the undergraduate (BBA) level from the recruiters' point of view[30] or in the context of the school environment[31].

As far as the European Union is concerned, many phenomena related to programmes financed by the EU have been studied, including international mobility of students, teachers and researchers[32], as well as the implementation of European Strategies at the European Union[33] and the Finnish level[34]. The influence of the

[17] Reichert and Wächter 2000
[18] ed. de Wit 1995, Bruch & Barty 1998, Elliot 1998, Kawaguchi & Lander 1997, van Dijk 1995, Knight 1995, Rudzki 1995, Ebuchi 1989 + reports by e.g. Oph 1992, OPH 1995, Oph 1996, CIMO, Nuffic
[19] Ollikainen 1999
[20] Reichert & Wächter 2000, Sadlak 1998, Scott 1998, Gibbons 1998
[21] eds. Crowther, Joris, Nilsson, Teekens, Wächter 2000
[22] CIMO reports, OPH reports, OPM reports
[23] e.g. Sartonen 1999, Johansson 1997, Ollikainen & Honkanen 1997
[24] van der Wende 1999, 1996, Dhondt & van Oost 1999, Rugman 1992
[25] Internationalising vocational education and training in Europe 2000, Mutanen 1997
[26] e.g. ed Tella, Räsänen, Vähäpassi 1999
[27] Pitt, Berthon & Robson 1997
[28] Lasvu & Kenman 2000, Gehmlich 1999
[29] Tillery, Cudd and Rutledge 1994, Lascu&Kenman 2000
[30] Alberts-Miller, Sigerstad and Straughan 2000
[31] Sartonen 1999, Johansson 1997, van der Wende 1996, Knight 1995, McNay 1995, Luostarinen & Pulkkinen 1991
[32] Teichler 1999, Ollikainen 1998, Scott 1998, OPH reports
[33] Barblan & Teichler 2000, Barblan 1999, Reichert 1999, Barblan & Teichler 1998
[34] Söderqvist 2001, Ollikainen 1997

Leonardo programme attracted a lot of attention in 2000, in Finland[35] and elsewhere[36]. The role of the European Union in this whole process,[37] and the related financing,[38] have come under scrutinity.

The educational policy discussions behind the scenes and in the open[39] have generated a few publications, most of them also easily obtainable through the Internet.

While internationalisation has matured in some markets and has been given another focus through governmental actions, new forms such as presenting higher education as a *commodity* in the global market[40] have arisen. Related to this maturation process is also the *quality* of internationalisation.[41] A further discussion *questions the whole phenomenon*,[42] and a guide to all the different associations[43] as players in the higher-education field recently saw the light of the day.

The management of internationalisation is a rarely-studied issue. Although the international dimension is a serious concern and a development area in many educational institutes, the problem of how to implement it has not been solved.[44] A need for new management has been expressed.[45] The rector's role,[46] as well as the boundaries and tensions between academics and professional administrators,[47] have been studied. There is an evident need to understand the birth of a whole new professional grouping (international-relations officers, European-programme managers, international-credential evaluators, research and industry liaison officers, study-abroad and foreign-student advisors), and its consequences for

---

[35] Manninen, Nevgi, Matikainen, Luukannel, Pokero 2000, Ollikainen & Sasu 2000, Oulujärvi-Perä-Rouhu 2000, Taitoa ja työllisyyttä Euroopasta 2000
[36] European Union/Commission 2000
[37] Ollikainen 1999,Teichler 1998
[38] Throsby 2001
[39] Bologna declaration, Sorbonne declaration, and their interpretative explanations, Haug 2000, Haug 1999
[40] Mallea 2001, Hagen 1999, Oettli 1999, Hazell 1997
[41] ed. Wächter 1999, Quality and Internationalisation in Higher Education 1999, Knight 1999, Nuffic report 1998, de Winter 1996, OPH moniste 15/1995, ed. Snellman 1995, Smith 1993
[42] ed. Callan 2000
[43] ed. Wächter 2000
[44] Luostarinen &Pulkkinen p.166
[45] Wächter et al. 1999 p.45
[46] Kelly 1999, Lajunen & Törmänen 1999, Scott 1997
[47] McInnis 1998

management.[48] Strategic thinking in the university context[49] and university strategies for internationalisation have also been investigated in different institutional and cultural settings[50].

Research Gap

To sum up the above description of the study phenomenon, the research gap identified in this study is as follows. The mass internationalisation[51] of the 1990s, which is probably still on the increase,[52] together with the growing importance of higher education in modern societies,[53] has created an important study phenomenon. It is claimed that, after decades of efforts at internationalisation by idealistic individuals and progressive institutions, it has now become a key entrepreneurial issue.[54] Since, in this context it is quite new, earlier research has been quite dispersed, as discussed earlier in this chapter, and the internationalisation of new higher-education institutes, the polytechnics, has very seldom been analysed[55], despite its significance. Polytechnics started at about the same time and they have been quite efficient in attracting a lot of international activities. Various authors have covered aspects of internationalisation that they have found interesting, and no consensus of the meaning of internationalisation yet exists[56], either amongst scholars or amongst practitioners. Theories of internationalisation activities are still practically non-existent.[57] Because of their extent, educational management is phasing in new schemes to integrate internationalisation into the general management of higher-education institutions[58]. Despite its importance, literature on education management is not very wide[59] – and on international management almost non-existent. None of

[48] Callan 1998 p.54
[49] Malkki 1999, ed. Mälkiä & Vakkuri 1998
[50] Davies 1995, Saarinen 2000
[51] e.g. Scott 1998, Sadlak 1998
[52] Wächter et al. 1999 p.11
[53] e.g. Elliott 1998, Callan 1998, Gibbons 1998
[54] Windham 1996 p.9, Reichert & Wächter 2000 p.32
[55] Sartonen 1999 p.145, Wächter 1999 p. 9
[56] e.g. Blok 1995, Callan 1998, Knight 1999, Sartonen 1999
[57] e.g. Smith 1993 p. 5, van Dijk 1995 p.19
[58] Callan 1998 p.54, Wächter et al. 1999 p.45, Wächter in Crowther et al. 2000, van der Wende 1999 p.210,
[59] e.g. Ekholm 1992

the earlier studies covers the holistic management of internationalisation in higher-education institutions.

The conceptual confusion of the term the internationalisation of higher education is analysed in this study and a model of a holistic management system presented in order to develop a theoretical planning framework. The starting point for this licentiate study is that the internationalisation of higher-education institutions is a dynamic change process including many activities decided on in the internationalisation strategies of the institutions and put forward in European Policy Statements (EPS strategies), for example.

1.1.2. The Research Problems, Research Objectives and Research Questions addressed in this Licentiate Study

Research Problems

There are two related problems to be studied. The first one concerns the conceptual confusion in the use of internationalisation and related concepts[60] (internationalism, international business, international education, globalisation, Europeanisation) amongst scholars and practitioners[61] in the higher-education field. People use different concepts to mean the same thing, and the same word is used to mean different things.[62] As Blok put it, "*There was no common conceptual framework for the definitions, aims and instruments of internationalisation. When colleagues from different countries discussed internationalisation, they often, quite unconsiously, had different things in their minds.*" Knight wrote the same four years later: "... *it is clear that internationalisation means different things to different people and as a result there is a great diversity of interpretation attributed to the concept.*" This also leads to misunderstandings about the rational behind internationalisation, what are the means to achieve a particular objective, and what the objectives themselves are.

---

[60] e.g. Blok 1995, Callan 1998, Knight 1999, Sartonen 1999

[61] e.g. observations in Campo (International Coordinators & Mangers of Finnish Polytechnics) seminars 15.12.2000, 26.3.2001 and in EAIE (European Association of International Education) conference 30.11. – 2.12.2000, esp. International Relations Managers session 30.11. and Institutional Change through International Partnerships 2.12.2000

Another related problem is the non-systematic, non-holistic way of managing internationalisation[63] in most higher-education institutions. Understandably, due to the different interpretations of the phenomenon, it becomes impossible to manage it, since there is no common idea[64] of what is to be managed. Neither is it possible to give a structure to the management, an organisation, since there is no strategy to set out the issues to be taken care of. In practice, this leads to burn-out symptoms[65] and changes in the personnel[66] taking care of internationalisation duties, which in turn then leads to the need for initialising periods, and to inefficiency in the smooth running of activities.

Research Objectives

In this study, higher education means higher-education institutions, if not otherwise specified. Such institutions consist of traditional universities and the new-comers, polytechnics, universities of applied sciences, "hogeschools" or whatever word is used for the non-university higher-education institution.

The study aims at analysing the conceptual confusion, i.e., the existing understandings of what the different concepts related to the internationalisation of higher-education institutions mean. An activity or a process cannot be planned without an understanding of what it means. The presentation of holistic management-systems thinking will further the development of a theoretical framework for planning internationalisation.

In order to deepen the understanding derived from the literature, the framework of the present study is *evaluated and improved* by using it in an analysis of the European Policy Statements of Finnish higher-education institutions. It is not the intention to test the framework in this licentiate work, but rather to analyse the internationalisation of higher-education institutes in terms of what is documented of the planning in relation to how it could be planned as part of a holistic management

[62] Blok 1995 p.1, Knight 1999 p.13, Sartonen 1999 p.10, p.22, p.32
[63] Parsons 2000, Saarinen 2000
[64] see e.g. the results of the analysis of the European Policy Statements
[65] Discussions in Campo seminars 15.12.2000 and 26.3.2001
[66] e.g. continuous calls for replacement personnel in the EAIE and CIMO CIMPPA email lists

and steering system, and thus reach a more thorough understanding than could be achieved in a literature review.

Multidisciplinary Phenomenon – Multidimensional Concept

Since this is a multidisciplinary phenomenon by nature, (the INTERNATIONALISATION of *HIGHER-EDUCATION INSTITUTIONS*), both international education-policy and international business discussions are studied in order to clarify the existing conceptual confusion. Other authors share the opinion that the internationalisation of higher-education institutions links international business and international education. Callan[67] claimed that the growth of links between international education and international business and commerce, and the implications of this, would be a focal issue in the future. Van der Wende[68] found that the great majority of internationalised curricula were in the areas of economics and business studies.

There is a common understanding that internationalisation is a multidimensional concept in both international business in terms of the firm[69] and in international education in terms of higher education[70]. However, on the international education side, analysis of the different dimensions of internationalisation and definitions of the internationalisation of higher-education institutes are lacking[71].

For the reader with an international business background, the study aims at providing an understanding of the internationalisation of higher-education institutions, and for the reader with an international education background the aim is to further understanding of planning as part of a holistic management system. It is hoped that both types of reader will benefit from the synthesis of these two issues.

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[67] Callan 1998 p.56
[68] van der Wende 1996 p.188 table 2
[69] Luostarinen 1979 p.200
[70] Callan 1998 p.55
[71] Blok 1995 p.1, Callan 1998 p.56, Sartonen 1999 p.145

Research Questions

The above-mentioned research objectives lead to the following research questions.

(1) What is internationalisation in higher-education institutions?

This question can be divided into the following subquestions:

(1a) How has internationalisation been defined and understood in the literature? How does it differ from the related concepts: international business, international education, internationalism, globalisation and Europeanisation?

(1b) What are the phenomena in society that caused the massive internationalisation of higher education in Europe in the 1990s? What are the rationales for internationalisation?

The answers to this main question and to the sub-questions are sought through analysis of the literature.

(2) What kinds of strategic and operative objectives, and what kinds of strategic measures and operative programmes, are included in the written documents outlining the planning of internationalisation?

The answers to the second research question are sought from the empirical material, with a view to improving the theoretical framework.

1.2 Methodological Choices and Methods Used in the Study

1.2.1 Methodology-Related Choices

Blaikie[72] states that methods of research mean the actual techniques or procedures used to gather and analyse data related to some research question or hypothesis. Methodology is the analysis of how research should or does proceed. It includes discussions of how theories are generated and tested – what kind of logic is used, what criteria they have to satisfy, what theories look like and how particular theoretical perspectives can be related to particular research problems. The adaptation of this idea is explained in this subchapter, 1.2.

The starting point of this study is that the world can be studied: it is something existing and not something produced in the documents. In other words, positivism is understood to mean "naïve realism, assuming an objective external reality upon which inquiry can converge". Another approach would have been contructivism that can be explained by "constructivism's relativism, which assumes multiple apprehendable, and sometimes conflicting social realities that are the products of human intellects, but that may change as their constructors become more informed and sophisticated."[73]

The phenomenon in question, the internationalisation of higher-education institutions from the management point of view, has rarely been studied and is not well known[74]. A qualitative approach was considered to be more suitable than quantitative research because it produces rich and deep data on the different aspects of the phenomenon.[75]

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[72] Blaikie 1993, p.7
[73] Guba & Lincoln 1994 p.111
[74] see chapter 1.1 of this study
[75] Alasuutari 1995, Hirsjärvi & Remes & Sajavaara 1997, Anttila 1998, Eskola-Suoranta 1998

First, the researcher planned to make a historical case study but it turned out that there was no ethically[76] sustainable way to gain access to data other than interviews and official documents. A historical case study would have required different sources of data[77], especially the use of internal and unofficial documents, because the massive internationalisation of higher-education institutions took place in the second half of the 1990s. The researcher has been involved in this process and has gained insights into the unofficial side. On the basis of this pre-understanding[78], the author understood this unofficial side of the process to be the key issue in understanding the management, and especially the planning, of the internationalisation of higher-education institutions on the institutional level. Unfortunately, in this particular study, access to valuable sources of evidence was not granted.

Therefore, it was decided to change the level of analysis from the local education institution to the national level. This decision to change the level of analysis resulted in an extensive amount of naturally-occuring data[79]. Naturally-occuring data is also an efficient way to do research: the researcher does not waste time in collecting data when good data exists already.[80] Forty-four institutions have each produced a 1 – 4 page-document concerning the planning of their internationalisation. The documents were, on the average, 2.5 pages long. All in all, 224 pages were available for analysis, and another 484 pages provided background information. An applied content analysis of the structure and contents of the documents was chosen as a method of analysis.[81]

The following subchapters introduce the data-collection and data-analysis procedures.

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[76] Punch 1994 pp. 83 - 97
[77] Yin 1989 p. 23
[78] Gummesson 2000 p. 57 -82
[79] Alasuutari 1995 p.84
[80] Silvermann 2001, lecture notes of a visiting lecture of 27.3.2001 to HSEBA
[81] See the section of "Data Analysis"

1.2.2 Pre-Understanding of the Phenomenon

The author has a pre-understanding[81] of the phenomenon to be studied. Internationalisation can be seen as a static state of affairs, or it can be seen as a dynamic change process inside any organisation. In this study it is taken as a dynamic process in which actors, actions and contexts change. The analysis starts from the idea that internationalisation is not only perceived differently by different people in different situations, but it is also a theoretically complex, multidimensional concept.[82]

The pre-understanding of the author is based on both her personal experience of working in two schools as a teacher with responsibility for international activities and as an international co-ordinator for two degree programmes, and on the experience of others through seminars and conferences. The work experience of the author as a brand manager made it difficult for her to get used to the governance tradition existing in higher-education institutions. It could be described as a bureacratic[83] way of functioning focusing more on structure than on strategy[84].

Planning is apparently the most obvious function of management in higher-education institutes throughout the organisation. This has lead to the focus on strategic planning at this licentiate level. Luostarinen and Pulkkinen[85] shared this view by stating in their study that the planning of internationalisation should become an integral part of the total planning system in institutions of higher education.

1.2.3 Data Collection

This sub-chapter describes in detail and in chronological order what was done in order to arrive at an understanding of internationalisation and its planning as part of holistic strategic management. First, in a pilot study, the notions of internationalisation that existed among the personnel in one major Finnish polytechnic were analysed in relation to the historical international events that had

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[81] Gummesson 2000 p. 57 - 82
[82] e.g. Luostarinen 1979 p. 200; Callan 1998
[83] see e.g. Mintzberg 1979 p.10, 84-87, 102, 195, 315,333 and 361 where he refers to Weber´s views
[84] Luostarinen 1979, 1991; Hunt et al. 1997, Hill & Jones 1998
[85] Luostarinen & Pulkkinen 1991 p.31

taken place. Second, in order to find a context, education-policy documents related to polytechnics and the internationalisation of higher education were studied. This partly overlapped with the author's work as an international coordinator. Third, different concepts related to internationalisation were studied in order to be able to justify the limitations of the study. Fourth, the main models found were studied in depth in order to understand what internationalisation means in the higher-education context. Fifth, internationalisation was analysed through holistic management models in order to develop a framework for the internationalisation of higher-education institutions and its planning. In the following this is explained in more detail.

Pilot study

The pilot study was carried out in order to get a general and deeper understanding of the phenomenon that was to be studied than the author's working experience offered. More than 20 persons from one polytechnic were interviewed in spring 1999. All the interviews were recorderd and they lasted around 1.5 – 2 hours. The idea was to find out how the interviewees saw internationalisation and thus to understand why it was managed as it was in that polytechnic. It was thought that this would provide a good basis for more thorough study. Theme questions were used, but the discussion was allowed drift in line with the hints given by the interviewees. This meant that the key themes were filtered from the subjects the interviewees themselves brought up. These interviewees were found by using the snowball effect[86] – one actor mentioned the other important actors. The interviews started on the management level, and also included the international-office personnel, international co-ordinators and teachers.

Since this polytechnic was established from three separate institutes, there were many documents to be read, including those of their internationalisation history and their international activities, based in one case on a book and in another on annual reports. The third institute had internationalised in a very different way so only some reports on research co-operation were studied.

[86] Patton 1990 p.182

Based on the pilot study, the interviews and the documents, the researcher understood how important the management of internationalisation really was. It also became evident that, in order to form a general understanding of the planning of internationalisation in higher-education institutions, it was essential to study public-educational policy documents.

Educational Policy Documents

The next question concerned why the polytechnics had internationalised. The management processes were the focus of interest, but interaction with the authorities in terms of laws, government decisions and their justifications, and the publications of the Board of Education, the Ministry of Education and the Centre for International Mobility (CIMO) had to be studied first in order to get enough understanding of the phenomena behind the direct management processes. European Union discussions and the general European developments were also often referred to, so they had to be read as well. OECD, ACA and EAIE publications were consulted, and some understanding of UNESCO was acquired – all these associations and organisations have been in active consultation with the EU. It was consciously decided not to go outside of Europe, the reason being that Finnish developments were understood to be directly linked to European developments, and only indirectly to those in the US and Japan, about which NAFSA publications and Japanese scholars would have been good sources of information.

Clarification of the concept

The study of the educational policy documents showed that no shared understanding what internationalisation meant existed. While this was going on, the author was also looking at the meanings of internationalism in the sciences and the differences in meaning on the international business side. At the very beginning of the licentiate process, the author had become familiar with internationalisation theories in International Business, especially the writings of Luostarinen and the Uppsala school. She considered their explanations of internationalisation related to the educational

context of this study to be insufficient. Moreover, since reasons for starting internationalisation are different in firms and in public higher-education institutions, the processes are probably different as well.

This literature provided a basis for understanding and analysing the phenomenon "internationalisation" in relation to five other related concepts, namely internationalism, globalisation, Europeanisation, international business and international education. The use of these concepts is not coherent or logical in the literature, or in practice. The following section examines these concepts, in terms of the reasons, pre-requisites, history, contents, stages and consequences of internationalisation as part of the holistic and dynamic management process that is needed in polytechnics.

European Policy Statements

In order to determine how the planning of internationalisation is carried out in practice, all the Finnish higher-education European Policy Statements of a maximum length of four pages from the year 1996, when Socrates I started, and from the year 2000 when the policies had to be reviewed, were analysed. The EPS strategies of all the Finnish universities (20) and 24 (of the present 29) polytechnics written in both years, 1996 and 2000, were analysed. The polytechnic system is quite new in Finland, and not all of the present 29 existed in their current form in 1996.

The European Union Socrates I programme demanded a European Policy Statement from all the education institutes wishing to obtain European Union funding, and Socrates II did the same. The instructions on what a European Policy Statement should include are discussed in Chapter 3. However, they were not very detailed, so there were considerable differences in structure.

The EPS strategies could be defined to be naturally-occurring data[87]. This means that it existed without any interference from the researcher or this study. The data comprised strategy documents produced by the higher-education institutions for a purpose other than research.

[87] Alasuutari 1995 p.84

Access to this data was gained by unobtrusive measures,[88] which means that the object of study should not be disturbed by the conducting of the study. The material was copied in CIMO,[89] and included the EPS strategy pages and some other information pages from the same applications, which would give some internal data triangulation. These pages included information on organising mobility, on contact persons and on desired Socrates funding per activity category.

One limitation of these internationalisation plans is that they were clearly done for their external purpose, either to get funding or to report to the authorities. However, since in many cases no other comparable data was available, these plans and strategies were used as the basis of this analysis.

During the same time period the author started to work as a part-time international co-ordinator of two degree programmes in a polytechnic. This practical working experience shed a different light on the phenomenon than the literature alone could provide.

1.2.4 Data Analysis

The researcher aimed at understanding the different concepts of internationalisation and its planning. In such a case, when the researcher aims to find out how the planning is actualised in reality rather than to understand the formal characteristics of the discourse or the interaction between the discussants, discourse analysis cannot be taken as a method of study.[90] Instead, an applied content analysis of the structure and contents of the documents was chosen as a method of analysis. A content analysis, can be defined as "a quantitatively oriented technique by which standardized measurements are applied to metrically defined units and these are used to characterize and compare documents".[91] These suggestions guided the analysis, as explained in Chapters 1.2.2 and 1.2.3.

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[88] Alasuutari 1995 p.84
[89] Center for International Mobility
[90] Alasuutari 1999 p.73
[91] Manning & Cullum-Swan 1994 p. 464

The view has been expressed that no names for different methods are needed in scientific work, but that a thorough explanation of what was done serves the readers better.[92]

Four rounds of reading

The European Policy Statements were carefully analysed, as explained in the following. The first reading gave a general picture of the texts all together, to raise understanding what was typical in the documents. Special attention was paid to the similarities and differences, and the documents were found to differ considerably in their format and in how they emphasised the different aspects of internationalisation. It became interesting to analyse the outlines of the documents. The researcher tried to be as sensitive to the texts as possible in order to find the different outlines of internationalisation and its planning.

After the second reading it was possible to analyse the structure and contents of both documents in each school, from 1996 and 2000, and to compare them. First, the anlaysis focused on finding the key theme of each chapter. Every chapter was given a label, a key word or a "title" describing briefly the content. Next, separate lists of the key words of every document from both years were created. These lists were used to describe the outlines/structures of the documents because they gave information on how they were put together, i.e. in what order the themes were presented. As there were two sets of documents, one from the year 1996 and one from 2000, it was interesting to further analyse whether these two sets of documents differed in their structures. It was not possible to see constant differences between them but, when the documents were compared in time according to the individual higher-education institution, it was found that changes in the structures had taken place.

The third reading produced comments on the themes mentioned below were based on the theoretical framework. The themes were presented in the form of six questions, which were:

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[92] Lecture notes from Professors Anne Kovalainen's and Päivi Eriksson's speech in Kataja's Qualitative Methods – course 16.-18.5.2001

- What are the rationales of internationalisation?
- What were the changes in the contents concerning management of internationalisation from 1996 to 2000?
- What were the objectives of internationalisation?
- What types of activities were considered as international activities?
- What were the ways in which the institutional commitment to internationalisation showed?
- How was the management of internationalisation understood in terms of planning, realisation and evaluation.

The answers to the above-mentioned questions were written on a separate piece of paper for each school.

During the fourth reading these separate pieces of paper were read again in order to sort out similar answers to each question, even though different words may have been used. Then, the extent of the existence of a certain answer was calculated. After that, the EPS strategies were read again, in order to ensure that all the answers to a certain question were found. Since the EPS strategies did not have a common structure it was felt necessary to check the analysis, and this difference in structure made the process of analysis difficult, laborious and time consuming.

The results were then summed up in a report that was published separately[93]. They were then analysed again in order to evaluate the propositions built up in the theoretical framework.

1.2.5 Reliability and Validity of the Results

Reliability and validity are important when evaluating a quantitative study. Since this was a population analysis, the external validity question is not relevant. External validity is understood as questioning the population in which the results can be generalised[94].

Validity in qualitative analysis could be divided into five categories: validity of the material, observation validity, validity of description, validity of analysis and validity of the objectives of the study.[95]

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[93] CIMO reports, Suomalaisen korkeakoulutuksen EPS-strategiat v.2000
[94] Anttila 1998 p.404
[95] Anttila 1998 pp. 400 - 418

Content validity[96], or validity of the material, is a relevant question in relation to the data analysed, and concerns how well the material responds to external criteria. Since the EPS were not meant to correspond to the internationalisation strategies of the schools, it could be questioned whether they could be used as material for analysing the strategic planning of internationalisation. They included what the authors wanted to include, and if that person did not have a management education s/he may not have mentioned something that would have been interesting from the management point of view. Moreover, in most cases it was impossible to know whether what was written related the opinions of the author, of a bigger group or of the institution. Nevertheless, since in many cases it could be shown that they were de facto the internationalisation strategies, or that they reflected one geographical aspect of that strategy, it is claimed that they comprise valid data.

Another limitation of the material used is the fact that the EPS are also marketing documents directed at the European Union. The institutes want to show that they have carried out of the desired actions.

It could be claimed that the EPS are one way to affect educational policy. For example, if it is stated often enough that Socrates funding is not sufficient, the policy makers may take the hint and give more money.

Every attempt was made to carry out the observations systematically and several times in order to make sure that everything relevant was found, as explained above.

Reliability is part of quantitative analysis in terms of whether the results achieved would be achieved in another analysis carried out in the same way, the idea being to eliminate the influence of hazard. It refers to reliability in handling data, and of the analysis.[97] Since the material was read systematically several times, and different summaries were made, it is claimed that the results are reliable.

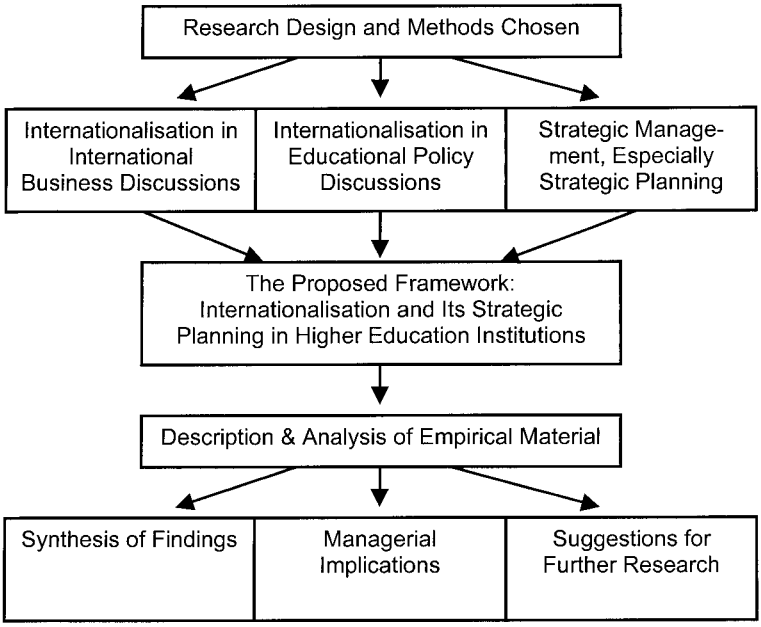
[96] Anttila 1998 p.404
[97] Anttila 1998 p.408

1.3 The Structure of the Study

This study is divided into four chapters. The first one introduces the study and discusses the methods used. The second chapter introduces the different concepts related to the phenomenon, namely educational policy discussions at the European level and relevant literature on international business internationalisation, higher-education internationalisation and strategic planning. The aim is to build theoretical framework for understanding the management of the internationalisation of higher-education institutions. The emphasis is on analysing the diffferent understandings of the term in order to create a strategic-planning framework for internationalisation in higher- education institutions.

The third chapter describes, analyses and discusses the data used to study the documented planning of internationalisation in higher-education institutions. The fnal chapter summarises the findings, discusses the theoretical and empirical contributions, gives suggestions for further research and discusses the managerial implications. The structure of this study is described in Figure1.

Figure 1. The Structure of the Licentiate Thesis



2 INTERNATIONALISATION AND HOLISTIC STRATEGIC MANAGEMENT IN THE CONTEXT OF HIGHER-EDUCATION INSTITUTIONS

2.1 An Introduction of the Neighbouring Concepts

The main emphasis in this study is on the term internationalisation, especially in the context of higher education. In order to fully understand internationalisation one has to understand the neighbouring concepts, since they are used indiscriminately in the literature and in practice.[98] As the literature review progressed, it became evident that several terms are used without any clear logic in connection with higher-education internationalisation. Sometimes the concept means the same, sometimes different things. Sometimes different words are used to mean the same concept. The conceptual confusion particularly applies to internationalisation, internationalism and international education, but also to Europeanisation, globalisation and international business.

This confusion has been highlighted by other authors, such as Blok, Sartonen and Knight. Blok[99] is as straightforward as Knight in saying

> "There was no common conceptual framework for the definitions, aims and instruments of internationalisation. When colleagues from different countries discussed internationalisation they often, quite unconsciously, had different things in their minds."

Sartonen[100] claimed that the meaning of internationalisation depends on the particular speaker's own starting point. She also said that it was not always obvious what different authors meant by internationalisation, whether it had value per see or whether it had value as being intrinsic to some other values. She also rightly pointed out that neither the Finnish Board of Education nor the Finnish Ministry of Education have given any specific definition in their publications. The objects of discussion in

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[98] e.g. Smith 1993, Blok 1995, van Dijk 1995, Callan 1998, Knight 1999, Sartonen 1999, observations in Campo seminars 15.12.2000, 26.32001 and EAIE conference 30.11.-2.12.2000
[99] Blok 1995 p.1
[100] Sartonen 1999 p.10, p.22 and p.32

these publications are usually student and teacher mobility, language teaching, content teaching in a foreign language, and joint modules or degrees.

Knight[101] is even more direct in her words

> "Due to the increased interest in and understanding of the international dimension of higher education, the term "internationalisation" is being used more and more. On the one hand, this can be interpreted as a sign that internationalisation is becoming more accepted and central to the provision of higher education. However, on the other hand, *it is clear that internationalisation means different things to different people and as a result there is a great diversity of interpretation attributed to the concept."*

Hence, it is important to understand what the internationalisation of a higher-education institution is, and what it is not.

The research topic, the internationalisation of higher education, and more specifically the internationalisation of higher-education institutions, is cross-disciplinary in nature, and may be studied in at least two different ways: through educational science or through the internationalisation theories of international business science. In other words, internationalisation in higher education can be described by using international business terms[102] or by using international education[103] terms. Of course there are other theoretical contexts in which this could also be placed, such as organisational theories, network theories and knowledge management. However, the focus in this licentiate study is only on internationalisation and international education, due to time and effort limitations in terms of the goals of licentiate work.

In the following section internationalisation is differentiated from the related concepts: international business, international education, internationalism, globalisation of higher education, Europeanisation of higher education.

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[101] Knight 1999 p. 13

[102] e.g. Luostarinen 1975, 1979, 1995 Johansson-Vahlne 1977, Johanson-Wiederscheim-Paul 1975, Cavusgil 1980, Juul-Walters 1987, Sullivan-Bauerschmidt 1990,Turnbull 1987, Welch – Luostarinen 1980, Welch-Wiederscheim-Paul 1980

[103] e.g. Johansson 1997, all Education Board and Ministry for Education reports and surveys in the 1990s, Enbom 1994, Kasvaminen kansainvälisyyteen 1993

2.1.1 International Business

International Business is the most distinct of the above-mentioned related concepts, even though it has been shown to have different meanings and implications of various kinds, leading to different associations in varying contexts.[104] It has been claimed to be a subject that lacks the clarity of form and solidity of substance found in the traditional academic disciplines from which it emerged: marketing, finance, economics and management[105]. As a formal discipline, International Business is relatively new. Consequently, there has been no clear concensus among educators about appropriate contents of International Business teaching.[106] Luostarinen and Pulkkinen found that some international business programmes are built on one functional area, such as marketing, and that others have developed following what is going on in the business world, i.e. business operations require education in areas such as global business, international business operations, internationalisation processes and strategies, international personnel management and the economic polices of the European Union. In 2001, at least area studies and cross-cultural issues can be added to the list.

A clear picture of Nordic International Business Research was given in Björkman's and Forsgren's article[107]. They introduced several objects of study. The starting point in Nordic IB research was how the international firm has been understood. The second issue of interest has been research on internationalisation and management of the firm. Earlier theories have concerned the internationalisation process, resulting in a sequential model and followed by alternative or complementary models and frameworks, such as networking theories.

The management of the international firm has been a major focus of studies in Nordic International Business Research. The emphasis has been on knowledge creation and diffusion in international firms, as well as on the problems involved in managing large international firms through formal control mechanisms. Different

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[104] Luostarinen-Pulkkinen 1991 p.22
[105] Luostarinen-Pulkkinen 1991 p.5
[106] Luostarinen- Pulkkinen 1991 p.131
[107] Björkman & Forsgren 2000

functions in the international firm, as well as operations in different countries and regions, have also been studied. This clearly indicates what international business is all about, since a common definition has not been found in the literature, neither during the process of the present study, nor earlier when the author was working as an international business teacher.

Given the process approach to the internationalisation of higher-education institutions taken in this study and by using the idea that internationalisation is a multidimensional concept, it seems appropriate briefly to highlight international business efforts concerning the process view of the internationalisation of the firm and the multidimensionality involved.

There are two perspectives from which internationalisation as a process has been approached: that of the Swedish researchers[108] (usually referred to as the Uppsala model), and the one developed by Luostarinen[109]. They both take the perspective of a single firm, and they are considered to be most valid in the context of fairly small and highly industrialised countries, such as the Nordic countries. The Uppsala model is restricted to examining the penetration pattern in a certain market, whereas Luostarinen's model presents an overall internationalisation pattern.[110] Luostarinen's model is based on extensive data (1007 companies out of 1504) including 94.7 % of the total exports in 1976, and takes a holistic approach on both the theoretical and the empirical level. Both are based on the behavioural theory of the firm,[111] and on the belief that internationalisation is the product of a series of incremental decisions. Internationalisation is seen as a dynamic, gradual and sequential process, dynamic in the sense that the outcome of one decision or one cycle of events constitutes the input for the next decision/event. Learning inside the organisation is important in order to move from one stage to the next, even though the time span of learning is decreasing in today's world, compared to the 1970s.

Luostarinen also emphasises the internationalisation of a firm as a multidimensional concept[112] that has several implications for the management.

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[108] Johanson & Wiedersheim-Paul 1975, Johanson & Vahlne 1977, Wiedersheim-Paul & Welch 1980
[109] Luostarinen 1970, Luostarinen 1979, Welch & Luostarinen 1988, Luostarinen 1994
[110] Hentola 1994 p.32
[111] Luostarinen 1979 p.22, Welch & Wiedersheim-Paul 1980 p.338, Johanson-Vahlne 1977 p.23
[112] Luostarinen 1979 pp.200 - 201

Those relevant[113] to the internationalisation of a higher-education institute are, first that, the planning of internationalisation should be included and integrated with the regular corporate planning system, second, that resources should be developed and allocated for internationalisation based on the understanding that the payback periods are long at first, and third, that as internationalisation is related to all the functions and activities of the firm it should be taken into account in the development of its information, organizational, implementation-, control and result systems. Fourth, as a process, internationalisation requires the gradual and continuous development of different systems along with its own development, and finally, since lateral rigidity is a barrier to all innovative strategic development, attempts should be made to reduce it.

Most of the criticisms[114] of the stages patterns arise from the methodological limitations of the Uppsala school. Luostarinen is not even referred to in these articles, even though they mention the "stages model", and it is not specified that they are referring to the Uppsala school.

2.1.2 International Education

International education is the other most obivious discipline connected to the internationalisation of *higher education*. However, the concept is not at all clear here either. Sometimes authors, such as Smith[115], speak about the international dimension of higher education. Sometimes internationalism is seen as international education leading to peace and other human values,[116] whereas in business literature it refers more to connections between people and companies from different nations. On occasions, especially in the early 1990s, and with reference to the beginning of internationalisation in a particular institute, international education means

[113] Luostarinen 1979 p.204
[114] Hedlund & Kvaerneland 1985, Turnbull 1985, Sullivan & Bauerschmidt 1990, Andersen 1992
[115] Smith 1993 p.6
[116] Sartonen 1999, Johansson 1997

international mobility and exchange, such as in "International Education in Europe".[117]

These two concepts, internationalism and international education, deserve a closer look even though some writers, such as Johansson[118] to some extent and van der Wende[119] totally, have been able to pass over the whole problem by concentrating on the internationalisation of the curriculum and comparing the elements and processes. Johansson studied the objectives and contents of international education in professional/vocational education. Since the curriculum is the main element in education, her study has a lot to do with the internationalisation of the curriculum. Her empirical material was gathered in one Finnish educational institute, while van der Wende studied internationalisation of the curriculum in the context of the Netherlands compared to some other countries. She proposed a typology of nine types of internationalised curricula, having first defined internationalised curricula as a curricula with an international orientation in their contents, aimed at preparing students for performing professionally/socially in an international/ multinational context and designed for domestic and/or foreign students.[120]

[117] EAIE Occasional Paper 2, 1992
[118] Johansson 1997
[119] van der Wende 1996
[120] van der Wende 1996 p.186 - 187

Type 1	Curricula with international subject matter
Type 2	C. in which the traditional/original subject area is broadened by an internationally comparative approach, e.g. international comparative education
Type 3	C. which prepare students for international professions, e.g. International Business Administration
Type 4	C. in foreign languages or linguistics which explicitly address cross-cultural communication issues and provide training in intercultural skills
Type 5	Interdisciplinary programmes such as area and regional studies, e.g. European studies
Type 6	C. leading to internationally recognised professional qualifications
Type 7	C. leading to joint/double degrees
Type 8	C. of which compulsory parts are offered at institutions abroad, taught by local academics
Type 9	C. in which the contents are especially designed for foreign students

Table 1: van der Wende's Typology of Curricula

International education was studied from a different point of view by Johansson.[121] Her licentiate thesis was about internationalism in vocational schools and in the teacher's pedagogical thinking. The goals were to clarify the concept of international education, to study how internationalism exists in the educational establishment's written curricula, to study teachers' preparedness and willingness to participate in the international activity of an educational establishment, and to describe how internationalism expresses itself in teachers' pedagogical thinking. Her aim was to build up a picture of the aims of international education and its contents in vocational education. The empirical part was carried out in seven vocational establishments of a geographical area called Keski-Uusimaa. It consisted of both quantitative and qualitative elements, and the end result of her literature review was the following sunrise picture.

[121] Johansson 1997

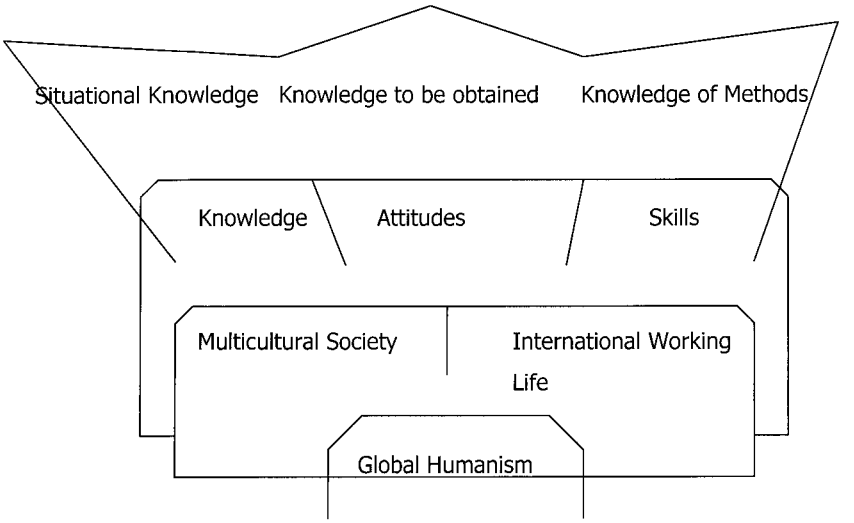

Figure 2: Johansson's Framework of International Education

The figure can be explained in a few words. The whole framework is based on the values of global humanism. Two elements of the reality in which the students live are emphasised, a multicultural society and international working life. Students should gain knowledge, attitudes and skills from their international curriculum. Examples of all of these are given, as the second table[122] shows.

	Knowledge	Skills	Attitudes
Global Humanism	Knowledge of different countries and cultures	Interaction skills	Tolerance/ acceptance of differences
Training for multicultural society	Knowledge of refugees and immigration	Communication skills	Acceptance
Internationalism in working life	Professional knowledge of different countries and customs	Language competence	Openness

Table 2: Johansson's Cross Tabulation of Elements of International Education

[122] Johansson 1997 p.36

According to another author, Teekens[123], knowledge and skills belong to the same category, and internationalised curricula only need to meet two types of objectives, cognitive objectives in the humanities and languages, and objectives related to attitude in order to increase intercultural competence. It can be concluded from all the above definitions that, from the international education point of view, internationalisation has a very different background than from the international business-administration point of view.

A different view was put forward by Smith[124] on the quality of international education. International education was divided between inputs, processes and outputs. Inputs included e.g. study programmes that required different elements, such as human resources, teaching competence, financial resources, administrative facilities and language resource centres. Process elements included programme structures, teaching/learning methodologies, administrative procedures and programme evaluation, carried out in order to facilitate international activities such as student and teacher mobility. No specific elements were given as outputs, but the points of view of the institutions, the departments and other stakeholders were emphasised.

Brown, Callan, Otten, and Rinehart,[125]amongst others, referred to one area of discussion, which is not taken further here, namely to one part of the curriculum internationalisation, multiculturalism and the effects of cultural diversity, and research related to these concepts. As a special discussion on international education, it is beyond the scope of this study. These are important issues as such, since multiculturalism in societies is growing and at the same time the internationalisation of higher education is bringing a growing number representatives of different cultures together every day. Hofstede is possibly the best known scholar in this field in terms of international business.

[123] Teekens 2000 p.30
[124] Smith 1993 p.11 - 14
[125] Brown 2000, Callan 2000, Otten 2000, Rinehart 2000

Reichert and Wächter[126] referred to another discussion that is related to the internationalisation of higher education, but that is also beyond the scope of this study, namely to development and aid to the third world countries. Finland has never been part of any colonialisation process, so internationalisation is limited to the phenomenon as such with no notions of helping former colonies or developing countries.

Even more concepts were brought into the discussion by Knight[127] to add to the conceptual confusion. Transnational education, global education, world education, intercultural education, comparative education and multicultural education were mentioned. These concepts are not included for two reasons. First, they did not often occur in the literature review in relation to internationalisation as a process. Second, they are considered more as parts of international education, and since this is considered here only to the extent needed in order to understand the topic, the internationalisation of higher-education institutions, these other issues are left for scholars of education science to deal with.

2.1.3 Internationalism vs. International Education

It could be argued that internationalism is the reason behind international education. In that case, internationalism is seen as a step towards world peace, broadmindedness, understanding and respecting other people and their cultures, values and ways of living, understanding racism and alienation, in Nilsson's[128] words. Internationalism is seen this way in the UNESCO discussions, referred to in Kasvaminen Kansainvälisyyteen[129] (= Growth towards Internationalism), for example, which is a research report about internationalism education and the UNESCO Aspro project. In that report Liikanen[130] explains how international education has been defined in many ways, and how in 1993 the discussion was about global education,

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[126] Reichert and Wächter 2000
[127] Knight 1999 p.14
[128] Nilsson 2000 p.21
[129] Kasvaminen kansainvälisyyteen 1993 ed. Pirkko Liikanen
[130] ibid, p.14

development education and education for development. According to Godwin (1992) and Rinne (1992), this development education included interdependence, knowledge of one's own and other cultures, societal and social justice, conflicts and how to solve them and change. In the 1970s and 1980s, the emphasis in Finland was clearly also on peace education, and internationalism was to be taught together with all other subjects. In practice, the realisation differed according to the teacher. There was a change in educational policy in the 1990s in Finland, as elsewhere,[131] and an active desire to promote international co-operation and communication was one of the emphases in the development of the whole education system.[132]

Another possibility is to take the more critical view of Scott[133]. He argued that internationalism has always been stressed in the *rhetoric* of higher education, and pointed out that one has to remember that universities were founded by nation states, and that their missions are very national. This view was also supported through the ACA project, for example, which, in 1999, published so-called country essays related to international issues.[134] Nevertheless, it is true that the world has become a global environment which forces higher-education institutes to reposition internationally. This lead him to conclude that it is in this context that internationalisation has to be conceived and promoted, and not in terms of sentimental nostalgia.

Another example of the difficulties in using these terms is taken from Windham,[135] who said:

"Internationalism is a personal as well as a national or institutional exercise".

From the context, it could be said that he is speaking more of internationalisation than internationalism. These two examples clearly show that sometimes these words are used almost synonymously, without no deeper reflection on their meanings. Even more confusing definitions could be introduced. For example, the EAIE[136] defined

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[131] e.g. Kameoka 1996 p.34
[132] e.g. Valtioneuvoston koulutuspoliittinen selonteko eduskunnalle 22.5.1990
[133] e.g. Scott 1996 p.27, Scott 1998
[134] Internationalisation in European Non-University Higher Education, a Project of the Academic Co-operation Association, 1999
[135] Windham 1996 p.12
[136] EAIE Occasional Paper no 2, 1992 p.9

international education as all the activities dealing with the internationalisation of higher education, the internationalisation of education being the whole range of processes through which higher education becomes less national and more internationally oriented. According to CIMO,[137] international education in itself functions as a quality-assessment system aimed at improving the quality of teaching and education. Both of these definitions seem to be circular.

Critical views on international education as a means to achieving the objective of internationalism (humanism) have been put forward lately. The EAIE published a report in 2000 written by five authors, in which especially Grünzweig[138] was critical of international education. In his view its potential as a critical element in the creation of a new identity from which to judge a reality open to criticism has been lost now in these days of the massification of higher education and its internationalisation. According to Grünzweig, due to the European Union's initiatives, a totalising culture can no longer create this.

2.1.4 International Education vs. Internationalisation

Callan[139] was one of the few people to take up the educational value of internationalisation. As she rightly argued, it is striking how rarely this forms part of the rationales for internationalisation. Employment and economic prosperity seem to elide the objectives of excellence in education for its own sake. It was further argued by Callan that these are legitimate and connected goals, but not the same goal. The fact that the educational rationale for internationalisation cannot be taken for granted but needs to be articulated, was also emphasised. Such articulation might ease the conceptual confusion amongst both professionals in the field and academic scholars.

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[137] CIMO Occasional Paper 1995 p.16
[138] Grünzweig 2000 p.3 - 8
[139] Callan 1998 p.52 - 53

The academic rationale for internationalisation in higher education was also taken up,[140] its importance being that it leads to the attainment of international academic standards for teaching and research. It was pointed out that it could be rigorously debated whether or not internationalisation is an end in itself, as is often claimed, or whether it is a means to an end, the end being an improvement in the quality of education. This assumes that enhancing the international dimension of teaching, research and service adds value to the quality of higher-education systems. This premise requires that internationalisation is central to the mission of the institution.

A contradictory view to those put forward above is presented by Sartonen[141]. She claimed that internationalism is a multidimensional concept that is not a separate qualification, but includes dimensions of many qualifications. (She probably meant international education rather than internationalism, which is the word she used). Later in her study[142] she summarises the qualifications of an international professional, according to the questionnaire she had used, and made three categories from the thirteen different qualifications, production related, normative and innovative.

2.1.5 The Europeanisation of Higher Education

A major study related to one specific example of regionalisation, namely Europeanisation, was carrid out by Ollikainen,[143] who extensively analysed the Europeanisation of Finnish education-policy discourses in 1987 – 1997. Some other authors, such as Reichert and Wächter,[144] refer to Europeanisation as a geographical subset of internationalisation. Teichler and Barblan[145] studied the effects of European Union programmes on internationalisation on several occasions in the late 1990s.

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[140] Knight 1999 p.20
[141] Sartonen 1999 p.53
[142] Sartonen 1999 p.139
[143] Ollikainen 1999
[144] Reichert & Wächter 2000 p.33
[145] Barblan & Teichler 2000, Barblan 1999, Teichler 1999, Barblan & Teichler 1998, Teichler 1998

They, like others[146], found that, on occasions, the EU is a powerful actor for internationalisation, but that Europe as a region is actually predominantly a sub-category of less than systematic relevance. This opinion is shared by Crowthner,[147] who argued that internationalisation means Europeanisation, and for many European institutes Europeanisation is only the first step towards wider internationalisation, and it is a question of degree rather than of nature.

However, it was pointed out by Teichler[148] that there are some authors (in Blumenthal et al. 1996) who claim that Europeanisation as regionalisation contradicts the principles of internationalisation by establishing co-operation among neighbours in order to counteract pressures from more distant regions of the world.

Europeanisation could also be seen not as an institutional process or orientation, but as study contents. European studies are discussed by Shennan,[149] for example, who proposed that a European curriculum should include three dimensions, historical, regional and cultural, through which one acquires knowledge, skills, attitudes and values. In fact, one learns to live in Europe, about Europe and with the help of Europe.

2.1.6 The Globalisation of Higher Education

Globalisation – being globalisation of the economy and society - could be taken as the reason for the internationalisation of higher-education institutes, as Elliott[150] put it. Alternatively, it could be claimed that globalisation is a topic over which there has been considerable controversy, and that it currently exists to a greater extent in industries such as financial services than in others, as Gibbons[151] claimed. Further,[152] it was suggested that globalisation seemed uncontested in the sphere of knowledge production, and support was expressed for the universities' role as producers of

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[146] e.g. Windham 1996 p. 11
[147] Crowther 2000 p.36
[148] Teichler 1998 p. 88
[149] Shennan 1991
[150] Elliott 1998 p. 32
[151] Gibbons 1998 p.70
[152] Gibbons 1998 p.72

primary knowledge. A geopolitical view was adopted by Sadlak,[153] who pointed out that control over territory was of less importance than control of and access to all kinds of markets, the ability to generate and use knowledge and the capacity to develop new technology and human resources. Globalisation was not only a complex inter-linking of various and not only economic processes, but also a sombrely dominant framework for anxious peering into our future as individuals and members of society.

Globalisation can be given a much wider meaning, one that emphasises the impact of global environmental changes, the threat of immigration or asylum policies by the superpowers, and the growth of hybrid world cultures created by the mingling of global-brand culture and indigenous traditions, as Scott[154] put it. He claimed that if globalisation is thus perceived, higher-education institutes have a new and unexpected role. It was further argued[155] that it cannot be regarded simply as a higher form of internationalisation, as Robertson suggested, according to Risager[156]. Instead of their relationship being seen as linear or cumulative, it might actually be dialectical. In a sense, globalisation could even rival the old internationalisation. Risager saw this differently, and argued that globalisation is perceived as menacing, and internationalisation is almost like a mantra and a form of defence against the threat of globalisation[157].

Another definition suggests that[158] "Globalisation is the flow of technology, economy, knowledge, people, values, ideas...across borders. Globalisation affects each country in a different way due to a nation's individual history, traditions, culture and priorities." The same authors suggest that the "internationalisation of higher education is one of the ways a country responds to the impact of globalisation yet, at the same time respects the individuality of the nation."

Thus, these two concepts are seen as different, but dynamically linked. Risager spoke of menace and defence, Knight mentioned globalisation as a catalyst

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[153] Sadlak 1998 p. 100
[154] Scott 1998 p. 122
[155] Scott 1998 p.124
[156] Risager in Internationalising vocational education and training in Europe, 2000 p.18
[157] ibid. p.15
[158] Knight 1999 p.14

and internationalisation as a response in a proactive way. Wächter[159] added to this by stating that globalisation is an uncontrolled process, determined mainly by fierce economic competition on a global scale, and by rapid advances in information and communication technology, and that internationalisation is based on conscious action. Even though this last claim can be questioned on the evidence of Luostarinen's studies,[160] in which he argued that it starts out as a sporadic phenomenon, the point was emphasized by Wächter as well that globalisation and internationalisation are not synonymous.

Thus, Scott puts forward a more philosophical and value-related view of globalisation than the other writers. It could also be concluded from the discussions referred to above that, if internationalisation is a concept that is understood in many ways, so is globalisation. However, the emphasis in this study is on internationalisation, not on a deeper and wider discussion of globalisation in the context of the internationalisation of the firm[161] or the internationalisation of higher education.[162]

2.2 Contents and Definitions of Internationalisation

The aim in this section is to present the main models found in the literature, namely those of Knight[163], van der Wende[164] and Luostarinen[165].

[159] Wächter 2000 p.10
[160] e.g. Luostarinen 1979
[161] see e.g. Kirpalani & Luostarinen 2000
[162] see e.g. The Globalisation of Higher Education, edited by Peter Scott 1998
[163] Knight 1999, Knight 1995
[164] van der Wende 1999, van der Wende 1996
[165] Luostarinen 1995, 1994b, 1991, 1981b, 1981c, 1979, Luostarinen & Pulkkinen 1991

2.2.1 Discussion of Knight's model

The typology of four different approaches to internationalisation was presented by Knight[166] in 1994 and included activity, competency, ethos and process. They are presented below in a table borrowed from Knight:

Approach	Description
Activity	Categories or types of activities used to describe internationalisation, such as curriculum, student/faculty exchanges, technical assistance, international students.
Competency	Development of new skills, knowledge, attitudes and values in students, faculty and staff. As the emphasis is on outcomes of education, there is increasing interest in identifying and defining global/international competencies.
Ethos	Emphasis on creating a culture or climate on campus that promotes and supports internationalisation/ intercultural initiatives.
Process	Integration or infusion of an international or intercultural dimension into teaching, research and service through a combination of a wide range of activities, policies and procedures.

Table 3: Knight's Internationalisation Approaches

The purpose of the typology was to illustrate the different areas of emphasis that have been given to internationalisation by different researchers, practitioners and higher-education institutions. These approaches are not necessarily exclusive, but could be claimed to be valid based on the literature review. Activities were discussed, amd curriculum-related questions were strongly present in Nilsson's and van der Wende's work. Student and teacher mobility and technical assistance currently feature in the European Union's programmes, as well as in the Finnish Ministry's and CIMO's statistics and reports, for example. The EAIE conferences also have a renowned branch staffed by International Relations Managers who deal with various issues to do with managing the daily work of international offices in higher-education

institutes. The competency view was taken up in the context of work placement by Oates, Sögaard, Wordelmann and Young[167], for example, and in discussion on the quality issues of internationalisation, when the focus is on the outcomes.[168] These discussions especially emphasise the role of internationalisation in developing the desired competencies of students. The ethos view is now concentrating on multiculturalism and its effects, as referred to earlier. The process view has generated some discussion, but so far no studies other than Knight's have been found. This is surprising considering how much of their financial resources the EU and the Finnish government have been using to internationalise higher-education institutes.

The process view is the one to which this study mostly relates.

Knight's Definition and Its Critics

Knight introduced a widely cited[169] definition of internationalisation in 1994:

> The process of integrating an international dimension into the research, teaching and services functions of higher education.

She used the same definitions in her later work in 1995 and in 1999.

The international dimension refers to a perspective, activity or programme that introduces or integrates an international, intercultural or global outlook into the major functions of the institution.

According to Knight's own explanation in 1999, this definition incorporates several key concepts. Internationalisation is taken as a dynamic process and not as a set of isolated activities. Integration or infusion into programmes, procedures and policies emphasises the ensuring of the international dimension as a central part and not as a marginal element. The definition includes not only geographical borders, but also different cultural groups within a country. By design, she did not include the

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[166] Knight 1999
[167] all in Internationalising vocational education and training in Europe, 2000
[168] e.g. in ed. Snellman 1995

rationales behind internationalisation in her definition in order to gain wider acceptance of it by claiming that different institutes have different rationales (as will be discussed in the Chapter 2.3 below), which need to be made clear and explicit elsewhere. Thus the definition of internationalisation in a higher-education institute is better linked with the functions of the institute, namely teaching, research and service to society.

This definition has been critised by Wächter[170] in many of his writings. His[171] own definition is based on that of Knight, but slightly moderated

> The process of **systematic** integration of an international dimension into the teaching, research and **public** service function of a higher education institution.

He adds the systematic way of functioning, emphasises the *state* universities and leaves out private higher-education institutes. This is inconsistent, since elsewhere[172] he emphasised the new markets of higher-education institutes and its commodification.

The notion of systematic functioning has been taken up by others, such as Elliott:[173]

> Internationalisation is to be understood as a **systematic**, sustained effort by **government** to make higher education institutions more **responsive to the challenges** of the globalisation of the economy and society,

but he also emphasised the role of governments and the importance of the context.

The elements of the internationalisation process are stipulated by Wächter,[174] meaning the elements by which the teaching, research and service functions of the institution are to be made international. The activities are not specified in Knight's definition, even though, as mentioned earlier, there is no consensus in the field on what the elements are.

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[169] in OECD, ACA, EAIE, EU discussions
[170] Wächter 2000, Crowther et al. 2000, Wächter et al.1999, Wächter 1999
[171] Wächter 1999, in Internationalisation in Higher Education. A Paper and Seven Essays on International Co-operation in the Tertiary Sector, p.95
[172] Wächter e.g. in Reichert and Wächter, 1999 p.37, Wächter in Crowther et al. 2000 p.6
[173] Elliott 1998 p.32

The process approach was discussed more by Knight[175], even though she did not explain the elements in the definition itself. The initiatives undertaken were introduced: activities, elements, components, procedures and strategies. She preferred the word "strategies" since it includes the *notion of planned direction* and is applicable both to the programme and to the organisational elements of internationalisation to which they applied. It was pointed out that both types of strategies are needed at the same time, since they complement and reinforce each other. By programme strategies she referred to academic activities such as teaching, training, research, advising and supporting activities of the institution both at home and abroad. Organisational strategies apply to policies, procedures, systems and supporting infrastructures that facilitate and sustain the international dimension of the university college.

A year later it was proposed by Smith[176] that the quality of internationalisation should cover five areas, academic staff, students, courses and curricula-comparative elements, certification/recognition/assessment and governance/ management. The same elements as Knight proposed were basically included in the staff, students and courses categories, but the appreciation, governance and management elements were added, so the ingredients are somewhat different. Governance and decision-making structures, and staff recruitment, promotion and development were included in governance and management. The various administration levels and their roles were mentioned by Smith and the central administration was preferred to be kept in the international offices, which could then act as the head of operations and allow the faculty/department level to arrange international activities. Different groupings and wordings were used to describe the same issue. Smith's ideas are summarised in the following.

[174] Wächter in Crowther et al. 2000 p.5 - 6
[175] Knight 1999 p. 23 - 26
[176] Smith 1993 pp. 9 - 10

Academic staff	Teaching assignments and exchanges
	Sabbaticals abroad
	Joint curriculum development
	Intensive courses and summer schools
Students	Arrangements for individual mobility
	Organised exchanges, study abroad
	Foreign student reception
Courses and curricula - comparative elements	International elements
	European elements
	Area studies
	Foreign languages (as subject of study)
	Foreign languages (as medium of delivery)
	Distance learning
	Use of new information and communications technology for internationalising study
Certification, recognition, assessment	Award of transnational joint and dual/double degrees
	Transnational credit transfer arrangements
	Academic recognition
	Adaptation of assessment arrangements
Governance/management	Governance of decision making
	Management at central institutional level (especially: international offices)
	Management arrangements at faculty/department level for international activities
	Staff recruitment, promotion, development
	Management of participation in transnational networks
	Exchanges of administrative staff
	Resource management
	Advisory services for students and staff
	Evaluation procedures
	Information services
	Infrastructure (eg. accomodation)

Table 4: Smith's Notions of Internationalisation

Knight[177] divided the process approach to the internationalisation of higher-education institutes into two, academic programme strategies and organisational strategies. Van der Wende acknowledged this distinction as early as in 1996 in her dissertation

conclusions[178] that it was important to distinguish between internationalising in terms of *changing its content* only, and of *internationalising the operational aspects* of a higher-education institution including the student body, the staff and the place. Luostarinen and Pulkkinen referred to this, as well as to the dimensions of internationalisation in a higher-education context. Van der Wende pointed out that the internationalisation process changes considerably if the operational aspects are taken into consideration, since they enhance the complexity of the innovation.

Many consider academic programmes to be internationalisation. This category is included in Knight's presentation of mobility and internationalised curricula. The present author has regrouped these activities to give bigger categories and to eliminate repetition. She also took the different directions of internationalisation, namely outward, inward and co-operative, first presented by Luostarinen[179] and later developed by Korhonen[180] into consideration. This division has not been used with reference to educational internationalisation, in which, at least in the smaller institutes, the co-operative model is alive and well in that the same persons take care of outgoing and incoming student and teacher mobility. The balance between outward and inward mobility has been one of the main issues in the EU rhetoric, especially in the Socrates programme.

Both the original and the present author's versions are summarised below:

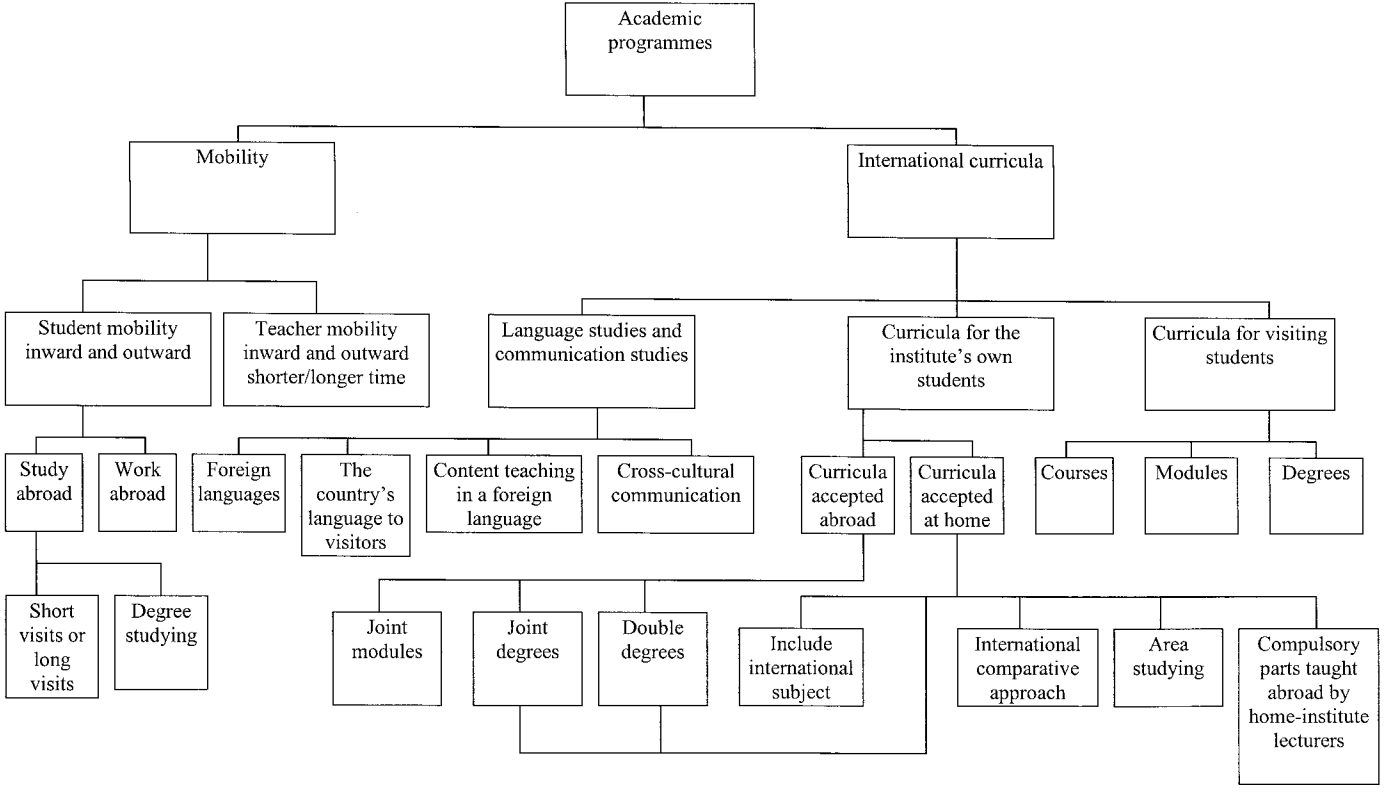
[177] Knight 1999 p.23
[178] van der Wende 1996c p.193
[179] Luostarinen 1979
[180] Korhonen 1999

Academic Programmes	Knight's original	Adapted by Söderqvist
	Student exchange programmes	Mobility
	Foreign language studies	International curricula
	International curricula	International curricula
	Area of thematic studies	International curricula
	Work/study abroad	Mobility
	International students	Mobility
	Teaching/learning process	International curricula
	Joint and double degree programmes	International curricula
	Cross-cultural training	International curricula
	Faculty/staff mobility programmes	Mobility
	Visiting lecturers and scholars	Mobility
	Link between academic programmes and research, training and development assistance	-

Table 5: Knight's Academic Programmes Adapted by Söderqvist

The proposed typology could be presented as a hierarchical structure, with more elements incorporated, as in the following chart. This helps us to understand the relationships between the different activities, and excludes activities that are just the opposite sides of the coin (such as student exchange programme/international students).

Figure 3: Knight's Academic programmes – Adapted by Söderqvist

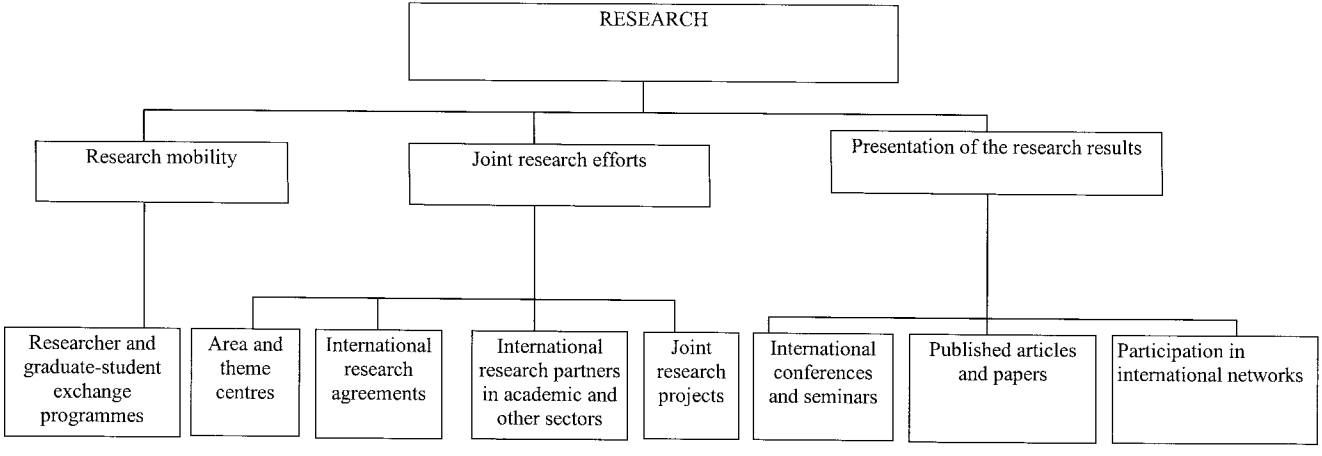


The second category of programme strategies focuses on research and scholarly collaboration. There are elements suitable for both scientific and applied research activities.

Research and scholarly collaboration	**Knight's elements**	**Adapted by Söderqvist**
	Area and theme centres	Joint research efforts
	Joint research projects	Joint research efforts
	International conferences and seminars	Presentation of the research results
	Published articles and papers	Presentation of the research results
	International research agreements	Joint research efforts
	Researcher and graduate - student exchange programmes	Researcher mobility
	International research partners in academic and other sectors	Researcher mobility
	Link between research, curriculum and teaching	-

Table 6: Knight's Research and Scholarly Collaboration Adapted by Söderqvist

Figure 4: Knight's Research and
Scholarly Collaboration – Adapted by Söderqvist

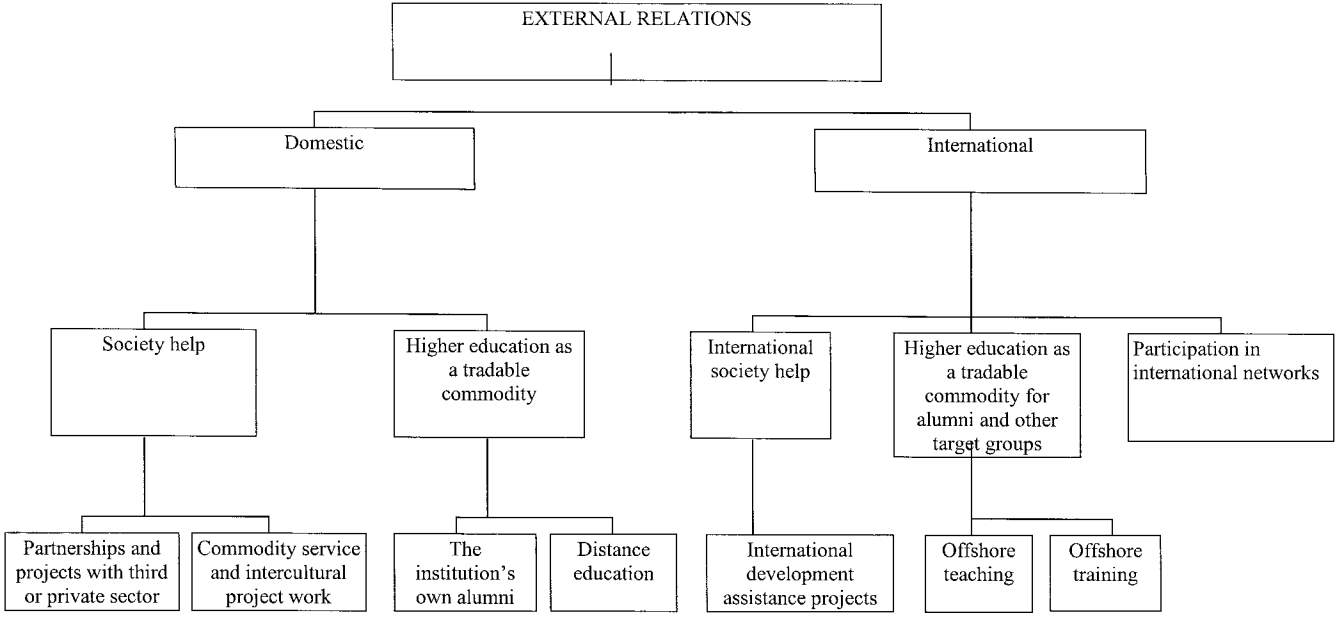


Knight's external relations and services, the third category of programme strategies, is also of relevance. However, she divides it in areas that are not very well developed in the hard sciences, such as economics, for example community aid and development projects, but that play a more important role in softer sciences, like health and social work. Her original categories and the author's own applied versions are presented in the following.

External relations and services, domestic and abroad	**Knight's original**	**Adapted by Söderqvist**
	Community based partnerships and projects with non-government groups or private sector companies	Domestic society help
	International development assistance projects	International society help
	Customised/contract training programmes off-shore	Higher education as a tradable commodity abroad
	Link between development projects and training activities with teaching and research	-
	Community service and intercultural project work	Domestic society help
	Off-shore teaching sites and distance education	Education as a tradable commodity
	Participation in international networks	Participation in international networks
	Alumni development programmes abroad	The institution's own students, further education as a tradable commodity

Table 7: Knight's External Relations and Services - Adapted by Söderqvist

Figure 5: Knight's External Relations and Services
Adapted by Söderqvist



Knight's fourth and last programme-strategy category was called extra-curricular activities.

Extra-curricular activities	**Knight's original**
	Student clubs and associations
	International and intercultural campus events
	Liaison with community-based cultural groups
	Peer groups and programmes
	Social, cultural and academic support systems

Table 8: Knight's Extra-Curricular Activities

This can be dealt with in a few words. Student clubs and associations, as well as international and intercultural campus events, seem to be informal programmes at school, often not organised by the institute's staff but by students in the institute's buildings and the surrounding area.

Community-based cultural groups could as well have been categorised as domestic society help. The last two categories, peer groups and programmes and social, cultural and academic support systems, are quite odd inclusions in the list of internationalisation activities of a higher-education institute. They are, of course, important elements of higher-education activities as such, but why are they proposed as international elements? One possible answer is that Knight meant them as extra help for international students.

The other large category of internationalisation initiatives that Knight[181] introduced was organisational strategies. She divided these into four subgroups, governance, operations, support systems and human-resource development. She emphasised that this list was selective rather than comprehensive. The present author would like to draw attention to some issues concerning this table. First, Knight used the word "governance" to refer to management. The issues taken up, such as the expressed commitment of senior management and the active involvement of all the members in the organisation, apply to any change-management process. In this

[181] Knight 1999 pp. 25 -26

particular case, the internationalisation of higher education, the recognition of an international dimension in a mission statement and other policy documents is most understandable.

In the present author's view, Knight's stated rationale and goals for internationalisation, as well as all that she mentioned under "operations", belong to what Luostarinen called the "holistic dynamic management and steering system", which is discussed in more detail in Chapter 2.4. The importance of a "managerialist style of leadership" was also taken up by Elliott [182] when he explained UK policy development. Institution-wide co-ordination and central steering were also emphasised by Wächter.[183]

> Internationalisation means not simply the sum of all international activity in a given institute[184] but also a coherent relationship between these activities, brought by some form of institution wide co-ordination and central steering.

Managerialism is also called for in the Socrates II programme, as Barblan & Teichler[185] explain, for example, and by Scott[186] who suggests that it is very important to emphasise that the

> Internationalisation of higher education is an intellectual as well as administrative, financial and logistical phenomenon.

Van der Wende[187] took up the need for management indirectly by stating that

> Internationalisation of curricula is a systematic way to respond to the challenges of new higher education institutes.

Like most of what is included in the other parts of Knight's Organisational Strategies, what she categorises as support services and human-resource development could be

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[182] Elliott 1998 p.35
[183] Wächter in Crowther et al. 2000
[184] Wächter gave as the origin for this part, in Reichert & Wächter 2000, van Damme (1999) Internationalisation and quality assurance: towards worldwide accreditation? Paper for the 12th Triennal Conference, Brussels 11 – 14.7.1999
[185] Barblan & Teichler 2000
[186] Scott 1998 p.121
[187] van der Wende 1999 p.210

discussed in the context of a holistic management and steering model – classified somewhat differently in more of a management way of thinking (see Chapter 2.4).

Knight's organisational strategies are presented below in the form of a table.

Governance	Expressed commitment by senior leaders
	Active involvement of faculty and staff
	Articulated rationale and goals for internationalisation
	Recognition of an international dimension in mission statement and policy documents
Operations	Integrated into institution-wide and department planning, budgeting and quality review system
	Appropriate organisational structures
	Communication systems (formal and informal) for liaison and co-ordinator
	Balance between centralised and decentralised promotion and management of internationalisation
	Adequate financial support and resource allocation systems
Support Services	Support from institution-wide service units, i.e. student housing, registariat, counselling, fund-raising
	Involvement of academic support units, i.e. language training, curriculum development, library
	Student support services for international students studying on campus and domestic students going abroad, i.e. orientation programmes, counselling, cross-cultural training, student advisors, etc.
Human Resource Development	Recruitment and selection procedures that reorganise international and intercultural expertise
	Reward and promotion policies to reinforce faculty and staff contribution to internationalisation
	Faculty and staff professional development activities
	Support for international assignments and sabbaticals

Table 9: Knight's Organisational Strategies

Knight's definition over-emphasises the research and service-to-society functions of institutes. In the case of polytechnics, being the new and big targets of the internationalisation activities of governments, research is not a key function. The idea is to educate experts, and perhaps the competencies that are aimed at deserve

to be mentioned in the definition. Van der Wende[188] pointed this out as well, by claiming that the teaching function is the dominant function in the new higher-education institutes. Service to society is not discussed further here, but in the 1990s and early 2000s, the economic rationale is emphasised more than human values in the stated purpose of the institutes. The new higher-education institutions in particular are asked to collaborate deeply and widely with industry, but their role as a link in passing on the human values of Western culture is not emphasised in the rhetoric of the government.

Internationalisation has been referred to by Wächter[189] as equivalent to the mobility of persons in general, and students in particular. According to the present author's understanding, this is an out-of-date view at the moment. Internationalisation could be said to have several stages, and mobility belongs to the first ones. Nowadays, other elements, such as the curriculum, institutionalisation and even the trading of internationalisation-based products internationally are also included.

Others support the wider definition of internationalisation than the one only based on mobility. It has been argued by Callan[190] that there is certainly a wide variation along the conceptual axis, with systematic transformation at one extreme and activity-based commitments at the other. Further arguments in favour of the multidimensional view of internationalisation suggest that its emergence, supported both by national commitments and by enabling instruments of the EU, is one of the most significant current developments in the internationalisation of higher education in Europe. It has also been argued by Kälvemark and van der Wende[191] that the initially narrow definition of internationalisation in terms of international academic mobility is now being widened, thus contributing to the diminishing conceptual disconnection between internationalisation and higher education policy in general. To

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[188] van der Wende 1999 p. 209
[189] Wächter in Crowther et al. 2000 p.5
[190] Callan 1998 pp. 50 - 51
[191] Kävlemark and van der Wende: Conclusions and discussion, in Kävlemark and van der Wende (eds) National Policies for the Internationalisation of Higher Education in Europe, Stockholm, National Agency for Higher Education, Högskoleverket Studies 1997:8

sum up, a shift from activity-based thinking to process-based thinking is suggested in the literature.

Another newly-emphasised phenomenon, namely internationalisation at home, has been taken up by Wächter[192]. This particular case, in which education should be international even though the students or teachers of the institute do not travel anywhere, has been defined as

> Any internationally related activity with the exception of outbound student and staff mobility.

The question is relevant, since according to Finnish and European statistics, not even 20% of students or staff experience different short or long periods abroad. Van der Wende[193] has participated in this discussion by claiming that the internationalisation of curricula offers the possibility for all the students of a particular institute to be in direct relation to the international requirements of the professional field for which they are being trained. With a strong teaching mission (especially in polytechnics), internationalisation of the curriculum could be one of the most natural manifestations of internationalisation at home. Its relevance has also been highlighted in several studies related to the Academy of International Business.

The context of internationalisation is another point that has been taken up[194]. According to Wächter,[195] this is the sum of all framework conditions that have an impact on the internationalisation process, and that do no originate from inside the university itself. The variables are given, and the university cannot influence them, but nonetheless they have a profound bearing on the process of university internationalisation. They may be stimulating, or they may reduce the institution's degree of freedom. The most important ones are governmental policies, the process of globalisation, the changed environment brought about by the IT revolution, the trend towards accountability and responsibility expressed in the expectations of the so-called stakeholders, and the widespread commodification of higher education. Wächter has been the only one to highlight the role of government in funding and

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[192] Wächter in Crowther et al. 2000 p.6
[193] van der Wende 1999 p.210
[194] especially in ed. Scott 1998: The Globalisation of Higher Education
[195] Wächter in Crowther et al. 2000 p.6

legislation. He introduced the different levels through which authorities influence higher-education policy in general, and internationalisation policies as well. European countries have three levels, the EU level, the national level and the regional government level.

The knowledge society and the essential role of knowledge-producing that higher-education institutions have, have been referred to by Gibbons[196] and Scott[197] as an important external factor.

The challenges for polytechnics with their new internationalisation processes have been mentioned by only a few writers, Van der Wende being amongst them[198]. She first characterised higher-education institutes as such as facing the main challenges related to their profile, status and position in the higher-education arena. These challenges are based on their relatively young age, their dominant teaching function, an orientation towards applied research, often with quite limited capacity and the absence of programmes leading to a PhD. She summarised her ideas as four main challenges:

- to develop an international dimension and profile without a strong basis in international research co-operation such as traditional universities have
- to co-operate internationally with institutes of a similar nature and/or level but with a different status
- to respond to the requirements of the international labour market through dialogue and interaction with professional branches and organisations at the national, European and international level
- to play an active role in overcoming the problems in the recognition of professional qualifications

[196] Gibbons 1998 p. 73 -82
[197] Scott 1998 p. 127
[198] Van der Wende 1999 p. 209 - 210

2.2.2 Discussion of van der Wende's Model

Van der Wende used the following definition of the internationalised curriculum in an OECD/CERI study:

> A curriculum **with an international orientation in context and or form**, aimed at preparing students for performing professionally/ socially in an international and multicultural context, **designed for domestic and or foreign students**.

This definition has been criticised for being too passive by Nilsson,[199] who proposed a modified version:

> A curriculum **which gives international and intercultural knowledge and abilities**, aimed at preparing students for performing professionally, socially and **emotionally** in an international and multicultural context.

The differences between the two definitions are written in bold. The second version is more powerful in that it includes the giving of knowledge and abilities instead of only international orientation in context or form. The common third element of learning, namely attitudes and values, is no longer in the modified version, which is strange given Nilsson's views on human values in general. However, "emotionally" is added to the performance aims, so the point is not entirely lost in the modified definition. The phrase "designed for domestic or foreign students" has beeen deleted, which is justified because there are no other students than domestic or foreign ones. The point of teaching and learning in the internationalisation of curricula is emphasised by Teekens[200] as well.

One point which is not at all taken up in the studies of van der Wende concerns the different ways of understanding the curriculum. The importance of the curriculum was analysed by Johansson in one whole chapter of her licentiate

[199] Nilsson 2000
[200] Teekens 2000

study,[201] briefly presented in the following. First, the curriculum can be divided into macro-level activity defining the nation's values and the labour market's and public administration's expectations, and micro-level activity dealing with the teacher's working plan and its implementation. She used the metaphore of a travel guide to illustrate this. This micro plan can be further divided into a written plan made in advance, a realised plan as actions taken, a lived plan through student experience, and a hidden plan as issues not said. Second, the curriculum can be taken as a product to be implemented, like the "lehrplan" tradition, or as a process description of learning, as a "curriculum". Third, it could be said to have six different levels: the ideological level explaining school and teaching values; the content level of the subjects, everyday knowledge and cultural heritage; the instruction level as responsibility divisions; the subject level as subjects and themes, choices; the internal-action level as the business idea and goals, and the external-action level as a school in relation to its environment.

It is argued that curricula-internationalisation has several advantages in relation to the internationalisation of the new higher-education institutions.[202] It is systematic; it is directly related to the strong teaching mission of these institutes; it offers the possibility to provide an international dimension for all students; it offers important, natural opportunities for collaboration in the development of joint or double degree programmes; and it creates opportunities for interaction with professional bodies and organisations in order to establish strong connections between international professional profiles and curricula-content in preparing students to meet professional requirements.

A series of studies on the internationalisation of higher education has been conducted by Van der Wende.[203]Her dissertation was called "Internationalising the Curriculum in Dutch Higher Education: an International Comparative Perspective". The conceptual framework of internationalised curricula[204] was presented in connection with the OECD/CERI study, as shown in the following table.[205]

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[201] Johansson 1997 pp. 16 - 23
[202] Van de Wende 1999 p.210
[203] Quality and Internationalisation in Higher Education, p. 265
[204] van der Wende 1996 p. 36 - 38
[205] van der Wende 1996 p.37

Unit of analysis	INTERNATIONALISED CURRICULA					
Case study questions	CHARACTERISTICS		IMPLEMENTATION		OUTCOME AND EFFECTS	
	FORMAL	OPERATIONAL	PROCESS	INFLUENTAL FACTORS	SHORTTERM	LONGTERM
	Values and aims	Teaching methods	Aims and involvement of actors	(Inter) National environment	Learning outcomes & effects	Profiles of graduates
Variables	Learning objective	Learning activities				
	Content definition	Type and grouping of students	Process management	Education setting (institutional characteristic)	Social/ intercultural integration	Labour market positions
	Design/ structure	Type of staff	Adoption and development	Characteristics	Educational results	Quality improvement
		Place, time and media	Implementation	Of the innovation		
		Evaluation and assessment	Institutionalisation	Innovation strategy	Accreditation and recognition	
		Resources and costs		Development		
				Setting		
				Impact/role of int. cooperation and mobility		
				Resources and costs		
Propositions	P5 P4	P2	P2 P1	P4	P3	P1 P3

Table 10: Van der Wende's Framework of Internationalised Curricula

The OECD/CERI study gave three focal elements of internationalised curricula, characteristics, implementation and outcome & effects. These were divided into sub-elements in that values and aims were considered formal characteristics, and teaching methods operational characteristics. Aims and involvement factors were said to be process-implementation elements, and the (inter)national environment influential factors.

Learning outcomes and effects formed the category comprising short-term outcome and effects, and the profiles of graduates were considered to be long-term outcome and effects. Several variables were used to find out more about these elements. Learning objectives, content definition and design/structure were applied to the formal characteristics, and type and grouping of students, type of staff, place, time and media, evaluation and assessment, and resources and costs to the operational characteristics.

Process management, adoption and development, implementation, and institutionalisation were the variables used to describe process implementation, and

education setting, the characteristics of the innovation, innovation strategy, development, setting the impact/role of international co-operation, and mobility resources and costs were used for the influential factors of implementation. Social/intercultural integration, educational results, and accreditation and recognition were used to describe short-term outcomes, and labour-market positions and quality improvement to describe long-term outcomes and effects.

Since the intention in this licentiate study is to analyse the process of internationalisation in higher education, the implementation of internationalised curricula deserves further consideration.

Van der Wende put forward a change and process-management view of internationalising the curricula, which could be compared to Knight's process approach to internationalisation, although the elements are different in that innovation strategy was mentioned and later[206] analysed more deeply.

The study postulated that *internationalising the curriculum is a process of educational change aimed at improving the quality of education.* That implies that such internationalisation should be considered an educational innovation. The theory of educational innovation[207] was explained in terms of different phases that can be distinguished within the change process. This is in accordance with how Luostarinen[208] treated the issue earlier in his internationalisation model for the firm, and with Pulkkinen[209] for education. Van der Wende stated that three parts are usually distinguished in the educational change process: adoption, implementation and institutionalisation. Luostarinen and Pulkkinen referred to start, development, growth and maturation. According to Van der Wende, the second feature of educational innovation is its different dimensions, social, organisational and behavioural changes, some of which were referred to in discussion of Knight's model. Third, various actors play different roles in the process, and fourth, the process is determined by the characteristics of the innovation itself, the innovation strategy and the institutional setting, and the international environment in which it takes place.

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[206] van de Wende 1996 pp. 65 - 89
[207] Van der Wende 1996 p.65
[208] Luostarinen 1975, 1979
[209] Luostarinen – Pulkkinen 1991

Fifth, it is a lengthy process often characterised by many obstacles and interim adjustments.

Change processes can be characterised on a continuum from completely rational to incremental, according to van der Wende. This means that, in the first case, the project can be divided into steps and lead to an outcome defined beforehand. The second case involves unpredictable steps, in which experiences in previous steps are built on and there is no blueprint of the exact outcome. Internationalising the curriculum was claimed to be a change process of the latter type: there are many changes to the initial plan, the process is complex and involves many actors in a complex institutional setting, and a lot depends on the innovation itself. This is in accordance with Luostarinen's finding in his dissertation on the internationalisation of the firm in 1979, in which he stated that internationalisation is a process demanding gradual and continous development of different systems along with its own development.

Van der Wende explained that the actual work related to the development and delivery of an internationalised curriculum takes place at the faculty level, even though various complementary decision-making and administrative processes may take place at different levels. Sufficient levels of institutional autonomy and flexibility in curriculum regulations and restrictions, together with a positive approach to academic challenge were found to be factors contributing to success in the internationalisation of the curriculum. The role of the innovator in the process was also found to be important. Moreover, broader involvement and commitment at the faculty level and from senior management were considered vital, and a further condition for success was found to be the overall policy and internationalisation mission in the faculty and the institution as a whole. The political infrastructure, the resources and the innovator's and other's motivation were other crucial factors, and in many cases it was found that a combined top-down and bottom-up strategy was successful.

The last phase of the innovation process is institutionalisation. In this case, the internationalised curriculum should become an integral part and sustainable feature of the institution's general curriculum. According to van der Wende, it is too early to talk of institutionalised praxis, and the last phase should ensure that "the

initiative is owned by many in the organisation", meaning that it cannot be a one-man show. Consistency with the institution's broader mission and policy is also vital. A third point is to ensure that the quality element is an intrinsic part of the institution's regular quality-assurance system. Finally, it is important to anchor the international programme to departmental course requirements, or to the general curriculum. These findings are in accordance with Luostarinen's findings, as well as with the findings of the Uppsala school concerning the early phases of the internationalisation of the firm. In other words, the process of internationalisation in the firm of the 1970s seems to be quite similar to the process of internationalisation in a higher-education institute in the late 1990s, which makes the assumptions and findings of Luostarinen and the Uppsala school seem relevant in other contexts.

Van der Wende[210] reported elsewhere on another study[211] of a curriculum-development project and the internal evaluation study of good practice in internationalising the curriculum, in which she was involved as an external consultant. The strategy for internationalising the curriculum consisted of three elements.

- It was based on the professional requirements for work in a European/international context
- It took an interactive approach, combining various sources and elements of internationalisation in order to create synergy between them and to contribute to the international dimension of the curriculum in various ways
- It presented an innovation perspective linking internationalising the curriculum with other major domains of pedagogical reform, including the use of information and communication technology.

This study had certain implications for the management of innovation. The first concerned the initiating and facilitating role of the central level – the Board should ask various faculties to include operational internationalising plans in the context of the yearly planning and control cycle, and to provide matching funds for these initiatives. The primary focus on the management of innovations should be at the decentralised level – faculties should decide on which elements of the curriculum are

[210] Van der Wende 1999 p.212
[211] J. van Schijndel: Internationalisation for all students. Policy Paper. Hogeschool van Amsterdam, April 1999

to be internationalised, for which students, on what terms and by whom, and they should make adequate budget reservations for this. Small interdisciplinary project teams should be formed consisting of academic and other staff working together. The quality of the various curriculum components should be monitored, and finally, the evaluation of these plans and policy initiatives should be co-ordinated at the central level.

These findings are also in accordance with Luostarinen's findings on the managerial implications of company internationalisation.

2.2.3 Discussion of Luostarinen and Pulkkinen's Model

Luostarinen and Pulkkinen[212] carried out a third major study of internationalisation in higher education, simlar to the two described above. This study was based on the initiative of the European International Business Academy (EIBA) to study the state and the dynamics of international business education in Europe in 1989-90. There was a lack of data on international business curricula at a time when the importance of international business education was rapidly increasing in Europe. The first survey of this kind was carried out in the USA as early as 1969. It documented for the first time the extent of international business education at European institutions of higher education[213], thus making the comparison of different systems easier and facilitating the planning of International Business curricula. It also included a directory of contact information, thus opening the door for further contacts to both faculty and students. Internationalisation of the curriculum was understood to include external factors, such as the student body.

Luostarinen & Pulkkinen's study is based on Luostarinen's earlier studies of the firm,[214] in which he defined

> the concept of internationalisation to be a multidimensional phenomenon, a stage wise process where a mainstream pattern can

[212] Luostarinen & Pulkkinen 1991 p. 5
[213] Some British and Belgian polytechnics were also included
[214] Luostarinen 1979

> be identified but where also different dimensions may develop in different order in different institutions so that a group of diversified patterns also exist.

Because the degree of internationalisation of different components may vary greatly, the stage at which an institution is depends on the components used. According to Luostarinen and Pulkkinen:[215]

> Internationalisation of business education is interpreted to mean gradual inclusion of the international dimension into the following seven components of business education:
>
> substance of business teaching = contents of curriculum,
> teaching personnel = faculty,
> student body,
> teaching language,
> language studies,
> business research and
> organisational structure through which IB education takes place.

They summed it up as follows:

> the internationalisation of business education in an institution means gradual inclusion of the international dimension in the institute's curriculum, human resources, languages used and taught, research and organisational structure.[216]

They also put forward two definitions of internationalisation, as a way of introducing the international dimension into the *components* of *business education* and of the *whole institute,* and as a *process included in this development*. This was later also adopted by van der Wende and Knight.

These definitions of internationalisation reveal the main objective of their study, namely to present the state of formal degree-level international business education in terms of supply and organisational arrangements in Europe in 1989-1990. *International business education* takes the main role, even though the definitions would stand without it, just if they merely stated that "internationalisation in an institute means... "

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[215] Luostarinen & Pulkkinen 1991 p.32
[216] Luostarinen & Pulkkinen 1991 p.33

Societal influence in the beginning of the 1990s is also evident in the fact that, in this study as in the second EAIE report,[217] *"adding of international dimension"* is mentioned.

Luostarinen & Pulkkinen made the basic assumption in their theoretical framework that the stages pattern of internationalisation in a firm could also be adopted to the study of internationalisation in business education[218]. They chose five dimensions[219], internationalisation of the curriculum, of the faculty, of the student body, of the language of instruction and of administration and finance. These were then further divided into sub-elements that are summarised below.

Internationalisation of the curriculum:

- Infusion strategy – incorporating the IB dimension into existing courses
- Specialisation strategy 1 – starting special IB courses
- Specialisation strategy 2 – developing particular IB programs
- Holistic strategy - internationalising the whole curriculum.

Internationalisation of the Student Body:

- Sending domestic students abroad
- Accepting visiting foreign non-degree/joint-degree students
- Accepting foreign degree students

Internationalisation of the language of instruction was not given any sub-categories.

Internationalisation of Administration and Finance:

- IB faculty within existing departments
- Co-ordinating unit for IB
- IB department
- IB school

What is more interesting in Luostarinen's studies, however, is the dynamics of internationalisation rather than the examples of variables that could be used for explaining the internationalisation of education, and especially one subject in it, international business. Luostarinen and Pulkkinen explained the dynamics[220] through

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[217] International education in Europe: a professional view on the Memorandum on Higher Education in the European Community, 1992
[218] Luostarinen –Pulkkinen 1991 p.27
[219] Luostarinen – Pulkkinen 1991
[220] Luostarinen & Pulkkinen p.131

certain core steps in the evolution process. The variables covered three main components of international business education: substance (curriculum), organisation (structure) and people (faculty and students). Using Luostarinen's internationalisation model for firms as a basis, they introduced four stages, as follows.[221]. At the starting stage IB education is rather undeveloped. The need is acknowledged, but the supply is not comprehensive. Non-IB faculty members teach at the lowest level of education and IB research is either non-existent or based on a few initial efforts by certain individuals in the functional faculty. At the development stage there are special IB courses and research activities. Special organisational arrangements can be identified, including separate IB teachers, and student and faculty exchange is acknowledged to be part of developing IB education.

At the growth stage IB has reached an acknowledged status within the institution. Strong supporting organisational arrangements can be identified and a comprehensive supply of education and research is offered. However, internationalisation has not been accepted everywhere in the institution, and there is still a clear contextual and organisational difference between IB and domestic education. At the mature stage, there is complete internationalisation of business education and research within the institution. There is no separate IB stream, and all education is international by nature.

Van der Wende[222] also referred to these dynamics when she mentioned a process of educational change. She distinguished only three stages - adoption, implementation and institutionalisation - in the change process.

The evolution of internationalisation in Europe was found to be a situation- and a school-bound phenomenon by Luostarinen and Pulkkinen. First, schools in which the demand for internationalisation was perceived to be large and growing in their catchment area, and which considered their human and financial resources sufficient, were more willing to start and develop the internationalisation process than those in which the situation was the opposite. Second, internationalisation did develop differently at different times. Institutions that were pioneers in IB teaching in Europe (in 1970 or before) showed a rather consistent mainstream pattern of

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[221] Luostarinen & Pulkkinen p.149 - 159
[222] Van der Wende 1996 p.194

internationalisation – following the stages model developed by Luostarinen and the so-called Uppsala school.

This stages model can be described as follows. First, the substance of teaching was internationalised, second the international dimension was added to the organisational structure, and finally the student body and faculty were internationalised, often under formal and informal networks of international exchange agreements. Another trend also appeared in the 1970s: schools internationalised their subjects and organisation at the same time, and within a short time the people as well. Those starting in the 1980s had stronger push and pull forces to start and could profit from the early birds, so the pace was even quicker and the process shorter. A consistent order could no longer be identified. In terms of time it was concluded that the development of substance and organisation was largely the focus in the 1960s and 1970s but, especially in the last half of the 1980s, the emphasis shifted to the student body and the faculty.

An analysis of the major barriers to internationalising the human side revealed that financial constraints and language problems played the major roles. Other obstacles included timing problems, non-compatible academic calendars, lack of standardisation of degrees and programmes, finding replacements for teachers who left, and the lack of special personnel and organisational arrangements for dealing with outgoing and incoming students.

The following table[223] with its ten components of the internationalisation of teaching and framework for the planning and development of the components was borrowed from Luostarinen and Pulkkinen since it summarises their study very well.

[223] Luostarinen and Pulkkinen 1991 p.172

IB variable	Starting stage	Development stage	Growth stage	Mature stage
Substance of IB teaching/ Curriculum	IB as an extension	Separate IB courses	IB programme	Fully internationalised
IB research	Non-existent or only a few separate efforts	Separate efforts, short term projects	Doctoral programme in IB, longstanding research, separate research institute in IB	Doctoral program and all research fully internationalised
Organisation	No specific organ	No specific organ, separate IB faculty	IB department	IB school
Faculty	Exchange and int. faculty non-existent or limited	Exchange and size of int. faculty limited	Extensive exchange, appr. 5-25%	Extensive exchange, appr. 25-80%
Student Body	Exchange and int. student body non-existent or limited	Exchange and size of int. student body limited	Extensive exchange, appr. 5-25%	Extensive exchange, appr. 25-80%
Language studies	Non-existent or very limited	Recommended or one foreign language compulsory	Compulsory	Language studies compulsory and extensive
Language of Instruction	Native language	Native language, only visitors use a foreign language	50-50 native and foreign	Instruction provided in a foreign language
Orientation - research - teaching	Domestic	Mainly domestic, but some int. aspects identifiable	International but not yet fully	Almost global, domestic trade considered special
Attitudes of - administration - other staff	Ethnocentric	Mostly ethnocentric, partly polycentric	50-50	Mostly polycentric or geocentric
Culture of school	Cultural sensitivity negligible	Cultural sensitivity recognised	Cultural sensitivity highly recognised	Cultural sensitivity essential

Table 11: Luostarinen & Pulkkinen's Components and Characterisitics of the Internationalisation Stages of Business Education

2.3 Prerequisites for Internationalisation – the European Context and Different Rationales

2.3.1 The European Context

The aim in this section is to connect internationalisation as a phenomenon to the European context and to introduce the key Finnish background actors, namely the Finnish Ministry of Education and the Finnish Board of Education, as well as the Centre for International Mobility (CIMO). Internationalisation is connected to the societal changes of the 20th century. The third issue to be discussed is the different reasoning or rationale behind the internationalisation of higher education.

2.3.1.1 European Actors

It could be claimed that internationalisation was aimed at promoting peace after World War I, as Brown[224] did. First-hand experience of other students in other countries was to be the best antidote of ignorance, mistrust and prejudice. It was also claimed that the concept of studying abroad, first advocated in the US, was later adopted and adapted by the European Commission to involve young people in the building of Europe. The role of the European Union was extensive in the mass internationalisation of higher education in the 1990s, as reported by Barblan and Teichler, for example.

There are numerous publications in which the European Union has set out its goals, strategies and action plans on the harmonisation of education and the implementation needs in different member countries[225]. In "Teaching and Learning towards the Learning Society", the White Paper on Education and Training from November 1995, guidelines were given up until the end of the 1990s. Internationalisation in schools was clearly emphasised:

> "... the impact of the free movement of people will make it essential for national education and training systems to consider the European

[224] Brown in International Education: towards a Critical Perspective, ed. Callan, 2000
[225] Bologna Declaration, Sorbonne Declaration, Magna Charta Universitatum, White Paper on Education and Training, Komission strategiset tavoitteet vuosille 2000 – 2005

> dimension"[226]. The internationalisation of the economy was clearly understood and taken as the second factor or upheaval for education.[227]

The EU Commission also identified five general objectives in fulfilling the new demands, namely:

1) encourage the acquisition of new knowledge
2) bring schools and the business sector closer together
3) combat exclusion
4) develop proficiency in three Community languages
5) treat capital investment and investment in training on an equal basis.[228]

The fourth of these objectives is directly aimed at internationalism, and the first two are aimed more indirectly than the third and fifth. However, in the White Paper itself, the three related objectives all mention EU international programmes as action tools for their fulfillment: "Proficiency in three community languages" is to be supported by Lingua, Socrates and Leonardo, "To encourage the acquisition of new knowledge" the Commission desires to support mobility and to use Socrates, Leonardo, Esprit, Telematique, Media II and Info 2000 to bring it about, and "To bring schools and the business sector closer together" is to be done through Erasmus, and particularly through the Leonardo programmes."

Simultaneously, and/or stimulated by the developments fostered by the European Union, some countries and organisations had similar aims for European higher education in the 1990s. The *Magna Charta from 1988* expressed the need to encourage mobility among teachers and students: a general policy of equivalent status, titles, examinations and awards of scholarships was taken to be essential to the fulfilment of the mission of European Universities. The *Sorbonne Declaration*, ten years later, from May 1998, highlighted the need for transparency, but also caused many misunderstandings amongst education policy makers from different European countries.[229] The four biggest European countries signed the declaration initiatilly.

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[226] White Paper on Teaching and Learning towards the Learning Society, 1995 p.3
[227] ibid p.7
[228] ibidd. p.32-33
[229] The Sorbonne Declaration – follow up and implications, 1999, The Sorbonne Declaration of 25 May 1998: what it does say and what it does not 16.9.1999

A joint project of the Confederation of European Union Rectors' Conferences and the CRE – the Association of European Universities - presented four principles for a kind of European Higher Education Space, of which three, namely mobility, diversity and openness, were clearly connected to the internationalisation of studies. The paper was prepared by Guy Haag in 1999. He claimed that, first, the most powerful engine for change and improvement in higher education in Europe had and would come from the growing awareness of alternative approaches and best practice in other countries. Second, European Higher Education could only fulfil its missions in a worldwide perspective based on competition and co-operation with other regions in the world. Third, measures not respecting the fundamental cultural, linguistic and educational diversity in Europe could jeopardise not only the progress already made but also the prospect of continuing convergence in the future. His fourth guiding principle concerned reforms of credit systems and degree structures in terms of substitutions and the improvement and guaranteeing of quality in curricula, teaching and learning.[230]

The Bologna Declaration on the European Space for Higher Education gave a clearly formulated common goal: to create a European space for higher education in order to enhance the employability and mobility of citizens and to increase the international competitiveness of European Higher Education. It set the deadline of the year 2010 and gave specific objectives:

- The adoption of a common framework of readable and comparable degrees
- The introduction of undergraduate and postgraduate levels in all countries
- ECTS[231] - compatible credit systems
- A European dimension in quality assurance
- The elimination of the remaining obstacles to the free mobility of students and teachers, as well as researchers and higher-education administrators.[232]

The process was continued in 2000 by highlighting the need and time to act in order to change the structure of European studies. Haag claimed that international education was entering a new age: the main thrust in the 1990s was co-operation and exchanges within existing structures, together with efforts at transparency and

[230] Trends in Learning Structures in Higher Education by Guy Haag, 1999
[231] European Credit Transfer System, where one point is equivalent to 60 hours of work

horizontal mobility. There was the need, and it was now time to act to change from the co-operation and mobility phase to the phase of structural change, to organise diversity, to have intergovernmental action in the whole of Europe, and to introduce new forms of mobility: vertical mobility and free movement at the postgraduate level. The need to regulate transnational education and educational services, and the need to learn to compete better in world markets for higher education were emphasised by not only providing courses in English, but also by offering the right types of courses, user-friendly student services and understandable degrees, and by publicising and explaining the offerings through permanent representations and recruitment efforts on site, as the UK, the US and Australia have been doing for a long time. [233]

International organisations such as the European Association of International Education (EAIE), the Academic Co-Operation Association (ACA) and the European Center for the Development of Vocational Training have also played important roles in creating internationalisation as we know it today. Many reports in which these organisations attempt to influence the development of the phenomenon itself, internationalisation from different perspecives, have been written. The topics discussed include international education in Europe[234] and other geographical areas[235], quality issues[236], international work placements[237] and student mobility.[238]

CIMO's European sister organisations, such as Nuffic, have studied different sides of internationalisation as well. The internationalisation of the whole of the Netherlands was reported on in 1993[239].

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[232] The Bologna Declaration: an explanation , 2000
[233] Visions of a European Future: Bologna and beyond, 1999 by Guy Haag
[234] e.g. International Education in Europe – a Professional View on the Memorandum on Higher Education in the European Community in 1992, Internationalisation in the sector of new higher education institutions in Europe 199?
[235] e.g. Strategies for the Internationalisation of Higher Education – a Comparative Study of Australia, Canada, Europe and the United States of America 1995
[236] e.g. Internationalisation and Quality Assurance, Goals, Strategies and Instruments, Smith 1993
[237] e.g. Internalising vocational education and training in Europe 2000
[238] e.g. Scott 1992
[239] Internationalisation of Higher Education in the Netherlands: A Reference Guide

2.3.1.2 Finnish Actors

To start with, since polytechnics represent a new educational system in Finland, the authorities, the universities and they themselves have extensively discussed their existence and role.[240] Second, internationalism and internationalisation were seen as major development issues in the 1990s in school development discussions in Finland and in the European Union.[241]

One of the most distinguishing characteristics is that the Finnish authorities have tried to help the polytechnics and their administration and management (and also the other school levels of the education system) by issuing many publications. In Luostarinen's terms it could be claimed that the authorities have tried to reduce the first three phases of lateral rigidity – limited perception, restrictive reaction and selective search. The Centre for International Mobility (CIMO), the Evaluation Council of Finnish Universities (Korkeakoulujen arviointineuvosto), the Board of Education (OPH) and the Ministry of Education (OPM) published a large number of reports and surveys in the 1990s in which they clarified the stages of internationalisation in different years[242], different school systems[243], different aspects of internationalisation[244] and the whole process,[245] or with which they tried to set guidelines and good practice in terms of how to implement internationalisation from the education point of view[246].

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[240] e.g. Ammattikorkeakoulut, vaihtoehto yliopistolle 1995, Polytechnics in Finland – a Brief Guide 1999

[241] e.g. Johansson 1997 p.1, Aholainen Reijo in Ammatillisten oppilaitosten kansainvälinen toiminta vuonna 1995 p.4, Koulutuksen ja korkeakoulussa harjoitetettavan tutkimuksen kehittämissuunnitelma vuosille 1995 - 2000

[242] e.g. Ammatillisten oppilaitosten kansainvälinen toiminta vuonna 1995, Ammatillisten oppilaitosten kansainvälinen toiminta vuonna 1996

[243] e.g. Kansainvälisen harjoitteluvaihdon kehittäminen ammattikorkeakouluissa 1997, Kauppaoppilaitosten kansainvälinen toiminta lukuvuonna 1991-1992, Selvitys aikuiskoulutusorganisaatioiden kansainvälistymisestä lukuvuonna 1993-1994, Selvitys ammatillisten oppilaitosten kansainvälistymisestä 1993,

[244] Ollikainen 1998a, Ollikainen 1998b

[245] Kansainvälistyvät ammattikorkeakoulut 1998

[246] CIMO yearly seminars for international coordinators, Oppilaitoksen kansainvälisen toiminnan kehittäminen ja arviointi 1995, Kansainvälisen harjoitteluvaihdon kehittäminen

For the same purpose some parts of KOTA (university statistics) and AMKOTA (polytechnic statistics) were introduced at the end of the 1990s to shed light on internationalisation in the eyes of the Finnish Ministry of Education. These statistics give figures of long-term and short-term student and teacher mobility, the costs and financing of international activities, foreign-language teaching and content teaching in a foreign language.

The mobility figures are even used as a criterion in deciding on some "result-based money" for the following years' budget for polytechnic financing. Much has been said on how quantitative criteria are probably not the best tools for analysing the results, but no qualitative criteria have been developed[247].

In the mid 1990s, 1995 and 1996, the Ministry of Education also published the International Strategy of National Culture, in which the tasks of different international organisations and bodies, and the role of the Finnish Ministry of Education in them, were clarified. This work gave some background information on the internationalism, internationalisation and internationalising discussion. The years surrounding the preparation for and entry into the European Union seem to have stimulated many publications and changes in the Finnish school system. The education system as such [248] in different countries has been studied by governments and international organisations.

2.3.1.3 Social and Societal Changes

Bruch and Barty[249] clearly explained some features of the growing popularity of international study. The process of globalisation in commerce and in communication has inevitably affected educational systems and objectives. Communication networks have expanded rapidly, cultural isolation has become untenable. International experience and fluency in globally important languages has become highly desirable, or even necessary for survival in relation to both individual career plans and national

ammattikorkeakouluissa 1997, Internationalisation of Higher Education: Goals, Prerequisities and Quality Insurance 1995

[247] See OPH selvitykset referred to above

[248] e.g. Koulutus kansainvälisessä vertailussa, Education at Glance 1993

[249] Bruch and Barty 1998 p.18

ambitions. The ready availability of equipment, expertise, research facilities and infrastructure is a powerful draw. Improving economic and political conditions have facilitated educational mobility. More students have been able to afford the costs and more institutional places were available for them in other countries. The ease and speed of travel have generally improved. Scholarships and exchange schemes have encouraged mobility.

Scott and Sadlak[250] also pointed out the role of the massification of higher education related to its internationalisation. There are many more institutions and many more students desiring to fulfil societal needs.

Reichert and Wächter[251] emphasised the role of technological advances in transportation and information. Scholars and academics have taken advantage of them to multiply and intensify their contacts. Students and academics can travel quickly, safely and cheaply between countries, not to mention the information flow.

In conclusion, it could be claimed that the external factors related to the internationalisation of higher-education institutes were highly positive and encouraging, not only because of the European Union's programmes but also due to other societal changes at the end of the 1980s and during the 1990s.

2.3.2 Rationales for Internationalisation

There are many rationales for internationalisation and the discussion on them is quite wide. Rationales mean reasons for or drivers towards internationalisation. This discussion is presented to the reader in this section. Gottlieb[252] questioned the role of internationalisation, whether it is any more relevant to even analyse rationales if internationalisation is a means towards other goals and no longer a goal as such. He referred to van der Wende and CIMO and their emphasis on its role as a means towards the improvement of quality in higher education. Knight[253] and van der

[250] Scott 1998, Sadlak 1998
[251] Reichert and Wächter 2000 p.32
[252] Gottlieb 1996 p.10
[253] Knight 1999 p.20

Wende[254] also considered internationalisation as a means to enhance the quality of education.

2.3.2.1 Eurocentric Rationales

In the European Union context the rationale for internationalisation is clearly *Europeanisation*: the achievement of European excellence, the strengthening of Europe's position in the global economy, safeguarding and strengthening its cultural heritage, strengthening the basis for further political development and for European political union, a European Community dimension in higher education and a European dimension in curricula. These phrases in the documents of the European Commission in relation to international co-operation are expressions of the political significance of European Community policy with respect to international education. This eurocentric view is understandable from the Commission's point of view but becomes a danger in itself if it is the dominant factor in higher education in Europe. It is the responsibility of new- and old- higher-education institutes to maintain their commitment to universal values and their role as future-oriented institutions promoting and anticipating global interdependence rather than European co-operation.[255]

According to Teichler,[256] the internationalisation of non-university higher education was almost non-existent before the European Union programmes, which were a success due to four factors: the mass approach, practice orientation, their regional emphasis and their preference for organised study abroad and curricular integration.

2.3.2.2 Anglo-Saxon Specialities as Rationales

The Anglo-Saxon world, namely the US, the UK and Australia, seem to have one different rationale in addition to those of other Western countries for their

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[254] van der Wende 1996c p.195
[255] EAIE Occasional Paper 2, p.11 -12
[256] Teichler 1999 p. 192

internationalisation. In their context, income from fees was important[257]. Governments decreased the funding of higher-education institutes, and foreign students were more than eager to stay in the English-speaking world because of their language competence.

McNay[258] identified three main rationales for the UK institutions to go international. The first is a purely market-driven, extrinsic reason: the fee income, or obtaining funding from external sources such as the government or the EU. The second was staff-driven and intrinsic, the ideological commitment of some individuals, their personal satisfaction and self-development. He also mentioned academic tourism in connection with this second rationale. The third one was customer-driven and curriculum based: internationalisation occurs for cultural enrichment, for community linkages and to support the learning of new skills and competencies. Bruch and Barty[259] supported these ideas some years later. They claimed that UK institutions want international students mainly for two reasons: they believe that internationalisation adds educational and cultural value to the institution, and they want the cash value accruing from full-fee paying international students. Elliot[260] confirmed this as well by referring to the Higher Education Funding Council for England that states the purposes of higher education, the last of which is clearly "higher education as tradeable activity".

According to Callan,[261] the Dutch shared this rationale for internationalisation, stimulating links in higher education towards a policy based on the view of education as an agent in raising the competitiveness of the Dutch national economy. Callan referred to the Swedish case in which the rationale is more the need for language and cultural competence than fees from foreigners. Another rationale, colonial relationships, was also mentioned by Callan. The UK, France, Spain and Portugal have broad ties with the areas where their languages are spoken.

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[257] Parsons 2000, McNay 1995, Bruch & Barty 1998, Elliot 1998
[258] McNay 1995 p.36
[259] Bruch and Barty 1998 p. 21 - 23
[260] Elliot 1998 p.33 - 38
[261] Callan 1998 p. 41

2.3.2.3 International-Mobility-Based Competence Rationales

Benefits for future employment have been listed by Van der Wende,[262] and include the development of an analytical and flexible approach, foreign-language proficiency, the acquisition of cross-cultural communication skills, and the ability to co-operate with people from other countries. Another list of reasons for internationalising was given two years later by Sadlak.[263] He also found the personal, educational and social benefits hard to measure, but he claimed that it was often acknowledged that studying abroad resulted in

- Acquiring new competencies
- Improving knowledge of foreign languages
- Familiarisation with new teaching methods as well as scientific equipment, organisation of laboratories etc.
- Opportunities to purchase new books, software etc.
- Establishing new personal contacts, professional networking etc
- Familiarisation with another country, its institutions and their functions
- Personal development and building self-confidence

In his criticism of international mobility Grünzweig[264] put these rationales in a different way grouping them in three types: international exchange and study abroad contribute to *international understanding*, study abroad leads to *personal growth*, and it makes participants aware of *global interdependence*.

2.3.2.4 Curriculum-Based Rationales

CIMO[265] has adopted Knight's view towards internationalisation: the objective of internationalisation is to improve the quality of university teaching and education (in CIMO's vocabulary, as in many other contexts as well, university includes all kinds of tertiary education and higher-education institutes, not only traditional universities but also polytechnics).

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[262] van der Wende 1996 p.194
[263] Sadlak 1998 p. 105
[264] Grünzweig 2000 p. 6 - 7
[265] CIMO Occasional Paper, 1995 p.4

A CERI study[266] that was an international comparative investigation of curriculum development for internationalisation in higher education in six countries (Australia, Denmark, France, Germany, Japan and the Netherlands) identified eight outcomes:

- Increased knowledge of the international aspects of the subject area
- Enhanced understanding and ability to communicate with people from other countries
- Improved foreign-language proficiency
- Enhanced labour-market opportunities, better qualification for international professions
- Introduction of new expertise and methods by foreign staff
- Professional development of domestic staff
- Innovations in taken-for-granted practices: new approaches to student learning and outcomes
- Social integration of student groups with different nationalities

Since these outcomes are almost identical to the above-mentioned rationales they are included in this subchapter to illustrate, their validity at least in terms of one study.

2.3.2.5 Push and Pull Factors as Rationales

Sartonen[267] adapted Luostarinen's[268] push and pull factors from his model of the internationalisation of the firm to the educational context. The categorisation she used is analysed in this subchapter. Internal factors such as the institution's vision, mission, goals, priorities and development objects, resources, growth possibilities, expectations of staff and students, commitment of management, reputation, status and fame, and other ad hoc factors were mentioned. Domestic external factors included goals and priorities of government, financial possibilities, expectations of working life, company internationalisation, competition between institutes, and alliances with other institutes. Foreign external factors were said to be OECD co-operation, the EU's political and educational objectives such as the free movement of capital, services and people, financial possibilities, competition for students, expectations of working life and multinational companies, and the value added to the

[266] van der Wende 1999 p. 73 - 78
[267] Sartonen 1999 p. 47

individual institution through international co-operation. The above-mentioned is illustrated in Sartonen's figure[269] "Push and pull factors of internationalisation in the education" (translated by the author)

INTERNAL FACTORS	**EXTERNAL FACTORS**
The institution's vision, mission and goals	**A) Domestic**
Priorities and objects of development (e.g. Quality)	Goals and priorites of government
Resources	Financial possibilities
Growth possibilities	Expectations of working life
Expectations of staff and students	Company Internationalisation
Commitment of management	Competition with other institutes
Reputation, fame	Alliancing with other institutes
Ad hoc factors	**B) Foreign**
	OECD cooperation
	The political and educational objectives of the EU
	Free movement of capital, services and people
	Financial possibilities
	Competition for students
	Expectations of working life and multinational companies
	Value added to the individual institution through international cooperation

INFLUENCE OF PUSH and PULL

INTERNATIONALISATION PROCESS

Table 12: Luostarinen's Push and Pull Factors, Adapted by Sartonen to the School Environment

[268] Luostarinen 1979

These classifications can be questioned, beginning with the internal factors. Are the first-mentioned – vision, mission and goals - only a consequence of external factors, or are they really push factors? Teichler & Barblan and Ollikainen have studied European Policy Statements, and it is clear that the plans were written mainly in order to receive extra funding from the EU – this is even mentioned by Sartonen[270] herself when she thanked the Ministry of Education and the Board of Education, as well as the European Union programmes for forcing institutions to have an internationalisation plan and project-specific plans.

It was also clear from this study of higher-education strategies that higher-education institutes are not managed in the full sense of the word, and have not traditionally had any strategic element in their management[271]. This was also supported in Teichler's studies. It means that higher-education strategies are developed because external organisations, such as the Ministry of Education or the EU, want them. If this is the case, can it be claimed that something forced from the outside, such as mission and vision statements and priority plans, in connection with obtaining internationalisation funding, could be a push factor for internationalisation, when push factors should be internal?

The very existence of growth as a factor could be questioned. In no other studies has growth been referred to in the context of the internationalisation of education. Even in the most market-driven countries like the UK, the rationale for internationalisation was not profit or growth, but staying alive and getting other funding to replace the decreasing government funding.

All the other *domestic* external factors except alliances are easy to understand as internationalisation factors. This may refer to the advent of polytechnics in Finland, where institutes that were new to each other started to collaborate in order to gain the status of a polytechnic.

It could also be argued that the value added of international co-operation for the *particular institute* would be better classified as an *internal factor* and not as a foreign external factor.

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[269] Sartonen 1999 p.47
[270] Sartonen 1999 p.38

The positioning of student competition is rather odd, too – isn't it more competition for *domestic* students rather than for foreign students that is relevant? Domestic students might choose an institute based on the opportunities for international co-operation, or for acquiring international competencies, but aren't foreign students still a small group in the Finnish context, according to official statistics?

This listing of push and pull factors could be compared to Smith's[272] earlier list of institutional reasons for internationalisation. He proposed the following:

- Providing students with a wider range of topic specialisations than could be provided by the home institute
- Building in an additional area studies component or option into an existing degree programme
- Enhancing the internationalist profile of graduates
- Adding a foreign socio-cultural dimension to studies
- Improving the foreign-language competence of students across a certain range of disciplines
- Improving the institution's reputation abroad
- Testing the ground for possible future co-operation on a larger scale

Most of these reasons are internal if the above-mentioned typology is used, and most of them are even curriculum-development related. The fame, reputation or status category also has two components in this list, enhancing the internationalist profile of graduates and improving the institute's reputation.

Both of these lists are quite different from what Wächter[273]claimed were the contextual factors. He had more of a macro view and argued that the important factors were, in this order, governmental policies, the process of globalisation, the changed environment brought by the IT revolution, the trend towards accountability and responsibility expressed in the expectations of the so-called stakeholders, and the widespread commodification of higher education. All of these factors are referred to in the Globalisation of Higher Education[274] by different authors, except that

[271] Saarinen 2000 p.10
[272] Smith 1993 p.11
[273] Wächter in Crowther et al. 2000 p.6
[274] ed. Peter Scott 1998

commodification is not claimed to be widespread, but to exist especially in the Anglo-Saxon countries and in the Netherlands.[275]

2.3.2.6 Knight's Categories of Rationales in International Education

Different rationales for internationalisation were divided to four categories by Knight: political, economic, academic and social[276]. These categories were explained as being more and more interrelated and not mutually exclusive. They were also considered to be increasingly blurred and constantly changing.

The political reasons for internationalisation were claimed to be more national than institutional, as Scott[277] has claimed elsewhere. Historically, the idea of international education was to promote peace and national security, but nowadays it could be argued to be not only communicational and diplomatic but also an export product. This means that the rationales for internationalisation have become more economic than political. Further it has been argued that, at the national level, there is a closer link between the internationalisation of higher education and the economic and technological development of the country, as OECD studies, European Union policy statements and Ollikainen et al. have also claimed.

The academic rationale for internationalisation is said to be directly linked with the traditional universities and their role and development. The international mobility of scholars has been connected to the international dimension of research. It is surprising that Knight did not mention the growing non-university sector in the context of the rationale debate.

Cultural and social rationale was claimed to be of diminishing importance, and to be taking a different direction than earlier. The preservation and promotion of a particular culture is apparently more strongly motivated in countries in which internationalisation has been taken as a way of respecting cultural diversity, and as a counterbalance to the homogenising effect of globalisation. The competency approach to internationalisation was referred to as well.

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[275] see e.g. Callan 1998 in the above mentioned book
[276] Knight 1999 p. 17 - 21
[277] Scott 1998

To conclude, it was pointed out that an individual's, an institution's and a country's rationales for the internationalisation of education are complex and multi-level, and evolve over time and in response to changing needs and trends[278]. Thus, it was not claimed that the four categories offered a perfect explanation, but they did illustrate the complexity of the various factors involved.

2.4 A Brief Introduction to Strategic Management as Part of a Holistic Dynamic Management and Steering Process in the Context of Higher-Education Institutions

This section aims at briefly introducing the situation of strategic school management as a basis for planning the internationalisation of higher-education institutions.

Ekholm[279] summarised the general situation of school-management studies in the Nordic countries, and this, in turn, is briefly summarised in the following. School management should follow the plans drawn up systematically by society. However, as a profession, it has a short history. Rectors have been the best teachers, and thus most appreciated. As far as the primary schools were concerned, school management was a part-time job, while in the secondary schools it was the top of the career-development ladder for a teacher. The situation has changed during the past 20 – 30 years as management tasks have increased more and more. However, schools are still managed along old teacher-autonomy lines: only highly-qualified teachers have been considered competent to evaluate their ways of working. Pedagogical management has been very rare. Management has been directed towards administration, student care, the maintenance of school buildings, further education planning and personnel matters.

Education in school management has been and still is very rare in the Nordic countries, as Ekholm claimed, and it is difficult to generalise and disseminate the relevant knowledge. Since the studies frequently cover only a few institutions, the

[278] Knight 1999 p.20
[279] Ekholm 1992

quality of management is not even mentioned in order not to emphasise the doings and non-doings of some particular persons. Management know-how is passed on in interaction between junior and senior colleagues. There has been strong ideological and pedagogic management, but in today's school the management has become more of a bureaucratic task, involving more administration than pedagogical issues. The work is sporadic, as is any management work. Women directors seem to be more active in psycho-social and pedagogical matters than men. The initiative and support of management strongly influence the development of a particular school.

A general Nordic, and European, problem in schooling is how to keep the quality when funding is becoming more and more scarce. According to Ekholm, a manager needs to be strong in cost calculation, to be able to see how different resources can be used in different ways, and to fully utilise ICT possibilities in administration, follow-up and evaluation. A shift from central to more decentralised administration is clearly visible in the Nordic countries. The responsibilities of school management are increasing, and managers should be aware of the interaction processes between people in order to lead the democratic steering process effectively. They should also know how to organise decision making and the delegation of power objectively, and be well versed in organisation development and change management.

Strategic Management

Management can be divided between planning, implementing and evaluating. Holistic strategic management [280] is one area in the extensive literature on strategic management, and is briefly introduced in the following.

Bonn and Christodoulou[281] claimed that the concept of strategic management reflects the economic, technological and social changes of society. Strategic management was a budget exercise in the 1960s, in the 1970s it was strategic planning-based and the 1980s saw a phase in which all the resources were orchestrated to create competitive advantage. This included a planning framework

[280] see e.g. Luostarinen 1979, 1991; Hunt et al. 1997; Hill & Jones 1998
[281] Bonn& Christodoulou 1996

that cut across operational boundaries, a flexible and creative planning process and a corporate value system reinforcing management commitment. The 1990s were characterised by the search for new paradigms. Strategic planning was criticised for bureacratising actitivities that then became rigid. It has even been claimed that formalised strategic procedures have, in fact, often ruined strategic thinking.

However, according to Bonn and Christodoulou's research on Australian companies, formalised strategic planning served as a tool to facilitate strategy development and implementation, and provided a forum for discussion between corporate and divisional or business-unit management. Formalised systems were claimed to have their place as part of a total strategic-management approach with its enhanced focus on customers and markets. It was not only top management, but also the levels underneath that needed to be included and to have full responsibility in the strategy-making process. A high degree of flexibility was needed to facilitate adaptation to the rapidly-changing environments.

Hill and Jones[282] set out the major components of the strategic-management process as defining the mission and major goals of the organisation, analysing its external and internal environments, choosing strategies that align or adapt its strengths and weaknesses with external environmental opportunities and threats, and adopting organisational structures and control systems to implement its chosen strategy.

Luostarinen[283] put forward a model of holistic management and steering according to which a holistic management system comprises information, planning, organising, implementation, and evaluation systems. When this was applied to the school environment, he and Pulkkinen came up with somewhat different elements, which are discussed in this study in the section on planning.

Luostarinen presented action premises as inputs, and result or performance as outputs. His view of the dynamic management/steering system of a firm is encapsulated in the following:

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[282] Hill & Jones 1998
[283] Luostarinen 1979, Luostarinen-Pulkkinen 1991, Luostarinen 1999

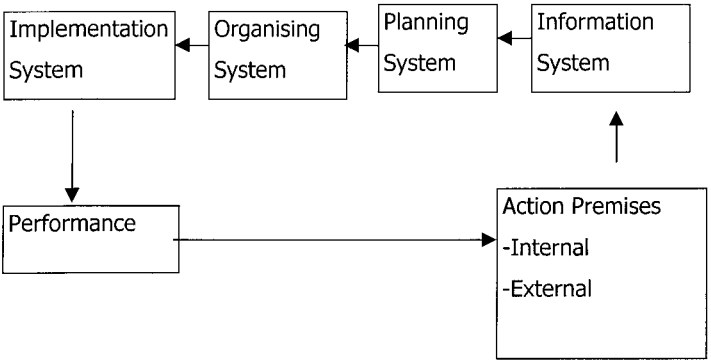

Figure 6: Luostarinen's Holistic Management/ Steering System

This management system included the structure of the previously-mentioned subsystems and a system description. Seven components and processes of an international information system were proposed. First, a collection system collects data from external and internal action premises. Second, the data is processed into information to be used. Third, it is coded, and if needed, a secrecy system is used. Fourth, the data is transferred. Fifth, a utilisation system puts the information in order of priority. Sixth, a storing system stores the desired information, and seventh, unnecessary information is deleted from the system. When strategic management is implemented it is crucial to analyse, according to all these components, what is done, by whom, to whom, when, how, with what budget and under whose responsibility. Project management[284] is one of the tools for this.

Internationalisation is claimed to influence the holistic functioning of the higher-education institution, and to require active participation and active development together with institutions of other countries.[285] Thus, strategic management is called for. Clarkson and Walls[286] echo this by claiming that

[284] Guss 1998, Jessen 1998, Brown 1999
[285] Ammatillisen koulutuksen kansainvälistäminen 1998 p.4
[286] Clarkson and Walls 1995

internationalisation as a holistic phenomenon, with its language-competence needs and multiculturalism ideals, represents a challenge to the directors of the institutional change process who have to develop their own and their employees' internationalisation preparedness, as well as to develop an international network. The Board of Education[287] shares the opinion that internationalisation is a change process demanding systematic development work, even though it has often started almost accidentally from human relations. They emphasised that significant results of internationalisation can be achieved only if activities are planned and goals are decided on. It is of utmost importance that school management and owners commit themselves to the internationalisation process. Fullan[288] shared this idea of going through development as a change process.

The external environment of higher-education internationalisation is systematically analysed and reported on by the Ministry of Education and by the Board of Education, as well as by CIMO. One of the rare more academic studies on internationalisation in Finland was conducted in 1991. It was found that most of the mobility in the European countries of Scandinavia and in the UK concerned the EC countries and Northern America, whereas for France, Portugal and Spain, the main emphasis was on the EC.[289]

It was suggested at the beginning of this study that the administrative culture existing in higher-education institutions heavily ifluences the internal environment of internationalisation. The independent decision making and responsibility taking that characterise the management function are not emphasised in the school environment. According to Kohonen and Leppilampi,[290] who borrowed the idea from Deal (1987), school culture means values, beliefs, understandings of learning, the learner's and teacher's relationship and co-operation, and of school management, myths, expectations, norms, roles, ceremonies and rituals that often unconscieously direct its functioning. School culture was earlier characterised by professional isolation, all teachers had their responsibility for specific classes and co-operation was almost non-existent.

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[287] Ammatillisen koulutuksen kansainvälistäminen 1998 p.7
[288] Fullan 1992
[289] Luostarinen-Pulkkinen 1991 p.95
[290] Kohonen & Leppilampi 1990 p.31

Now this culture seems to be changing.[291] Co-operation and decision power at the bottom of organisations are emphasised everywhere in society. School administration has been decentralised,[292] and there is a huge change from isolation to active internal development. Understandings of learning are changing as well, with the encouragement of holistic learning: versality, activeness, functionality, feelings, experiences and imagination.

This change is necessary for school development.[293] It is crucial for the whole personnel to be involved in the preparation and planning of change, which takes years. The implementation decisions should be made together, and the solving of real problems should guide the actions taken. Efficient internal training is an essential tool, and management has to support the process, analyse it and regularly and systematically evaluate the implementation of change.

According to Kohonen and Leppilampi,[294] structural change needs co-operating in decision making, which should be based on the active use of research results and the collection of relevant local information, and which concerns curriculum and pedagogical development. School development is a holistic phenomenon including curriculum and process development, changes in school culture and networking with interest groups.

Hill and Jones[295] shared the view that organisational change is a key aspect of strategic management. They defined it as a complex and difficult process for organisations to manage successfully, the first problem being to make managers realise that change is necessary and to admit that there is a problem. Once they recognise the need, they can recommed actions and analyse the potential obstacles to change. It needs to be appreciated, however, that organisations are not just rational decision - making systems in which managers calculate the potential returns on their investments, but that they are arenas of power in which individuals and groups fight for prestige and the possession of scarce resources. If strategic change is to be managed effectively, the politics and conflicts need to be handled creatively.

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[291] Kohonen & Leppilampi 1990 p.34
[292] e.g. Ekholm 1992
[293] Kohonen & Leppilampi 1990 p.36 - 38
[294] Kohonen & Leppilampi 1990 p.38 - 43
[295] Hill and Jones 1998 p.467

Knight[299] introduced Organisational Strategies (see Table 10 in this study), in which the first category, governance, included items that could be treated under strategic planning, namely expressed commitment by senior leaders, articulated rationale, and goals for internationalisation and the recognition of an international dimension in the mission and policy statements. Her fourth ingredient, active involvement of faculty and staff, belongs, in the author's view, to "realisation" in terms of the categories used in this study. One of the aspects of Knight's "operations", namely "Integrated into institution-wide and department planning, budgeting and quality review system" also comes under the planning function. All the rest of her "Organisational Categories" fall within "Realisation: organisation" in terms of this study, with the exception of her "Adequate financial support and resource allocation systems",which come under "Realisation: financing". She has effectively elaborated the issue in detail.

Strategic planning could be claimed to have four components[300]. First, the *mission* states why the organisation exists. Hill and Jones[301] sugggested that the mission statement should contain three broad elements:

a) a statement about the overall vision of the company
b) a statement that indicates the key philosophical values that managers are committed to
c) the articulation of key goals that management believes must be adhered to in order to fulfill the mission statement.

This clearly illustrates the fact that there are different ways to define the borders of vision, mission and business idea. Second, *a business idea* reveals what is done, how the mission is implemented in real life. Third, the *objectives* show where the organisation is heading and fourth, *strategies* then explain how the objectives are to be achieved. Goals should specify with precision what must be done if the company is to fulfil its mission. Well-constructed goals are precise, mesasurable, and address important issues; they are challenging but realistic, and specify a time period within

[298] Luostarinen 1999
[299] Knight 1999 pp.25-26
[300] Luostarinen 1999
[301] Hill and Jones 1998 p.64

which they should be achieved.[302] Both the mission and the vision might have several versions, a management version, which is detailed, and could be in matrix form; a personnel version as a summary for internal use, and a PR version in slogan form for public consumption.[303] Strategic planning is carried out on different organisational levels. Hill and Jones added that strategic decisions have an ethical dimension, and any action has an impact on the relevant interest groups.

Strategic planning is the framework for operative planning.[304] The mission and idea give rise to the operative planning, which includes plans, budgets and programmes set out in a clear formula in order to facilitate the achievement of the objectives.

There are two types of action premises: external and internal.[305] External action premises, in turn, can belong to the macro, meso or micro environment. Economic, technological, legal, political and socio-cultural matters are parts of the macro environment, while the meso environment consists of industrial analysis and external-value-chain members such as customers, suppliers, financiers, competitors and owners. Technological and political relations, and legal, cultural and social connections are parts of the micro environment.

Core competencies are based on resources and core skills and knowledge.[306] Strategic competitive edges are gained by exploiting external strategic opportunities and the ability to use current core competencies or build up new ones. Hamel & Prahalad[307] conceptualised a company as a portfolio of core competencies, as opposed to a portfolio of businesses. Corporate development means maintaining existing competencies, building new ones and leveraging them by applying them to new opportunities. The external environement can be analysed according to Porter's model of competition, and by other strategic-group models, as claimed by Hill and

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[302] Hill & Jones 1998
[303] Luostarinen 1999
[304] Luostarinen 1999, Hunt et al. 1997
[305] Luostarinen 1999
[306] Luostarinen 1999
[307] Hamel & Prahalad: Competing for the Future, Cambridge 1994 p.227 according to Hill& Jones p.321 & p.340

Jones[308]. They emphasised the criticisms these models have received for being static and de-emphasing the role of innovation and differences in different organisations.

The key components of strategic planning can be said to be the mission, the total objectives and the grand strategies developed and reformulated to explicitly include the international dimension.[309] This thus offers the necessary framework for the education context, both as a token of authority and an obligation on staff to consider the internationalisation of different components of education in their units, departments and subjects. By defining the mission, objectives and strategies at the unit/department level as a part of the strategic-planning process, the faculties can also define the framework for starting operative planning. Once the level has been set, the structure and contents have to be decided, as do the human aspects and the language questions. Financing, organisation and evaluation are also included in the process, as are the orientation basis, and the values and attitudes existing in the particular institute. This is summarised by Luostarinen and Pulkkinen in a figure as a tool for the planning of internationalisation for higher education[310], and based on Luostarinen's study of 1975. Figure 7 below is presented as more generally applicable.

[308] Hill and Jones 1998 p.103, 209
[309] Luostarinen&Pulkkinen 1991 p.173
[310] Luostarinen&Pulkkinen 1991 p.174

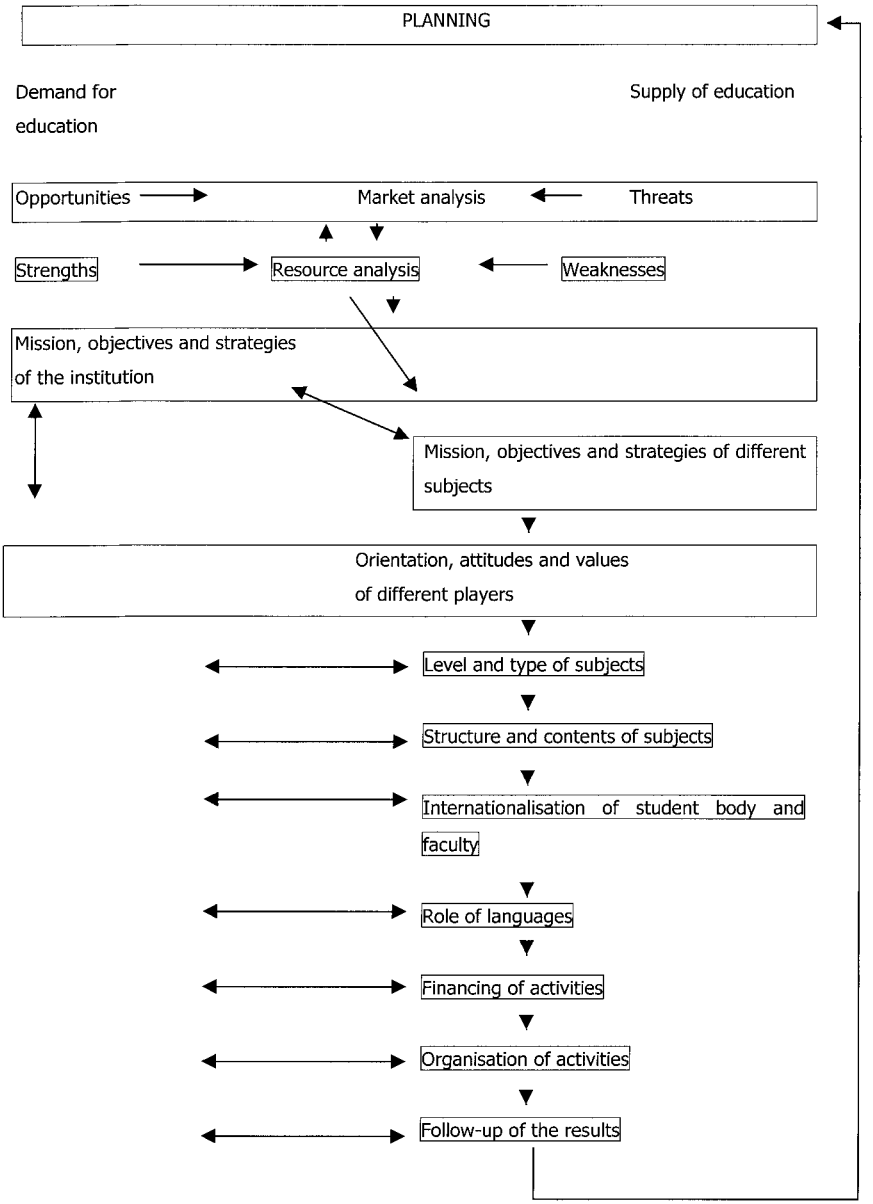

Figure 7: Luostarinen and Pulkkinen's View of the Planning of International Business Education, Adapted by Söderqvist

A strategy can be defined as an action that an organisation takes in order to attain one or more of its goals. It is further claimed to be an outcome of a rational planning process. Revision of the concept suggests that a strategy may emerge in the absence of formal plans as lower-level managers respond to unpredicted situations. It could also refer to the way strategic managers devise a plan of action for using an organisation's resources and its distinctive competencies in order to gain competitive advantage.[311]

Hill and Jones[312] referred to Mintzberg's model of strategy development: an organisation's realised strategy is the product of whatever planned or intended strategies are actually put into action and of any unplanned or emergent strategies. Emergent strategies are the unplanned responses to unforeseen circumstances, often arising from autonomous action by individual employees deep within the organisation.

According to the Board of Education[313] (it was an important player in the internationalisation of polytechnics before they were given permanent status), a good internationalisation plan includes not only financing but also parts explaining

- How the further education of different personnel groups is going to be organised
- What the language-education opportunities for both staff and students are
- How content and language integration in learning is going to be organised alone or in cooperation with other institutions
- How teacher, other staff and student mobility is going to be organized
- What international activities are going to be carried out and with whom
- How internationalism and multiculturalism are going to be taught
- How immigrants are going to be educated
- What special demands the field of education and the regional emphasis impose
- How the results of internationalisation are going to be disseminated and used in developing further the institution and its interest groups
- What EU projects are going to be realized
- Who is going to be responsible for implementing the plan and what resources are available for the implementation

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[311] Hill & Jones 1998 p.30
[312] Hill &Jones 1998 p.21; referring to H. Mintzberg, Patterns in Strategy Formulation, Management Science, 1978, no. 24 pp. 934 –948
[313] Ammatillisen kolutuksen kansainvälistäminen 1998 p.8

- How total commitment is going to be guaranteed
- How internationalisation is going to be assessed and included in the self-evaluation processes of the holistic functioning of the institution, of teaching and of student qualifications

2.4.2 Realisation: Organisation, Financing and Implementation as Parts of Strategic Management

Organisation

Three tools for organising system development are offered: an *organisation chart* indicating to tell levels and positions, *job descriptions* indicating duties and authority, and *meeting charts* to help in team working.[314] There are at least four types of an organisation structure: the divisional system, the strategic business-unit system, the functional system and the geographical system. Implementing a strategy successfully depends on selecting the right structure and control system to match the organisation's strategy.[315] There is a basic choice between differentation and integration, and decentralisation is suggested as one way of solving some problems related to differentation. Flat, tall, multidivisional, matrix, product-team and geographic structures are given as alternatives, and the greater the complexity of the integrating mechanism, the greater the costs.

The place of international education in higher-education institutes was critised by Teekens[316]. Even though internationalisation has rapidly gained in awareness and importance, most international activity still takes place outside of mainstream institutional activity, so that higher institutes remain national in scope and activity. This view is shared by Johnson and Johnson,[317] who strongly emphasise collaborative learning as a method of organising school activities and introduce a step-by-step model of how to create a collaborative school. The first step is to educate opinion leader-teachers, the second to change the administration, the third to allocate trainers and the fourth to institutionalise the activities. It is nonetheless claimed that independence and collaboration are not the same as good and evil.

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[314] Luostarinen 1999
[315] Hill & Jones 1998 p.376
[316] Teekens 2000 p.29
[317] Johnson and Johnson 1992

They are both relative concepts[318]. Collegiality that is created by force is warned against since it could ignore the real school culture and create contacts that nobody wants and that just use the time of the personnel for inefficient activities.

Fullan emphasised the fact that developments that cause good results go hand in hand with the development of personnel[319]. These two correlate strongly. According to Little (1989) and Sparks & Loucks-Horsley (1990), personnel development means any process or activity that aims at the development of knowledge, skills, understandings or capacities. Fullan further claimed that it is often not properly carried out, because it is difficult and because it includes questions of power and status as well as offering help to students and teachers.

According to Luostarinen and Pulkkinen,[320] there is a wide variety of organisational arrangements to do with internationalisation. Certain schools use centralised administration, others decentralised administration, and some even use a mixture of the two. It was also suggested that a major part of the co-ordination and integration of different IB activities takes place at the personal level through the participation of key persons in different decision-making bodies. Further, a few institutions follow the business world and obtain external sourcing in the form of international operations, strategic alliances, networks, subsidiaries, joint-ventures, subcontracting, co-operation agreements and private agreements. Knight's Organisational Strategies[321] elaborated this issue in even more detail (see Table 10 in this study). The organisational arrangements needed to carry out current international activities were introduced for higher education, and also the role of the different arrangements needed from the Human Relations Management side was highlighted in the category "Human Resource Development". Since higher-education institutes are expert organisations, the human capital needs to be carefully managed.

No organisation functions without a leader and/or manager. Hill and Jones[322] referred to Hambrick[323] in their discussion of some of the characteristics of good

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[318] Fullan 1992 p.103
[319] Fullan 1992
[320] Luostarinen and Pulkkinen 1991 p. 96 - 106
[321] Knight 1999 p. 25-26
[322] Hill and Jones 1998 p.14-16
[323] D.C. Hambrick 1989, Putting Top Managers back into the Picture, Strategic Management Journal, Special Issue, 1989, no. 10 pp. 17 - 32

leaders. These were suggested to be vision, eloquence and consistency; commitment; being well informed; the willingness to delegate and empower; and the astute use of power.

Implementation

Luostarinen[324] describes strategic and operative implementation systems. Strategic implementation includes the vision, the mission, the business idea, the objectives and the strategy. Implementation of the vision is a move towards the desired state of affairs/dream, and the mission implementation satisfies the crucial needs of selected target groups. Realisation of the business idea implies the skillful use of a dynamic set of excellences that offer a competitive edge, and the achievement of objectives means striving towards them in order of priority. Strategy implementation means following selected strategies when striving towards objectives on the basis of the business mission and idea.

Operative implementation includes the plan, the budget and the programme. In terms of the plan, this means carrying out the defined activities and measures, while budget implementation is concerned with volumes and money, and programme implementation with the schedule. Project management is associated with operative implementation.

A process of change, such as the internationalisation of higher education, can be taken as a project. Project work is recognised by the following characteristics[325]. It is always problem oriented, i.e. the efforts are not haphazard but the result of a qualified desire, an identified problem or a recognised need. It is a goal-seeking endeavour, i.e. its main objective is clearly definable and practically attainable. It is resource-constrained, i.e. it has to be executed within well-defined limits in terms of time, personnel and capital outlay. It is by nature unique, i.e. it has few routine components and the work therefore has to break new ground or provide new insights for the participants. As such, it introduces an element of risk and a certain degree of challenge for those involved. It is also recognizable and visible, i.e.

[324] Luostarinen 1999
[325] Jessen 1998 p. 14 –19 applying Jessen 1990

it always relates to an actual situation, a "base" organisation. All these characteristics are to be found in the internationalisation process of a higher-education institution.

Project management is defined as a set of techniques enabling management to determine the scope, time, cost and human relations implications pertaining to a project in the achievement of its goals.[326] The generic nature of the project-management process is implicit in the definition, namely to manage:

- What is to be achieved
- Who is going to do it
- How much time is needed
- How much money is involved[327]

There are several ways in which organisations can increase efficiency[328]. Given that an educational institute is a service provider, there are the following possibilities: economies of scale and learning effects, upgrading the skills of employees through training, introducing self-managing teams, linking pay to performance, building a company-wide commitment to efficiency through strong leadership, and designing structures facilitating co-operation among different functions in pursuit of efficiency goals. Achievieng superior quality, for example, demands an organisation-wide commitment to quality, a clear focus on the customer, and the metrics to measure quality goals and incentives emphasising quality.

Hill and Jones[329] also pointed out that, on the functional level, each function requires a different kind of structure and control system to achieve its objectives. When an organisation becomes more international, it needs to switch to a more complex structure that allows it to co-ordinate increasingly complex resource transfers and to facilitate global learning. They also took up the influence of the change in structure towards corporate-level strategy, and vice versa. Network structures are claimed to be one outcome of the growth of outsourcing.

According to Fullan, the implementation of changes demands careful attention to the matter at hand, skills and goal-directdness[330]. Referring to Pink (1989), he suggested that obstacles to the implementation of development arise

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[326] Brown 1999 p.2 using Brown 1997
[327] Brown 1999 p.2
[328] Hill and Jones 1998 p.180
[329] Hill and Jones 1998 p.438

because of the lack of a suitable theoretical basis. This in turn results in resorting to fashion hits and quick solutions, failing to enlist the support of the school administration, managing with scarce resources, trying to do too much with too little, meeting too many needs, the inability to introuduce project management, of which nobody is aware, teacher turnover and burnout, and the inability to understand differences between schools and to define the roles of universities and their owners.

Fullan[331] also refers to Miles (1986), who gives a list of fourteen key factors in three stages that could make a change a success. The first phase involves reformulating the desired change to meet the central need for development, having a clear realisation plan, finding one or more strong supporters, and being active. The second phase calls for coordination, decentralised control, pressure and support, a continuous supply of technical help and rewards. The third phase internalisation, concentrates on the connections to teaching, the extent of the usefulness of the project and the discounting of any rivals, and continuous support.

Fullan[332] also stresses the fact that, even if teachers would like to maintain collegiality in stress situations, they cannot. Four conditions are set out in the development of the education institution: a common goal, common procedures, necessary structures for change, and an understanding of continuous development. [333] The training of personnel has to be started in the context of the actual school culture and the professional procedures in order to make changes happen.

The Aristotelian and Galilean understanding of human beings as factors influencing school-development aspirations was clarified by Lahdes[334]. The Aristotelian way of thinking emphasises the inherent difference in human activities, which calls for an explanation of goals, objectives and causal changes. The Galialean view emphasises changes in structures, roles, expectations and power relationships, while according to the Aristotelian view, change will not happen before people change. Lahdes claims that structural changes have traditionally been used in

[330] Fullan 1992 p.91 -92
[331] Fullan 1992 p.96
[332] Fullan 1992 p.107
[333] Fullan 1992 p.108
[334] Lahdes 1992 p.119-120

Finland, and when it is realised that changes do not happen there is a move towards the Aristotelian view by decentralising power to the local level.

2.4.3 Evaluation as Part of Strategic Management

Control systems may be classified as operative or strategic.[335] Operative control means daily control of the system: production volume and quality, and other performance control. Plans, budgets and programmes can be implemented daily, weekly, monthly, quarterly or yearly. Goal-achievement control is the third aspect of of the vision, the mission, the business idea, objectives and strategies.

Strategic control is defined as the process of setting targets, monitoring, evaluating and rewarding organisational performance[336]. The Balance Scorecard is given as an example of an approach encouraging managers to develop strategic control systems measuring all the important aspects of their organisation's performance.

Choosing a control system to match the structure and strategy offers management a number of challenges[337]. Controls that provide a framework for monitoring, measuring and accurately evaluating whether or not the organisation has achieved its goals and objectives are essential. Financial, output and behaviour controls and organisational culture should reinforce one another, and unforeseen consequences should be avoided. Effective controls are flexible, accurate and provide a quick response.

The implementation of internationalisation has been discussed on a practical level. A six-part detailed checklist for institutional self-evaluation of internationalisation is provided by CIMO[338]:

- Strategy and Policy
- Organisation and Structures
- University's external relations
- International interaction of academic staff

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[335] Luostarinen 1999
[336] Hill and Jones 1998 p.406
[337] Hill and Jones 1998 p.405
[338] Internationalisation of Higher Education: Goals Prerequisites and Quality Assurance 1995 pp.27-30

- Students
- Teaching and curriculum

Each of these parts includes concrete questions that are meant to facilitate analysis of the implementation of internationalisation.

2.5 The Proposed Framework for the Planning of Internationalisation in Finnish Higher-Education Institutions

The purpose of a conceptual framework is to integrate a set of perspectives with aspects relevant to the study in question. The framework can be said to reflect the main dimensions to be studied, the key factors and the presumed relations amongst them.[339] The framework of this study provides the analytical tools for synthesising internationalisation in higher-education institutions – in terms of description and undestanding - as a basis for planning, whch is understood as part of a holistic management system. The proposed framework consists of three parts: *the definition, the integrated understanding of the planning of internationalisation* as part of holistic management, and *eight propositions* that are put forward, the first of which suggests that recent internationalisation seemed to evolve through five stages, and the other seven concerning the different aspects of the management of internationalisation as a basis for planning.

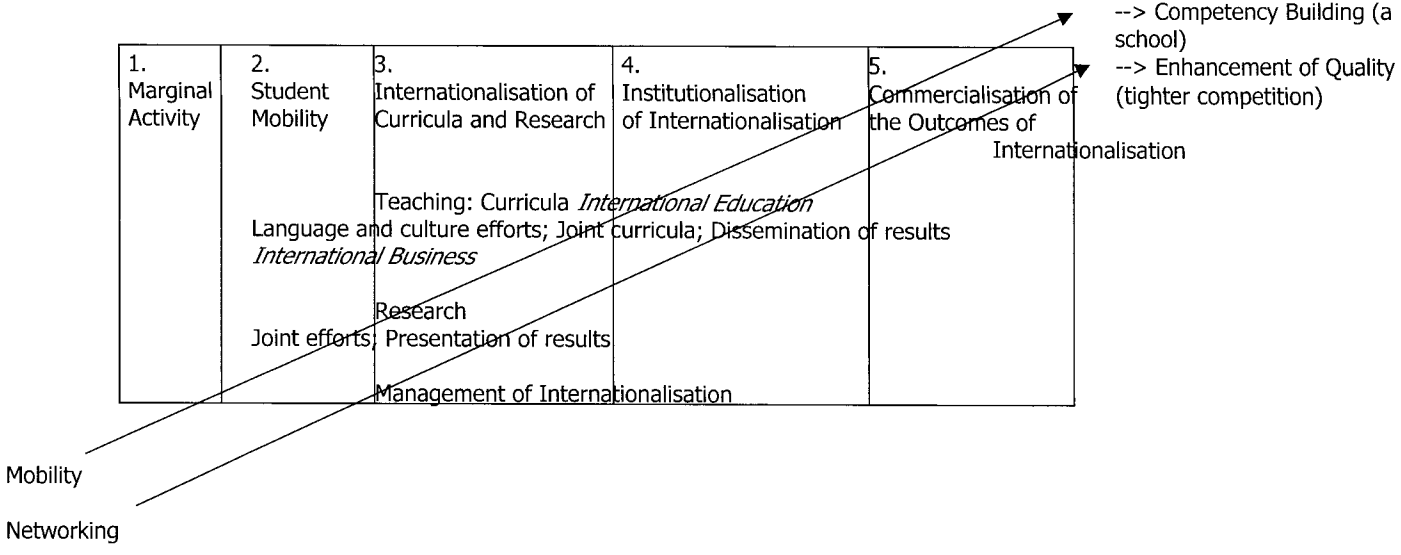
The Internationalisation of a Higher-Education Institution – the Definition

It is claimed that internationalisation in the context of this study can be defined as follows:

> *The internationalisation of a higher-education institution is a change process leading to the inclusion of an international dimension in all aspects of its holistic management in order to enhance the quality of teaching and research and to achieve the desired competences.*

This understanding, derived from the literature review, is depicted in Figure 8 below:

Figure 8:
THE INTERNATIONALISATION OF A HIGHER-EDUCATION INSTITUTION



This integrated understanding of internationalisation and its planning, as part of the holistic-management framework of this study, can be summarised in the following set of phrases:

"Based on an analysis of its external and internal environment

it is desired in a public higher-education institution

to actively and systematically manage

a change process

leading to including an international dimension in all parts of holistic strategic and operative management, namely information, planning, organising, financing, implementing and evaluating,

in order to enhance the quality of the desired outcomes of internationalisation in the higher-education institution in question.

These desired outcomes can be grouped under teaching and research.

Figure 9: An Integrated Understanding of Internationalisation and Its Planning

There are several assumptions on which the framework is based. The first is that internationalisation is a *dynamic change process*, as described in the literature.[340] "Dynamic" means that the result or output of a previous decision/action/stage influences the following one, or constitutes the input for it[341]. This is the reason why it is emphasised that planning should be based on an analysis of the external and internal environments.

Since the internationalisation of a higher-education institution is understood as a dynamic change process, it is by definition a phenomenon that calls for a *holistic perspective*: change in an institution is a holistic change, hence the reference to a holistic management system.[342]. Such a system is said to include several subsystems, namely information, planning, organisation, financing, implementation and evaluation

[340] Johanson & Wahlne 1977, Luostarinen 1979, van der Wende 1996abc, Knight 1999
[341] Johanson & Wahlne 1977, Luostarinen 1979
[342] e.g. Luostarinen 1979, Hunt et al. 1997, Hill & Jones 1998

(Figure 10)[343]. Since higher-education institutions are expert organisations, management is emphasised rather than steering. As *planning* is the main emphasis of the present study, certain relevant assumptions can be made. Management based on planning is understood to fulfil its aims better than management based on emergent strategies because of the *systematic* thinking involved. It is assumed that the *objectives* of internationalisation are phrased and communicated – otherwise it is impossible to evaluate whether the desired outcomes were achieved or not. The definition further emphasises that the plannning of this process is a holistic *two-level-action,* with strategic and operative aspects.

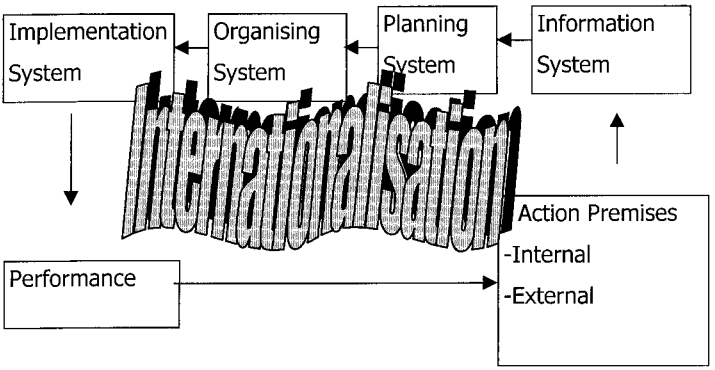
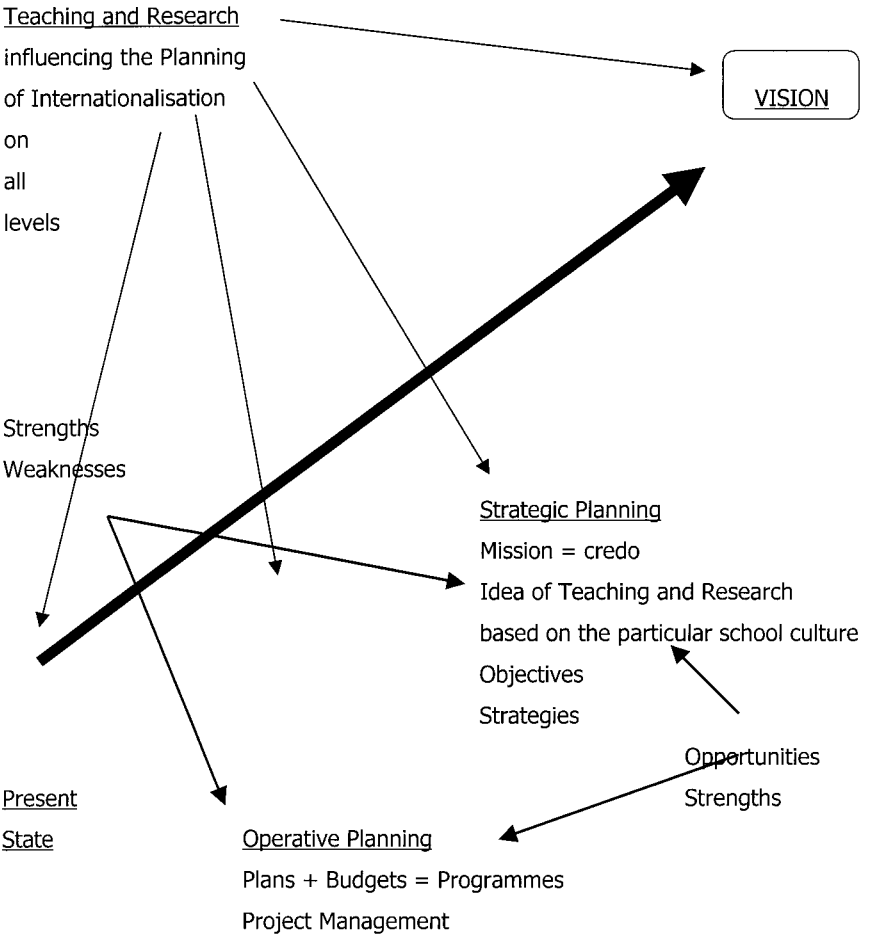


Figure 10 Integrated Understanding of a Holistic Management System for the Internationalisation of a Higher-education Institution – Adapted from Luostarinen 1999

[343] a modified version of Luostarinen's holistic management/steering system, 1999

Figure 11: A Holistic Planning System for the Internationalisation of a Higher-education Institution, Adapted from Luostarinen 1999



The internationalisation of higher-education institutes is also assumed to be an educational innovation/change,[344] which, according to the literature on educational innovations, implies that *different stages* are to be found within the process. These usually include adoption, implementation and institutionalisation.[345] The desired outcomes of the internationalisation of higher-education institutions could be grouped under teaching and research[346].

It is also assumed that internationalisation in this context is an *evolutionary process*[347], a product of a series of incremental decisions[348] influenced by learning and lateral rigidity in a similar way as in the internationalisation of the firm.[349]

Since internationalisation as a process is complex[350], it is assumed that a systematic holistic approach to management, and especially to planning, leads to better results than an ad-hoc or emergent strategy would produce.

Propositions Derived from the Literature Review

The first proposition is that the mass internationalisation of higher education institutions evolves through five stages.

It was claimed that internationalisation in higher education is a change/educational innovation process consisting of several stages. According to Van der Wende, the tripartition of adoption, implementation and institutionalisation is usually applied.[351] Luostarinen defined four stages[352], in connection with the internationalisation of the firm and higher-education institutions. It is claimed here that five stages can be identified, derived from the review of literature on the mass internationalisation of higher-education institutions in the 1990s. These five stages are described and analysed in the following. Later stages may include characteristics from an earlier

[344] van der Wende 1996b p.65
[345] van der Wende p.65, van der Wende 1996c p.30 according to Fullan 1982, 1991 and Curry 1992
[346] modified from Knight's definition 1994 explained in Knight 1999
[347] van der Wende 1996
[348] Luostarinen 1979, Johanson & Wahlne 1977
[349]Johanson & Wiederscheim-Paul 1975, Johanson & Wahlne 1977, Luostarinen 1979, Cavusgil 1980, Welch & Wiederscheim-Paul 1980
[350] van der Wende 1996c p.29, Callan 1998
[351] Van der Wende 1996

stage, and it should be noted that not all organisations proceed in this order. The five stages are

- Internationalisation as Marginal Activity
- Student Mobility
- Curriculum and Research Internationalisation
- Institutionalisation of Internationalisation
- Commercialising the Outcomes of Internationalisation

Luostarinen & Pulkkinen presented their stages model in 1991[353], based on an analysis of the state and dynamics of International Business Education in 1989 – 90. There are four major differences from the present analysis. The first is the moment of *time*, since this analysis is being carried out ten years later. Second, the Luostarinen & Pulkkinen analysis focused on *International Business education,* whereas the focus in the present analysis is on the *internationalisation process of an organisation*, i.e. a higher-education institution. A third difference concerns *the present role of the European Union* in influencing the mass internationalisation that took place in the 1990s. A fourth difference is the *speed of change* and its impact on the evolution of higher-education institutions.

Both of these analyses are based on a process view. Luostarinen & Pulkkinen's study was derived from Luostarinen's extensive and appreciated studies[354] on the internationalisation of the firm in Finland. The present analysis was, in addition, based on the process view that Knight[355] defined as the "integration of infusion of an international or intercultural dimension into teaching, research and service through a combination of a wide range of activities, policies and procedures", and on van der Wende's view[356] that internationalisation represents an educational innovation, and can be referred to as a change process in which the first feature contains the different phases.

The main differences between these starting points are the following. The present author has considered internationalisation - and its stages - as a means

[352] Luostarinen 1979, Luostarinen-Pulkkinen 1991
[353] see table 12, Luostarinen's and Pulkkinen's Components and Characteristics of the Internationalisation Stages of International Business Education
[354] see the reference list
[355] Knight 1999
[356] van der Wende 1996 p.65

towards the enhancement of the quality of research and teaching, whereas, at least implicitly, Luostarinen & Pulkkinen present internationalisation as an end in itself.

Luostarinen & Pulkkinen also suggest different dimensions of internationalisation. Their ten dimensions are divided into four stages, whereas in this new proposal the stages are built on each other, in most cases the following stage including the activities or elements of the preceding one. The dimensions are grouped differently according to the influence of the European Union's programmes and their demands. For example, the present author's curriculum development includes Luostarinen & Pulkkinen's Faculty, Language Studies, Language of Instruction and Orientation, as can be seen from Figure 3, (Knight's Academic Programmes – Adapted by Söderqvist), which sets out the author's understanding of international curricula and mobility. As such, dimensions such as institutionalisation, networking, IT, quality, multiculturalism and commercialisation do not exist in the earlier model, possibly due to the increased influence of the five last years in today's society compared with the society of the late 1980s.

The proposed stages are described in the following table and discussed thereafter.

Table 13. Stages of Internationalisation in Higher Education Institutions

Zero stage Internationalisation as Marginal Activity	- There are some free movers - Internationalisation is an exotic and status phenomenon – some important actors in the organisation travel to congresses - Foreign languages are taught
First stage Student Mobility	- Awareness of the need to internationalise - Commitment to planning and implementing different programmes enhancing the mobility of students - Creation of internatonal offices to take care of the routines of student mobility - Internationalisation is taken as an end in itself - ECTS becomes an important tool to facilitate counselling and the acknowledgement of foreign studies
Second stage Curriculum and Research Internatinalisation	- Awareness of teachers to internationalise in order to make the internationalisation of the curriculum and research possible - Organising of teacher mobility - Internationalisation taken as a means to enhance the quality of education - Different ways to internationalise the curriculum - Nomination of international coordinators to take care of curriculum and research internationalisation
Third stage Institutionalisation of Internationalisation	- Internationalisation is given a strategy and a structure - Networking both through cheap travel and new ICT; partnerships and strategic alliances - The quality of internationalisation is receiving more attention - Multiculturalism - Nomination of an internationalisation manager
Fourth stage Commercialising the Outcomes of Internationalisation	- Exporting education services - Franchising education services - Joint ventures - Strategic alliances[357] - Creation of organs to promote commercialisation

[357] A strategic alliance can be defined as a co-operative agreeent between actual/potential competitors. Its advantages include the facilitation of entry into foreign markets, the sharing of fixed costs and risks, the facilitation of the transfer of complementary skills between companies, and helping companies to establish standards. (Hill-Jones 1998 p.275)

At the zero stage, called Internationalisation as Marginal Activity, internationalisation is taken as something exotic. Only top management and the small circle around it is concerned: rectors and directors travel to meet each other. A teacher is lucky to get the funding to participate in an international conference. Foreign languages are taught, there may be some special courses showing that international affairs are taken into account. Some students travel to study in institutes abroad, but there is no organised activity, and no system for including such studies in their degrees. Wächter[358] has referred to free movers, and van der Wende[359] to foreign-language studies. The "pilot study" of one polytechnic's history and the interviews conducted in 1999 clearly mentioned the status question.

Internationalisation is taken as a serious activity at the first stage referred to as Student Mobility. It includes not only inward and outward student exchange, but also joint projects, courses and other short-term arrangements for students to travel and meet each other within the studying context. The biggest contribution of the organisation is to organise practical affairs, housing, registration, counselling in many forms for both inward and outward students, and the dissemination of results. An office for setting up the routines is created. Very often, internationalisation is taken as an end itself. Evidence of the existence of the Student Mobility phase is in the amount of official national statistics describing different types of student mobility.

The second stage, Curriculum and Research Internationalisation, gives a clue to the activities. The higher-education institute aims to have more influence on all the students from its internationalisation efforts than it has only as a result of student mobility. Internationalisation at Home is called for. Teachers start to travel more in order to lay the basis for collaborative and project-based courses. Teacher exchange can turn to be very problematic: teachers need to be informed, motivated, rewarded and helped with the practical arrangements at both the sending and the receiving ends. Van der Wende[360] produced a typology of different ways of internationalising curricula – all of which place special emphasis on the particular institution's culture and other elements of the internal environment.

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[358] Wächter 1999 p.186
[359] van der Wende 1996
[360] van der Wende 1996

Internationalisation is taken as a means of enhancing the quality of education.[361] The different projects call for an increase in personnel resources to take care of them.

At the third stage, Institutionalisation of Internationalisation, the focus is on institutionalisation. It seems that if all the possible outcomes are to be achieved in terms of the personal and organisational costs pertinent to internationalisation, it has to be institutionalised and it has to have a structure and a strategy. When people already have their personal networks, it is easier for them to use new ICT[362] to co-ordinate and co-operate. The quality of the process and the quality of the outcomes require more attention.[363] When many nationalities and cultures are in contact every day, multicultural issues are raised[364]. Activities increase, and the process of internationalisation spreads throughout the organisation, creating the need for an internationalisation manager.

The last stage, Commercialising the Outcomes of the Internationalisation, refers to the commercialisation of outcomes due to changes in the external environment.[365] Educational institutes receive less money from governments and they need the same amount as earlier in order to guarantee the desired pedagogical and research results. Different types of non-investment international operations are used, such as exporting, franchising and joint ventures. Internationalisation starts to resemble how it is described in the Internationalisation of the Firm, and further elaborated by Luostarinen and those who have adopted his framework. These ideas are summed up in Table 13.

The following seven propositions are derived from the integration of internationalisation and its planning. It is postulated that, in order to understand the dynamics of educational change, four basic factors should be taken into consideration: the educational setting, the environment, the innovation itself and the change strategy.[366] The educational setting is claimed to be professional bureacracy. The environment is highly complex, involving multilevel organisation and dynamic

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[361] Internationalisation... ed. by Snellman 1995, Scott 1992, Knight 1999, Bolobna process
[362] e.g. The Globalisation of Higher Education 1998
[363] e.g. Internationalisation... ed by Snellman 1995, Quality and Internationalisation in Higher education 1999
[364] Knight 1999, Brown 2000, Callan 2000, Otten 2000, Rinnehart 2000
[365] McNay 1995, Bruch & Party 1998, Elliott 1998, Callan 1998
[366] Dalin 1978, 1989 in van der Wende 1996c p.28

alliances and networking. The internationalisation itself incorporates two elements of change, namely of interaction and of management. The most important element as far as this study is concerned is the last one, change strategy. Individual and organisational strategies are distinguished, but the focus is on organisational strategies.

The second proposition is that the strategic objective of the internationalisation process is the enhanced quality of the desired outcomes of teaching and research.

The second proposition was based on Knight's definition of internationalisation.[367] The desired outcomes are in the fields of teaching and research.

The third proposition is that the desired outcomes of teaching and research are decided based on an analysis of external and internal environments.

The third proposition is based on the holistic-management principle[368] according to which the information system analyses the environment and establishes the basis for the planning of internationalisation.

Let us say that the desired outcome is to have 30% of students participating in foreign-exchange programmes at the Student Mobility stage, then the organisation has to manage the process accordingly, e.g. to have foreign studies advisors, international officers to take care of housing, registration and the like.

If the desired outcome at the Curriculum Internationalisation stage is to have joint modules of joint degrees with foreign institutes, then teachers have to have the opportunities to get to know foreign colleagues and to learn about foreign degrees. The organisation has to have a well-equipped library and ICT services, for example.

At the Institutionalisation Stage, the desired outcome may be the institutionalisation of international activities, in which case the higher-education institute has to have the necessary financing and administrative procedures, a clear structure and an expressed internationalisation strategy, for example.

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[367] Knight 1994 in Knight 1999
[368] e.g. Luostarinen 1979, 1999, Hill & Jones 1998

At the Commercialising Stage, the organisation may wish to cash in on the costs paid during earlier stages, and the outcomes must be educational products of the structures through which such products can be bought. The present author would like to emphasise with these examples that it is not relevant to discuss what items should be internationalised without knowing the objectives of the internationalisation.

The fourth proposition is that internationalisation as a change process means the inclusion of an international dimension in all aspects of holistic managment. In the planning system, the desired outcomes are expressed when strategic and operative objectives are communicated through planning documents.

This view, again is, based on holistic management as referred to earlier. Strategic objectives include the mission, the vision and long-term objectives, and operative objectives can be seen in short-term plans, budgets and programmes concerning how to achieve the strategic objectives.[369] A management system comprises information, planning, organising, financing, implementation and evaluation systems.[370] Strategic Planning does not only comprise budgeting: planning of the organising and the implementing go hand in hand with planning the funding.

The fifth proposition is that organisational changes caused by and needed for the internationalisation of higher education are planned actively and systematically through Project Management.

Active management differs from the more passive "carrying out of orders from the education authorities" type of functioning, and the systematic approach is emphasised. This reflects holistic-management thinking involving the analysis of the external and internal environments on which all planned actions are based.

Project management[371] is claimed to offer good tools for planning the management of internationalisation, and incorporates the integrated management of scope, time, cost and human relations.

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[369] Luostarinen 1999
[370] Applied from Luostarinen 1999
[371] Jessen 1998, Brown 1999

The sixth proposition is that mobility and networking are the main tools for achieving the desired outcomes of the internationalisation of the higher-education institution.

The European Union's influence on mass internationalisation is clear.[372] Mobility and networking are emphasised in programmes such as Socrates, Erasmus and Leonardo. Thus, planning their use is important if internationalisation is to proceed smoothly.

The seventh proposition is that there are many actors involved in the process of internationalisation on the institutional level: rectors, internationalisation officers, teachers and other administrative staff.

There are many actors involved in the internationalisation process, all of whom should be named, appreciated and given enough resources[373]. Actors can be identified by analysing the activities, and especially in the case of teachers, bearing in mind the history of independent professionals, a structure must be created that embraces them all.

The commitment of all the actors is needed. This can be stated in terms of organisational values, for example, but it needs to be seen in practice at the action level.

Students are part of the higher-education institute, but they do not have a planning role. They use the outcomes of this planning process by participating in foreign-exchange programmes and studying internationalised curricula.

[372] e.g. Teichler in all of his referred works to

[373] e.g. Parsons 2000 emphasises the resource-based view of the internationalisation of higher-education institutions

The eighth proposition is that, since the internationalisation of higher-education institutions is a process, it demands gradual and continuous development of the different systems along with its own development.

This was emphasised in Luostarinen's conclusions on the internationalisation of the firm. Van der Wende has outlined the same approach. Development requires planning.

3 EUROPEAN POLICY STATEMENTS AS PLANNING DOCUMENTS FOR INTERNATIONALISATION IN FINNISH HIGHER-EDUCATION INSTITUTIONS

3.1 Description of the Empirical Material

Barblan and Teichler[374] explained the history and new aims of Socrates as follows: The European Union has several programmes with which it desires to contribute to the internationalisation of higher-education institutes. The Socrates programme was introduced in 1995 to replace the former star, Erasmus. The Erasmus programme, launched in 1987, turned international co-operation and mobility from an exceptional phenomenon into a regular feature of the higher-education landscape in Europe. With Socrates the EU wished to bring together various educational programmes under a single administrative roof *and* to encourage European and international activities to focus on a policy encompassing the whole institution, from students to curricula. By turning ad hoc European activities into an institutional interest, *the EU was proposing a holistic view* of international linkages that implied an extension of support to other activities. Beyond the content, this shift of emphasis brought about substantial managerial changes. The higher-education institutes were to:

- submit a single application encompassing all their exchange and co-operation activities, thus replacing previous applications submitted by multilateral networks of co-operating departments coming from different institutions
- multiply bilateral co-operation agreements between partner institutions to cover international activities that had been arranged earlier through multilateral agreements between partner departments

- **formulate a European Policy Statement that would draw a framework for all European Activities organised in the applying institution, thus showing the contribution of Socrates to its European profile.**

This study analyses the Finnish Higher Education European Policy Statements for Socrates from 1996, and the SocratesII statements from 2000. The EPS strategies should not be more than five pages each according to the instructions given to the institutes, which otherwise had free hands to write them without any specific structure. All the institutionalised Finnish polytechnics and universities sent in a Socrates application in both years, and only those who that existed in both years are analysed here.

In addition to the EU guidelines, the Finnish higher-education institutions use the development plan of the Ministry of Education, of which some parts are quoted below.[375] According to this, the primary objective of international co-operation is to support the birth of high-quality education and research, and it should be only one aspect of the quality control. International co-operation in education and research supports the internationalisation of the Finnish economy and promotes Finnish knowhow.

The internationalisation of the curriculum, joint education and research projects and international mobility all contribute to the achievement of language and communication competence, tolerance, cultural knowledge and all-round education. Content teaching in foreign languages must be of high quality.

Finland is active in educational and research co-operation in the European Union. Special attention is given to the implementation of EU educational and research programmes, as well as to the removal of obstacles to mobility. One of the main focuses of Finland's EU policy is the development of the northern dimension and the setting of the scene for addressing the special questions and problems related to the economic and social development of Lapland, Russian Karelia and the Barents area.

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[374] Barblan & Teichler 2000

[375] Koulutus – ja tutkimus vuosina 1999 – 2004 is a document approved by the Council of State in 29.12.1999 for the years mentioned. This type of document is prepared and approved every fourth year for the approval year and the following four years.

In terms of university activities, basic scientific research and researcher education, as well as basic education, are emphasised. Universities are responsible for the continuous growth of the research volume in our knowledge-intensive society, for ensuring the supply of researchers and high-quality labour, and for producing scientific knowledge, often as a basis for innovations.

The Finnish higher-education system is being developed according to a dual model, so that universities and polytechnics complement each other. The task of polytechnics is to foster the connection between industries and knowhow development in order to serve the needs of small and medium companies and of different areas. Polytechnics are developing research and development together with industries, and are producing experts to meet industrial needs.

European Policy Statements, based on the above guidelines, could be seen still to have three functions, as Ollikainen stated in 1997:

- they describe the institution and its aims, its strengths and its needs for development, thus making the other parts of the application understandable
- they serve as publicity to the Commission
- they reflect the history and traditions of action in a particular institute.

However, they could also be seen as parts of the holistic management system, involving the planning and implementation of strategies based on the analysis of the internal and external environment, and involving information, planning, organisational and evaluation systems.

According to the Socrates Guidelines,[376] the higher-education institution should describe its general plan for strategic development over the medium term, and set out its short-to medium-term strategy for European cooperation in the European Policy Statement.

It is still emphasised that the aim of the present analysis is to evaluate the proposed framework, not to conduct a major empirical study. The second research question: "What kind of strategic and operative objectives, and what kind of strategic measures and operative programmes, are included in the written documents outlining the planning of internationalisation?", served as the basis for the analysis.

3.2 Analysis of the European Policy Statements of Universities

3.2.1 Analysis of the Realisation of European Policy Statements in Socrates I

According to the instructions[377] on how to write European Policy Statements (later EPS strategies or EPS), institutes that participated in Socrates I should include in their first EPS for Socrates II an analysis of the results achieved in the first phase, how these relate to the objectives stated in the original EPS, and how the new EPS for the second phase builds on them. This piece of advice had not been read by about half of the respondents. In seven papers (out of twenty) there were no remarks about the first EPS, and in three of them only some phrases referring to this were hidden in sections describing other issues. Ten of the statements had a specific section analysing the results, and most of them set out their new objectives in terms of their earlier results. The categories defined by Knight and modified by the author in Chapter 2.2 were used as a basis for classifying activities.

[376] Socrates Guidelines for applicants, 2000 p.71
[377] Socrates Community Action Programme in the field of education (2000 – 2006), Guidelines for applicants p.71; ECTS= European Credit Transfer System

As realised activities, the following items were mentioned:

International curricula	**Use of ECTS**[378]
	Increase of education in a foreign language
	Increase of teaching with the help of Information technology
	Expansion of activities thanks to Socrates/Erasmus
Research	Internationalisation of research
Mobility	**Increase of student mobility**
	More structured activity handling within student mobility
	Equal amounts of sent and received students
	Increase of courses/modules specially planned for exchange students
	More time invested in the counselling of exchange students and other support for them
	Increased teacher mobility (thanks to information events before and structured systems for relating their mobility experiences; special money invested to support teacher mobility; language education for teachers)
	Building of networks
	Strengthening of the administration of international activities
	More money invested in internationalisation from the budget of the university

Table 14: Realised Curricula, Research and Mobility Activities in Socrates I - Universities

The following issues were mentioned as not at all realised activities, or not realised according to earlier EPS strategies:

- Teacher mobility (because of the small numbers of full-time teachers and because of the extra costs to the teachers)

[378] the issues in bold were mentioned in more than half of the EPS strategies

- Student mobility (because of the strict structure of the curriculum and because of working and studying at the same time)
- Projects (because of heavy administration)
- Courses in English
- ECTS

Even though the University of Jyväskylä had succeeded well in attaining the objectives outlined in the first EPS strategy, they had carried out a deeper analysis on the basis of which they were able to list several problem areas that they planned to address during the following period. These included:

- insufficient knowledge of English among arriving exchange students
- difficult integration of visiting teachers into the university society
- insufficient funding
- changed situations at the department level
- insufficient co-ordination of activities and lack of commitment from partners
- insufficient legal and financial counselling from the central administration

3.2.2 Documentation of the Planning Process

Eight universities referred in some way to their planning systems by mentioning their holistic or international strategies. They did not present the planning processes that led to their EPS strategies.

One university stated that it had internationalisation-related aims in every activity category, and another one that its international strategy was built into yearly plans and budgets.

3.2.3 Elements of Strategic Planning

Objectives

The objectives of internationalisation can be divided into the following categories (adapted from Knight[379]):

- human objectives of international education
- objectives related to multiculturalism
- realisation of international activities
- development of students' competences
- carrying out the internationalisation project of the institution

Not all of the universities gave information about their aims or the objectives of internationalisation, and some gave several aims. Sometimes the aims had to be inferred, since nothing was said about them. For example, in cases where nothing was said directly, but comprehensive lists of activities related to mobility were given, the realisation of activities was taken as an aim in itself.

As mentioned earlier, whether internationalisation is an aim in itself, or whether it is only a means for achieving aims related to international education is discussed in the literature[380].

The most frequently-mentioned objective was the realisation of activities. Fourteen of the EPS strategies included some related aims, which is understandable given that the EPS is a means for obtaining financing to realise the international activities. The second most frequently-mentioned aims were related to multiculturalism and the internationalisation of the institution – both being mentioned eight times. The third most common objective, mentioned five times, was related to the development of competencies. The more human objectives were mentioned four times.

This order and set of objectives differ somewhat from those found by Ollikainen[381]. In his study, the most frequently-mentioned goal was to increase the level of education and research, the second most frequent aim was the same as in 2000, multiculturalism, and that related to internationalisation was now mentioned

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[379] Knight 1999
[380] e.g. van der Wende 1996 Knight 1999, ed. Snellman 1996
[381] Ollikainen 1997

more than in Ollikainen's analysis. Moreover, the competence-related aims of improving career and employment prospects were now rated fourth most important, whereas Ollikainen reported them to be the third most important.

Socrates funding was applied for according to the following table (figures collected elsewhere from applications for Socrates II):

OM[382]	20
ECTS	5
PROG	2
MOD	1
DISS	
IP	7

Table 15: Socrates - funding Applied for by the Universities (20 universities)

As can be seen, all the universities applied for funding for mobility (OM category). Five universities wanted money to fund activities related to the European Credit Transfer System, there were seven proposals for Intensive Programmes, but only one or two applications were related to joint programmes or European modules.

In general, the same types of activities were also mentioned in the first EPS documents.

Strategic measures

Strategic measures mean the same as the more common term "strategies". In the present study the word strategy has already been used in connection with the European Policy Statements (as the official translation was "EPS-strategia"), so another term was needed to differentiate the two.

[382] OM = Organisation of Mobility, ECTS= European Credit Transfer System; PROG = Joint study programmes, i.e. full degrees, MOD= joint development of European modules, DISS=dissemination of curricular development projects, IP=Intensive Programme

Quantity or quality?

"Quantity without forgetting quality"

could be said to be the slogan. Since all the universities applied for funding for mobility, it was not surprising that *all but one* of them sensibly included *quantified* mobility aims in their EPS strategies. The quantification of an aim was usually related to student mobility, and very often also to teacher mobility. Some papers did not mention these, but gave some other quantitative figures concerning the numbers of courses, modules, programmes or degrees taught in English or in other foreign languages. Figures were also given for the numbers of networks or research projects in which the university was participating.

The Theatre Academy was the only one to refuse to give any quantitative aims, which it justified as follows:

> In the European Policy Statement drafted in 1995 the Academy did not mention any quantitative criteria – as there will be none in this renewed Policy Statement of 2000. Internationalisation at the Theatre Academy signifies concentration on quality instead of quantity. The statement emphasises the artistic and professional development of the training programmes and the students as well as the support of the research, in which the international contacts are of significant importance.

As quantification of aims, some universities referred to the Objective and Result Contracts made with the Finnish Ministry of Education.

When the EPS included references to the development of processes or systems, or the deepening of cooperation in networks, it was interpreted as an aim related to enhancing the quality of internationalisation. According to this interpretation, *all* the papers included aims to enhance quality, and some including the University of Art and Design Helsinki, were explicit:

> Mobility, even though important, is an inadequate tool for the internationalisation as for the quality factors. Mobility must be tied into dense net of curricular development and intensive programmes...

University Commitment to Internationalisation/International Education/ Internationalism

Since understandings of internationalisation vary, as mentioned in earlier chapters, the terms used about internationalisation vary accordingly. The aim of this analysis was not to check who used what and when, but rather to understand the phenomenon in itself.

Only a handful of universities referred to the Bologna process in their EPS strategy – of course this was not at all compulsory in a European Policy Statement.

All universities are committed to an international dimension in their activities. This is seen in their strategy language as well in their strategic measures. However, only three universities referred to their values, one listing them and another mentioning one value related to internationalism.

Networking was emphasised as a strategic measure. Language and culture education, the teaching of Finnish to foreigners, the teaching of content in foreign languages, integration of foreign studies with the help of ECTS were also mentioned many times, and were included in half of the university EPS strategies.

Organising the administration of international activities, the university's own funding as extra support for teacher and student mobility, and virtual education were themes that were also taken up and elaborated in more than half of the papers as strategic measures to support internationalisation of the higher-education institute in question. Counselling, advising and tutoring in several forms were mentioned many times, and information, marketing and "being seen" internally and externally were claimed to be important sources of support to internationalisation. About a quarter of the strategies mentioned the existence of internal prizes to motivate teacher mobility – there was only one such prize on the polytechnic side.

In general, the means of commitment were the same as in the earlier EPS strategies. Even today, the universities did not generally report concrete sums or give any other quantitative measures of commitment.

Co-operation areas

Finnish Universities have effectively internalised the preferences of the Finnish Ministry of Education[383]: the same preferences are to be found in the EPS strategies. The universities emphasised cooperation with the Nordic and Baltic countries, as well as with EU countries. The special cases of the geographic areas of Lapland, Karelia on the Russian side and the Barents area were mentioned in the Ministry plans, but only in three university EPS strategies. The Ministry also mentions Asia, Latin America and Africa, in general, and research cooperation with the USA, Japan and Russia. Areas with which more than half of the universities wished to cooperate that were mentioned in EPS included the rest of Europe (not only the EU countries), Northern America, the Baltics and Russia. Asia was mentioned eight times whereas China, India, Southern America, Latin America, Australia, New Zealand, Africa, Japan, Singapore, Mexico, the Ukraine and the developing countries were mentioned only a few times.

Other EU programmes

The Socrates guide states that European Policy Statements should be a strategy for all European cooperation. The universities mentioned Nordic co-operation most, in particular Tempus – Tacis, research programmes and Leonardo da Vinci. The Jean Monnet, Grundtvig, Minerva, Alfa, Interrreg, Comenius, Lingua, EU-USA, EU-Canada, EU-China, EU-India, Marie Curie, Alfaforep, Media, Time, Eunite and structural funds were mentioned a maximum of five times, i.e. in 25% of the papers.

3.2.4 Elements of Operative Planning

In most cases, the objectives were not divided into sub-objectives, and no scheduled plans/programmes for their achievement were given in any paper.

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[383] Koulutus ja tutkimus vuosina 1999 – 2004 pp. 16 - 17

The importance of realising the plans was described, for example, by the University of Technology in Helsinki

> The management of international affairs is important to the realisation of the strategy. The office of international affairs... The innovation center... The Finnish Virtual University... The international association of further education in technology, the IAEE...

The universities differed from the polytechnics by decentralising the different activities more as the above example illustrates. It might be assumed that any activities are organised in the best possible way, and that the international dimension is always taken care of together with the domestic dimension. This could reflect the longer tradition of internationalisation among the universities, which could also mean that they have more international activities to be taken care of, thus justifying their dispersal throughout the organisation.

What? To Whom?

The international activities carried out are manifold, but could be grouped under three themes: universities have international research, international curricula and international mobility, as seen in Chapter 2.2. Activities related to research include researcher mobility, the mobility of those who will become researchers, and participating in and coordinating international research projects.

Activities in the international-curricula category are described in a more detailed way in the EPS strategies. First, mobility calls for teaching in foreign languages (in most cases in English; some Russian, German and Swedish trials were mentioned) ranging from separate courses to modules and degrees, and including everything in between. Language, cultural knowledge and communication skills are also taught.

The existence of systematic information channels and the use of teacher mobility in particular help in the creation of joint modules and programmes and double-degree programmes.

In terms of "Internationalisation at Home", different types of virtual education were also mentioned in the EPS strategies. Mobility in itself requires many

different procedures, which are analysed in more detail in the section that describes how international activities are organised. The different activities include network management, counselling, tutoring and the giving of information.

The general situation in universities was described in the intoductory part of the Helsinki University EPS (translated by the author):

> The first phase of the Socrates programme was characterised by the expansion of activities. Even though many departments have already participated in the Erasmus programme, the wider expansion of activities started in autumn 1997. Student mobility was particularly important. The earlier remote aim of achieving a balance between departing and arriving students is now a reality... by increasing teaching in foreign languages and creating special courses for foreign students, and by investing in counselling and other services for exchange students... Teacher mobility was popular on the planning level, but the realisation did not meet the expectations.

The different international activities mentioned in the statements in 1996 were also mentioned in those of 2000. Despite the fact that most universities did report something like the Oulu University:

> "The Finnish code of practice for support and service for disabled students and staff will apply to exchange students and staff. The university will identify possible obstacles against the disabled participating in mobility programmes, and find ways to remove them",

there are still many universities that elsewhere in their application, reported "no" in response to the question on the provision of special facilities for students with physical, visual or hearing difficulties. Only thirteen universities answered positively, which is about the same as in the earlier EPS strategies. In only two cases was a person employed to help the disabled, and only one university, the University of Helsinki, reported that three disabled persons, which was all who had applied, have benefited from student mobility. Seven universities in the fields of commerce and art did not comment at all on questions related to the disabled, even though the Socrates guidelines specified this. An interesting detail is that the strategy text and answers to questions elsewhere in the application did not correlate in several papers.

Fifteen universities claimed that there was no problem implementing the principle of equal opportunities for persons of different sexes, although only two

mentioned some person who was taking care of this. The situation is better now than in 1996 since the question is taken up by more universities, but concrete actions are not now reported either.

Other aspects of inequality mentioned in the Socrates guidelines, such as racial, cultural, ethnic and religious discrimination and socio-economic disadvantage, were mentioned in six EPS strategies - they were not mentioned at all in 1996. Vaasa University was the only one to report (translated by the author)

> an attitude of supporting the participation of those in a disadvantageous position in the associated countries, Russia or the developing countries.

Who has the responsibility? How are power and control distributed?

The question of power and control was not referred to in most of the papers. The EPS of the University of Helsinki stated that the solution and decision-making power were there when they were needed. Jyväskylä University indicated that their International Office reported to the Financial and Planning Office.

By whom?

Only 60% of the universities commented on the organisation of international activities. The universities differed from the polytechnics by having personnel in financial units of central administration to take care of international activities, often working with the financing of international research projects.

All the organisations concerned had an office for international affairs, with similar tasks in the different universities, even though they were reported on at different levels. Some examples of many time-consuming tasks are: application procedures, information, the division of grants, the organisation of orientation days, counselling, coordinating language education, exchange-student administration, coordinating ECTS, other services for foreign exchange students (such as housing, health, support for the disabled, student-union co-operation), conference and seminar arrangements, travel administration, cooperation with other institutes of

higher education nearby to organise this or parts of it together in the region, evaluation procedures, holistic co-ordination of different international activities.

Universities emphasised information and their external image, which were not often mentioned by the polytechnics.

Perhaps the earlier internationalisation of universities – or the fact that they did not get any extra funding for their internationalisation process - is reflected in the more complicated administration of internationally related activities. It was possibly more natural for them to integrate international activities into other everyday procedures in the university. Nevertheless, administrative solutions differed, as they did in 1996.

The amount of personnel says something about the capacity to realise international activities. The figures are given elsewhere in the Socrates application. According to Table 15, 1 – 17 persons work within the international dimensions of curricula, research and mobility. The average number is five persons, which is the same figure as in the polytechnics, and represents 0.4 –3 per cent of the workforce, the average being 1.2%. This is 0.5 percentage points less than the polytechnics report. The ratio of staff to full-time students ranges from 0.04 – 0.44 per cent, the average being 0.14% which is also less than in polytechnics – 0.11 percentage points less. In the table, the ***biggest figures*** are in bold and in italics, and the **smallest figures** are only in bold.

University[385]	Int. personnel Average 5	Other personnel (teachers + administrative personnel)	Int. pers./all pers. Aver. 1.2%	Full time students	Int. pers./ full time students Average 0.14%
HKKK	12	140+258=398	***3.0%***	3343	0.36%
HY	***17***	2540+879=3419	0.5%	35739	0.05%
JoY	4	332+92=424	0.9%	6203	0.06%
JY	6	569+509=1078	0.6%	12729	0.05%
KuY	4	267+243=510	0.8%	4873	0.08%
KuvA	**1**	13+21=34	2.9%	223	***0.44%***
LY	5	177+224=401	1.2%	3382	0.15%
LTKK	5	213+124=337	1.5%	3563	0.14%
OY	5	813+472=1285	**0.4%**	12897	**0.04%**
SibA	3	190+92=282	1.1%	1353	0.22%
SHH	4	109+91=200	2.0%	2229	0.18%
TaY	6	500+381=881	0.7%	13912	**0.04%**
TaiK	4	108+210=318	1.3%	1477	0.27%
TTKK	4	315+200=520	0.8%	9399	**0.04%**
TeaK	**1**	69+1=73	1.4%	321	0.31%
TKK	9	516+533=1049	0.9%	13572	0.07%
TuKKK	**1**	86+83=169	0.6%	1695	0.06%
TY	10	800+171=971	1.0%	13328	0.07%
VaY	2	160+140=300	0.7%	3556	0.06%
ÅA	4	349+222=571	0.7%	7044	0.06%

Table 16: International Personnel in Universities as an Absolute Figure and Related to Other Personnel and to the Number of Full-Time Students

When?

Not one university explained what is going to be done in any specific year of Socrates II. Those (12/20) who somehow referred to some time schedule (often in

[385] See the explanation of the abbreviations in Appendix 2

the title) had a time span until the year 2005 or 2006 (8 universities), and one was even longer, to 2010.

Financed how?

Eighty percent of the universities inserted a phrase indicating its support of international activities by its own budget funding although only three gave concrete sums. Two gave figures of around FIM one million, and one offered FIM 2.3 million to support student mobility. Several universities mentioned the wish for more Socrates funding to cover the expenses of international activities.

Evaluation?

Sixty percent of the universities took up the evaluation of internationalisation/ international education/ internationalism in their EPS strategies. Most of these papers mentioned some kind of systematic yearly evaluation, which is only 5 percentage points more than in 1996.

3.3. Analysis of the European Policy Statements of Polytechnics

3.3.1 The Realisation of European Policy Statements in Socrates I

A little under half of the polytechnics had analysed their earlier EPS objectives and the outcomes. Some reported the results of internationalisation, even if they did not compare these results with the objectives set out in the 1996 EPS, or even indicate whether they were given as aims at that time.

As realised activities, the following were mentioned:

Curricula	*ECTS realised[385]
	Support for teachers teaching in a foreign language
	Increased language education
	Degrees in foreign languages
	Internationalisation-at-Home project
	More Teaching in a foreign language
	ODL projects
	Finnish for foreigners
	International Projects
	Work placements
	European-Career-Orientation project
	International alumni activity
Research	Applied international research
Mobility	**Increased student mobility**
	Teacher mobility as part of normal education
	Increased number of exchange students
	Studies accepted as part of the degree
Internationalisation process	Increased amount of teacher mobility
	International connections established
	Established abroad
	International company networks created
	More services and support for international students
	Evaluation of international activities carried out
	Deeper cooperation with the network
	Financial supporting of teacher mobility
	Internationalisation process gone forward
	International activities have become manifold, important and visible
	EPS is part of the holistic strategy
	Benchmarking is done

Table 17: Realised Curricula, Research and Mobility Activities and Internationalisation-Process Outcomes of Socrates I - Polytechnics

The polytechnics gave more information than the universities about the results of their internationalisation process. This is understandable, since polytechnics have

[385] The issues in bold were mentioned in at least half of the EPS strategy documents.

been "going international" over a shorter time span and the level of internationalisation was one of the criteria for being given polytechnic status.

The polytechnics mentioned the following as issues not fully realised as planned

- teacher mobility
- knowhow in carrying out projects
- increase of education in foreign language because of the shortage of resources
- mobility objectives not reached because of the good employment conditions in Finland
- administrative and resourcing undeveloped
- realisation of fewer virtual projects than wished for.

3.3.2 Documentation of the Planning Process

Not one EPS strategy mentioned holistic-management systems, although one third referred to a holistic strategy for the whole institution. Half of them referred to the evaluation system and a quarter to a quality system. Two polytechnics used the ISO9001 system. Processes and procedures were mentioned in only two EPS strategies.

It is amazing that only one third of the EPS strategies mentioned the planning of international activities, given the emphasis on the planning function otherwise in polytechnics. Only two said anything about planning, for example that yearly planning documents were then split up at the degree level. Information technology was used in only one school to help the planning process, and half of the schools mentioned virtual education.

3.3.3 Elements of Strategic Planning

Objectives

Knight[386] presented a categorisation of the objectives of internationalisation. In her adaption of this, the present author was looking for statements concerning human-international education objectives, activity realisation, competence development, multiculturalism and carrying out the internationalisation process as a project.

According to this categorisation, the objectives of polytechnics differed from those of universities. Polytechnics mentioned competence development more frequently than the universities (21/24). Ten statements concerned the internationalisation of the institution, which was also the second most frequently-mentioned objective in the university category. Multiculturalism was mentioned in seven statements, and human objectives and activity realisation in two. Once activity realisation starts to be routine, the next phase, as claimed in proposition one, seems to be curricula/research internationalisation, the direct aim of which is competency building, at least in the case of recent mass internationalisation.

In the earlier EPS documents, the most frequently-mentioned aim was international visibility, followed by competence development, and then the internationalisation process.

International Activities

Kymenlaakso Polytechnic wrote as follows in its EPS (translated by the author):

> The development of teaching requires international comparison and exchange of opinions with colleagues. Teacher mobility is an excellent tool in this respect promoting openness and transferability and also communication between cultures, a creation of a good collegial spirit, and finally curricular versatility, internationalisation and quality enhancement.

[386] Knight 1999

The Socrates activities for which the polytechnics applied were as follows:

OM	24
ECTS	19
PROG	1
MOD	3
DISS	1
IP	12

N=24 polytechnics

Table 18: Socrates Funding Applied for by the Polytechnics

ECTS funding was requested to a much greater extent than in the case of the universities, while about the same needs were expressed in the other categories.

Quantity or quality?

As with the universities, quality and quantity were both emphasised. Quantified aims were given, but the content of activities was claimed to be paramount. All of the polytechnics, like the universities, had quality statements. All of the universities had put some quantification on their aims, 88% giving student-mobility figures and more than half teacher-mobility figures. The polytechnics gave mobility-related quantified aims more often than the universities. As Northern Savo Polytechnic stated (translation by the author):

> It is an important aim for 2001 – 2003 to invest in quality, and at the same time in a relative increase in mobility in order to promote the development of international co-operation. Quality is evaluated by evaluating the functionality of international cooperation, its benefits and the achievement of the stated aims...

Polytechnics referred more frequently to the Result and Objective Contracts with the Finnish Ministry of Education than the universities did.

Co-operation areas

The polytechnics, like the universities, internalised the objectives of the Ministry of Education in their statements. The majority mentioned the EU and the Nordic countries as preferred areas of co-operation, and five referred to Nordic issues.

Other areas, mentioned by at least half of the polytechnics, included Russia, other European countries, the Baltics, the USA, Canada, Asia, Africa and China, while some mentioned New Zealand, Australia, Chile, Mexico, Japan, Southern America, Latin America, EU-associated countries, Malaysia, Thailand and South Korea. This differed to some extent from the list derived from the university EPS strategies, possibly partly because different schools grouped geographical areas differently. Some categorised countries, others regions and still others continents.

Other EU programmes

The most frequently-mentioned programmes were Leonardo, Tempus, Nordplus and other Nordic programmes. Others included were Phare, Lingua, Comenius, Grundtvig, ESF ERDF, Minerva, ERD, ERG, FPRD, Interreg, research programmes, other education and research programmes, culture and co-operation programmes, EU-Canada, EU-USA, CEO, Alfa, Magellan and Adapt. Here, too, the analysis was different in different schools – some categorised the programmes and some mentioned them all by their names.

Polytechnic Commitment to Internationalisation/International Education/ Internationalism

It is difficult to say what the commitment to internationalisation was, and what internationalisation itself meant, when the terminology was used in a non-coherent way. In any case, it could be concluded that internationalisation is important to polytechnics, and that polytechnics are committed to it as a value, a strategy and a means to achieving other aims.

Values

The Diaconia Institute of Higher Education in Finland emphasised that its internationalism was based on its own values. It was also the only higher-education institute that defined internationalism in its EPS strategy, which it did as follows: (translated by the author)

> Internationalism emphasises humanity across borders, and especially activities with groups that are alienated or at risk of being alienated for geographical, political, socio-economic or other reasons, or whose human dignity is otherwise in a vulnerable position because of sex, disability or other reasons. Learning results in a greater emphasis on ethical choice, truth, tolerance and critical action. The starting point is justice and the human dignity of all.

Kymenlaakso Polytechnic stated that its internationalisation values were the same as its values as a higher-education institution: the ability to co-operate, a readiness for continuous learning, a capacity for change, high professional know-how and profitability. Mikkeli Polytechnic particularly mentioned tolerance building as one of its highest values in terms of internationalisation. Other polytechnics did not state their values.

Other means of commitment

Language and cultural studies concerning both teachers and students, different types of counselling, tutoring and advising both departuring and arriving students, teachers and other experts were considered important, as were internationalisation-at-home, the institute's own funding, the development of administration and other supporting services. The earlier EPS strategies were similar, and even today the polytechnics do not give information about the sums with which they support internationalisation, or about other concrete measures of commitment.

3.3.4 Elements of Operative Planning

What? To Whom?

The polytechnics did not divide their objectives into sub-objectives, or make any scheduled plans/programmes of how to realise internationalisation.

The international activities realised can also be grouped under three themes, curricula, research and mobility, and they were possibly presented more concretely as parts of the internationalisation process than in the case of the universities. For example, three papers listed how they were promoting teacher education. It was understandable that co-operation with industry was more emphasised than researcher education. Themes such as lifelong learning and virtual learning were also found in these EPS strategies, and the polytechnics gave more details on issues to do with curricula and mobility than the universities did.

The same phenomenon of a positive attitude towards the disabled was evident in the polytechnic strategies, as it was in the university strategies. Many echoed the feelings expressed by the North Karelia Polytechnic:

> North Karelia Polytechnic will remain firmly committed to the principles of equality and Nordic welfare, which are central to the character and mission of North Karelia Polytechnic. The Polytechnic is committed to providing equal educational opportunities for both men and women and to taking into consideration the special needs of the physically challenged and other special groups when offering equal education.

However, eight polytechnics did not mention the disabled, or chose the "no" option elsewhere in the application as an answer to the question whether they provided special services needed by students with physical, visual or hearing problems. This was somewhat better than in the 1996 strategies, when ten polytechnics did not give a positive response to this issue. Again, it was interesting how the "nos" and the text did not correlate.

Thirteen polytechnics out of the 24 reported that sexual equality existed, and the rest made no comment. As far as mobility was concerned, the situation at Seinäjoki Polytechnic probably reflected the situation elsewhere:

> Among those leaving Finland are more girls[387], among those arriving in Finland are more boys.

A table showing the sex and the titles of the contact persons in the Socrates applications was drawn up and annexed. It indicates that the sex is not significant as far as the title of the job is concerned, although it does seem to be important to the jobholder – in most cases it was a woman who made the application, whereas it was most often a man, who as rector, had the responsibility for the institutional contract.

Nine polytechnics commented on inequality in other contexts. Seinäjoki Polytechnic was possibly the most direct by stating that (translation by the author)

> We are going to recruit foreign students on courses leading to degrees that foster the prevention of prejudice and racism.

Who has the responsibility? How are power and control distributed?

Only two polytechnics commented on power and responsibility. The first one indicated that the rector was responsible and actively followed what was being done, and the second that representatives of every department had formed a group to co-ordinate activities. The planner of international activities acted as the chairman of the group and was responsible for the development manager, who was also the vice rector.

By whom?

Seventeen polytechnics of the 24 gave some information on their organisation. There were very strong variations in how internationalisation was organised. In most cases international coordinators had been appointed for different disciplines or fields of study, and they or the persons responsible for international activities or co-operation

formed a team that included the personnel in the international office. The responsible persons and co-ordinators usually only spent part of their time on internationalisation, being lecturers as well. Sometimes, there were different international co-ordinators for different projects, one for EU projects, another for mobility, for example. An international office existed, with between one and three employees at most (in the office!), who took care of the routines of international mobility. Only one EPS mentioned student tutors.

The number of international personnel calculated as full-time personnel was negligable in most cases given the amount of work, other personnel and to the numbers of full-time students. It would be interesting to compare the figures with those of finance offices. On average, the total number of international personnel per polytechnic was five, and if Mikkeli Polytechnic is exluded, where resourcing is on a totally different level, it is less than four. Related to other personnel, the figures for international personnel vary between 0.5 – 7.5 percent, the average being 1.7 % and excluding Mikkeli only 1.4%. The ratio of international personnel to full-time students varies between 0.04% and 3%, the average being 0.25% and excluding Mikkeli only 0.13%.

[387] Aalto & Pajala 2001, p.7

Polytechnic[388]	Int. pers.	Other personnel: teachers + administrative	Int. pers/ other pers.	Full time students	Int. pers./full time students
Arcada	2	88+29=117	1.7%	1467	0.14%
DIAK	2	129+48=177	1,1%	2005	0.10 %
EVTEK	8	158+129=287	2.8%	4173	0.20%
HIAMK	4	110+93=203	2.0%	1287	0.31%
Stadia	9	358+108=466	1.9%	5930	0.15%
Helia	3	250+61=311	1.0%	4511	0.07%
HAMK	5	228+131=359	1.4%	3935	0.13%
JAMK	3	268+185=453	0.7%	4388	0.07%
KAMK	**1**	230+73=126	0.8%	1269	0.08%
KTAMK	3	115+55=170	1,.8%	856	0.35%
KPAMK	2	112+10=122	1.6%	2341	0.09%
KYAMK	2	220+147=367	**0.5%**	3264	0.06%
Laurea	4	212+84=296	1.4%	4089	0.10%
LAMK	5	180+83=263	1.9%	3005	0.17%
MAMK	***25***	342+170=335	***7.5%***	845	***3.00%***
OAMK	6	300+85=385	1.6%	5160	0.12%
PKAMK	3	165+136=301	1.0%	3384	0.09%
PSAMK	6	256+150=406	1.5%	4450	0.13%
RAMK	**1**	155+27=182	**0.5%**	2620	**0.04%**
SAMK	6	300+65=365	1.6%	5400	0.11%
SEAMK	**1**	150+28=1780	0.6%	2627	**0.04%**
SYH	2	73+40=113	1.8%	1147	0.17%
TAMK	7	214+145=359	1.9%	3278	0.2%
VAMK	2.5	145+81=226	1.1%	3000	0.08%

Table 19: International Personnel in Polytechnics as an Absolute Figure and Related to Other Personnel and to Full-time Students

In the earlier EPS documents, 19 institutions described how they organised their internationalisation, which is about the same as now (17). Now that mobility has become more of a routine activity, the aims have been fulfilled: one or more are employed to take care of matters related to mobility. The earliest statements also mentioned teams, as well as the special resourcing and organisation of Mikkeli.

There was a negative relationship between the job title and the numbers of personnel: 70% of polytechnics having a director for international affairs had fewer employees than average in relation to the whole staff or to the numbers of the full-time students. However, it has to be remembered that the Socrates contact person is not always the director of international affairs in the particular polytechnic or university.

[388] For an explanation of the abbreviations, see Appendix 3

When?

A good half of the polytechnics mentioned a time span in their EPS strategies, 2001 - 2003 in most cases and about half as broad as in the case of the universities, 2001 – 2005/6. However, the activities were not broken down in terms of time here either. The only exception was the mobility tables taken from the Result and Objective Contracts with the Ministry of Education, in which exact annual figures are given for different kinds of mobility.

Financed how?

About 70% of the EPS strategies mention financing of internationalisation, but only three give concrete sums, from FIM 500 000 to more than FIM 3 000 000. Most of them just stated that the polytechnic was also using its basic budget to fund internationalisation by giving extra mobility grants. Various financing methods had been tried, as stated in Chapter 3.3.3

Evaluation?

Half of the EPS strategies mention the evaluation of activities. Many of them referred to the collection of mobility reports, although this was often not systematic or total. Regular internal and external auditing were sometimes mentioned, and in a quarter of the strategies, evaluation was claimed to be part of the quality work, and done according to the quality system. Evaluation and follow up were similarly treated in the earlier EPS strategies as well, although the procedures were more carefully explained in 1996. Nevertheless, the polytechnics deserve praise for describing their evaluation more extensively than the universities did, both in 1996 and in 2000.

3.4 Summary of Analysis

The aim in Chapter three was to evaluate the framework presented in Chapter 2.5 by using it in the analysis of the written planning documents of Finnish higher-education institutions.

The European Statement Policies were chosen as evaluation material since they are acknowledged to be the only strategic material that all the Finnish HEIs have prepared with more-or-less similar aims in mind, presenting their internationalisation strategy together with their aims related to the EU programmes. The analysis revealed that in the majority of HEIs the EPS strategy is the only existing internationalisation strategy, and that only in the minority are there more comprehensive strategic plans of which the EPS strategy forms a part. From some EPS strategies, it was impossible to draw conclusions of the state of affairs.

Statements on the strategic and operative objectives of the internationalisation of higher-education institutions and on the elements of strategic and operative planning were sought. As stated previously, it was clear from the literature review that the understanding of internationalisation varied a lot in the EPS strategies.

Some of the conclusions mentioned in Ollikainen's[389] paper were still valid five years later. There are many different structures in the strategies. Read separately, most of them have good internal logic, but comparing them was labour-intensive. The aim to achieve a better EPS structure in general in the university category is still valid, even though there was a lot of variation in the ones produced by universities and polytechnics. In the new versions, as in the old, the authors had included all the "desired" rhetoric. The presentation of management and administration is still very light. How the EPS relates to the international strategies and the overall strategic development and thinking in the institutions still needs clarification.

Nevertheless, it was evident that Socrates I has helped the institutes to internationalise. The emphasis on different aims of international cooperation has changed, activity-related aims being most frequently mentioned in the university

category, and competence-development aims in the polytechnic category. In the majority of cases, the aims were not directly stated or split into sub-aims, and there was a lack of scheduled plans and programmes for their realisation.

International activities in higher education are manifold. On the textual level, at least, the institutions are strongly committed to internationalisation, but they do not refer to the actual investments they have made or show by other means that this textual commitment is applied on the action level as well. The emphasis on research is self-evident in the case of universities. What was amazing was that ALL the polytechnics reported plans for research-related activities as well, and they reported a regional role/task, and co-operation with industry. Sixty per cent of universities mentioned co-operation with industry and 30% had a regional role as well.

The management of internationalisation/international education/ internationalism needs development, as is clear from the EPS strategies of Finnish higher-education. The role of top management as the implementers of actions does not come up. Top management should devote time to the development of management, of systematic processes and ways of functioning. There should be enough resources, so that the objectives could be clearly stated and concretised, and even better results achieved. All in all, the management of the international dimension is not well reported in the EPS strategies, and universities also report badly on their evaluation systems.

Equal opportunities are claimed to be self-evident, but real actions are not reported on, and we cannot ensure that the situation is so, or make it better.

Three regional clusters where universities and polytechnics are working together to realise some international activities were identified.

The EPS strategies were analysed in order to evaluate the framework derived from the literature review. Two major conclusions were drawn from the literature. First, an integrated definion of internationalisation and holistic management was derived in order to make our understanding of the internationalisation of higher-education institutes from the process perspective explicit. Second, the framework was summarised textually and in a figure. Eight propositions were put forward in order to facilitate the analysis of the framework.

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[389] Ollikainen 1997

It was clear froom the analysis that the derived definition as such will hold for further studies. The summary of the integrated understanding of the internationalisation process of higher-education institutions, and of holistic planning as part of holistic management, was also found to be usable in further studies if two things are emphasised more. The project-management approach to operative management could give a structure and strategy to the analysis being now by definition a set of very practically-oriented techniques. Mobility and networking were found to be the main tools of internationalisation, and were mentioned in almost all of the EPS strategies. Since these tools are used in EU programmes, it is obvious that they are explicitly mentioned in the strategic plans as well.

These two additions were added to the summary and relevant figures. The proposal given in Chapter 2.5 is reviewed here, and references to mobility and networking as tools are added:

"Based on an analysis of its external and internal environment

it is desired in a public higher-education institution

to actively and systematically manage

a change process

leading to including an international dimension in all the parts of holistic strategic and operative management, namely information, planning, organising, financing, implementing and evaluating,

in order to enhance the quality of the desired outcomes of internationalisation in the higher-education institution in question.

These desired outcomes can be grouped under teaching and research.

Mobility and networking are the main tools for achieving them.
Operative management works best if internationalisation is taken as a project;
and project management serves as a theory basis for the actions taken

Figure 12: Reviewed Integrated Understanding of Internationalisation and its Planning Based on the Holistic Management View

The framework was thus found to be useful on the general level, but as far as the detailed propositions were concerned, the material was not sufficient to provide a basis for its evaluation. It is not versatile enough. It will therefore be re-evaluated in the forthcoming doctoral study, using the case material already collected, in order to give more depth to the analysis. For example, strategy processes are not reported on.

What was interesting for further studies was that, from the majority of EPS strategies it could be concluded that internationalisation planning is not based on an analysis of external and internal environments. Second, the functions of holistic and operative management were referred to, but not in a systematic way in this empirical material. Third, internationalisation was seen as an end and a means, so the confusion that exists in the literature exists in practice as well. The quality of the outcomes was referred to in all of the papers, and so it could be said that enhancing the quality of the desired outcomes of internationalisation in the organisation in question is the objective of internationalisation as proposed in the framework. Fourth, strategic planning was reported on, but operative planning was mentioned in fewer than five papers.

Desired outcomes can be grouped under teaching and research once the institution has become mature enough in terms of its internationalisation process so that the creation of structures and systems no longer takes all the attention.

Mobility and networking were the main tools used in carrying out activities under the internationalisation theme. In order to implement these tools efficiently, several sub-objectives of their use can be named both in qualitative and in quantitative terms. To illustrate this, examples can be given. One of the aims of research is to gain international appreciation. Figures of how many research conferences are participated in, how many conference speeches given, or how many articles are published can be taken as quantitative objectives. The two first ones require Researcher Mobility. Joint articles with researchers from an organisation abroad are appreciated. In order to find somebody to co-operate with, networking is needed. Top-level journals do not accept other than top-level articles, so the quality of research is ensured.

The teaching should be of top-level internationally. Teachers need to meet each other in order to make friends or good connections and to be able to collaborate. Teacher Mobility is thus vital. Networks are needed in order to know where to go to find possible contacts. The number of joint courses, modules or degrees can be given as a quantitative objective. The number of networks or teacher days spent abroad can be seen as sub-objective in order to achieve the real objective, enhancement of the quality of teaching. Nobody initiates cooperation with somebody who is not professional, so the quality of teaching is ensured.

According to this material, it could be said that very few institutions are still at the stage of Internationalisation as a Marginal Activity, and that they are strongly moving towards the Student Mobility stage. This is by far the most common stage in Finland, the majority of institutions having reached it. Many institutions also indicated that Curriculum Internationalisation was a major focus. Some of them emphasised the characteristics given for the third stage, but only one Finnish higher-education institution was engaged in commercialising the Outcomes of Internationalisation – and this had been going on for many years.

It is clear from the material that the various actors who are expected to participate in internationalisation do so, but that their roles are not always clear.

To sum up, it is suggested that more material is needed to further analyse the framework.

4. CONCLUSIONS

4.1 Synthesis

The present study examined the different understandings of the internationalisation of higher-education institutions and the problematics related to its planning. The justifications for studying this phenomenon include its recent massification[390] and the growing importance of higher eduation in modern societies[391]. It was claimed that, after decades of effort by idealistic individuals and progressive institutions, internationalisation is now a key area of interest in higher education.[392] Since to this extent it is quite a recent phenomenon, earlier research is sparse. No concensus on the meaning of internationalisation exists,[393] amongst scholars or amongst practitioners. Neither has its management been extensively studied, even though its importance has been acknowledged by many[394]. None of the earlier studies covers the holistic management or any of its sub-systems in the context of the internationalisation of higher-education institutions.

The present study aimed at analysing the different understandings of the phenomenon. A process cannot be planned without understanding its nature and characteristics. There are differences from the neighbouring concepts of international business, international education, internationalism, globalisation and Europeanisation in higher education. By presenting holistic management thinking the study aimed at developing a theoretical framework for the planning of internationalisation. The framework was evaluated by using it to analyse the European Policy Statements of Finnish higher-education institutions. This was not a test of the framework as hypotheses are tested traditionally, but the aim was to achieve a more thorough

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[390] Scott 1998, Elliott 1998
[391] Callan 1998, Elliott 1998, Gibbons 1998
[392] Windham 1996, Reichert & Wächter 2000
[393] Smith 1993, Blok 1995, van Dijk 1995, Callan 1998, Knight 1999, Sartonen 1999
[394] Callan 1998, Wächter et al. 1999, Wächter in Crowther et al. 2000, van der Wende 1999

understanding of internationalisation and its planning by studying the empirical material.

Since the phenomenon is multidisciplinary by nature (Internationalisation of higher education), both international-education and international-business discussions were studied in order to gain deeper understanding. Other links[395] between the two areas were found, including the commercialisation of international education, and the fact that the majority of internationalised curricula were in economics and business studies. From the very beginning it has been understood that internationalisation is a multidimensional concept, in both disciplines.[396]

Given the above-mentioned objectives, the research questions were formulated as follows:

1) What is internationalisation in higher-education institutions?
2) What kinds of strategic and operative objectives, and what kinds of strategic measures and operative programmes, are included in the written documents outlining the planning of internationalisation?

The answers to the first research question were sought in the literature, and the empirical material was used to find answers to the second question, with a view of improving the theoretical framework.

The empirical material covered the whole population of traditional and newer higher-education institutions, i.e. 20 universities and 24 polytechnics. European Policy Statements, 1-4-page planning documents for internationalisation were used as material. These EPS strategies were naturally occuring data.[397] The EPS strategies written in 1996 and in 2000 offered the possibility of viewing the development of the plans of particular institutions and of the two systems. Moreover, since the material covered the two systems of higher education, their internationalisation plans could be compared. The structure of the plans was also analysed. The material was carefully read several times in order to make sure that the observations were systematic. Six themes for analysis were covered, the rationales for

[395] Callan 1998, van der Wende 1996
[396] Luostarinen 1979, Callan 1998, Knight 1999

internationalisation, the changes in its content and management between 1996 and 2000, objectives, activities, commitment to internationalisation and its management in terms of planning, realisation and evaluation.

The results were summed up and the report was published separately.[398] The material was used to obtain a more thorough understanding of internationalisation and its planning among the Finnish population.

Following the literature review, and in order to integrate the process view of internationalisation and the planning of it as part of holistic management, the following definition was formulated:

> **The internationalisation of a higher-education institution is a change process leading to the inclusion of an international dimension in all the aspects of holistic management of a higher-education institution in order to enhance the quality of teaching and research and achieve the desired competences.**

It is claimed that if internationalisation is understood in the same way throughout the organisation, and if the planning of it is done systematically, the desired outcomes are achieved in a more efficient way.

Analysis of the empirical material showed that mobility and networking are the main tools used for managing the internationalisation of research and teaching, due to the strong influence of European Union programmes such as Erasmus, Socrates and Leonardo in which these types of tools are emphasised.

According to the literature review, project management[399] could be seen as a relevant tool in the implementation of internationalisation planning. It was defined as a set of techniques enabling the integrated management of the scope, time, cost and human relations pertaining to a project, in order to achieve its goals.[400] It was claimed that the internationalisation process of a higher-education institution could be claimed to be a project since it is problem-oriented, goal-seeking, resource-

[397] Alasuutari 1995
[398] Söderqvist 2001
[399] Jessen 1998, Brown 1999
[400] Brown 1999

constrained, unique, and recognizable and visible, as project work is acknowledged to be.[401]

The integrated understanding of internationalisation and its planning, as part of holistic management, was summarised in the following set of phrases:

> *"Based on an analysis of its external and internal environment*
>
> *it is desired in a public higher-education institution*
>
> *to actively and systematically manage*
>
> *a change process*
>
> *leading to including an international dimension in all the parts of holistic strategic and operative management, namely information, planning, organising, financing, implementing and evaluating,*
>
> *in order to enhance the quality of the desired outcomes of internationalisation in the higher- education institution in question.*
>
> *These desired outcomes can be grouped under teaching and research.*
>
> *Mobility and networking are the main tools for achieving them.*
>
> *Operative mangement works best if internationalisation is taken as a project;*
> *and project management serves as theory basis for the actions taken."*

Figure 12; Reviewed Integrated Understanding of Internationalisation and Its Planning Based on the Holistic Management View

This summary was then split into eight propositions, of which the first one suggests that the recent internationalisation of higher-education institutions seemed to evolve through five stages, and the other seven comment on the different aspects of the integrated understanding of internationalisation and its planning. The stages were described and labelled as follows:

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[401] Jessen 1998

Zero stage Internationalisation as Marginal Activity	- There are some free movers - Internationalisation is an exotic and status phenomenon – some important actors in the organisation travel to congresses - Foreign languages are taught
First stage Student Mobility	- Awareness of the need to internationalise - Commitment to planning and implementing different programmes enhancing the mobility of students - Creation of internatonal offices to take care of the routines of student mobility - Internationalisation is taken as an end in itself - ECTS becomes an important tool to facilitate the counselling and the acknowledgement of foreign studies
Second stage Curriculum and Research Internatinalisation	- Awareness of teachers in order to make the internationalisation of the curriculum and research possible - Organising of teacher mobility - Internationalisation taken as a means to enhance the quality of education - Different ways to internationalise the curriculum - Nomination of international coordinators to take care of curriculum and research internationalisation
Third stage Institutionalisation of Internationalisation	- Internationalisation is given a strategy and a structure - Networking both through cheap travel and new ICT; partnerships and strategic alliances - The quality of internationalisation is receiving more attention - Multiculturalism - Nomination of an internationalisation manager
Fourth stage Commercialising the Outcomes of Internationalisation	- Exporting education services - Franchising education services - Joint-ventures - Strategic alliances[403] - Creation of organs promoting the commercialisation

Table 13: Stages of Internationalisation in Higher Education Institutions

[403]A strategic alliance can be defined as a co-operative agreeent between actual/potential competitors. Its advantages include the facilitation of entry into foreign markets, the sharing of fixed costs and risks, the facilitation of the transfer of complementary skills between companies, and helping companies to establish standards. (Hill-Jones 1998 p.275)

The other seven propositions were more concerned with the planning system of internationalisation of a higher-education institution. The propositions are presented below. It was postulated that, in order to understand the dynamics of educational change, four basic factors should be taken into consideration: the educational setting, the environment, the innovation itself and the change strategy.[403] The educational setting was claimed to be professional bureacracy. The environment was considered highly complex, with involving multilevel organisation and dynamic alliances and networking. The internationalisation itself incorporated two elements of change, namely of interaction and of management. The most important element as far as this study is concerned was the last one, change strategy. Individual and organisational strategies were distinguished, but the focus was on organisational strategies.

The second proposition is that the strategic objective of the internationalisation process is the enhanced quality of the desired outcomes of teaching and research.

The second proposition was based on Knight's definition of internationalisation.[404] The desired outcomes are in the fields of teaching and research. Mobility and Networking are the main tools, the efficient use of which requires certain sub-objectives in both qualitative and quantitative forms. To illustrate this, examples can be given. Research is aimed at gaining international appreciation. Figures concerning the numbers of research conferences attended, of conference speeches given, and of published articles can be taken as quantitative objectives. The two first ones require Researcher Mobility. Joint articles with researchers from an organisation abroad are also appreciated. Networking is needed in order to find somebody to co-operate with. Top-level journals do not accept less than top-level articles, so the quality of research is ensured.

The teaching should be of top-level internationally. Teachers need to meet each other in order to establish friendships and good connections, and to be able to collaborate. Teacher Mobility is thus vital. Networks are needed to provide

[403] Dalin 1978, 1989 in van der Wende 1996c p.28
[404] Knight 1994 in Knight 1999

information on where to go to find possible contacts. The numbers of joint courses, modules and degrees can be given as a quantitative objective, and the number of networks or teacher days spent abroad could be considered as a sub-objective in achieving the real objective, enhancement of the quality of teaching, and desired competences. Nobody co-operates with somebody who is not professional, so the quality of teaching is ensured.

The third proposition is that the desired outcomes of teaching and research are decided based on an analysis of external and internal environments.

The third proposition is based on the holistic-management principle[405] according to which the information system analyses the environment and establishes the basis for the planning of internationalisation.

Let us say that the desired outcome is to have 30% of students participating in foreign-exchange programmes at the Student Mobility stage, then the organisation has to manage the process accordingly, e.g. to have foreign studies advisors, international officers to take care of housing, registration and the like.

If the desired outcome at the Curriculum Internationalisation stage is to have joint modules of joint degrees with foreign institutes, then teachers have to have the opportunities to get to know foreign colleagues and to learn about foreign degrees. The organisation has to have a well-equipped library and ICT services, for example.

At the Institutionalisation Stage, the desired outcome may be the institutionalisation of international activities, in which case the higher-education institute has to have the necessary financing and administrative procedures, a clear structure and an expressed internationalisation strategy, for example.

At the Commercialising Stage, the organisation may wish to cash in on the costs paid during earlier stages, and the outcomes must be educational products of the structures through which such products can be bought. The present author would like to emphasise with these examples that it is not relevant to discuss what items should be internationalised without knowing the objectives of the internationalisation.

The fourth proposition is that internationalisation as a change process means the inclusion of an international dimension in all aspects of holistic managment. In the planning system, the desired outcomes are expressed when strategic and operative objectives are communicated through planning documents.

This view, again is, based on holistic management as referred to earlier. Strategic objectives include the mission, the vision and long-term objectives, and operative objectives can be seen in short-term plans, budgets and programmes concerning how to achieve the strategic objectives.[406] A management system comprises information, planning, organising, financing, implementation and evaluation systems.[407] Strategic Planning does not only comprise budgeting: planning of the organising and the implementing go hand in hand with planning the funding.

The fifth proposition is that organisational changes caused by and needed for the internationalisation of higher education are planned actively and systematically through Project Management.

Active management differs from the more passive "carrying out of orders from the education authorities" type of functioning, and the systematic approach is emphasised. This reflects holistic-management thinking involving the analysis of the external and internal environments on which all planned actions are based.

Project management[408] is claimed to offer good tools for planning the management of internationalisation, and incorporates the integrated management of scope, time, cost and human relations.

The sixth proposition is that mobility and networking are the main tools for achieving the desired outcomes of the internationalisation of the higher-education institution.

[405] e.g. Luostarinen 1979, 1999, Hill & Jones 1998
[406] Luostarinen 1999
[407] Applied from Luostarinen 1999
[408] Jessen 1998, Brown 1999

The European Union's influence on mass internationalisation is clear.[409] Mobility and networking are emphasised in programmes such as Socrates, Erasmus and Leonardo. Thus, planning their use is important if internationalisation is to proceed smoothly.

The seventh proposition is that there are many actors involved in the process of internationalisation on the institutional level: rectors, internationalisation officers, teachers and other administrative staff.

There are many actors involved in the internationalisation process, all of whom should be named, appreciated and given enough resources[410]. Actors can be identified by analysing the activities, and especially in the case of teachers, bearing in mind the history of independent professionals, a structure must be created that embraces them all.

The commitment of all the actors is needed. This can be stated in terms of organisational values, for example, but it needs to be seen in practice at the action level.

Students are part of the higher-education institute, but they do not have a planning role. They use the outcomes of this planning process by participating in foreign-exchange programmes and studying internationalised curricula.

The eighth proposition is that, since the internationalisation of higher-education institutions is a process, it demands gradual and continuous development of the different systems along with its own development.

This was emphasised in Luostarinen's conclusions on the internationalisation of the firm. Van der Wende has outlined the same approach. Development requires planning.

The management of education is rarely studied, and the management of internationalisation in the education field is almost non-existent. The empirical contribution of this study was the population analysis of the management, and

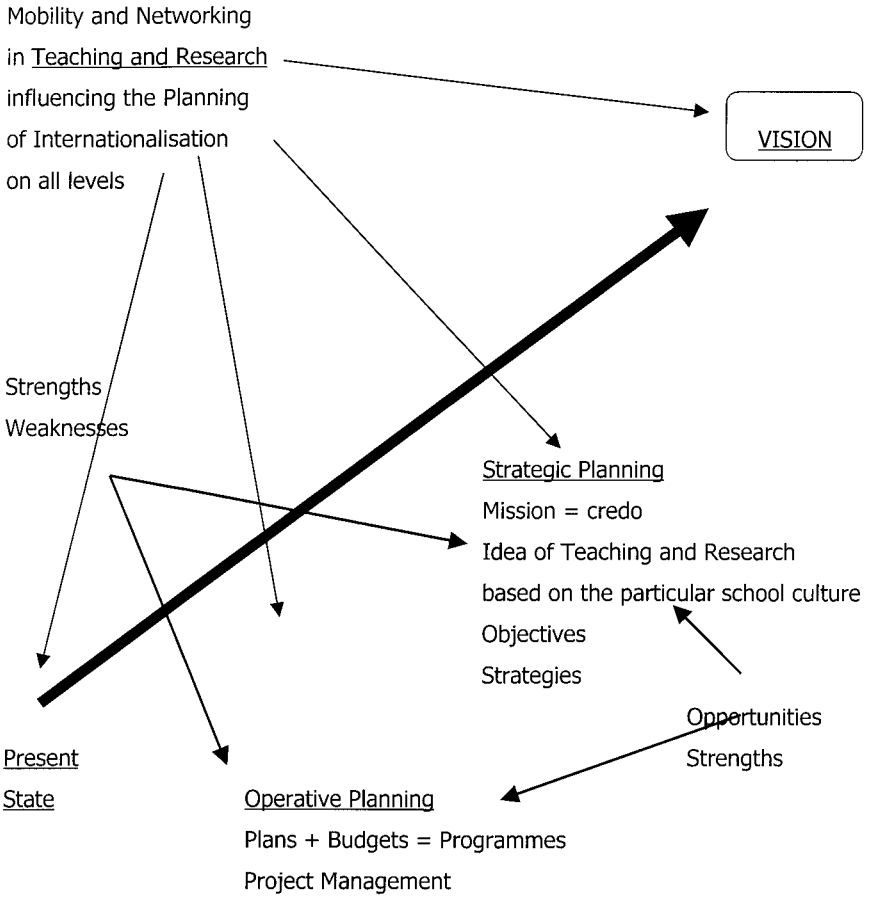
[409] e.g. Teichler in all of his referred works

especially the planning function, of internationalisation in Finnish higher education in 1996 and 2000. This analysis contributed to our understanding of the situation of universities and polytechnics. It showed that the strategic thinking in this context is neither very vast, nor very deep.

The main assumptions behind this summary of the framework were that the internationalisation of higher-education institutions is a dynamic, evolutionary change process in which incremental decisions are made in a sequential order. It was suggested that planning, the function of holistic management, which is seen most in public higher-education institutions, and internationalisation planning need to be integrated into the other institutional planning processes and procedures. The planning of internationalisation was summarised and illustrated in the following figure.

[410] e.g. Parsons 2000 emphasises the resource based view of internationalisation of higher education institutions

Figure 13: Reviewed Holistic Planning System of Internationalisation (Modified from Luostarinen 1999)



4.2 Managerial Implications

It was claimed in the literature review that school-management studies are quite rare.[411]

Due to the young age of the mass internationalisation of higher education, which has been brought about by the European Union programmes[412], there are not many studies on the management of internationalisation. Saarinen[413] examined the strategy and analysis of international activities but his study concentrated on the problematics of one department, while Parsons[414] looks at internationalisation from a resource-based view. A holistic view of the management of the internationalisation of higher-education institutes is needed, and its application to such institutions could serve as a tool for developing their planning systems and procedures.

A summary of the management of internationalisation was given in order to facilitate the management of the internationalisation process:

> "Based on an analysis of its external and internal environment it is desired in an organisation to actively and systematically manage a change process leading to including an international dimension in all aspects of holistic strategic and operative management, namely information, planning, organising, financing, implementing and evaluating, in order to enhance the quality of the desired outcomes of the organisation in question."

As was found in the literature review, understandings of internationalisation vary enormously[415]. To manage a process it is of vital importance to understand its nature and characteristics. Hence, it is claimed that a common understanding of the internationalisation of higher education is important to institution managers of different levels as well.

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[411] Ekholm 1992
[412] e.g. Teichler 1999, 1998, Barblan & Teichler 2000, 1999
[413] Saarinen 2000
[414] Parsons 2000
[415] e.g. Blok 1995, Callan 1998, Knight 1999

The descriptive analysis of the written planning documents of all Finnish universities and 24 polytechnics that existed both in 1996 and in 2000 revealed that strategic and operative thinking in relation to internationalisation is neither vast nor deep.

To conclude, it must still be noted that this study is not, and was not meant to be, a holistic study of the planning of internationalisation. The empirical material was studied in order to evaluate and improve the theoretical framework of the study. However, due to the fairly recent mass-internationalisation[416] of higher-education institutions it could make a contribution to the development of planning procedures by promoting a better understanding of the phenomenon in question.

4.3. Suggestions for Further Research

As the diverse terminology used indicates, research on the internationalisation of higher-education institutions has only just commenced. This means that there are several interesting paths to follow when studying internationalisation in an educational context. The European Union has lead to the establishment of numerous international, and especially European, networks[417] of higher-education institutes and companies. It would be challenging to use network theories to analyse them and to study the changes and outcomes they cause.

It would also be interesting to study further the position and ingredients of the subject of International Business at the European and worldwide levels. The first study was carried out in 1991[418] and it has not been repeated. The past ten years have seen an immense change of internationalisation in higher education, and it would be interesting to study its influence on teaching and the organising of the teaching of International Business.

A huge but very interesting research project would be to study the internationalisation of higher education at the European level from a process

[416] e.g. The Globalisation of Higher Education, 1998
[417] Erasmus, Socrates and Leonardo projects as key academic programmes
[418] EIBA study by Luostarinen and Pulkkinen 1991

perspective[419]. This would require a substantial research group and efficient project management, but it would certainly be rewarding.

It would also be rewarding to study other fields, such as consulting, private education or other services, in order to find out whether internationalisation could be understood using the theoretical framework developed here. Studies on the Internationalisation of firms have concentrated on manufacturing companies[420], whereas this study concerned public organisations.

Doctoral studies as an extension to this licentiate thesis could put the emphasis on polytechnics as newcomers in the field of higher education. They would be a good choice for the following reasons. First, since their internationalisation was very quick – in most cases between 1995 to the present, from start to finish, the management of the mobility and network tools would be an interesting research object. Second, the institutionalisation problematics of internationalisation, which is the phenomenon currently in focus, deserves a further study.

The management of internationalisation was chosen for two main reasons. First, the whole management process in itself – how things are planned, realised and evaluated - is interesting and has rarely been studied in the school context.[421] It was established that there are some shortcomings, so it would be useful to find out how they could be overcome in order to facilitate the achievement of desired outcomes. Second, the fact that top management was shown not to be very enthusiastic or knowledgeable about what internationalisation means in the everyday work of middle managers calls for a closer analysis of their roles and tasks in the internationalisation process. This particularly concerns the use of tools such as mobility, networking and project management, and how they relate to other important players, not only top management, but also all the other key actors including teachers, researchers and support staff.

The eight propositions put forward in this study should be further developed and tested in relation to the three types of empirical material to be used in the forthcoming doctoral dissertation. First, the Objective and Result Contracts that Polytechnics make with the Finnish Ministry for Education will be analysed from this

[419] CERI study was done concerning internationalisation of curricula in a few countries.
[420] Luostarinen 1979 and Uppsala School in 1970s

point of view. Second, one polytechnic case will be analysed in depth, and third, the results will be compared with an analysis of the holistic management of the internationalisation process in two Belgian polytechnics. The thesis will also include more comprehensive coverage of management, in particular project management and the role of middle management, in order to arrive at a more comprehensive understanding of the management of internationalisation.

To conclude, as a field of study the internationalisation of higher education still has many challenging paths to be followed.

[421] e.g. Fullan 1992, Ekholm 1992

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APPENDIX 1 –INTERVIEWS

Interviews, speeches and courses

Arhinmäki, Juha

1999 Counsellor for Education, Helsinki, 11.6.1999

2000/1 Counsellor for Education, Ministry of Education, Department for Education and Science Policy, Polytechnic Division, Helsinki, 29.5.2000 (Director of the same department starting 1.1.2001)

2000/2 Counsellor for Education, AMK: n kehitysnäkymät, speech 21.1.2000 at 9.15

Arpan, Jeff

2001 Email list titled "Internationalizing Curriculum: Chronology" as an answer to email question of internationalisation of university business schools, studies done amongst AIBers, emails of 7.3.2001 and 8.3.2001

Eriksson, Päivi & Kovalainen Anne

2001 Professors, KATAJA COURSE of Qualitative Methods, lecturing notes of 16.-18.5.2001

Ketolainen, Juho

2000 Advisor, CIMO 5.6.2000

Luostarinen, Reijo

1997 Internationalization of the Business School, speech notes of a speech given 5.11.1997 at Helsinki School of Economics and Business Administration

1998/1 Professor, IB:n viimeaikaiset kehitykset ja tulevaisuuden näkymät. Speech in HEKO/Kv-ekonomien tilaisuudessa Helsingin Kauppakorkeakoululla 5.11.1998

1998/2 Theories in International Business, FIGSIB course in spring 1998, lecturing notes of 26.5.1998

Malm, Kaj

2000 Secretary General, ARENE, Helsinki 5.6.2000

Ollikainen, Aaro

1999 Advisor, CIMO, autumn 1999

Seminars and Conferences

2001 Campo-seminar on 26.3.2001 at Haaga Institute Polytechnic

2000 Campo-seminar on 15.12.2000 at Helsinki Business Polytechnic

2000 European Association of International Education 30.11. – 2.12.2000 in Leipzig, Germany, especially sessions of International Relations Managers

Silvermann David

2001 Visit lecture in HSEBA on 27.3.2001, lecturing notes

APPENDIX 2: EXPLANATION OF ABREVIATIONS OF UNIVERSITIES

University	
HKKK	Helsinki School of Economics and Business Administration
HY	University of Helsinki
JoY	University of Joensuu
JY	University of Jyväskylä
KuY	University of Kuopio
KuvA	Academy of Fine Arts
LY	University of Lapland
LTKK	Lappeenranta University of Technology
OY	University of Oulu
SibA	Sibelius Academy
SHH	Swedish School of Ecnomics and Business Administration
TaY	University of Tampere
TaiK	University of Art and Design Helsinki
TTKK	Tampere University of Technology
TeaK	Theatre Academy
TKK	Helsinki University of Technology
TuKKK	Turku School of Economics and Business Administration
TY	University of Turku
VaY	University of Vaasa
ÅA	Åbo Akademi University

APPENDIX 3: EXPLANATION OF ABREVIATIONS OF POLYTECHNICS

Arcada	ARCADA Polytechnic
DIAK	The Diaconia Institute of Higher Education in Finland
EVTEK	Espoo-Vantaa Institute of Technology
HIAMK	Haaga Institute Polytechnic
Stadia	Helsinki Polytechnic
Helia	Helsinki Business Polytechnic
HAMK	Häme Polytechnic
JAMK	Jyväskylä Polytechnic
KAMK	Kajaani Polytechnic
KTAMK	Kemi-Tornio Polytechnic
KPAMK	Central Ostrobothnia Polytechnic
KYAMK	Kymenlaakso Polytechnic
Laurea	Espoo-Vantaa Polytechnic
LAMK	Lahti Polytechnic
MAMK	Mikkeli Polytechnic
OAMK	Oulu Polytechnic
PKAMK	North Carelia Polytechnic
PSAMK	North-Savo Polytechnic
RAMK	Rovaniemi Polytechnic
SAMK	Satakunta Polytechnic
SEAMK	Seinäjoki Polytechnic
SYH	Swedish Polytechnic
TAMK	Tampere Polytechnic
VAMK	Vaasa Polytechnic

APPENDIX 4: TITLES AND SEX OF SOCRATES CONTACT PERSONS

HKKK	Planning Officer	F
HY	*Suunnittelija*	**M**
JoY	**Director of International relations**	F
JY	*Erikoissuunnittelija*	F
KuY	**Head of international office**	**M**
KuvA	Apulaissihteeri	F
LY	**Kansainvälisten asiain päällikkö**	**M**
LTKK	**Kansainvälisen keskuksen päällikkö**	F
OY	**Director of International Relations**	F
SibA	International Relations Coordinator	F
SHH	International Programme Coordinator	F
TaY	**Director of International Education Services**	F
TaiK	**Associate Director**	F
TTKK	**Head of International Office**	F
TeaK	International Affairs Coordinator	F
TKK	*Suunnittelija*	**M**
TuKKK	*Kansainvälisten asiain suunnittelija*	F
TY	International Officer	F
VaY	Kansainvälisten asioiden koordinaattori	F
ÅA	*International Officer*	F

APPENDIX 5: TITLE AND SEX OF SOCRATES CONTACT PERSONS

Polytechnic	Title	Sex
Arcada	**Chef för internationella relationer**	F
DIAK	Kansainvälisen työn koordinaattori, yhteiset palvelut	F
EVTEK	A s s i s t e n t t I	F
HIAMK	International coordinator	F
Stadia	Suunnittelija	F
Helia	Kv-koordinaattori	F
HAMK	International Relations Coordinator	F
JAMK	**International Relations Manager**	F
KAMK	K v – o p i n t o s i h t e e r I	F
KTAMK	Kansainvälisten asioiden koordinaattori	F
KPAMK	**Head of the International Office**	F
KYAMK	**Kansainvälisten asioiden päällikkö**	F
Laurea	**Director of International Activities**	F
LAMK	*Kansainvälisten asioiden suunnittelija*	**M**
MAMK	Kansainvälinen koordinaattori	F
OAMK	**Kansainvälisyyspäällikkö**	**M**
PKAMK	*Kansainvälisten asiain suunnittelija*	F
PSAMK	*Kansainvälisten asioiden suunnittelija*	F
RAMK	KV-suunnittelija	F
SAMK	Kv-koordinaattori	**M**
SEAMK	**Kansainvälisten asiain päällikkö**	F
SYH	Head	F
TAMK	**Kv-päällikkö**	F
VAMK	**Kv-päällikkö**	F

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