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TRANSNATIONAL EDUCATION: A CLASSIFICATION FRAMEWORK AND DATA COLLECTION GUIDELINES FOR INTERNATIONAL PROGRAMME AND PROVIDER MOBILITY (IPPM)

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Preface

For the last three years, the British Council and the DAAD have collaborated to support research on different aspects of TNE. As a first result of this collaboration, the study 'Impacts of transnational education on host countries' (2014)[1] clearly demonstrated that TNE host countries believed there were academic, skills development, and social/cultural benefits to TNE. However, there was very little hard data to support these perceptions. A follow-up study, 'Transnational Education Data Collection Systems: Awareness, Analysis, Action' (2015)[2] examined the TNE data collection systems in both host and sending countries and found that very few host countries had robust data on TNE provision even though it represented an important part of their higher education system. A key finding was that there is a multitude of different terms used to describe the same type of programme and provider mobility (IPPM), and that this 'terminology chaos' makes it challenging to collect comparable and reliable TNE data across countries and to develop appropriate policies and regulations for TNE at the national level.

These insights led to the current project which focused on developing a common TNE Classification Framework for IPPM and TNE data collection guidelines. These tools were designed to support TNE active countries to gather relevant data for the development of appropriate policies and regulations and help with overall higher education enrolment planning. In a first step, an International Advisory Working Group with experts from both host and sending countries piloted-tested, consulted with local stakeholders, and provided invaluable advice on the development of the TNE Framework and data guidelines. These 'prototypes' were then discussed and further developed in conference workshops, presentations and consultations, resulting in the TNE Classification Framework and guidelines for TNE data collection presented in this document.

During the past year, we have engaged with nearly 100 senior policymakers and higher education experts from government departments, institutions, and organisations – national, regional and international – from 30 countries. Their feedback, advice, shared knowledge and encouragement were a tremendous contribution. With their support, the project has built significant momentum and the engagement has moved beyond data collection to a wider debate about the impact of TNE and how different models can benefit both host and sending countries in different ways. We believe the guidelines thus produced in a truly international effort are a real milestone in our ongoing quest to understand TNE on a global scale.

Dr Jo Beall, Director, Education and Society, British Council

Dr Anette Pieper, Director Projects department, DAAD

1. https://www.britishcouncil.org/sites/default/files/tne_study_final_web.pdf
2. https://www.britishcouncil.org/sites/default/files/1.1_report_tne_data_collection_system.pdf

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Executive summary

The purpose of this report is to present the proposed Common TNE Classification Framework and data collection guidelines for international programme and provider mobility.

Growth in scope, scale and importance of transnational education

As international academic mobility increases in scope, scale and importance so does the confusion about what the terms cross-border, transnational, borderless and offshore education actually mean. To provide clarity and simplicity about what transnational education (TNE) involves the term international programme and provider mobility (IPPM) is introduced to indicate that TNE involves programmes and providers moving across national borders to deliver higher education programmes and credentials to students in their home or neighbouring country instead of students moving to the country of the foreign higher education institution/provider for their full academic programme. The terms TNE and IPPM are used interchangeably in the report.

For IPPM it is critical to recognise that there are different rationales, impacts, policies and regulations for sending TNE countries versus host TNE countries. To date, more attention has been given to sending countries' perspectives and less to host countries. This report is relevant to both sending and host countries but it highlights the importance and implications of IPPM for host TNE countries, especially those who are in the early stages of receiving or partnering with foreign sending higher education institutions (HEIs)/providers.

TNE terminology chaos

Recent studies which have reviewed national TNE policies, impacts of TNE provision on host countries, national TNE data collection and management systems, and research on TNE provision all point to a common finding – TNE terminology chaos. Over 40 different terms are being used to describe international programme and provider mobility. Furthermore, the same terms are used to denote very different modes of IPPM while different terms are being used to describe the same mode of IPPM. In short there is mass confusion about what is meant by an international branch campus, franchise programmes, joint/double degree programmes, distance education, and joint universities.

The implications of TNE and IPPM terminology chaos are many and significant. While it is important that each country uses terms that fit into the domestic higher education landscape, it is equally important that there is a shared understanding and use of TNE terms across countries. The lack of a common understanding of the terms raises serious issues related to appropriate quality assurance processes, qualification recognition procedures, registration of new providers or programmes, completion rates and the collection of programme level information and enrolment data.

The inconsistency in the use of terms also makes comparisons of TNE provision, data, policies and research within and across countries challenging and often inconclusive. It also means that generalisation of research findings is difficult and the analysis of internationally comparable TNE data questionable.

Need for a Common TNE Classification Framework and data collection guidelines for IPPM

The confusion and misunderstandings about the different modes of IPPM points to a challenge that requires the attention of the many higher education and TNE actors and stakeholders. Is it possible to develop a common set of IPPM terms which allows consistency and clarity of use within and across countries but which respects the local context, linguistic differences and regulatory environment? Furthermore, is it possible to develop a framework to differentiate the various modes of IPPM by using a set of common criteria to describe each mode and distinguish one mode from another? The proposed Common TNE Classification Framework for IPPM as discussed in the report is an important step towards developing such a practical and analytical framework.

In spite of the fact that TNE is increasing in scope and scale, there is a significant lack of reliable information regarding the nature and extent of TNE provision in terms of enrolments and the characteristics of IPPM modes. While highly active sending TNE countries have developed TNE policies and regulatory processes and databases on all TNE activity under their jurisdiction it is clear that the majority of TNE host countries, especially the ones who have only recently become more TNE active, do not have appropriate registration of foreign programmes or TNE data collection systems in place. This means that there is insufficient information to effectively include TNE provision in their higher education planning processes, policies, and regulatory functions. The proposed TNE data collection guidelines provide information for national higher education agencies in both host and sending countries on how to establish a national TNE data collection system. The guidelines are aligned to the classification framework and provide information on how to establish basic TNE data collection templates plus more focused IPPM modules in order for countries to customise TNE databases to their own needs, priorities and level of TNE provision.

Objectives and use of Common TNE Classification Framework

The objectives of the framework are 1) to provide some clarity and common interpretations of the different modes and categories of TNE. This requires the framework to be robust enough to ensure that the characteristics of each IPPM model are clearly defined, but flexible enough to reflect the realities and different contexts of more than 120 countries involved in TNE; 2) to provide a foundation to help systematise data collection and management within and across countries through TNE data collection guidelines. Users of the framework include higher education institutions, higher education agencies and government departments, quality assurance agencies and others; 3) to provide common IPPM terms and categories so that eventually this data can be included in the UNESCO, OECD and Eurostat (UOE) database on higher education. This will allow trends and enrolments in IPPM to be monitored in the same way that student mobility and international student data and trends are monitored both nationally and internationally.

Meaning of Common TNE Classification Framework for IPPM

Common indicates that it is relevant to and used by both host and sending TNE countries/providers around the world. *TNE* is defined succinctly as 'the mobility of higher education programmes and institutions/providers across international borders'. *Classification* refers to the categorisation of different modes or types of IPPM and *Framework* indicates that there is a logic or analytical frame used. IPPM specifies that the six different models of international programme and provider mobility are addressed in the framework. Overall, the framework introduces some structure and logic to how different types of TNE are described and differentiated from one another.

Row	Independent	Collaborative
1	Franchise programmes	Partnership programmes
2	International branch campus	Joint universities/colleges
3	Self-study distance education	Distance education with local academic partner

Two organising principles of the framework

The first principle relates to the differentiation of TNE as primarily a standalone or *independent* TNE activity by a sending HEI/provider and TNE as a *collaborative* effort between host and sending HEIs/providers. The distinction between *collaborative* TNE provision and *independent* TNE provision has important implications for both host and sending country regulations and policies related to registration, external quality insurance, awarding of qualifications, degree recognition, responsibility for the curriculum and TNE data collection.

The second principle relates to six distinct categories or modes of programme and provider mobility as identified on the three horizontal rows of the framework. The six categories represent different modes of international programme and provider delivery and are carefully aligned with the independent or collaborative approaches.

Row one differentiates *franchise programmes/arrangements* which are primarily exported by a sending country from *partnership programmes* which are based on collaboration between host and sending country HEIs/providers. The second row distinguishes between an *international branch campus* which is essentially a satellite operation of a parent HEI in the sending country from a *joint university* which is co-founded or co-developed by both sending and host country HEIs. The third row refers to distance education as a separate TNE mode and distinguishes between *self-study distance education programmes* (which are provided solely by the foreign sending HEI/provider and has no teaching or learning support provided locally), and *distance education with a local academic partner*. The continuous growth and dynamic changes in the use of distance education technologies demands that the framework recognise distance/online education as a separate TNE category unto itself. However, distance education is also a form of teaching and learning through face-to-face, online or blended approaches which are applicable to all modes of programme and provider mobility.

Descriptions of TNE modes and commonly used terms

The framework provides a brief description of each category of IPPM. They are not called definitions to allow for customisation to local contexts in TNE active countries. Three key questions help to differentiate the characteristics of the categories: who awards the qualification, who has primary responsibility for the academic curriculum, and who has primary responsibility for external quality assurance. While there are always exceptions, the overall logic is that for independent TNE provision the sending country has primary responsibility for the curriculum, the qualification awarded, and external quality assurance. While for collaborative TNE provision both the host and sending countries share or have joint responsibility for these three aspects of TNE programmes.

Use of the classification framework

For the framework to be useful, it must be robust enough to differentiate between each of the six primary categories of IPPM but flexible enough to acknowledge individual contexts and regulations of TNE active countries. Countries have different approaches and levels of IPPM involvement and must be able to use the framework to meet their particular needs and circumstances. Thus the framework is not a top-down imposed structure but rather a foundation and guideline to help countries have clarity on the different modes of TNE provision.

The use of the Common TNE Classification Framework for policy development and data collection will vary from country to country, depending on the prevalent IPPM modes, as well as how the data will be used for planning, policy analysis and development of regulatory processes. It is important to emphasise that the use of the classification framework will vary, but not the actual content. Countries, especially host countries are at different stages in establishing TNE data collection systems and will develop their capacity over several phases. To allow for an incremental approach to data collection, the framework must be flexible and have different entry points, but still have robust descriptions of the six modes. It is important to note that the classification framework is aligned to the TNE data collection guidelines.

TNE data collection guidelines

For many countries, IPPM is becoming almost as prominent as the mobility of international students across national borders. However, whereas most countries collect robust data on student mobility, few countries are collecting any significant level of TNE data. Key challenges for collecting TNE data included: lack of a clear strategic approach at national policy level, inability of countries to classify the various categories of TNE activity, and use of outdated or poorly structured data request templates. The report includes TNE data collection guidelines to assist host and sending countries in developing a TNE data request instrument, in order to collect robust, consistent, and internationally comparable TNE data. The approach taken is to present a series of questions laid out in table format, from both the host and sending country perspective; and also from both the perspective of the agencies collecting the data and the institutions providing the data.

National level agencies collecting the data

TNE data is collected by national level agencies in both host and sending countries: either departments or the statistical unit within the ministry of education (MoE); or independent regulatory or statistical bodies, usually reporting to the MoE. The agency or department collecting TNE data may be separate and standalone from the department collecting general higher education data, or may be distinct units within the main education data collection agency. The first step for any data collection agency mandated to collect TNE data is to decide which institutions will be asked to complete the TNE data request. There are different considerations here for host and sending countries, so a separate data table has been developed for each. These tables will help the data collection agency to generate lists of target institutions and will also allow for more segmented and comparative analysis of the responses they provided.

A modular approach to collecting TNE data

Once the data collection agency has identified the institutions to be surveyed, the next step involves developing a TNE data request to be sent to the institutions. There is potentially a large amount of data that can be requested from TNE active institutions. However, care must be taken to balance the amount and complexity of data requested, with the capacity and ability of the institutions to provide the data. Therefore a key consideration of these guidelines is to propose 'core' data that is recommended as a priority to collect, regardless of which agency is collecting the data; and additional 'optional' data that may have particular relevance for different agencies depending on their mandate and rationale for collecting and using TNE data.

Core data modules

A key consideration of the guidelines is to propose 'core' data that is recommended as a priority to collect, mainly with a view to encouraging early stage/developing TNE countries to begin the process of collecting TNE data. TNE programme title, field of education, level of programme, country and institution awarding the qualification, and total number of students enrolled in the programmes are proposed as basic data to collect for each TNE programme. In addition, a classification data module is proposed as another core data module, given that it enables each TNE programme to be classified as belonging to one of the six TNE categories in the classification framework.

Additional data modules

The data proposed as being optional, at least from the perspective of a country at an early stage of collecting TNE data, is organised in terms of a programme data module, and an enrolment data module. Additional programme data is of interest to regulatory bodies, including licensing, accreditation and quality assurance agencies and recognition bodies. Enrolment data is of particular interest to the ministry of education and other economic and trade ministries interested in understanding the scale and economic impacts of the TNE activity. The optional student level data module provides a deeper level of understanding about the programme, and a profile of the TNE students and their graduation and employment outcomes, allowing for comparisons against local non-TNE students in the host country.

A key principle of the guidelines is that data collecting agencies will decide what data to collect, what they consider as the basic level of data to collect, and ultimately how the data request can be customised to the local higher education environment and context.

Emerging trends and issues in IPPM

A number of emerging issues are discussed, particularly with a view to keeping on top of classification and data collection issues going forward.

Articulation/pathway programmes

One of the challenges involved in developing a TNE classification framework is deciding where to draw the line about what is, and what is not, included in the framework. One mode of internationalisation that straddles both IPPM and international student mobility is articulation/pathway programmes. This form of international higher education (IHE) has shown a great propensity for innovation, creativity and increasing complexity with a diversity of host, sending and even third country actors involved. All of this creates challenges for classification and data collection of this activity. While the classification framework does not include articulation/pathway programmes, it is important for higher education (HE) agencies in sending and host countries to be aware of these programmes.

Distance education

Delivery of TNE via distance education accounts for a significant and expanding proportion of global TNE activity. Elements of distance education provision (online in particular) are becoming ubiquitous and likely will be imbedded to some extent in the majority of HE programmes in the future. However, distance education is often happening outside a formal regulatory framework, in the absence of concrete national level policies and plans to guide its development. This presents major challenges in terms of quality assurance of distance education programmes, recognition of distance education qualifications, and is part of the reason behind a worrying lack of data on distance education programmes. Most countries are struggling to understand key basic questions around the nature and scale of this activity, owing to the variety and complexity of distance education operational models in existence. The question about whether distance education should be considered as a distinct type of programme, or as a mode of pedagogy, is a key classification issue discussed in the report.

Quality assurance of TNE

While the overall TNE context is one of growth and opportunity, effective quality assurance of TNE presents a major challenge, for both host and sending countries, and few countries have robust TNE quality assurance systems in place. In view of the above, it is encouraging to see new networks being formed involving quality assurance agencies in different sending and host countries working together. There also remains an important role for existing regional and international agencies to play in terms of sharing of best practice guidelines, research and data. And the UNESCO/OECD *Guidelines for quality provision in cross-border higher education* will continue to support the development of quality assurance procedures and systems within countries. As more countries become active as both hosts and senders of TNE programmes, quality assurance agencies will need to consider both perspectives in discharging their duties.

The classification framework clearly distinguishes between independent and collaborative forms of TNE provision. As national quality assurance systems develop, this distinction may become an important consideration in determining the appropriate approaches to oversight and review of TNE activity.

Going forward, co-ordination between quality assurance and statistical bodies within countries will result in a more efficient and rounded approach to collecting data, so that robust data is collected about the TNE programmes, and also about numbers and characteristics of students enrolled in the programmes.

Awarding and recognition of qualifications

As TNE becomes more collaborative in nature, host country HEIs are becoming more involved in the awarding of the TNE qualification, whether as a single award by the host country institution, or a joint or double award with their foreign partner. Therefore, as TNE develops, the question about who provides the academic oversight may become as important as who awards the qualification. It should also be noted that the concept of awarding qualifications is becoming more flexible. In addition to awarding diplomas and degrees, HEIs are becoming more active at awarding credits for specific modules of study, as well as certificates for completion of MOOCs. Another trend is the veritable explosion of double degrees being awarded by both partner institutions. From the perspective of classification and data collection, double degrees are problematic in distinguishing host from sending country, and can result in double counting of the students.

The main mechanism used by host countries to confer recognition on TNE programmes is to place them on a register of approved programmes. Lack of recognition of distance education TNE qualifications is a major issue in a number of countries. Lack of a national qualifications framework is a noticeable barrier to recognition of TNE qualifications in a number of host countries, as this makes it difficult to reference the TNE qualification against a local equivalent. This situation is likely to improve as national qualifications frameworks are currently under development in several countries.

IPPM is at an important juncture, where national governments would benefit greatly from a better understanding of this important dimension of internationalisation, so that the challenges and opportunities it presents can be effectively managed, and its potential evenly shared across societies, HE systems and the broad student body. A better understanding will allow countries to decide how best to engage with IPPM, and what national and sector level actors should be involved. The concept of programmes and providers moving across national borders should eventually be as well understood as international student mobility.

1. Changes and challenges in TNE and the different modes of international programme and provider mobility

1.1 Transnational, cross-border, offshore, borderless education: are they different?

During the last two decades there has been an exponential increase in all forms of international academic mobility – student and scholar, programmes and providers, policies and regulations, and the universal exchange of knowledge, ideas, values and culture. The diversity in the modes and forms of mobility is unprecedented. This has brought new opportunities and innovation to international higher education and has also raised new issues and potential risks. At the same time, it has introduced a new lexicon to international academic mobility as more terms are being created to try to capture the evolution and many changes. All this points to the dynamism, responsiveness and innovation of the international higher education landscape; but it is also contributing to mass confusion and misunderstanding of the different forms of mobility.

To date there are four generic terms which are used in referring to international academic mobility. They are cross-border, transnational, offshore and borderless education. These terms are most often used interchangeably even though they mean different things to higher education actors and stakeholders. For many, transnational education is understood to cover higher education programmes and providers moving across international borders. This differs from cross-border education which is wider in scope and includes student and scholar mobility, as well as programme and provider mobility. Borderless was once thought to include new developments in distance and online education but has since broadened and is used in a general sense to include any and all kind of academic mobility in terms of space, time, discipline etc. Offshore education is a well-known term but landlocked countries do not see it being relevant to them. Thus, the terms are becoming broader in concept but less meaningful in practice.

These four terms have different meanings both within and across countries and between different national, regional and international organisations. While this is a sign of the growing importance and recognition given to international academic mobility, it also signals that more attention has to be given to clarifying what the different terms mean and what type of mobility strategies are included. A logic and structure needs to be applied to the diverse terms used to describe the many forms of international academic mobility. The challenge is to have clarity and a common understanding of the terms, without trying to standardise definitions – thus ignoring local context, policies and language orientation.

1.2 Transnational education: focus on international programme and provider mobility

This report focuses on transnational education (TNE) which means 'the mobility of academic programmes and providers across international borders'. In other words, TNE refers to international programme and provider mobility (IPPM). However, programmes and providers move across borders in diverse ways such as international branch campuses, franchise programmes, distance education, partnership programmes and joint universities. The common feature is that a sending country HEI/provider offers its programmes in a host country. Thus, the host country is the recipient – or a collaborating partner – with a foreign sending HEI/provider offering programmes in the host country. Taking a macro perspective, one can say that the major focus of TNE provision is on academic programmes and providers moving to the students and not the students moving to the country of the foreign HEI/provider.

A key issue at stake is therefore distinguishing between international programme and provider mobility (IPPM) and international student mobility (ISM). At a general overview level, ISM refers to two types of student mobility. The first features those students who move to study at an HEI/provider in another country for their full academic programme. There is no question that recruiting international students to study in a foreign country is big business. The second type of ISM includes students enrolled in a home university who have the opportunity to study in another country on a short-term basis through semester or year abroad programmes, internships, field work, or summer camps. In both these scenarios, it is primarily the student who is moving. This contrasts with IPPM where it is primarily the programme or HEI/provider that moves to offer an academic programme and qualification to students in a host country. Of course these are not watertight categories. With today's innovations through ICT and networking there are new combinations and permutations of international higher education mobility. But, for the purposes of clarity, TNE refers to the provision of higher education through international programme and provider mobility (IPPM).

The purpose of this introduction has been to first provide a clearer picture of what transnational education means as opposed to other terms such as cross-border education, offshore education and borderless education and secondly, emphasise that transnational education focuses on the different modes of international programme and provider mobility (IPPM). As will be discussed later, transnational education does not rule out the possibility that students enrolled in a TNE programme might have some study abroad experiences.

However, for TNE the primary unit of analysis is the movement of programmes and providers across international borders.

The next section addresses the increasing scale, scope and importance of TNE provision and the unprecedented growth in the number and types of IPPM.

1.3 Growth in scope, scale and importance of transnational education

Not only has there been an exponential increase in the number of new TNE programmes being offered by sending and host countries around the world, there are new forms of partnerships and delivery modes emerging into the international higher education landscape. The last decade has seen a steady increase in the number of branch campuses and the development of internationally co-founded and joint institutions. Franchising arrangements are evolving from individually franchised programmes to the development of new private independent universities in a host country which primarily offer franchised academic programmes from different foreign providers. The number of twinning and franchise programmes is now being surpassed by the staggering increase in double and multiple degree programmes. Distance education is being revolutionised by the development of new technologies, the open access movement, and massive open online courses (MOOCs).

The growth in the scale of TNE enrolments and the diversity of IPPM modes of delivery is vividly illustrated by a UK example. According to a 2016 report by Universities UK and the British Council entitled the *Scale and Scope of UK Higher Education – Transnational Education,* 52 per cent of all international students who are enrolled in a UK qualification awarding programme take some or all their programme through TNE provision. That means that just over half of total registered international students are not moving to a UK-based institution for their full programme; instead they are enrolled in a TNE-type programme offered by the UK HEI/provider in another country, usually their home or nearby neighbouring country. Thus, there are more UK international students studying in TNE programmes outside the UK than in UK based HEIs/providers. For the large sending countries like the UK and Australia, this trend is expected to increase thereby highlighting the importance of IPPM for sending TNE countries.

In terms of TNE host countries, a similar increase in enrolments in TNE is happening. For instance, in Mauritius, 40 per cent of all their local students are enrolled in some type of IPPM – either distance education, international branch campuses, franchise, or partnership programmes. In Dubai, about 50 per cent of total higher education enrolments are through IPPM, primarily international branch campuses. In countries with a long history of TNE such as Malaysia, Singapore and Hong Kong between ten and 20 per cent of higher education provision is through IPPM.

However, the research and monitoring of these new TNE developments is simply not keeping pace with the accelerated rate of change. While opinion and anecdotal evidence reveal the benefits and risks attached to this burgeoning field, there continues to be a significant lack of research, robust data and information regarding TNE and the different IPPM modes of delivery. This is especially true in terms of host country TNE activity. Institutions and national agencies in major sending countries, such as the UK, Australia, Germany and France seem to be more active in tracking their TNE activities and producing data for use in their home context. Host countries, in contrast, especially those with developing higher education systems, are lagging behind in obtaining solid information on stand-alone TNE institutions, such as branch campuses as well as franchises and distance education arrangements, partnership programmes between local and foreign institutions, including twinning and joint/double/multiple degree programmes.

Furthermore, without information from monitoring of TNE trends and the collection of TNE data, there are limitations in terms of what kind of national enabling policies and regulatory frameworks countries can develop and implement. A 2016 British Council study entitled *The Shape of Global Higher Education: National Policies Framework for International Engagement* (Ilieva and Peak, 2016) did a comprehensive review of national level policies on different forms of international academic mobility (student, researcher, programme and provider) in 26 internationally engaged countries in all regions of the world. These countries are listed in Table 1.1. It is both interesting and revealing to analyse the difference in the strength of national policies for international student mobility versus international programme and provider mobility as illustrated in Table 1.1. Of the 26 countries reviewed, 89 per cent were strong in policies for international student mobility while only 66 per cent of the same countries were strong in policies for international programme and provider mobility.

Table 1.1: Comparison of percentage of countries with strong or weak national policies for international student mobility versus international programme and provider mobility

National policies	Strong (very strong and strong categories combined)	Weak (very weak and weak categories combined)
International student mobility (ISM)	89%	11%
International programme and provider mobility (IPPM)	66%	34%
26 countries included in the study: Australia, Botswana, Brazil, Chile, China, Colombia, Egypt, Ethiopia, Ghana, Germany, India, Indonesia, Kazakhstan, Kenya, Malaysia, Mexico, Nigeria, Pakistan, Philippines, Russia, South Africa, Thailand, Turkey, UK, USA, Vietnam.		

Source: Ilieva and Peak, 2016

Table 1.2: Comparison of percentage of sending and host countries with strong or weak national policies for IPPM

National policies for IPPM	Strong (very strong and strong categories combined)	Weak (very weak and weak categories combined)
Primarily sending countries	100%	0%
Both sending and host	100%	0%
Primarily host country	53%	47%

Source: Ilieva and Peak, 2016

Table 1.2 delves deeper into the policies for IPPM and compares the strength of policies of sending countries versus host countries. All four sending countries (Australia, UK, US and Germany) plus the three countries which were identified as both sending and host (China, India and Malaysia) were all rated strong in terms of having IPPM policies. This is in stark contrast to the 19 host countries where only 52 per cent were rated strong in IPPM policies.

Thus, in spite of the growth in the size, scope and importance of TNE provision, it is clear that a key issue which must be addressed is the development of policies and regulations in TNE host countries, especially those which are in the early stage of increasing TNE provision and using different IPPM modes.

1.4 Examining the different modes of international programme and provider mobility

As previously discussed there is confusion about the meaning of four generic terms describing international academic mobility but there is a further source of misunderstanding related to the naming and categorisation of the different IPPM modes. Four recent studies, which examined the different modes of IPPM, provide concrete evidence of the different interpretations and perceptions around labelling the diverse strategies used in TNE provision. Highlights of the findings from these four studies follow and point to the need for an improved structure and logic to categorise the modes of IPPM.

Review of national policies on international higher education (2013)

A British Council report, *The Shape of Things to Come 2: Evolution of Transnational Education* (McNamara, Knight and Fernandez-Cheung, 2013), examined core issues such as data, definitions, opportunities and impacts of TNE. Of particular importance is the opportunities matrix. This is essentially an analytical framework which uses a set of indicators to review three aspects of TNE: 1) the national policies and regulations which are in place in 25 countries from all regions of the world; 2) the potential market and 3) the existing academic mobility scene. The purpose of the matrix was to determine which countries are attractive for future TNE opportunities. A major challenge was the lack of hard data on TNE and wading through the plethora of different terms used to describe programme and provider mobity in order to undertake a comparative review. See Appendix A for a summary of the report findings.

TNE impacts on host country study (2014)

To date, the majority of research, discussion and debate on TNE have been from the sending country perspective. However, to find out the true impact of TNE on receiving/host countries it is important to get their opinions and understand their views. To that end, a major survey study was undertaken by the British Council and DAAD (McNamara and Knight, 2014) with collaboration from Australian International Education and in association with Campus France and

the Institute for Education. Customised surveys were sent to eight different target groups – TNE students, TNE faculty members, senior TNE institutional leaders, HE experts, government agencies, employees as well as non-TNE students and non-TNE faculty in ten active TNE countries in all regions of the world to get their feedback on TNE impacts. The analysis of the over 1,900 respondents yielded some fascinating and important results. It clearly demonstrated that TNE host countries believed there were academic, skills development, and social/cultural benefits to TNE.

Of interest is that at the national level, academic impacts in the form of increased 'access to higher education' and 'improvement in education quality' were seen as the top two benefits of TNE and are perceived as being more important than political, economic or skills benefits. In general, respondents believed that TNE is not providing different programmes to those offered locally which dispels the myth that TNE is offering specialised niche programmes not available in the host country. Furthermore, respondents believed that for the most part TNE programmes are responding to student interests more than the needs of the labour market. While these findings are clearly important, they are opinions only and there was very little empirical evidence to support the perceptions of these eight different respondent groups. This then led to a follow-up study also sponsored by the British Council and DAAD on TNE data collection and management in sending and host countries. For further information on the TNE impact study see Appendix B.

Transnational education data systems (2015)

The British Council/DAAD study *Transnational Education Data Systems: Awareness, Analysis, Action* (McNamara and Knight, 2015) focused on which TNE active countries had TNE data collection and management systems in place at national or sub-national level. After completing a brief review of more than 40 TNE active countries, in depth case studies were completed on 13 countries (three sending and ten host) as to the availability of TNE data and the types of TNE data collection systems in place. The results showed that very few host countries had robust data on TNE provision even though it represented a significant percentage of their higher education provision. The picture was different for three major sending countries – UK, Germany and Australia. Understandably each TNE system was customised and used different categories or terms to denote a TNE mode. It is important to note that the TNE data from the sending country did not align with the TNE data from the host country. Some countries used standalone TNE data collecting systems, and other countries integrated the TNE data into overall HE data.

Overall, the study confirmed that TNE active countries use different terminology; target different institutions; use different template structures and formats and capture different information about TNE programmes and providers. In many cases the data templates don't allow for differentiation of TNE from local (non-TNE) programmes or simply describe TNE providers as private providers with no indication whether they were offering local or international programmes.

The study found that there are diverse rationales for collecting TNE data. A major driver relates to the regulatory functions associated with registration, accreditation, and, to a lesser extent, quality assurance, of TNE providers and programmes. Even countries at an early stage of collecting TNE data appear to be motivated to collect TNE data by the need for developing and implementing regulatory processes. But, motivations for TNE data collection can also be framed within a policy development and decision making context. Examples of national policy areas influenced by the existence of TNE data include: accreditation and quality assurance, recognition of foreign qualifications, visa and immigration, promoting access to higher education, and knowledge and innovation. The scale of TNE activity relative to domestic programmes appears to be an important factor in establishing data collection systems. In some cases, the reason for collecting TNE data is simply explained as being a natural extension of the data collection on higher education. This then leads to the question as to whether TNE data is integrated into an overall higher education database and therefore sometimes difficult to extract or whether it is collected as standalone disaggregated data thereby being much easier to access and analyse.

The key challenge identified in collecting TNE data is the categorisation and definitions used to label different types of TNE modes and partnerships. Consultation with HE agencies indicated that while most countries recognise this problem, to date there has not been any kind of solution provided. A clear finding from this study was the need to develop a common TNE classification framework and guidelines for TNE data collection. See Appendix C for further information on this study.

Review of TNE research 2000–15

Compared to student mobility, international programme and provider mobility is a fairly recent phenomenon, albeit one that is exponentially increasing in size and scope. A recent study (Knight and Liu, 2017) undertook a systematic review of the published scholarly and applied research on TNE since 2000. Published journal articles, book chapters, reports and dissertations on TNE were reviewed and coded as to the type/mode of TNE provision, date of publication, research methodology, major theme, geographic

focus, and source of reference. The review focused on various modes of programme and provider mobility and thus did not address student mobility *per se*. Research on distance education was not included.

The results showed that international branch campuses (IBCs) at 29 per cent were the most researched mode followed in descending order by partnership programmes (involving collaboration between host and sending countries such as twinning and joint/double degree programme) at 16 per cent, then joint universities (bi-national, co-founded and co-developed institutions) at six per cent, then franchise programmes (export programmes from sending countries) at five per cent. It is important to note that research which dealt with multi-TNE modes or generic TNE themes represented 43 per cent of the published research. When geographic focus is factored in for IBCs it shows that research from the viewpoint of the sending countries was most prevalent and that research from the host country perspective significantly under-represented. It is also worth noting the low number of PhD dissertations on TNE, compared to the multitude of studies on international student mobility.

Together these four studies demonstrate that while TNE provision is increasing in importance and impact there is still confusion as to what different modes of IPPM actually involve, how they are labelled, and how to distinguish one mode from another. Thus evidence from two reviews of national policies for TNE provision, an analysis of TNE impacts at national and institutional level, and a review of the literature all point to a state of confusion about what TNE means and includes.

*This section is adapted from Knight, J (2017) 'Transnational Education Terminology Chaos: Working Towards a Common TNE Classification Framework' from International Education Handbook, DUZ Verlags-und Medienhaus GmbH

1.5 Need for a Common TNE Classification Framework of IPPM and TNE data collection guidelines

TNE terminology chaos

As has been discussed there are many terms used in polices, practice and research to describe the same IPPM mode. A revealing example is the international joint venture universities in China which are commonly (and mistakenly) labelled as international branch campuses. A close look at the Chinese regulations for foreign providers operating in China shows that a Chinese partner is mandatory for all TNE provision. As a result there are growing numbers of jointly developed independent Chinese universities which are new legal entities and do not act as an international branch campus of a foreign provider. They are commonly referred to as joint venture or collaborative universities, but, many international articles and reports continue to refer to them as an international branch campus of a foreign provider. There are instances in China where in a new joint venture university, the Chinese partner tends to be a silent partner but in more recent years this is increasingly not the case. This is but one example of the confusion in labelling TNE activities.

The second most problematic term seems to be double/ joint degree programmes. The rising popularity of these programmes means that it has become a misunderstood and misused term and now encompasses twinning, franchise, study abroad, cotutelle and a multitude of other programmes as demonstrated in the literature and practice. Another important study (Kosmutsky and Putty, 2015) which reviews the literature of international higher education also addresses the confusion of terms both at the generic level – transnational, cross-border, borderless and offshore – and at the level of the different types of IPPM modes.

With one term being used to describe very different types of TNE initiatives and many terms being used to identify one TNE mode the term 'TNE terminology chaos' is most apt. Without question, there is much confusion within and among countries about what different types or modes of TNE actually mean and involve. A recent report, *Transnational Education Transnational education in the European context-provision, approaches, and policies* (ACA, 2012), reports on TNE activity in several European countries. For some countries such as Spain and Germany, the term offshore education is used while for other countries, such as the Netherlands and the UK, the term transnational education is used. There does not seem to be an explanation of the conceptual or programmatic differences in these descriptors. Another report *Delivering education across borders in the European Union* (Brandenburg et al., 2012), uses a set of definitions for cross-border higher education that differ from the ACA report. This is not surprising but is indicative of the murky waters of TNE terminology.

Implications of TNE and IPPM terminology chaos

The implications of TNE and IPPM terminology chaos are many and significant. While it is important that each country uses terms that fit into the domestic higher education landscape, it is equally important that there is a shared understanding and use of TNE terms across countries. The lack of a common understanding of the terms raises serious issues related to appropriate quality assurance processes, qualification recognition procedures, registration of new providers or programmes, completion rates and the collection of programme-level information and enrolment data.

The inconsistency in the use of terms also makes comparisons of TNE provision, data, policies and research within and across countries challenging and often inconclusive. It also means that generalisation of research findings is difficult and the analysis of internationally comparable TNE data is questionable.

Thus, the confusion and misunderstandings in the TNE terminology have been clearly documented in the review of national TNE policies and regulations, country level TNE data and TNE data collecting systems, an informal review of university websites which promote TNE programmes, and a review of the TNE literature. All of this points to a challenge that requires the attention of the many higher education and TNE actors and stakeholders. Is it possible to develop a common set of TNE terms which allows consistency and clarity of use within and across countries but which respects the local context, linguistic differences and regulatory environment? Furthermore, is it possible to develop a framework to differentiate the various modes of IPPM by using a set of common criteria to describe each mode and distinguish one mode from another? The proposed common *TNE Classification Framework for IPPM* as discussed in Chapter Two is an important step towards developing such a practical and analytical framework.

In spite of the fact that TNE is increasing in scope and scale, there is a significant lack of reliable information regarding the nature and extent of TNE provision in terms of enrolments and the characteristics of IPPM modes. As already discussed, highly active sending TNE countries have developed TNE policies and regulatory processes and databases on all TNE activity under their jurisdiction. However, it is fair to say that the majority of TNE host countries, especially the ones who have only recently become more TNE active, do not have appropriate registration of foreign programmes or TNE data collection systems in place. This means that there is insufficient information to effectively include TNE provision in their higher education planning processes, policies, and regulatory functions. The proposed TNE data collection guidelines, discussed in Chapter Three, provide information for national higher education agencies in both host and sending countries on how to establish a national TNE data collection system. The guidelines are aligned with the classification framework and provide information on how to establish a basic TNE data collection template plus more focused IPPM modules in order for countries to customise TNE databases to their own needs, priorities and level of TNE provision.

It should be noted that both the Common TNE Classification Framework and data collection guidelines are meant to support both host and sending countries in their IPPM activities. There is no intention for the framework and guidelines to be imposed in a top-down manner on countries, instead they are designed to help national higher education agencies and institutions build a foundation to assist with the development of relevant policies and practices to guide TNE provision and have greater clarity on what is involved with each IPPM mode of delivery.

2. Common TNE Classification Framework for IPPM

2.1 Purpose and outline of chapter

The purpose of this chapter of the report is to examine the principles, structure and use of the proposed Common TNE Classification Framework for IPPM. The classification framework is designed for different higher education actors and stakeholders at different levels. These include higher education policymakers at national, regional and international levels, quality assurance agencies, national governmental and non-governmental higher education organisations, higher education institutions and providers, transnational education experts and scholars, and others who have a vested interest in ensuring that the different modes of programme and provider mobility are carefully monitored, quality assured, and contribute in positive ways to the needs and interests of both host and sending countries.

The outline of this chapter is as follows. The first section discusses why a Common TNE Classification Framework for International Programme and Provider Mobility is necessary and the intended uses and users of the framework. The next section outlines the meaning, objectives and assumptions underpinning the framework. The organisational principles of the framework are then examined followed by a discussion of how the principles inform the structure of the framework. The framework distinguishes between independent and collaborative TNE provision and the six distinct modes or categories of IPPM are discussed in relation to the three key characteristics or criteria applied to each mode – who awards the qualification/s, who has primary responsibility for the curriculum, who has primary responsibility for external quality assurance. Each IPPM mode is described and examples from both host and sending countries are provided. The final part looks in more detail at how the framework provides information for national policymakers and aligns to the TNE data collection guidelines discussed in Chapter Three.

2.2 Why a classification framework is necessary

As discussed in Chapter One, international programme and provider mobility is growing in scale, scope and importance. With this unprecedented expansion of TNE provision there is mass confusion about what kind of international academic mobility is part of TNE, what are the different modes of delivery, and how these modes can be distinguished from one another so that appropriate policies and regulatory frameworks are established. The terminology chaos for TNE is legendary. Different terms are used for the same activity and the same TNE activity is described with a diversity of terms. The classification framework is a step towards addressing this confusion and bringing some clarity to the diversity of TNE activities which are taking place in sending and host countries around the world.

The primary intended users of the classification framework include national or system level higher education agencies and government departments, quality assurance agencies and other professional and non-governmental organisations and agencies active in IPPM. Secondary users will be related national level governmental and non-governmental organisations such as immigration departments which are responsible for visa issues and trade and industry departments which may be involved in the registration of TNE providers entering a host country. Of course, higher education institutions and providers will be users of the framework as they establish, operationalise, and monitor the quality and enrolments of IPPM. The classification framework will be important as they determine the type of collaborative relationships with partner institutions and the data collection guidelines will help HEIs decide what information they need for institutional use and what data is necessary to respond to national level requests.

There is no doubt that international organisations such as UNESCO, OECD and other agencies that manage international databases on HE will need a framework to begin to collect IPPM data. To date these types of organisation only collect information on international student mobility and foreign student enrolments; but in time, with the growth in the importance and scale of IPPM, information will need to be collected on the types of IPPM and enrolments. For this kind of international data collection to occur and be useful there needs to be a common IPPM classification framework in place. This will allow trends and enrolments in programme and provider mobility to be monitored in the same way that student mobility and international student data and trends are monitored.

2.3 Meaning, objectives and assumptions of the classification framework

Meaning

To better understand the meaning and intentions of the Common TNE Classification Framework for IPPM each major concept is explained. *Common* indicates that it is relevant to and used by both host and sending TNE countries/providers around the world. *TNE* is defined succinctly as 'the mobility of higher education programmes and institutions/providers across international borders'. *Classification* refers to the categorisation of different modes or types of IPPM and *Framework* indicates that there is a logic or analytical frame used to differentiate between different types of programme and provider mobility. Overall, the framework introduces some structure and logic to how different types of IPPM are described and differentiated from one another.

Objectives and uses of the classification framework

Given the diversity of potential users for the classification framework, it is important to be clear about the objectives. The main objectives are:

- To provide some clarity and common interpretations of the different modes and categories of IPPM. This requires the framework to be robust enough to ensure that the characteristics of each mode are clearly defined and distinct from other modes, but at the same time flexible enough to reflect the realities and different contexts of more than 100 countries involved in TNE.
- To provide a foundation to help develop and systematize IPPM data collection and management within and across countries through a common understanding of terms.
- To allow cross-country comparisons on IPPM and ensure that the comparative analysis is regularised and reliable by using common descriptions of the primary modes of IPPM.
- To track national, regional and international trends and developments of IPPM through use of a common interpretation and use of TNE terms.
- To help distinguish and categorise the different modes of TNE provision and to highlight the differences between international programme and provider mobility and international student mobility.

Assumptions

The development of the framework is based on a number of key assumptions and two fundamental organising principles. The following assumptions guide the development and use of the framework.

- The framework addresses programme and provider mobility only. It does not categorise or include the major types of international student mobility (ISM) as discussed in Chapter One. In short, the framework focuses on categorising the different modes of programmes and providers moving across international borders.
- The framework is intended to help countries and HEIs build a foundation of common terms and understanding of IPPM. It is not intended to be a top-down imposed set of definitions but instead a set of criteria and descriptions that help to clarify what is involved with each IPPM mode and to help differentiate one IPPM mode from another.
- It is applicable to both host and sending country HEIs/providers. Host countries are defined as those countries who are recipients of the IPPM, while sending countries are those who are providing the academic programmes in the host country. While the framework is probably of greatest benefit to early TNE host countries to help them develop appropriate policies and regulations, it has been deliberately designed to be applicable to both host and sending countries. This is of fundamental importance as host and sending countries need to have a common interpretation and lexicon of IPPM terms in order to understand TNE provision and negotiate the terms of both independent and collaborative IPPM.
- One of the major uses of the framework is for developing national TNE policies and regulations and for collecting relevant data on the modes and enrolments of IPPM. Thus the framework is relevant to national/system level higher education government and non-government departments and agencies with a mandate related to TNE. At the same time, the classification framework is relevant to individual HEIs and providers but focuses more on policy and data uses at the institutional level rather than for operationalisation purposes.
- The framework is designed for both early stage emerging TNE countries as well as active mature TNE countries. In terms of policy development and the collection of data, it will likely be most useful to emerging TNE countries who are at the early stages of being actively involved in IPPM. The more mature TNE countries who already have registration, quality assurance, and other relevant policies in place may find the classification helpful in revising or tweaking their policies and data collection systems and also comparing their trends and TNE enrolment patterns with other countries.
- Academic oversight, quality monitoring, and external quality assurance are important processes in TNE provision. Academic oversight and quality monitoring are considered the responsibilities of the HEIs/providers responsible for designing and delivering the academic programmes. External quality assurance refers to the assessments done by national level quality assurance agencies of the respective host and sending countries.
- Local context is of fundamental importance for TNE in general, but especially for country level IPPM data collection systems. The adage that one size/system does not fit all applies. The framework does not offer rigid standardised definitions of each IPPM mode. The framework respects local contextual differences by being generic enough to accommodate different country approaches to IPPM but is rigorous enough to differentiate between IPPM modes.

2.4 Two organising principles of the classification framework

Two organisational principles are fundamental to the framework. The first principle addresses the nature of the relationship between a sending HEI/provider and the local host HEI/provider and the second principle relates to the mode of delivery at both the programme and provider level.

First principle – independent versus collaborative TNE provision

The first principle organises the framework into two vertical columns and makes the distinction between TNE as a standalone or *independent activity* by the sending country HEI/provider *and* a *collaborative effort* between host and sending HEIs/providers.

The distinction between academic *collaborative* TNE provision and *independent* TNE provision is central to the framework. It has important implications for both host country and sending country regulations and policies related to registration, external quality assurance, awarding of qualifications, degree recognition, responsibility for the curriculum, and data management.

For example, when a host country is doing a national review of TNE provision it would be useful to know the percentage of TNE programmes and student enrolments through a collaborative partnership between local and sending HEIs/providers versus the percentage of TNE programmes and students enrolled in independent and often described as foreign imported programmes.

The collaborative TNE programmes offer a number of benefits such as 1) opportunities for joint curriculum development and delivery to ensure that programmes are relevant to the local context, 2) possibilities for joint research on locally relevant topics, and 3) the potential for capacity building and internationalisation of both the local host and foreign sending institutions. On the other hand, independent TNE provision normally provides a curriculum designed, delivered and quality assured according to the regulations and standards of the sending country and the qualification offered is from the foreign provider. For many students in host countries having a foreign based curriculum, pedagogy and qualification is the most attractive and sought after feature of TNE because it is more affordable than travelling abroad yet offers a foreign curriculum and pedagogy.

Many small countries depend heavily on TNE to provide increased opportunities for higher education and a wider diversity of programme offer because the local higher education infrastructure is not able to meet the demand for full-time or part-time tertiary education. Thus, it is important for these host countries to know what percentage of higher education students are studying in local HEI provision versus what percentage are studying in TNE programmes. Furthermore, it is critical to know whether the TNE programmes are offered through collaborative relationships such as joint/double degree programmes or through standalone foreign providers such as franchise arrangements, international branch campuses or self-study distance education programmes because host country policies for registration, approval, and quality assurance and qualification recognition may differ for independent versus collaborative TNE programmes. This applies as well to the policies and regulations for independent versus collaborative TNE provision of sending countries.

As noted above, the classification framework is primarily designed to assist national level policymakers and regulators to track TNE movements in and out of their country and to develop appropriate policies and regulations for programme and provider mobility. Yet, the framework also has to make sense at the institutional level as well. While HEIs/providers will use the framework for institutional level policies, they may also have an 'operational' versus 'policy lens' to interpret the framework. For example, an IBC is designated as an independent TNE activity given that the sending country has primary responsibility for the curricular design and external quality assurance of the programme, and awards the qualification. This does not exclude the reality that the IBC can also have academic relationships with local host country HEIs at an operational level. However, the key criteria of an independent provision as outlined in Table 2.1 still apply.

Table 2.1: Independent versus collaborative programme and provider mobility

Two major approaches to TNE provision	
Independent	**Collaborative**
The foreign sending HEI/provider is primarily responsible for the design, delivery and external quality assurance of their academic programmes and qualifications being offered in another country.	A foreign sending HEI/provider and host country HEI/provider work together on the design, delivery and/or external quality assurance of the academic programmes.

Table 2.2: Six categories of modes of programme and provider mobility

Row	Independent	Collaborative
1	Franchise programmes	Partnership programmes
2	International branch campus	Joint universities/colleges
3	Self-study distance education	Distance education with local academic partner

Second organising principle – six categories/modes of IPPM

The second principle relates to six distinct categories or modes of programme and provider mobility as identified on the three horizontal rows of the framework. The six categories represent different modes of international programme and provider delivery and are carefully aligned with the independent or collaborative approaches.

- Row one differentiates *franchise programmes/arrangements* which are primarily exported by a sending country from *partnership programmes* which are based on collaboration between host and sending country HEIs/providers.
- The second row distinguishes between an *international branch campus* which is essentially a satellite operation of a parent HEI in the sending country from a *joint university* which is co-founded or co-developed by both sending and host countries HEIs.
- The third row refers to distance education as a separate TNE mode and distinguishes between *self-study distance education programmes* (which are provided solely by the foreign sending HEI/provider and has no teaching or learning support provided locally), and *distance education with a local academic partner.* The continuous growth and dynamic changes in the use of distance education technologies demands that the framework recognises distance/online education as a separate TNE category. However, distance education is also a form of teaching and learning through face-to-face, online or blended approaches which are applicable to all modes of programme and provider mobility. The differentiation of distance education as a mode of IPPM or as a pedagogy used in all forms of IPPM is discussed further in the section 2.5 where the two forms of distance education are examined in greater detail. For understanding and using the framework, distance education is treated as a separate category or mode of distance education, for example open universities.

Table 2.3: Common TNE Classification Framework for IPPM

Common TNE Classification Framework for IPPM	
Two major approaches to TNE provision – independent and collaborative	
Independent TNE provision The foreign sending HEI/provider is primarily responsible for the design, delivery and external quality assurance of their academic programmes and qualifications being offered in another country.	**Collaborative TNE provision** A foreign sending HEI/provider and host country HEI/provider work together on the design, delivery and/or external quality assurance of the academic programmes.
Six categories of IPPM	
1. Franchise programmes Description: The foreign sending HEI/provider has primary responsibility for the design, delivery and external quality assurance of academic programmes offered in host country. The qualification is awarded by a sending HEI. Face-to-face, distance and blended education can be used. ***Commonly used terms:*** *import/export, validation, foreign, non-local, international private programmes*	**4. Partnership programmes** Description: Academic programmes in host country/ies are jointly designed, delivered and quality assured through collaboration between host and sending country partners. The qualification(s) can be awarded by either or both host and sending country HEIs in the form of single, joint or double/multiple degrees. Face-to-face, distance and blended education can be used. ***Commonly used terms:*** *joint/double/multiple degrees, twinning programmes*
2. International branch campus Description: A satellite bricks and mortar campus established by foreign sending HEI in host country. Sending parent institution provides curriculum, external quality assurance, and awards the qualification. Face-to-face, distance and blended education can be used. ***Commonly used terms:*** *satellite, private international, offshore campus, portal campus*	**5. Joint university** Description: An HEI co-founded and established in host country involving both local and foreign sending HEI/providers who collaborate on academic programme development and delivery. Qualifications can be awarded by either or both host and sending country HEIs. Face-to-face, distance and blended education can be used. ***Commonly used terms:*** *co-developed, bi-national, co-founded, multinational, joint ventures universities*
3. Self-study distance education Description: Foreign sending distance education provider offers academic programmes directly to host country students. No local academic support available. Qualification, curriculum and external quality assurance offered by foreign sending HEI. ***Commonly used terms:*** *fully online education, open university, MOOCs, pure distance education*	**6. Distance education with local academic partner** Description: A foreign distance education HEI/provider offers programmes to host country students in collaboration with a local academic partner. Curriculum can be jointly developed and the qualification awarded by foreign HEI or by both partners. External quality assurance provided by foreign sending HEI/provider or both partners. ***Commonly used terms:*** *online or distance education with reference to local academic partner*

(Knight, 2017)

2.5 The structure of the Common TNE Classification Framework for IPPM

Table 2.3 integrates the two organising principles into one framework and provides a short description and set of commonly used terms for each of the six categories.

The framework provides a brief description of each IPPM category/mode. They are intentionally not called definitions so as to respect local context and avoid the tendency to standardise the meaning of each mode of IPPM. That being said, it is critical to have a robust description of each of the six modes of IPPM in order to have distinctive features to distinguish one mode from the other. Yet, it is equally important to acknowledge the unique features of each national policy and regulatory context. Therefore the framework delineates and describes six different modes or categories of IPPM. Given the diversity of national contexts other commonly used terms are included. These commonly used terms are taken directly from host and sending country IPPM policies and demonstrate the importance of having a robust description of each category even if a country prefers to use a different term or the translation into English results in a unique term.

To ensure that the differences (or similarities) among the six categories are clear and understood, there are three key criteria or questions which are used to help to delineate and differentiate the characteristics of each mode or category. The three fundamental questions are:

- Who awards the qualification?
- Who has primary responsibility for the academic curriculum?
- Who has primary responsibility for external quality assurance?

While there are always exceptions, the overall logic is that for *independent TNE provision* the sending country has primary responsibility for the curriculum, the qualification awarded, and external quality assurance. While for *collaborative TNE provision* both the host and sending countries share or have joint responsibility for one or all of these three aspects of TNE programmes. In Chapter Three of this report these three questions are also used to determine the classification of each mode for the purposes of collecting, analysing and managing IPPM information.

2.6 Elaboration of the six categories of IPPM

This section provides a deeper understanding of each of the six mode categories and discusses some of the different terms used by countries around the world. It is worth repeating that the six mode categories need to be robust enough to distinguish one from another but also flexible enough to accommodate the different contexts, regulatory frameworks and linguistic orientations of TNE active countries. The framework is not intended to be a top-down imposed structure of definitions, rather it is help countries gain clarity on how they interpret and use the terms related to IPPM activity in their local context.

Core elements/factors

As noted in the previous section there are three core criteria or elements which are used to define and differentiate one mode from another. The three elements or questions will be delineated for each of the six categories:

1. franchise programmes
2. partnership programmes
3. international branch campuses
4. joint universities
5. self-study distance education and;
6. distance education with local academic partner.

Other criteria and elements were given serious consideration (see McNamara and Knight, 2015) but eventually eliminated as they were not strong enough to distinguish one category from another. These additional but excluded criteria focused on who delivers or teaches the programme, who is responsible for internal quality assurance, who applies for approval and registration. After extensive consultation and pilot testing of the Common TNE Framework for IPPM in several TNE active countries, it was determined that they were not robust enough to distinguish one category from another. However, these elements did provide important information on the nature of the TNE activity and thus are included as thematic issues that countries may want to use for IPPM data collection and management, as discussed in Chapter Three.

Mode 1: Franchise programmes

A franchise arrangement can be described as a programme which is offered by a foreign sending HEI to students in the host country. The foreign sending HEI/provider has primary responsibility for the curriculum design, external quality assurance of academic programmes and awards the qualification. In some cases, a local agent, provider or HEI may be involved by providing space and administrative support services and even some teaching, but the sending HEI/provider maintains ultimate responsibility for the curriculum, external quality assurance and awarding of the qualification. In a franchise programme face-to-face, distance and/or blended learning pedagogies can be used. See Table 2.4.

Table 2.4: Application of three criteria to franchise programmes

Franchise programme	Description	Notes
Who awards the qualification?	Sending HEI/ provider	
Who has primary responsibility for external quality assurance?	Sending country quality assurance and accreditation agency	Local quality assurance and accreditation may also be necessary if host country regulations require it.
Who has primary responsibility for design of the academic programme/ curriculum?	Sending HEI/ provider	

Franchise programmes will continue to evolve. While there is more growth in the partnership programme category of IPPM than in franchise programmes, one can expect more innovation and fluidity in franchise arrangements resulting in the development of new enabling policies and regulatory frameworks by both host and sending countries.

However, there is one trend which may eventually result in a significant decrease in the scale of franchise programmes. This trend is the rapid and unprecedented increase in the offering of double or multiple degrees for any kind of academic programme which involves two or more international partners. Students are keen to register in a double degree programme as it means receiving two or more qualifications from two or more different universities while essentially completing the normal work load for one degree. Institutions support double degree programmes as each partner claims the students as graduates of their institution which increases their graduation rates. Thus, we might see sending country HEI/providers offering franchise programmes linking up with host country HEIs to offer double degrees. If a double degree was to be offered, there is an assumption that there would be joint curriculum design and this would then mean it was a partnership programme not a franchise programme which is independent of any local academic collaboration and only the foreign sending country awards the qualification.

This trend will be discussed in more detail in the section on partnership programmes but suffice to say that while students are very interested in franchise programmes because they can receive a foreign curriculum, programme and qualification without leaving their country, the idea of receiving both a local and a foreign degree from a partnership programme, again without having to leave home, may lessen the long-term interest in franchise programmes which by definition only offer a single foreign qualification.

Mode 2: International branch campus (IBC)

An international branch campus is described as a satellite bricks and mortar campus established by foreign sending HEI in a host country. The sending country parent institution provides the curriculum, ensures external quality assurance, and awards the qualification. In an international branch campus, face-to-face, distance and/or blended learning pedagogies can be used. This is a basic 'bare bones' description that can be applied to the majority of different models of IBCs.

However, there are a myriad of definitions of an international branch campus because they are customised to the local host or sending country context, especially in terms of ownership, registration and quality assurance policies and regulations. Thus, other terms for IBCs from a sending country perspective include 'satellite or offshore' campuses. While host countries commonly call them 'foreign private institutions' that normally require a host country approval through a registration and licensing procedure. See Table 2.5.

Table 2.5: Application of three criteria to international branch campus

International branch campus	Description	Notes
Who awards the qualification?	Sending HEI/provider	
Who has primary responsibility for external quality assurance?	Sending country	Local quality assurance and accreditation may also be necessary if host country regulations require it.
Who has primary responsibility for design of the academic programme/ curriculum?	Sending HEI/provider	

Examples of international branch campuses where the foreign parent sending HEI is responsible for designing and overseeing the curriculum, ensuring external quality assurance and accreditation, and awarding the qualification are University of Nottingham – Malaysia Campus, Manipal University – Dubai, Texas A&M University at Qatar, Stockholm School of Business in Russia and the Technical University Munich Campus in Singapore to name a few. It should be noted that the formal names of these IBCs identify the location. This is usually demanded by the host country so that there is a differentiation from the formal name of the parent university located in the sending country and its international branch campus located in a host country.

For national policy and regulatory purposes, it is necessary that each country has a description of an international branch campus which suits the local context but which aligns with the key characteristics of the mode as set out in the classification framework. This allows cross-country comparisons and international tracking of enrolment patterns, trends, and policy development especially in terms of quality assurance and qualifications for IBCs.

Mode 3: Self-study distance education

Self-study distance education as a mode of IPPM involves a foreign sending distance education HEI/provider that offers academic programmes directly to host country students. Self-study is a fundamental part of the description as it means that no local academic partner is involved in designing the curriculum, ensuring quality and accreditation of programmes, or involved in the awarding of qualifications. These are the responsibilities of the foreign distance education HIE/provider. Self-study distance education is often difficult to track by the host country as the student enrols directly with the foreign distance education provider. However, in some countries, higher education authorities require pure distance education providers to ensure that students register at a host country examination centre so that the enrolments of students can be tracked.

There are many terms used to describe distance education. They include: online education, distributed learning, open distance learning, virtual education, and a more traditional term like correspondence education plus a contemporary term like massive open online courses (MOOCs) which is growing in popularity. For the purposes of this report, distance education is the preferred term. See Table 2.6.

Table 2.6: Application of three criteria to self-study distance education

Self-study distance education	Description
Who awards the qualification?	Sending HEI/provider
Who has primary responsibility for external quality assurance?	Sending country
Who has primary responsibility for design of the academic programme/ curriculum?	Sending HEI/provider

There is a great deal of debate as to whether distance education should be included as a distinct mode category in the classification framework or whether it should be seen as a form of pedagogy common to all modes of IPPM. In reality, this is not an either/or question. Distance education is used as a form of pedagogy used in various IPPM modes as described in the framework. But, at the same time, there are distance education providers such as open universities which rely primarily on distance education as their means of delivery. Thus, these types of distance education providers need to be recognised as a separate mode or category of TNE provision. Given the growth in the enrolments in open universities in most regions of the world, and that they are the source of innovation and providing access to groups of students who previously did not have opportunities for higher education it is important to have distance education classified as a distinct mode of IPPM.

Clearly there are cases when foreign distance education providers do collaborate with local providers or have locally available facilities for academic support and teaching. These types of situations would not be classified as independent self-study distance education but would be included in the category which includes distance education with local academic partners.

Examples of distance education providers that offer self-study courses internationally include The Open University (OU) in the UK, the University in South Africa (UNISA), Athabasca University in Canada and the Open University of Tanzania. Major providers who are offering self-study distance education through MOOCs include companies like COURSERA, EdX, Udacity and FutureLearn as well as individual HEIs.

There continue to be major issues related to self-study distance education in terms of qualifications and quality assurance. For instance, providers of MOOCs who are often well-known reputable universities, are not offering their own qualifications but involve third party entities that translate and certify the MOOCs into credits which can then be accepted as prior learning credits in terms of advanced admission to local higher education institutions. This is an evolving area and rather messy but does deserve further work and investigation.

Mode 4: Partnership programmes

Partnership programmes are described as academic programmes which are jointly designed, delivered and/or externally quality assured through collaboration between partner HEIs/providers in host and sending countries. In these types of programmes the qualifications can be awarded by one, both or multiple partner HEIs. Partnership programmes can include face-to-face, distance and/or blended learning pedagogies.

Commonly used terms for the types of collaborative arrangements in the partnership programme mode are single, joint, double, multiple or twinning programmes. Again, the policies and regulations of the partner countries dictate the nature of the partnership programme and how many qualifications are offered. There are countries where a joint degree is illegal and thus either single or double/multiple qualifications are awarded depending on the number of partners. Conversely, there are countries which are starting to make double/multiple degrees illegal because of the double counting of the same workload/credits for two or more degrees.

Table 2.7: Application of three criteria to partnership programmes

Partnership programmes	Single degree programme	Joint degree programme	Double/multiple degree programme
Who awards the qualification?	Either host or sending partner	Both partners on a single diploma	Each partner issues their own separate diploma
Who has primary responsibility for external quality assurance?	Either host or sending partner	Both partners from respective quality assurance and accreditation agency	All partners from respective quality assurance and accreditation agency
Who has primary responsibility for design of the academic programme/curriculum?	Either host or sending partner	Both partners	All partners

Partnership programmes represent the majority of TNE activity in terms of actual numbers of programmes (perhaps not enrolments) and has undergone the greatest change in terms of the number of qualifications offered, the increasing use of online education, the structure of the programme, and respective responsibilities of the partner institutions. There has been an exponential increase in the number of joint, double and multiple degree programmes and the models of these programmes differ within and between countries. While partnership programmes can be labelled as the fastest growing category, it can also be described as the 'messiest category' given the multiple interpretations and descriptions of double and multiple degree and twinning programmes. See Table 2.7.

Mode 5: Joint university

Joint universities are a rather recent and quite innovative development.

A joint university is described as a HEI co-founded and established in host country involving both local and foreign sending HEI/providers who collaborate on academic programme development and delivery. Qualifications can be awarded by either or both host and sending country HEIs. A joint university can include face-to-face, distance and blended learning approaches.

Table 2.8: Application of three criteria to joint universities

Joint university	Single degree	Joint degree	Double/multiple degree
Who awards the qualification?	Host country joint university	New joint university and foreign partner HEI on one diploma	All partners, including the new joint university issue their own separate diploma
Who has primary responsibility for external quality assurance?	Host country	Both partners from respective quality assurance and accreditation agency	All partners from respective quality assurance and accreditation agency
Who has primary responsibility for design of the academic programme/curriculum?	New host country joint university	New host country joint university and partner HEI	All partners

Other terms used by countries to label these new joint universities are bi-national, multi-national, international, joint venture, co-founded universities.

A joint university is a newly established entity in the host country. It is not an international branch campus of a sending HEI/provider. The newly created joint university can be a public or private university in the host country and is guided and regulated by host country policies and regulations. In terms of programme offerings the new joint university has several options. It can develop and offer its own academic programmes and qualifications and it can also offer the programmes and qualifications of its founding local and foreign partners either through joint or double degree programme arrangements. Quality assurance at the programme level is normally done by the host country quality assurance and accreditation agency and by all partners for joint, double, multiple degree programmes. This arrangement can be quite burdensome administratively as there could be quality audits by all partner institutions and thus new arrangements may emerge for external quality assurance for joint university programmes.

Examples of joint universities include the multiple bi-national universities established by Germany. Each model is different but they usually include a consortium of German universities who help to establish a new joint university in the host country. They include the University in Cairo, the German Jordanian University, German-Kazakh University, the Turkish-German University and the Vietnamese German University among others. The Singapore University of Technology and Design is another example as it was co-founded and developed by three universities: the Singapore Management University, the Massachusetts Institute of Technology and Zhejiang University in China. In China, there are a number of newly established joint universities such as the University of Xian Jiaotong–Liverpool University. This is a legally registered Chinese University co-founded by Xian Jiaotong University and Liverpool University. It is not an international branch campus of Liverpool University which it is often mistakenly believed to be. See Table 2.8.

Mode 6: Distance education with a local academic partner

Distance education with a local academic partner is not a popular mode of IPPM but can be described as a foreign distance education HEI/provider offering programmes to host country students in partnership with a local academic HEI partner. The curriculum can be jointly developed and the qualification awarded by a foreign HEI or by both partners. External quality assurance is provided by the foreign sending HEI/provider or both partners.

Table 2.9: Application of three criteria to distance education with local academic partner

Distance education with local partner	Description	Notes
Who awards the qualification?	Sending distance education provider	In some cases, it could be a double degree by distance education provider and local partner
Who has primary responsibility for external quality assurance?	Sending distance education provider	
Who has primary responsibility for design of the academic programme/curriculum?	Sending country in collaboration with host country partners	

In general, this type of collaboration involves the local partner offering some face-to-face tutorial support, or access to a local host country HEI library, laboratory and counselling services. A more recent trend is that distance education providers are building brick and mortar campuses and offering students the choice of distance education courses or face-to-face courses. This is not the same as blended learning where both face-to-face and distance are offered in the same course. An example of this kind of arrangement is the Arab Open University in Oman.

The African Virtual University (AVU), which is located in Kenya, is an innovative experiment involving a network of over 50 academic partners in more than 25 countries in Africa who collaborate with AVU. AVU develops the curriculum with specialists and offers open access to all of its curriculum which can then be adopted or adapted for use by the academic partner country. See Table 2.9.

2.7 Use of classification framework for policy development and data collection systems

It is worth repeating that the purpose of the Common TNE Classification Framework for IPPM is to develop a common understanding of terms and categories within and between countries. For the framework to be useful, it must be robust enough to differentiate between each of the six primary categories of IPPM but flexible enough to acknowledge individual contexts and regulations of TNE active countries. Countries have different approaches and levels of IPPM involvement and must be able to use the framework to meet their particular needs and circumstances. Thus the framework is not a top-down imposed structure but rather a foundation and guideline to help countries have clarity on the different modes of TNE provision.

Consequently, the use of the common TNE framework for policy development and data collection will vary from country to country, depending on the prevalent IPPM modes, as well as how the data will be used for planning, policy analysis and development of regulatory processes. The use of the Common TNE Classification Framework will vary, but not the actual content. Countries, especially host countries are at different stages in establishing TNE data collection systems and will develop their capacity over several phases. To allow for an incremental approach to data collection, the framework must be flexible and have different entry points, but still have robust descriptions of the six modes.

How a country uses the framework and definitions will depend on a number of factors, such as 1) whether the majority of IPPM is collaborative or independent; 2) what is the most popular mode: franchise, international branch campus, self-study distance education, partnership programmes, joint

universities or distance education with a local academic partner, 3) how the information is used in the development of new regulations and policies, analysis of enrolment data, monitoring quality assurance, or discerning IPPM trends. The use of the classification framework aligns with the TNE data collection guidelines discussed in Chapter Three. There is a wide variety of information that can be collected to assist a host or sending country in analysing TNE provision trends and develop appropriate policies and regulations.

Examples of types of information that could be collected by host countries using the classification framework include:

- The degree to which TNE provision is collaborative between local and foreign providers and how much is provided exclusively by foreign sending country HEIs and providers. This is valuable information for host and sending country HE long-term planning and policy development as there are different benefits and risks attached to the independent or collaborative approach to IPPM.
- Within the collaborative category, how much of the IPPM curriculum is imported/exported and how much is jointly developed? This is useful information in terms of capacity building of local host HEIs and for determining how relevant programmes and curriculum are to the local environment.
- For each IPPM mode, programme information on discipline, level (undergraduate, master's, PhD), qualification(s) offered, tuition fees, duration, internships and study abroad opportunities etc. This is useful information in determining the overlap of TNE programmes with those provided by local HEIs.
- For each IPPM mode, information on enrolment data by programme, gender, level of programme, part-time or full-time study etc. This is helpful in assessing whether IPPM does increase access to education and for which categories of student.
- For each independent IPPM: source country of provider, type of provider, quality assurance and accreditation procedures and tuition fees. This information is useful for determining priority of foreign TNE countries and for developing quality assurance and accreditation procedures.
- For each collaborative IPPM: local HEIs involved, source country of partner, number of qualifications being offered (joint, double, multiple), etc. This information is useful for determining what kind of local HEIs are active in TNE collaborative activities and which are the prevalent foreign TNE countries and HEI partners involved. This will help to evaluate TNE provision and, if appropriate, develop a more strategic approach to choice of countries, counterpart HEIs, registration processes, and quality assurance policies.
- Tracking the number of students who move to a third country (not the country of the foreign HEI/provider) to take a TNE programme. This is important information for immigration planning purposes.

The type of information that can be collected is extensive and needs to be customised to the needs and priorities of the host or sending country. These examples show the breadth of information and how it can be used. These examples stress the importance of the classification framework for national policymakers. Clearly, there are similar parallels for using the framework at an institutional level. HEIs in both host and sending countries will benefit from collecting information on the modes and enrolments of their IPPM activities. At the same time, the framework provides the foundation to monitor international trends in IPPM and also undertake cross-country analysis on key issues and challenges as well as enrolments.

The next chapter focuses on the TNE data collection guidelines. The rationales and challenges for collecting TNE data are examined followed by a discussion on the objectives, key assumptions and principles. Concrete examples of data tables are provided to help the national TNE data collection agency determine which institutions are involved in TNE provision and what kind of information they would like to collect on the types and numbers of IPPM modes and student enrolment.

3. TNE data collection guidelines for IPPM

3.1 Tracking TNE: priority and approach

Introduction

The mobility of higher education programmes and providers across national borders is no longer a niche activity. For many countries, this facet of internationalisation is becoming almost as prominent as the mobility of international students across national borders.

However, whereas most countries collect robust data on student mobility, few countries are collecting any significant level of TNE data. That said, a few of the major players do have reasonably well developed data systems in place (such as Australia, the UK, China, Hong Kong and UAE – Dubai). Other countries are indirectly collecting the data via collection of data on private HE provision, much of which involves IPPM (such as Malaysia, Botswana, and Mauritius). And data systems are developing in a number of countries becoming more active as either senders or hosts of TNE. However, for the majority of countries involved in TNE, data is not being captured in any systematic way, or at best is captured via ad hoc surveys, which only capture part of the story. It is clear from data that is being produced that IPPM continues to expand at an accelerated pace and that data systems (although improving) are lagging well behind the rapid expansion in TNE activity.

Rationales for collecting TNE data

It is important to be clear about why TNE data is collected, and what the uses and benefits of collecting data are. There are various rationales for collection of TNE data by national level agencies. These include:

- Higher education planning and policy development, such as developing internationalisation strategies; supporting accreditation and quality assurance activities; recognition of foreign qualifications; informing visa and immigration policies; and promoting access to higher education.
- Registration and approval of providers and programmes, to ensure that regulatory requirements are met, particularly in host countries.
- Monitoring, quality assurance and enforcement action, depending on the maturing of the quality assurance systems in place, and the extent of TNE activity.
- Research and analysis purposes, particularly as TNE activity reaches a critical mass.
- Measuring the value and impact of TNE at a national level, as well as student metrics such as satisfaction and outcomes.
- Assist universities and colleges with their international strategic planning.

These rationales will have different relevance for different user groups, such as: government ministries and departments, HE regulatory bodies, qualification recognition bodies, as well as the HE sector and individual HEIs. Therefore, care is taken in this chapter to present different thematic data collection modules, and to emphasise the prospective users and uses of the data collected.

Enablers for collecting TNE data

The mobility of programmes and providers across international borders is a dynamic and evolving phenomenon, and one which plays out across a mix and variety of higher education landscapes that can differ markedly from country to country, and region to region. Therefore, it is not surprising that national and international agencies face many challenges in approaching the complex area of TNE data collection. However, a number of key enablers for collecting TNE data exist, and apply to all countries and regions, providing opportunities and optimism that the challenges can be met and addressed. These key enablers include:

- Clear and consistent classification of TNE activity is an absolute precondition and necessity for collecting TNE data.
- Coherent strategic approach at national policy level is an important enabler for collection of TNE data. This includes having a well-developed regulatory environment in place, providing for the establishment and recognition of TNE providers and programmes.
- Clear and efficient lines of communication between the data collection agencies and HEIs supported by education and training for HEIs on the importance of providing the requested information, including briefings and meetings between HEIs and data collection agencies.
- Improved administration by data collection agencies including development and use of clearly structured data requests with clear instructions and guidelines is a key enabler of collecting TNE data. Use of outdated or poorly structured data requests is considered a major reason for lack of, or poor quality, TNE data in many countries.
- Dedicated capacity and expertise within the HEIs to complete the data requests, to ensure that responses are provided on time, and to respond to queries from the data collection agency.

Chapter Two seeks to address the classification challenge; Chapter Three seeks to address the requirement for the data collection agency to use clearly structured data surveys when requesting TNE data from institutions.

Objectives of the TNE data collection guidelines

HEIs can only provide the information and data requested of them. Therefore, having a well development survey instrument is vitally important. Given the inherent complexity of TNE provision, and the well flagged issues around classification, and the difference between a host and sending country perspective, developing a robust survey instrument does present some challenges. This chapter attempts to assist data collection agencies with taking these first steps in developing a TNE data collection instrument, or building on steps already taken.

The main objective of developing the TNE data collection guidelines is to assist host and sending countries to collect more robust, consistent, and internationally comparable TNE data. This will ultimately provide countries with important information about the various modes and characteristics of TNE being delivered in their country, or by their institution abroad.

The approach taken is to present a series of questions laid out in table format, with accompanying guidelines and explanatory information relating to each question. This approach is taken in the interests of presenting all relevant information efficiently and logically, and also with a view to assisting with adoption of the guidelines by data collection agencies. It is therefore intended to walk the reader of the report through the practical considerations involved in developing a TNE data collection system.

Key assumptions and organising principles

A number of key assumptions and organising principles have informed the content of the TNE data guidelines:

- The importance of local context and national sovereignty is respected and acknowledged. While the data guidelines are relatively technical in nature and make various proposals about the type of data to collect and the format for collecting it, ultimately it's for each country to decide what is most appropriate for their local context and needs.
- The data guidelines are presented in survey question format in a number of tables and thematic data modules, and are intended to provide the data collection agency with choice and options to customise the questions and data selected for collection. The descriptions provided for the questions provide examples of potential uses of the data collected, and optional additional related data that could be collected.
- The data guidelines are aligned with the classification framework, and this is particularly evident in the classification data module. Collecting TNE data in a way that allows for clear distinction between the main categories of TNE is important.
- One of the big challenges in developing the guidelines has been to consider both the host country and sending country perspective. Data collection agencies in the host country will have a different perspective to their counterparts in sending countries, not least because one is concerned with HE activity happening at home, while the other is concerned with HE activity happening abroad. For this reason, there are two tables which relate solely to the host country perspective, and two tables that relate solely to the sending country perspective. The remaining four tables are relevant for both host and sending countries.
- The main stakeholders in the data collection process are: 1) the data collection agency (collectors of data) and 2) HEIs (providers of data). As the national level body with the responsibility and capacity for collecting data, the guidelines are written through the lens of the agency collecting the data. Careful consideration is given to the key questions the data agency must answer before a data request can be developed for the HEIs.
- Since any particular institution can be involved in delivering different modes of TNE programmes, in various subject areas, at different levels of education etc., it is proposed that TNE data should be collected at individual programme level. This is an onerous, but necessary assumption built into the TNE data collection guidelines.

3.2 National level agency collecting the data

Diversity of actors

TNE data is collected by national level agencies in both host and sending countries: either departments or statistical units within the ministry of education (MoE); or independent regulatory or statistical bodies, usually reporting to the MoE. The profile of the data collection agency is generally different for host and sending countries. For host countries, the agencies are generally regulatory bodies, with responsibility for approval, quality assurance or accreditation of higher education providers and programmes. These agencies tend to place a greater focus on collecting programme level data, and less on student level data, given the nature of their role and responsibility to ensure that providers and programmes meet minimum registration or quality assurance standards. For sending countries, the agencies are generally education statistics agencies, primarily concerned with collecting data about the number of students enrolled on TNE programmes, and less focused on programme level data, given their primary interest in capturing the scale and economic, social and cultural significance of the activity. It should be noted, however, that quality assurance bodies in sending countries are becoming more involved in monitoring and

collecting data on the TNE programmes delivered by their domestic institutions.

The agency or department collecting TNE data may be separate and standalone from the department collecting general higher education data (e.g. Hong Kong Education Bureau), or may be distinct units within the main education data collection agency (such as UK HESA). In the case of Germany, the main TNE funding agency (DAAD) acts as the main TNE data repository. In a few cases, university associations publish lists of collaborations with foreign universities, which may include joint and double degree programmes, but these are generally not comprehensive. For the purposes of this report, the guidelines are written from the perspective of national level data collection agencies. Beyond that, there is no distinction made in the following text as to what type of agency is collecting the data.

Host country: selection of institutions to survey

The first step for any data collection agency mandated to collect TNE data is to decide which institutions will be asked to complete the TNE data request. There are different considerations here for host and sending countries, so a separate data table has been developed for each. The host country table is presented first.

Table 3.1 is intended for completion by the host country data collection agency, to record information about the type of HEIs/providers being asked to complete the TNE data request. This will help the data collection agency to generate lists of target institutions and will also allow for more segmented and comparative analysis of the responses provided to the template. Importantly, this table allows for the potential identification of two of the six sub-categories of TNE, as per the framework: international branch campuses and joint universities.

Identifying these institutions has obvious benefits in terms of capturing a significant stock of TNE activity, and also provides a useful contact point for additional information gathering requirements. The other four categories of TNE are more difficult to capture in such an aggregate way.

Question 1 *(Category of institution)* asks which types of institutions should be targeted for the TNE data request by the host country data collection agency. A number of institutional types are listed. Local public HEIs/providers are likely to already be surveyed by the ministry of education (or relevant data collection agency), therefore a list of these institutions should be readily available, and data contact points/personnel may already be in place. Private HEIs/providers have historically accounted for the bulk of TNE activity in most host countries, and are clearly important to survey. However, an important issue to consider is whether private institutions are obliged by law or licence to provide data. If not, the response rate to a data request may be expected to be low, particularly for large HE systems. Distance education institutions are included separately, given their increasing prominence in delivering TNE programmes via distance or online learning in the host country.

International branch campuses are a high-profile constituent of the TNE landscape, but can be difficult to distinguish from local private HEIs/providers in the host country. Joint universities are often established by agreement between national governments and may be backed by one or several sending country 'mentor' universities, and can represent significant providers of TNE programmes in the host country. Although IBCs and joint universities may be registered as public or private institutions, where possible, data collection agencies should aim to distinguish domestic institutions from foreign-owned or foreign-backed institutions, which will allow for a more detailed breakdown and analysis of the aggregate data set compiled, and will also help to identify two of the TNE categories in the classification framework (IBCs and joint universities).

Other types of HEIs/providers that could be included in the TNE data request might include: foreign owned or backed institutions that don't fit the description of an IBC or joint university, corporate entities, research bodies, or non-traditional providers of HE, as decided and selected by the host country data collection agency.

Table 3.1: Selection of institutions to survey (host country)

Q.1	To which of the following categories does each of the institutions being asked to complete the TNE data request belong?
	1 = Local public HEI/provider 2 = Local private HEI/provider 3 = Distance education institution 4 = International branch campus 5 = Joint university/colleges 6 = Other (free text box for explanation)
Q.2	Does the institution have 'local' diploma or degree level awarding powers?
	1 = Yes 2 = No

Question 2 *(Awarding powers)* seeks to identify approved/licensed 'non-academic' institutions, operators, business partners, franchise providers, tuition providers, or non-traditional providers of higher education programmes in the host country. In some cases, such institutions exist solely to facilitate the delivery of foreign programmes, and represent an important part of the TNE ecosystem in a number of host countries. Again, whether such institutions are legally obliged to provide data is an important consideration.

Sending country: selection of institutions to survey

Table 3.2 is intended for completion by the sending country data collection agency, to record information about the type of HEIs/providers being asked to complete the TNE data request. From the sending country perspective, the data collection agency is concerned with collecting data about the TNE activity of domestic institutions, delivered in a foreign country. Therefore, only domestic institutions will be surveyed, and any such institutions delivering TNE programmes can be assumed to have awarding powers. Therefore, fewer criteria are required in selecting institutions to survey from the sending country perspective.

Table 3.2: Selection of institutions to survey (sending country)

Q.1	**To which of the following categories does each of the institutions being asked to complete the TNE data template belong?**
	1 = Local public HEI/provider
	2 = Local private HEI/provider
	3 = Distance learning institution
	4 = Other (free text box for explanation)
Q.2	**Does the institution have 'local' diploma or degree level awarding powers?**
	1 = Yes
	2 = No

Question 1 *(Category of institution)* asks which types of institutions should be targeted for the TNE data request by the sending country data collection agency. However, unlike with the host country table, this question does not include IBC or joint university as an option, as only domestic institutions can be engaged in delivery of TNE programmes by the sending country. As with host countries, public HEIs/providers are likely already accustomed to providing HE data, whereas private HEIs may, or may not, have an obligation to provide data. However, in contrast to host countries, public HEIs/providers account for the vast bulk of TNE activity delivered by the sending country. The question also identifies a wholly distance education institution in the sending country (i.e. not offering any fully face-to-face programmes, e.g. an Open University, thus highlighting potential providers of distance education TNE programmes abroad. While the distance education institution may be a local public or private institution, where possible this institution should be separately identified by the data collection agency. It is important to note that the sending country is best placed to capture the TNE category 'self-study distance education'. Since these TNE students in the host country are directly enrolled with the sending country institution, and there is no local partner for the host country data collection agency to survey.

A final option is also provided to allow for 'other' types of institutions to be targeted in the data request, such as alternative providers or corporate entities, as decided and selected by the data collection agency.

In summary, Tables 3.1 and 3.2 represent a survey management exercise by the data collection agency, and simply identify and classify the relevant institutions to be targeted with the TNE data request. This is an important starting point in the overall TNE data collection process. It should be noted that since any country can be active as both a host and/or sender of TNE programmes, the data collection agency will need to consider both of the tables, and whether it is appropriate to collect data on TNE programmes hosted, TNE programmes sent abroad, or both.

3.3 Institutions providing the data

Designing the data request

Once the data collection agency has identified the institutions to be surveyed, the next step involves developing a TNE data request to be sent to the institutions. Generally, the data collection agency sends an official letter or circular, requesting HEIs provide the necessary data by a certain date. Whether there is a legal requirement to provide the data is an

important consideration. The following section provides guidelines about the questions that should be considered for inclusion in such a TNE data request. All the tables in this section are designed with a view to being completed by the institutions being surveyed. The guidelines are organised as follows:

- Identification of TNE active institutions.
- Core data modules – recommended as priority data to collect.
- Additional data modules – recommended as optional data to collect.

Host country: identification of TNE active institutions

In most countries, not all of the institutions being surveyed will be involved in delivering TNE programmes. Therefore, one of the first objectives of the data request is to identify TNE active institutions. This will allow non-active institutions to exit the survey as soon as possible, thus minimising the reporting burden. There are different considerations here for host and sending countries, so a separate data table has been developed for each.

Table 3.3 seeks to identify institutions in the 'host' country involved in delivering TNE programmes, and forms the first part of the data request. The host country institutions selected for survey in Table 3.1 are asked whether they are delivering TNE programmes, and subsequently, to provide some additional information about their institution.

Table 3.3: Identification of TNE active institutions (host country)

Q.1	**Does your institution deliver a higher education degree-level programme 'on behalf of' or 'in academic collaboration with' a foreign HEI/provider?** (TNE programme)
	1 = Yes
	2 = No (exit template)
Q.2	**Which of the following best describes your institution?**
	1 = Local public HEI/provider
	2 = Local private HEI/provider
	3 = Distance learning institution
	4 = International branch campus
	5 = Joint university/college
	6 = Other (free text box for explanation)
Q.3	**Which of the following best describes the TNE programmes you deliver?** (skip if institution is an IBC or joint university)
	1 = Franchise programme(s)
	2 = Partnership programme(s)
	3 = Both franchise and partnership programmes
	4 = Other programme (free text box for explanation)

Question 1 *(Identification of TNE)* is an important question in that it determines whether the institution is delivering a TNE programme. A no answer sees the respondent drop out of the survey; therefore it's very important to clearly explain what is meant by a TNE programme. The question covers both independent (on behalf of) and collaborative (in academic collaboration with) forms of TNE, to make it easier for the respondent institution to identify itself with one or both forms.

Question 2 *(Category of institution)* asks the respondent HEI to classify itself as a public HEI/provider, private HEI/provider, distance education institution, IBC, joint university or other institution. This is the same question asked of the data collection agency, and is repeated here to cross-reference/audit the two perspectives (national level and sector level) and identity any inconsistencies.

Question 3 *(Category of TNE programmes)* seeks to identify whether the institution considers itself to be a provider of franchise programmes, partnership programmes, or both; in line with the classification framework. This question is not asked of IBCs or joint universities since the category of their programmes may already be understood via their institutional category. The intention here is to begin to establish whether genuine academic collaboration is a feature of the TNE activity taking place. This information can be used in addition to more detailed programme level information captured later on in the data request. An 'other programme' option is provided for respondents to explain the programme, if necessary.

Table 3.4: Identification of TNE active institutions (sending country)

Q.1	**Does your institution deliver (or jointly deliver) a higher education degree-level programme outside (your country)?**
	1 = Yes
	2 = No (exit template)
Q.2	**In which foreign country(s) does your institution deliver this programme(s)?** Select all countries that apply
	Drop down list of +200 countries
Q.3	**For each country selected, please name the institution(s) delivering the programme(s)**
	E.g. Country 1; Institutions A, B and C
Q.4	**Which of the following best describes (institution A)?**
	1 = Local public HEI/provider
	2 = Local private HEI/provider
	3 = Distance education institution
	4 = International branch campus of your institution
	5 = Joint university/college
	6 = Local business partner or agency (i.e. non-academic institution)
	7 = Other (free text box for explanation)
Q.5	**Which of the following best describes the programmes delivered by (institution A)?** Skip if institution is an IBC or joint university
	1 = Franchise programme(s)
	2 = Partnership programme(s)
	3 = Both franchise and partnership programmes
	4 = Other programme(s) (free text box for explanation)

Sending country: identification of TNE active institutions

The sending country data collection agency has a different perspective on identification of TNE active institutions, given that the activity is taking place outside their jurisdiction, and possibly across a range of countries, whereas the host country data collection agency is only concerned with activity happening in their country. Table 3.4 identifies institutions in the sending country involved in delivering TNE programmes, and is the first part of the data request they are asked to complete.

Question 1 *(Identification of TNE active institution)* is a similar pre-qualification question as used in Table 3.3, but written from a sending country perceptive, where the sending institution may be delivering the programme independently (deliver) or collaboratively (jointly deliver). Again, a no answer here sees the respondent institution exit the survey.

Question 2 *(Foreign country)* identifies the foreign countries in which the institution is delivering its higher education programmes. A sending institution may be active in a number of foreign countries. Identifying these host countries makes it easier to request information about the TNE programmes delivered in these countries. This is not as important for the host country, as their institutions are typically partnered or affiliated with one (or few) sending countries.

Question 3 *(Institution name)* requests the names of the institutions delivering the TNE programmes in each host country. The names of the institutions are important, and of themselves convey information about the activity. For example, IBCs usually have the same or a similar name as their parent institution, often with the host country or city name included e.g. Nottingham University Malaysia. Joint universities often have both partner countries included in the name, e.g. German Jordanian University. Having the name of an institution allows for accurate and specific information to be requested about the TNE programmes delivered by that institution, and also allows for institution name changes to be tracked.

Question 4 *(Category of institution)* asks the respondent to classify each of the institutions delivering the TNE programmes in the host country. Option 1 and 2 is where the respondent institution is delivering their programmes via a local public or private HEI/provider in the host country. Option 3, 4 and 5 identifies the institution in the host country delivering the TNE programmes as a distance education institution, IBC or joint university. These first five options were also included in Table 3. An additional option is included in Table 4, 'local business partner or agency' to capture non-academic institutions involved in delivering TNE programmes in the host country, since these entities will typically not be surveyed in the host country, but can be identified here by the sending country. This is another example of data best captured from the sending country side.

Question 5 *(Category of TNE programme)* is the same as Q3 in Table 3 and seeks to identify whether the institution considers itself to be a provider of franchise programmes, partnership programmes, or both; in line with the classification framework.

A modular approach to collecting TNE data

There is potentially a large amount of data that can be requested from TNE active institutions. However, care must be taken to balance the amount and complexity of data requested, with the capacity and ability of the institutions to provide the data. Therefore a key consideration of these guidelines is to propose 'core' data that is recommended as a priority to collect, regardless of which agency is collecting the data; and additional 'optional' data that may have particular relevance for different agencies depending on their mandate and rationale for collecting and using TNE data.

The data collection agency will ultimately decide what data to collect. To assist with this selection process, the survey questions are grouped according to four thematic modules, two core modules and two additional modules. The following tables in this chapter are intended for completion by the institutions, and therefore the tables are equally relevant from both a host and sending country perspective.

Core data modules

It is proposed that the following two core modules be carefully considered by the TNE data collection agency in both host and sending countries.

Basic data module

It is proposed that all data collection agencies collect some minimal or basic level of programme level data. Table 3.5 presents the basic template to be completed by the TNE active intuitions surveyed, in both host and sending countries. This basic module is developed mainly with a view to encouraging early stage/developing TNE countries to begin the process of collecting TNE data. For mature TNE countries, this data may already be collected, or may seem limited in detail.

Table 3.5: Basic data module (host and sending country)

Q.1	Programme title
	e.g. Bachelor's (hons) of Marine Science
Q.2	Field of education
	UNESCO ISCED 2011 Code
Q.3	Level of programme
	UNESCO ISCED 2011 Code National Qualifications Framework
Q.4	Which country awards the qualification?
	1 = Host country only 2 = Sending country only 3 = Joint award by host and sending country 4 = Double award by host and sending country
Q.5	Name of institution(s) awarding the qualification
Q.6	Total students enrolled in programme (headcount not FTE)

Question 1 *(Programme title)* emphasises that all data in this module (and the following modules) relate to a particular TNE programme. This will mean that each TNE active institution will be asked to complete a separate survey module for each TNE programme they deliver. The programme title is an important reference point to ensure that host and sending countries are responding about the same programme. It is useful to know whether these programmes are similar to local programmes, or are niche programmes addressing particular skills gaps. The total number of TNE programmes is an important indicator of the scale of TNE activity.

Question 2 *(Field of education)* captures information about the field of education of the TNE programme, as per the UNESCO ISCED 2011 code, to allow for international comparability.

Question 3 *(Level of programme)* captures information about the level of programme, as per the UNESCO ISCED 2011 code, to allow for international comparability. The guidelines have been developed with a focus on programmes at ISCED level 5 and above, which correspond with tertiary education programmes.[3] Where national qualification frameworks exist, efforts should be made to reference the TNE programme against this framework, which takes into account the local context, such as recognition of qualifications, and allowing for credit transfer or accumulation.

Question 4 *(Awarding country)* asks which country is responsible for awarding the qualification, which is the mostly commonly used defining attribute of TNE, and is therefore included here as a basic question. This question also allows for identification of joint and double degree programmes, which are an important TNE delivery mode. Having a list of foreign countries

1. ISCED level 5 'short cycle tertiary programmes' typically have minimum study duration of two years and are often referred to as diplomas or associate degrees. ISCED level 5 includes vocational programmes; however, the guidelines are not designed with specific regard to these types of programmes. www.uis.unesco.org/Education/Documents/isced-2011-en.pdf (page 14)

awarding the TNE programmes is informative and useful for understanding who the main foreign partner countries are and how trends are developing over time.

Question 5 *(Awarding institution)* asks for the name of the institution(s) awarding the qualification. It is good practice to be clear about the identity of the awarding institutions, so that institutions with similar names are not confused with each other and that institutions that change their name can be tracked. Important to note that institutions with a country included in their name may not in fact be from that country.

Question 6 *(Students enrolled)* ask for the total number of students enrolled in the programme. The total number of TNE students in the host country (or from the sending country) is the most important metric on the extent and trend of TNE activity, and can be used to generate TNE students as a percentage of the tertiary student population. This question also allows for triangulation of enrolment data between partner countries.

It is proposed that student enrolment is measured in headcount, as opposed to full-time equivalent, so part-time and full-time students are counted the same. (However, it is proposed capturing full-time and part-time students in Table 3.8 below). Part-time study is an important feature of TNE, often delivered in concentrated modules at the weekend or intensive study period over a few days or weeks at a time, use of fly-in faculty, etc.).

Classification data module

The classification data module is proposed as a second core data module, given that it enables each TNE programme to be classified as belonging to one of the six TNE categories in the classification framework, when used along with the data collected from Tables 3.3 and 3.4 'Identification of TNE active institutions'. Accurate classification of the TNE programmes in an internationally consistent way offers significant benefits in terms of higher education policy development, quality assurance of TNE, encouraging international collaboration and communication, and enabling informed research and analysis of TNE issues and trends.

The classification module is presented as standalone and separate from the basic module. This is done to emphasise that all questions in the classification module must be answered, in order for the TNE programme to be classified according to the framework. In other words, the first three questions in the classification module (programme title, awarding country, and awarding institution) are also contained in the basic module. This overlap is necessary, in case a data collection agency decided to adopt the classification module, without adopting the basic module (or selected different questions for an alternative basic module).

Table 3.6: Classification data module (host and sending country)

Q.1	Programme title
Q.2	Which country awards the qualification?
Q.3	Name of institution(s) awarding the qualification
Q.4	Which country has primary responsibility for curricular content of the programme?
	1 = Host country 2 = Sending country 3 = Jointly responsibility for curricular content
Q.5	Name of institutions(s) with primary responsibility for curricular content
Q.6	Which country has primary responsibility for 'external' quality assurance of the programme?
Q.7	Name of body(s) with primary responsibility for 'external' quality assurance
Q.8	Teaching/learning mode used to deliver the programme
	1 = Face-to-face only 2 = Mix of face-to-face and distance education (blended learning) 3 = Distance education only

Question 4 *(Curricular content – country)* asks which country developed the curriculum or whether it was jointly developed by institutions from both the sending and host country. This question enables the data collection agency to determine whether academic collaboration is taking place, giving due consideration to local context and conditions; or whether the curriculum is simply imported by the host country. The extent to which TNE is driving capacity development and knowledge transfer in the host country is an important consideration for policymakers.

Question 5 *(Curricular content – institution)* asks for the name of the institution(s) responsible for the curricular content, in case this is different to the institution(s) awarding the qualification, e.g. where the curriculum is developed by a third party, which may have particular relevance for distance education programmes.

Question 6 *(External quality assurance)* asks which country is responsible for the 'external' quality assurance of the programme. This is another indicator of the extent of academic collaboration taking place, and to what extent the host and sending countries are sharing responsibility for the quality assurance processes and thus ensuring the sustainability of the TNE programme. However, where both countries have responsibility, unless there is co-ordination between the agencies, this does not necessarily represent collaboration between the countries, and may in fact represent a challenge to effective administration of the programme.

Question 7 *(External quality assurance body)* requests the name of the external agencies with responsibility for quality assurance of the TNE programme. This requires some minimal due diligence on the part of the survey respondent, and therefore provides increased confidence in the response provided to the previous question.

Question 8 *(Teaching/learning mode)* asks whether the programme is delivered to the student via face-to-face, distance education, or blended learning teaching methods. This question therefore uses teaching pedagogy to identify distance education programmes, i.e. where the programme is delivered to the student via distance education only.

To summarise: where the sending country has responsibility for awarding the qualification, developing the curriculum, and external quality assurance, this may be classified as a franchise programme. Where the host and sending countries have joint responsibility for any of awarding the qualification, developing the curriculum, or external quality assurance, this may be classified as a partnership programme. Table 3.6 also identifies distance education programmes. Whether the local partner is a distance education institution may be determined from Tables 3.3 and 3.4. Finally, IBCs and joint universities can also be identified from Tables 3.3 and 3.4.

Optional (additional) data modules

The data proposed as being optional, at least from the perspective of a country at an early stage of collecting TNE data, is organised in terms of a programme data module, and an enrolment data module. It is for each country to decide what additional data is important and relevant to the local context, and therefore how the data request should be customised from this point onwards.

Additional programme data module

Additional programme data is of interest to regulatory bodies, including licensing, accreditation and quality assurance agencies and recognition bodies. This module is of particular interest to host countries, as this is where the activity takes place. Host countries have been more concerned with ensuring that TNE programmes meet minimum licensing and/or registration standards, hence data collection agencies are generally regulatory bodies in the host country. However, the questions in Table 3.7 are also relevant for sending countries, where quality assurance bodies have increasing responsibility for oversight of the foreign activity of their domestic HEIs. And there is also a trend of international collaboration between quality assurance agencies, working together to ensure quality from both the host and sending country sides. Table 3.7 presents the 'programme data module'.

Table 3.7: Programme data module (host and sending country)

Q.1	**Is the programme approved by a national licensing/accreditation body in the host country?**
	1 = Yes, fully approved
	2 = Yes, provisionally approved
	3 = No, but approval is pending
	4 = No
	If approved, insert: registration number, approval date and expiry date
Q.2	**Which institution has primary responsibility for teaching the programme?**
	1 = Reporting (or parent) institution
	2 = Foreign partner institution
	3 = Reporting (or parent) institution 'and' foreign partner institution have joint responsibility
Q.3	**Duration of programme**
	Months, semesters or academic years
Q.4	**Academic credits attached to programme**
	– local
	– International
Q.5	**Is there a study abroad option attached to the programme?**
	1 = Yes
	2 = No
	(If yes, to which country?)
Q.6	**Is there an internship option attached to the programme?**
	1 = Yes, in host country
	2 = Yes, abroad
	3 = Yes, either in host country or abroad
	4 = No
	(If 'yes, abroad', to which country?)

Question 1 *(Programme approval status)* asks whether the programme is formally approved in the host country. It is proposed that only approved TNE programmes in the host countries (or programmes delivered by approved HEIs/providers) should be included for the purposes of data collection. Approved programmes may be placed on a 'register' in the host country, and this a useful reference point for data collection agencies. However, it should be noted there is often little or no distinction between local private programmes and TNE programmes on such registers. But a few countries have dedicated TNE registers.

If the programmes are approved, additional information such as the programme registration number, date of approval and date of expiry may also be requested. The registration number is important as an 'identifier' of the programme and can link to additional information about the programme.

Question 2 *(Teaching institution)* asks which institution has primary responsibility for teaching the programme (i.e. provides the teaching faculty and professors to deliver the lectures and tutorials, whether face-to-face, distance education or blended). It may also be of interest to know whether the teachers are local hires, expatriates or fly-in faculty from the sending country; and which language/s of instruction (local/foreign or combination) is used.

Question 3 *(Duration of programme)* asks about the length of the programme. It is proposed that only programmes of at least one academic year are included for the purposes of data collection. This includes full-time and part-time programmes, since TNE programmes are often delivered over intensive study periods during the evenings or at the weekend.

Question 4 *(Academic credits)* records the academic credits earned following successful completion of the programme. Each country will have its own academic credit system. If possible, attempts should be made to record this as the equivalent grade on an international classification system, such as the European Credit Transfer System (ECTS) or other international benchmark, to allow for international comparability.

Question 5 *(Study abroad)* asks if there was a study abroad option attached to the TNE programme. It is important for host countries to know if TNE is driving outbound student mobility, and whether this is having any socio-cultural impact on the TNE graduates. From a sending perspective, this question provides some insight into the interplay between TNE and inbound student mobility. The sending country could further explore: the length of stay, whether it resulted in progression to study another programme based wholly in the sending country. Note that in the case of multiple degree programmes, study can take place in multiple jurisdictions.

Question 6 *(Internship)* asks whether an internship option was attached to the programme, and whether these placements are located in the host country or abroad. TNE programmes often include a work placement as part of the programme curriculum. An additional question could ask whether the internship was optional or mandatory. Data collection agencies may be interested to explore this and other labour market outcomes associated with the TNE programme. For example, whether some programme subjects are more likely to have internships than others; or evidence of clearly defined pathways to employment via TNE study.

Optional (additional) enrolment data module

Enrolment data is of particular interest to the ministry of education and other economic and trade ministries interested in understanding the scale and economic impacts of the TNE activity.

The optional student level data module provides a deeper level of understanding about the programme, and a profile of the TNE students and their graduation and employment outcomes, allowing for comparisons against local non-TNE students in the host country. Host countries are typically weak on student level data, given that the data collection agency is generally a regulatory body, primarily interested in programme level information. Whereas sending countries have placed more emphasis on student level data, given that the data collection agencies are generally statistical bodies or funding agencies.

Table 3.8: Enrolment data module (host and sending country)

Q.1	**International students enrolled in programme**
Q.2	**Total students enrolled by study mode**
	Full-time
	Part-time
Q.3	**Total distance education only**
Q.4	**Total student enrolled by gender**
	Female
	Male
Q.5	**Total students enrolled by age**
	17–24
	25–32
	33+
Q.6	**Tuition fees per student**
	Local currency, per semester or academic year
Q.7	**Proportion of students who graduated from the programme last year**
Q.8	**Proportion of graduates employed within six months of graduation**

Question 1 (*International students)* requests data on the number of international students enrolled in the TNE programme. TNE delivered in a number of host countries is attracting significant numbers of international students, mainly from neighbouring countries. For the sending country, this question relates to students enrolled in the TNE programme who are international in relation to the host country, not the sending country. Tracking the extent to which TNE is driving student mobility is of interest to a number of national level stakeholders, including the ministry of education, the ministry of foreign affairs, and the immigration department. The definition of an international student is set out in the coverage statement above. It may also be of interest to include a question about the source country of the international students, to get a profile of where the students are travelling from.

Question 2 *(Study mode)* requests data on the number of students enrolled by study mode: full-time and part-time. A significant proportion of TNE programmes are designed to facilitate part-time study, and this question will provide insight on the extent to which TNE is reaching a particular student profile that must balance study with work, or other time constraints. Part-time study is defined as less than 75 per cent of normal full-time hours, per semester (UOE).

Question 3 *(Distance education students)* requests data on the number of students enrolled on the programme who are studying fully via distance education, and excludes any face-to-face or blended learning students who may also be enrolled in the programme. It's another question (along with Q4 in Table 3.3, and Q8 in Table 3.6) that provides information about the extent and importance of distance education for TNE.

Question 4 *(Gender)* requests data on students enrolled by gender, thus capturing the extent to which TNE programmes are reaching both male and female populations in the host country. This will help the ministry of education, and other socio-economic departments, to understand how TNE is impacting on access to HE in the host country, in particular, access for women.

Question 5 *(Age)* requests data on the age profile of the TNE students enrolled in the programme. This question offers further insight into the profile of TNE students, and whether TNE is reaching an older demographic than non-TNE programmes.

Question 6 *(Tuition fees)* requests data on the tuition fees paid by TNE students, which may in turn be compared against the cost of studying local public or private HE programmes, or against the cost of studying abroad. The tuition fee data should be recorded against a defined time period, i.e. tuition fees per semester, academic year; or per number of credits, if appropriate. Respondent institutions may consider tuition fees as sensitive information (especially for-profit institutions), and may not have an obligation or inclination to provide this data. It is proposed that average tuition fees per student are supplied in the local currency.

Question 7 *(Graduation ratio)* requests data on the proportion of students successfully completing the TNE programme, which is an important HE performance metric. The propensity for students to 'drop out' of study is an issue in many countries, and this question will enable comparisons between TNE and non-TNE programmes in this regard, or compare graduation rates across different TNE subjects, fields and study levels.

Question 8 *(Employment ratio)* considers the employability of the TNE graduates, and therefore, how well aligned the qualification is with labour market needs in the host country. This question could be further explored as to whether graduates were employed locally or internationally, or were already employed while they studied the TNE programme, or went on to further study.

3.4 Concluding comments

This chapter represents the distillation of a large amount of information, and is as important for what it excludes, as for what it includes. Care has been taken to present the main information in a way which encourages the reader to navigate through the most important questions and issues associated with TNE data collection.

The approach of including the questions and answer options in the tables and data modules is done with a view to assisting the data collection agency to develop their own structured data request, and therefore to facilitate ease of adoption of the guidelines. How the agency administers the data request (such as via email or online portal) or whether it is embedded within an existing data collection survey, or developed as a standalone instrument is for the data collection agency to decide. The guidelines are intended as a complement to the knowledge and experience that already exists in the data collection agencies and related national level policy agencies.

Where possible, every effort has been made to make the guidelines as succinct and straightforward as possible. Nevertheless, the chapter is content heavy and relatively technical in nature. However, it is hoped that the guidelines will provide a useful reference point for any national level agency, institution or person with an interest in improving the collecting of TNE data.

The distinction between host and sending countries is somewhat artificial, as 1) a country can be both a sender and host of TNE programmes, and 2) countries do not deliver TNE programmes, institutions do. However, the country level distinction is used because, in practice most countries identify themselves as being primarily host or sending countries, and the agency collecting the data is a national level agency.

While much consideration has been given to the users and uses of the data, the possibility for misuse or misinterpretation of the data is a potential unintended consequence of collecting TNE data. This is an inherent risk associated with collecting data in general, and is best addressed by adopting a robust and consistent approach to data collection, as well as a clear and transparent approach to publication of the aggregate data.

A key principle of this chapter is that data collecting agencies will decide what data to collect, whether to take a host country or sending country perspective (or both), what they consider as the basic level of data to collect, and ultimately how the data request can be customised to the local higher education environment and context.

4. Emerging trends and issues for IPPM

4.1 Introduction

IPPM is well established and has become an important part of the wider process of the internationalisation of higher education across the world. While some countries are more active than others, all countries are to some extent involved and a number of countries have become active as both senders and hosts of TNE, a process which looks set to continue. And while some models appear to be in decline (e.g. franchise programmes) others are clearly expanding (e.g. distance education and joint universities), others are holding their own (e.g. international branch campuses) and others are showing a tendency to overlap (e.g. franchise programmes and double degrees). The scope for further growth, and the propensity for innovation witnessed so far, will very likely continue.

In general, the level of understanding of IPPM at national policy level is incomplete, particularly compared with knowledge about international student and academic mobility. As things currently stand, much of the TNE activity is driven at sector level with individual institutions having to navigate through a myriad of national and regional higher education policy and regulatory environments. There is no doubt that TNE is a complex area and that competence and knowledge at national policy level must be built up over time and will require some resources and commitment.

The research conducted to inform this report has shown a genuine and growing interest across countries to better understand TNE and to become more informed and competent about classification of IPPM activity, and a number of countries are currently reviewing their approach to collecting TNE data. Countries are also becoming more strategic about their involvement in TNE, as can be seen in recent policy development in countries as diverse as New Zealand, the Philippines and the Netherlands. It is also interesting to observe the extent to which quality assurance agencies in different countries are working more closely together to address TNE issues of common concern. Nevertheless, policies relating to IPPM will continue to lag behind polices for international student mobility for some time. One of the key research challenges in engaging with different countries was keeping the discussions focused on IPPM as opposed to student mobility, while acknowledging there are synergies and overlaps between all forms of internationalisation.

During the course of the research for this report, a number of important trends and issues became apparent. Given the challenge of producing a framework and data guidelines for use across a range of countries, it was not possible to accommodate all perspectives and address all issues. The instruments in Chapters Two and Three have been developed with a leaning towards simplicity over complexity, as they must be workable in a number of different local contexts.

A number of emerging issues became apparent, and deserve specific mention, particularly with a view to keeping on top of classification and data collection issues going forward. These are discussed as follows.

4.2 Articulation/pathway programmes

One of the challenges involved in developing a TNE classification framework is deciding where to draw the line about what is, and what is not, included in the framework. One mode of internationalisation that straddles both IPPM and ISM is articulation programmes. These programmes involve inter-institutional agreements which allow host country students, having completed a specified local curriculum, to apply to a sending country programme (either being taught in the sending or host country) and enrol with 'advanced standing'. An example of such a programme is a so-called '3+1'arrangement, whereby the student in the host country studies three years towards a local programme, after which they can articulate/transfer to the final year of a sending country programme. Thus, the student may be awarded a sending country degree after one year enrolled on the programme because their previous study is recognised as counting towards the sending country degree.

These arrangements may be loosely considered as a form of TNE, when the sending country institution provides input into the (pre-articulated) curriculum of the host country programme, so that it better aligns with the sending country programme. However, in general, little or no such input is provided by the sending HEI. In practice, the main purpose of articulation programmes is to recruit international students to the sending country. Therefore, for the purposes of the framework and data guidelines, articulation programmes are not considered as a form of TNE, but rather as a facilitator of international student mobility.

There are many variations and possibilities as to how articulation programmes work, such as whether the host country institution is a local HEI/provider, or has some affiliation with the sending country institution. A number of study configurations are possible, such as 3+1, 2+2 or even 2+1+1, in the latter case the student completes their study in the host country institution. Clearly there is an onus on the sending country institution to satisfy itself that the host country students are sufficiently qualified (academically and linguistically) to transfer to the sending country programme. Where the student articulates to a sending country programme delivered in the host country (i.e. a TNE programme) this is often referred to as a 'top-up' programme.

Foundation programmes are where the host country students enrol on a 'year 0' programme delivered in the host country (and sometimes in the sending country), successful completion of which gains entry to a sending country programme. This caters for host country students without the secondary level qualification of the sending country, and acts as an international student recruitment mechanism. Foundation programmes do not typically provide advanced standing; students must complete the full sending country curriculum from year 1 onwards. Articulation arrangements, top-up programme and foundation programmes are often referred to collectively as pathway programmes.

Pathway programmes are an increasingly important feature of the IHE landscape. For example, China – the world's largest sender of international students – sends a significant proportion of its students overseas via articulation agreements. But they can also be a source of misunderstanding and confusion between sending and host countries, especially around expectations and extent of academic collaboration between the partner institutions: what one side understands as a joint or double degree, the other may understand as an articulation arrangement. Increasingly, national level agencies are becoming more explicit about the level of detail and collaborative commitments contained in the inter-institutional agreements, including the extent to which student mobility can be encouraged in both directions.

This form of IHE has shown a great propensity for innovation, creativity and increasing complexity with a diversity of host, sending and even third country actors involved. It also shows how the lines between IPPM and ISM can be blurred. All of this creates challenges for classification and data collection of this activity. While the classification framework does not include articulation/pathway programmes, it is important for HE agencies in sending and host countries to be aware of these programmes.

4.3 Distance education

Delivery of TNE via distance education accounts for a significant and expanding proportion of global TNE activity. According to a 2016 report by Universities UK and the British Council entitled the *Scope and Scale of UK Higher Education – Transnational Education*, just over half of all UK TNE programmes in 2015 were delivered abroad via distance/online education (mainly in Singapore, Hong Kong and Nigeria), and around two out of five of these programme were delivered through a local partner. The Australian Department of Education and Training reported that 12 per cent of Australia's TNE students were enrolled on distance education programmes delivered offshore in 2015. The general consensus from the HE sector would appear to support a scenario of increasing provision of TNE programmes via distance education. Elements of distance education provision (online in particular) are becoming ubiquitous and are likely to be embedded to some extent in the majority of HE programmes in the future. There is little doubt that distance education offers huge potential for students, HEIs and national education authorities, particularly around: providing flexible access to HE (including economies of scale); supporting innovative approaches to teaching, learning and assessment; enabling research collaboration; adaptability of curriculum to employer requirements; and potential for knowledge sharing and capacity building between institutions.

However, distance education is often happening outside a formal regulatory framework, in the absence of concrete national level policies and plans to guide its development. This presents major challenges in terms of quality assurance of distance education programmes, recognition of distance education qualifications, and is part of the reason behind a worrying lack of data on distance education programmes. Most countries are struggling to understand key basic questions around the nature and scale of this activity. Classification of distance education TNE programmes is challenging for three main reasons.

1. The variety and complexity of distance education operational models

There are a number of operational models by which TNE programmes are delivered via distance education, and these models are continuing to evolve and adapt. The main current operational models include:

Fully distance education

This is where the host country students are studying the TNE programme fully by distance education and therefore 'self study' the programme. The host country students are directly enrolled/registered with the sending country institution. In some cases, host country students on these programmes may choose to supplement their distance education study with face-to-face study or tutorials in a local study centre or tuition provider, which may or may not be affiliated with the sending country institution. This model accounts for a significant proportion of HE enrolment in Mauritius, for example, where students are directly enrolled with HE institutions in the UK, such as the University of London or Open University UK.

MOOCs

MOOCs are similar to fully distance education above, where students are directly enrolled/registered with the sending country institution. MOOCs are targeted at the mass market (some programmes can have hundreds of students enrolled at a time) and there is typically no diploma or degree level qualification awarded, but there may be a certificate of completion. There are typically no tuition fees, but students may have to pay to receive their certificate of completion. EdX is an example of a MOOC platform based in the US, founded by Harvard University and MIT in 2012, currently with over 90 global partners including universities, national governments, non-governmental organisations and multinational corporations.

Distance education with local or international business partner

The involvement of third party commercial operators is becoming more common in the delivery of TNE programmes via distance education. Such agencies typically take responsibility for marketing, student recruitment and retention, and various commercial aspects of the programme. The Laureate Education model is a good example where Laureate Education partners with universities around the work by offering strategic, operational, and marketing expertise to deliver their programmes fully online on a global basis. Again, the students are typically enrolled/registered with the sending country institution.

Distance education with local academic partner

This is where the sending country institution enters into an academic partnership with a local HEI/provider in the host country, so that there is joint input into curriculum design, quality assurance procedures, and administrative co-ordination around setting and correcting exams. In this case, the student will typically be enrolled/ registered with the local partner institution. The local institution may be an open university or a traditional bricks and mortar institution. The extent to which academic collaboration is happening on these programmes is difficult to gauge. However, if the experience of other TNE delivery modes is replicated, TNE via distance education is likely to become more collaborative over time.

Given the various approaches to delivering TNE programmes via distance education and their capacity for evolution and innovation, classification of this category of TNE will remain a challenge. This is a particular issue for host countries, given the lack of a local partner in some cases, and incidences of students being directly enrolled with the sending country institution. The interaction of academic institutions with business partners also presents challenges for classification of the distance education activity along purely educational lines.

2. Distance education as a mode of pedagogy or a distinct category of TNE programmes

Given the fact that any HE programme can have elements of curriculum delivered via face-to-face lectures and online lectures (often referred to as blended leaning) the question arises as to at what point the programme becomes an online programme. It is when over 50 per cent of the curriculum is delivered via online teaching methods? A similar question arises regarding when a programme is considered part-time or full-time. UNESCO, OECE, Eurostat (UOE) methodology on the joint collection of education data defines a part-time programme as one where the student studies less than 75 per cent of the normal expected hours; and also that part-time study is an attribute of the student, rather than an attribute of the programme. It could be argued that the same rationale is used for distance education programmes.

What about when some face-to-face students and some online students are enrolled on the same programme; at what point does the programme become an online programme? Is it when over 50 per cent of the students are enrolled online? If the curricular content is the same for both sets of students, then the programme is not affected, rather the method by which the teaching and learning occurs is affected, i.e. the approach to pedagogy.

The question about whether distance education should be considered as a distinct type of programme, or as a mode of pedagogy, is a key classification issue. Placing students at the centre of the teaching and learning process would lean towards TNE as a mode of pedagogy. And the fact that different forms of TNE (such as international branch campuses, joint universities, partnership and franchise programmes) can integrate distance education teaching methods into their programmes also supports TNE as a mode of pedagogy, rather than a distinct type of programme.

However, where a programme is delivered fully by distance education, this may be arguably considered as a distinct type of programme. Therefore, to some extent, the classification framework accommodate both perspectives, by providing separate distance education categories, but also allowing distance education to be considered as a mode of pedagogy within any of the TNE categories. This allows host and sending countries to monitor this form of TNE as it develops, and to decide which classification approach works best for them.

3. Challenges with distance education data collection

Collection of information and data about distance education TNE programmes will remain a challenge for a number of reasons, in addition to the classification issues discussed above:

- The classification issues discussed above make it difficult for data collection agencies to decide which institutions to survey and what delivery models of distance education to attempt to capture.
- For some models of distance education there is no local institution for the host country to survey, and the data collection agency will not have jurisdiction to survey institutions in the sending country.
- Where there is a local private partner involved (either an academic or business partner), it may not be legally obliged to provide data to the data collection agency.
- In some cases, the data collection agency in the sending country is best placed to collect data about a distance education TNE programme delivered in the host country. For example, where the students are registered with institutions in the sending country. This is an important finding and underlines the importance of collaboration between host and sending countries, in terms of sharing data, and using a common classification framework.

4.4 Quality assurance of TNE

While the overall TNE context is one of growth and opportunity, effective quality assurance of TNE presents a major challenge, for both host and sending countries. Instances of poor quality provision and the existence of rogue providers pose major risks for student and their parents in the host country, for the reputation of the sending country HE system, and for the reputation of TNE in general. Nevertheless, few countries have robust TNE quality assurance systems in place. This is arguably a more important consideration for the host country, as the location of the study and where most of the graduates will end up working.

For host countries, it is generally more appropriate to talk about TNE licensing, registration or approval systems, since the primary responsibility of the quality assurance agency is to ensure that institutions are approved to deliver HE programmes, and that they meet minimum educational standards. Ongoing monitoring of the programmes is generally quite weak. Therefore, quality assurance systems may generally be considered as a work in progress in most countries, excepting the mature TNE host countries of Malaysia, China and the administrative region of Hong Kong.

The leading sending countries (such as the UK, Australia and Germany) have robust quality assurance and academic oversight systems in place, but have placed greater priority on collecting aggregate TNE enrolment data than programme level data. Most other sending countries are without specific TNE quality assurance policies. For example, the US is one of the main TNE sending countries and employs a relatively light touch approach to oversight of its TNE provision via a number of independent regional agencies. Furthermore, the US does not collect any TNE data, despite having by far the greatest number of international branch campuses overseas. On the other hand, it is interesting to note that New Zealand approves specific domestic programmes for overseas delivery.

A number of quality assurance trends and issues with regard to classification and data collection are noticeable.

Collaboration between quality assurance agencies in different countries

Given that sending and host countries both have a role to play with quality assurance of TNE programmes, the most effective approach involves quality assurance agencies in both countries working together. Lack of co-ordination can result in either no oversight of the TNE programme; or potentially too much oversight where national quality assurance agencies are separately involved. The host country agency has an important role to ensure that the TNE programme has due regard to local conditions and culture, and this will often require co-ordination with the sending country quality assurance agency, for example where changes are required to the curriculum. Or collaboration may involve formal quality assurance processes covering TNE provision in general, as opposed to collaboration on a case by case basis.

In view of the above, it is encouraging to see new networks being formed involving quality assurance agencies in different sending and host countries working together. For example, the Quality Beyond Boundaries Group (QBBG) was established in 2014 by quality assurance agencies in Australia, Dubai, Hong Kong, Singapore, the UK and the US. And the Cross-border Quality Assurance Network in Higher Education (CBQAN) was established in China in 2016 to build a communication and co-operation platform for quality assurance agencies in Asia and Europe to work together. One of the main potential applications of the classification framework is to assist quality assurance agencies to work together by enabling them to communicate via use of a common classification language.

There also remains an important role for existing regional (e.g. AQAN and ENQA) and international (INQAAHE) agencies to play in terms of sharing of best practice guidelines, research and data. And the UNESCO/OECD 'Guidelines for quality provision in cross-border higher education' will continue to support the development of quality assurance procedures and systems within countries.

Countries as both hosts and senders of TNE

As more countries become active as both hosts and senders of TNE programmes, quality assurance agencies will need to consider both perspectives in discharging their duties. This will include somewhat different perspectives around classification and data collection, which have already been addressed to some extent in Chapters Two and Three. This will become a more important issue as TNE continues to mature. When TNE programmes are delivered in multiple countries, more than two country quality assurance agencies may be involved.

Independent versus collaborative forms of TNE

The classification framework clearly distinguishes between independent and collaborative forms of TNE provision. As national quality assurance systems develop, this distinction may become an important consideration in determining the appropriate approaches to oversight and review of TNE activity. For example, there may be a different approach required to ensure the quality of programmes delivered in an international branch campus, than a TNE programme delivered in collaboration with a local public university.

Scope for quality assurance agencies and HE statistics bodies to work together

Quality assurance agencies and regulatory bodies have a central role in collecting TNE data in host countries, owing to their mandate to approve, and in some cases monitor, TNE activity. In sending countries, HE statistical agencies are mainly responsible for collecting TNE data, due to the focus on collecting enrolment data. Going forward, co-ordination between quality assurance and statistical bodies within countries will result in a more efficient and rounded approach to collecting data, so that robust data is collected about the TNE programmes, and also about the number and characteristics of students enrolled in the programmes. It is hoped that the data collection guidelines in Chapter Three assist both quality assurance and statistical bodies to collect TNE data.

4.5 Awarding and recognition of qualifications

Which country awards the qualification has traditionally been the principle defining attribute of TNE in most countries. For host countries collecting data on private HE provision, it's the main attribute by which local private programmes can be distinguished from foreign private (TNE) programmes. However, as TNE becomes more collaborative in nature, host country HEIs are becoming more involved in the awarding of the TNE qualification, whether as a single award by the host country institution, or a joint or double award with their foreign partner. This can be observed with TNE programmes awarded in Thailand as 'national degrees' and TNE programmes awarded via German joint universities, where a 'local degree' is often awarded. Therefore, as TNE develops, the question about who provides the academic oversight may become as important as who awards the qualification.

It should also be noted that the concept of awarding qualifications is becoming more flexible. In addition to awarding diplomas and degrees, HEIs are becoming more active at awarding credits for specific modules of study, as well as certificates for completion of MOOCs. This raises the prospect of students aggregating or stacking credits to build their own customised degrees. The framework does not currently include provision for sub-diploma level programmes, but it's important to keep an open mind about this as TNE develops and awarding of qualifications becomes a more fluid concept.

Another trend is the veritable explosion of double degrees being awarded by both partner institutions. Double degrees have an obvious appeal for students and institutions, with the former getting two qualifications instead of one, and the latter credited with producing more graduates. The extent of academic collaboration in double degrees can be variable, and as joint awards are not permitted in some countries, a double award may be the only option. Many double degrees are earned on the basis of genuine academic collaboration between partner HEIs, where the student has undertaken additional modules of study. However, there are undoubtedly cases of double degrees being marketed as 'two for one' offers by HEIs, and this poses serious reputational risks for TNE. From the perspective of classification and data collection, double degrees are problematic in distinguishing host from sending country, and can result in double counting of the students.

Awarding of qualifications raises an obvious question about whether the qualifications are subsequently recognised by employers or by the HE sector at home or abroad. The main mechanism used by host countries to confer recognition on TNE programmes is to place them on a register of approved programmes.

Other than that, recognition of TNE qualifications is generally processed via the system in place to recognise foreign qualifications in general. This can sometimes result in bureaucratic difficulties associated with recognising a foreign award, when no overseas study has taken place. Lack of recognition of distance education TNE qualifications is a major issue in a number of countries. In many countries, individual HEIs decide whether or not to recognise specific TNE programmes and this decision is often based on the status of the sending country awarding/partner institution.

Lack of a national qualifications framework (NQF) is a noticeable barrier to recognition of TNE qualifications in a number of host countries, as this makes it difficult to reference the TNE qualification against a local equivalent. This situation is like to improve as NQFs are currently under development in several countries.

International and regional recognition networks also have a role to play, but it's not clear to what extent they have been successful in improving recognition of international qualifications. It would appear that lack of a common TNE classification framework has acted as a barrier to their efforts. The same would appear to be the case with regard to the UNESCO recognition conventions, which have been in existence since the 1970s. It is therefore hoped that the classification framework can support the development of national level policies to improve recognition of TNE qualifications.

4.6 Looking to the future

IPPM is at an important juncture, where national governments would benefit greatly from a better understanding of this important dimension of internationalisation, so that the challenges and opportunities it presents can be effectively managed, and its potential evenly shared across the broad student body. A better understanding will allow countries to decide how best to engage with IPPM, and what national and sector level actors should be involved. The concept of programmes and providers moving across national borders should become as well understood as international student mobility.

This report has not considered issues around implementation of the framework or data collection guidelines in any great depth. A key principle has been that each country should decide what elements of the report are relevant for their context, and how best to incorporate the instruments into their own HE system. The report is therefore intended as a catalyst for change, and as a resource which can add to the experience and knowledge already existing within countries, and which may of course result in as many questions being asked as have been answered. A key part of any implementation process will undoubtedly involve pilot testing of the instruments with key national level and sector level stakeholders within country.

While the British Council and the German Academic Exchange Service have taken the lead in developing this report, the research has been supported by input from national agencies in over 30 countries across all regions of the world. This unique global network comprised: ministries of education; HE licensing, quality assurance and recognition bodies; data collection agencies; university associations; and HE experts. In this sense, one of the valuable outputs of this project has been the identification of key contacts within agencies and institutions, and the facilitation of discourse, information exchange, and sharing of views and ideas. The report is therefore an international document and will hopefully become an agent of change and a tool for effective policy development in many countries.

OECD and UNESCO clearly have a central role to play with regard to supporting and encouraging national level efforts towards classification of IPPM activity and collection of data. The broad reach of UNESCO, which represents 195 countries across the world, is of particular relevance in this regard. It is hoped that the current report will provide food for thought within these agencies as to how the various issues raised can be more effectively addressed at a multilateral as well as national level. For example, it would appear timely that the 'UNESCO, OECD guidelines for quality provision in cross-border higher education' include more explicit reference to classification and data collection of IPPM activity.

As IPPM continues to expand, new host and sending countries will emerge on the scene, just as they have with international student mobility. Growing demands from students to study an international curriculum without having to travel abroad will result in new institutional actors emerging, new delivery models evolving and TNE will remain at the forefront of innovation in the global HE sector. This presents many opportunities and challenges for national level HE agencies to navigate. Being able to accurately classify and track IPPM will prove a huge assistance for the journey ahead.

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Appendix A

The Shape of Things to Come 2: The evolution of transnational education: data, definitions, opportunities and impacts analysis

McNamara, J, Knight, J and Fernandez-Chung, RM (2013) *The Shape of Things to Come 2: The evolution of transnational education.* British Council. Available online at: https://www.britishcouncil.org/education/ihe/knowledge-centre/transnational-education/the-shape-of-things-to-come-2

Executive summary

Transnational Education (TNE) is a component of the wider phenomenon of the internationalisation of education. The general principle of TNE is that students can study towards a foreign qualification without leaving their home country, meaning that the programmes and providers cross national and regional borders, not generally the student. While robust data is generally lacking, available evidence suggest that TNE is continuing to expand and that modes of delivery and policy approaches to TNE continue to evolve on a country-by-country basis. This report summarises the findings of an ambitious programme of research to achieve the following objectives:

1. Review existing definitions and description of TNE and its various delivery modes, and conduct an exhaustive search of national and international sources of TNE data.
2. Develop an analytical framework to establish which host countries have the most favourable environments for TNE operations to establish and/or develop.
3. Assess the impacts of TNE on the host country, focusing on academic, economic, human resource development, socio-cultural and status outcomes.

TNE data and definitions

The research identifies numerous efforts to define TNE by multilateral agencies – such as the Council of Europe, UNESCO/OECD and the INQAAHE – and national agencies such as the China Ministry of Education, Australian Education International and German DAAD. Some definitions place an emphasis on TNE as an education export, others emphasise its collaborative characteristics and others take more a holistic view by including references to projects, research and ideas crossing national and regional borders. Overall, however, the general principle of the student being based in a different country to the awarding institution is well established. In recent years, more emphasis has been placed on defining the various delivery modes of TNE. There are some differing views as to which modes of delivery are considered as TNE. For example, the Australian definition does not include distance learning and the DAAD does not consider joint degrees as TNE.
In practice, providing exact definitions for the various delivery modes of TNE is difficult and this report does not attempt to do so. Instead, a working description for the modes of TNE covered in this report is presented in Table 3. Most of the existing definitions and descriptions of TNE have been produced by sending countries.
There is a need for sending and host countries to work together to develop definitions that have relevance from both perspectives.

The research identifies three sending countries (Australia, Germany and UK) and six host countries (China, Hong Kong, Malaysia, Mauritius, Thailand and Vietnam) that are producing TNE data. The data is presented in Tables 4 and 5 respectively. All three sending countries use different data collection techniques, and report the data in different ways. The data is therefore not directly comparable across countries. The host countries collate their data from TNE programmes registered with their ministries of education – with the exception of Thailand, where the data was sourced via a one-off survey. None of the host countries use the same terminology to describe the data, and only Vietnam actually refers to 'TNE programmes'. This again highlights the difficulty with making cross-country comparisons.

Group 1	Group 2	Group 3	Group 4	Group 5
Well above average	Above average	Average	Below average	Well below average
Hong Kong	Qatar	Botswana	Brazil	Nepal
Malaysia	South Korea	Bahrain	Indonesia	Sri Lanka
Singapore		China	Mexico	
UAE		India	Nigeria	
		Mauritius	Pakistan	
		Oman	Poland	
		Spain	Russia	
		Thailand	Turkey	
		Vietnam		

TNE Opportunities Matrix

The Opportunities Matrix (OM) is an analytical framework developed to identify countries with the most favourable prospects as hosts of TNE programmes over the next two to three years. The developed indicators aim to shed light on the various approaches taken to facilitate and manage TNE by reviewing the national policies and regulations in place. The OM also investigates factors likely to impact on the demand environment for TNE and compares the mobility environments of the study countries. The overall opportunity groups are presented as follows, with countries offering 'well above average' opportunity listed in Group 1 and 'well below average' opportunity listed in Group 5.

Policy environment

The policy environment category assesses the extent to which host country governments have implemented policies and processes to facilitate and manage inbound TNE. Existence of a dedicated agency (or agencies) with responsibility for TNE is an important differentiator between the higher and lower grouped countries. Almost half of the countries have no ministerial department or separate body with any significant level of responsibility for TNE. This reflects the fact that TNE is simply not a policy priority in these countries.

In many countries the policy focus remains squarely on student mobility. Surprisingly, none of the 25 countries appear to have published an internationalisation strategy document, much less a strategy document focused specifically on TNE. This emphasises the generally fragmented policy approach that host countries have in place to manage and facilitate TNE. Part of the reason for this fragmented approach is that TNE is often framed within a number of national contexts: educational, economic, trade and international relations.

The establishment of education cities and economic free zones dedicated to education and training represents major commitments to develop TNE in some countries. Use of incentives by host countries to attract TNE providers and programmes is an important feature of the TNE policy landscape, with 13 out of 25 study countries providing some form of incentives for foreign providers to establish TNE operations. Countries offering the largest incentives are generally those with genuine ambitions to develop international education hubs.

Encouragingly, 21 out of 25 study countries/region have some regulatory basis for the establishment of an IBC, the exceptions being Nepal, Poland, Sri Lanka and Turkey. Getting parliamentary approval in the host country for the establishment of IBCs can meet significant social and political resistance. In some countries, the process for receiving accreditation can be onerous (China and Nigeria) or requirements are vague in detail (Indonesia and Thailand). In some cases the regulations place significant restrictions on sending HEIs (China and Vietnam).

TNE is currently developing in a number of countries (e.g. Nepal and Sri Lanka) without any formal regulatory framework in place. The evidence from this research suggests a complex push-and-pull relationship between TNE activity and TNE regulations, where TNE activity reaches a certain critical mass and elicits a regulatory response from the government. While TNE regulations are not a requirement for TNE activity to take place, they have an important role to play in relation to quality assurance and recognition of qualification and for ensuring the sustainability of the TNE going forward. The top opportunity markets identified in this research are those with, or moving towards, a system of robust policy and regulatory oversight.

About two-thirds of the study countries have some TNE quality assurance (QA) systems in place. The research identifies a number of different, and sometimes overlapping, approaches to QA: registration of TNE programmes with host country MoE; requiring that the TNE provider is accredited in the home

country; the TNE provider must get approval/licence the from host country MoE to operate; the TNE is considered as part of the host education system and approved TNE providers are QA reviewed and accredited the same as domestic HEIs. Unsurprisingly, the most active/long-standing host countries for TNE are generally those with the most robust QA systems in place, but there are exceptions. One of the positive by-products of a robust QA system is an improvement in collection and reporting of TNE data – although data availability in general is woefully inadequate.

It is important that host country recognition bodies make efforts to publicly communicate their recognition and acceptance of TNE as a form of education. Overall, the research shows that this is an area of relative weakness in the study countries. None of the 25 host countries appear to communicate directly with the labour market or higher education sector regarding their acceptance of TNE qualifications. However, two host countries do stand out for their efforts to recognise TNE qualifications: Hong Kong and Malaysia. Bilateral degree recognition agreements play an important role in the recognition of international qualifications, but in many countries it's left to the discretion of individual institutions/organisations to decide upon recognition of foreign qualifications.

Market environment

The market environment category considers factors which are likely to affect the demand for TNE programmes in the host country. Since TNE qualifications are generally more expensive than domestic education provision, affordability – via GDP per capita – is included as an indicator of demand. The data shows that, in general, the most mature TNE host countries have relatively high GDP per capita ratios. However, this is by no means a clear-cut story.

Services as a percentage of GDP and tertiary age population as a percentage of total population appear to bear little or no relationship with TNE activity. It is interesting to note the high rates of economic growth forecast for the countries overall, with 14 out of 25 countries forecast to experience 4 per cent or more annual economic growth from 2012 to 2014. While a blunt measure of opportunity, this data suggests that economic growth will remain accommodative to TNE activity for the next two years, particularly in Asian countries such as China, Sri Lanka, India, Indonesia, Vietnam and Thailand. However, the labour markets in Botswana, Spain, Poland, Nepal and Nigeria will remain tough for all graduates – including TNE graduates – to find jobs over the next two years.

Survey data produced by the World Economic Forum suggests that the mature TNE hosts are perceived as having relatively high-quality domestic higher education systems. Sending HEIs, therefore, appear to be locating in host countries with relatively high-quality education systems, which makes sense, especially for collaborative forms of TNE. Government spending on the host HE system appears to have little or no bearing on TNE activity levels or TNE policies, but spending data is frequently out of date by more than five years.

Broadband penetration rate was included as a proxy measure for development of IT infrastructure. High-quality IT and library facilities are important for delivery of TNE programmes. On this measure, the Asian countries of South Korea, Hong Kong and Singapore dominate. However, Malaysia stands out as having a low penetration, comparable with Vietnam and Brazil.

The private sector HE enrolment rate was included in acknowledgement of the dominant role that private/for-profit HEIs have historically played in development of TNE in host countries. Overall, the data suggests a positive, but weak, relationship between private sector involvement and TNE activity (based on available data), with some notable exceptions. The research also suggests that higher levels of societal development (as measured by the UN Human Development Index) are positively correlated with TNE activity.

Four countries score two opportunity groups higher in the market category compared with the policy category: Spain, India, Poland and Turkey. These countries appear to have average or above-average (Spain) demand conditions for TNE, but are without the supporting TNE polices. Should such polices improve, these countries may become increasingly attractive host locations for TNE.

Mobility environment

Countries that have already achieved some critical mass as hosts of TNE are likely those that will continue in this direction and therefore offer opportunity as TNE hosts going forward. However, determining whether countries have achieved traction is difficult in the absence of published TNE data. This category uses international branch campus activity and student mobility activity as proxy measures of proclivity for attracting TNE providers and programmes. While a number of the relatively well-known TNE countries do feature in the top groups, two new countries are brought into the mix on these measures: Botswana and India. According to OBHE data, the top five host countries for IBCs in 2012 were UAE, China, Singapore, Malaysia and Qatar. Only three countries in the study did not host an IBC in 2012, as per the OBHE definition: Pakistan, Oman and Brazil.

Interestingly, India is recorded as hosting nine IBCs, without having a formal regulatory structure in place for their establishment. Of the 25 countries in the study, India is the only major sender of IBCs, having 21 abroad in 2012, according to OBHE data.

Four countries stand out with respect to inbound international student mobility ratios. In Qatar and UAE, inbound students represent a staggering 40 per cent and 39 per cent respectively of the total domestic student population. In Bahrain and Singapore, inbound students represent over 20 per cent of the domestic student population. The top international student receiving countries are also among the top senders of domestic students abroad. However, Botswana and Mauritius lead on this measure with outbound student ratios of 50 per cent and 30 per cent respectively. This represents a lack of domestic HE capacity in these countries, pointing to opportunity for foreign HE providers.

The impact of TNE on host countries

Given the relative absence of attention given to host countries in the TNE literature, the report focuses on the impacts of TNE on receiving countries in general and for three countries in particular: China, Malaysia and the United Arab Emirates. The outcomes and impact of TNE can bring both benefits and potential risks and are individualised for each country. Impacts are directly related to driving rationales and goals, and for the majority of countries national TNE policies do not exist, making it difficult to compare desired outcomes with actual impact. Five impact categories are analysed: academic, economic, human resource development, socio-cultural and status.

Providing increased access for specific segments of the population is prevalent in both Malaysia and UAE, but the access agenda is being eclipsed by a greater emphasis on economic rationales and outcomes. However, economic impacts can differ significantly. For instance, Malaysia foresees international student recruitment and TNE as a means to increase revenue while UAE perceives TNE as a way to develop an educated and skilled workforce pivotal to developing a service- and knowledge-based economy. At this point in time TNE, especially international branch campuses, are not attracting foreign direct investment in terms of physical or equipment infrastructure, but it is an area of potential development and worthy of close monitoring.

China is currently using TNE for academic capacity building in terms of knowledge transfer from foreign partners for modernising and improving teaching practices, quality assurance standards, programme and curriculum development, and academic management and governance matters. By contrast, the UAE does not give the same emphasis to academic capacity building for local institutions as there are very few twinning and franchise programmes between UAE domestic HEIs and foreign partners.

Common to all three countries is TNE's impact on human resources development. Malaysia and to a lesser extent China emphasise the importance of using TNE for professional development of the teaching and research staff at domestic institutions while the UAE stresses the importance of using TNE to develop and retain a skilled workforce. Malaysia and China are conscious of the perceived status benefits from collaboration with high-ranking elite foreign partners, and the UAE clearly wants to increase its competiveness and status as a regional education hub. The sociocultural impacts are acknowledged as being important but are more difficult to grasp and measure.

There is not 'one way' or a 'universal right way' for a country to approach TNE – there are a variety of approaches. Each host country must develop its own path to ensure that TNE complements its domestic higher education system and meets the articulated goals and outcomes for international collaboration and provision. This will ensure that the outcomes and impact of TNE are relevant to local/national needs and priorities.

Appendix B

Impacts of Transnational Education on Host Countries

McNamara, J and Knight, J (2014) *Impacts of Transnational Education on Host Countries.* British Council and DAAD. Available online at: https://www.britishcouncil.org/education/ihe/knowledge-centre/transnational-education/impacts-transnational

Executive summary

Background

More and more students across the world are choosing to study international higher education programmes without having to move to the country awarding the qualification/providing the academic oversight to study the entire programme. This increasing phenomenon is facilitated by higher education institutions, and the programmes they deliver, crossing international borders to reach the students demanding these programmes. There are a number of terms used to describe this international mobility of providers and programmes, the most common being transnational education (TNE). While this particular facet of the internationalisation of higher education is certainly not new, it does appear to have accelerated in recent years to such an extent that it now constitutes a significant component of the higher education system in a number of developing countries. In most 'host' countries, however, TNE represents a small but increasingly important alternative to traditional international student mobility and domestic higher education for local students.

Research on TNE has generally been from the perspective of sending/awarding countries, and relatively little research has been conducted to investigate the impacts of TNE on the host country. The current research seeks to consider TNE specifically from the host country perspective. This project was jointly commissioned in October 2013 by the British Council and DAAD with the participation of Australian International Education, Campus France and the Institute for International Education. The main objective of the research was to produce robust findings on the impacts of TNE in host countries, focusing on four main impacts categories:

1. academic impacts
2. cultural/social impacts
3. economic impacts
4. skills impacts.

Country selection

Criteria for selection of countries/administrative regions for inclusion of the study included: maturity of TNE location, diversity of TNE delivery modes, geographical mix and the research experience from a previous pilot study. The following table presents the final ten country/region selection.

The final ten country/region selection
1. Botswana
2. Egypt
3. Hong Kong
4. Jordan
5. Malaysia
6. Mauritius
7. Mexico
8. Turkey
9. UAE
10. Vietnam

Online survey of TNE stakeholder groups

The main methodological approach involved administering an online survey to eight different TNE stakeholders groups in each of the study countries:

Online survey of TNE stakeholder groups
1. TNE students/graduates
2. Non-TNE students/graduates
3. TNE faculty
4. Non-TNE faculty
5. TNE senior leaders
6. Higher education experts
7. Government agencies
8. Employers

The total number of survey responses received was 1,906 across the ten countries, and all data was analysed in the aggregate rather than at the individual country level.

	Total
TNE students	912
Non-TNE students	473
TNE faculty	168
Non-TNE faculty	131
TNE senior leaders	62
Higher education experts	56
Government agencies	31
Employers	73
Total	1,906

Main findings

A large body of data was generated as part of the research which allowed for many topics of interest to be investigated. While much of the existing received wisdom about TNE has been supported, a number of new, and in some cases unexpected, findings have been revealed. A few of the most important findings are presented as follows:

1. TNE reaching a different profile of student

One of the most interesting outcomes of this research is an insight into the profile and characteristics of TNE students. While there is certainly no typically TNE student, the data suggests that TNE students are generally older than the traditional secondary school leaver entering higher education. The proportion of TNE students with previous employment experience as well as the high numbers studying master's and PhD level programmes also points to a relatively mature demographic. It's interesting to note the surprisingly high proportion of students working full-time during their studies, often facilitated by modules delivered over concentrated time periods during the evenings or weekends. The flexibility of TNE clearly has appeal for students with requirements to balance work, study – and possibly other life demands – at the same time. This fascinating data raises important questions about the extent to which TNE is catering, or can further cater, for the current and evolving needs of more mature students, as well as the needs of the host country.

2. 'Career development' the main motivation for choosing TNE

Understanding why students chose their TNE programme is fundamental to understanding their expectations and objectives. The message from the students surveyed in this study is clear: they see TNE as a way to improve their professional skills, thereby improving their career prospects. For the majority of students this involved starting their career, but for many this involved developing an already established career. TNE students are also firmly of the opinion that employers perceive TNE to be advantageous when selecting job candidates. The two main reasons cited for this were 1) prestige and status of the foreign institution/ education system, and 2) the international outlook and multicultural experience of TNE graduates relative to local non-TNE graduates. While students perceive that employers are predisposed to TNE graduates, more research is needed to ascertain employers' awareness level of TNE, their perceptions of its value, and their support for further education through TNE programmes.

3. Importance of 'international outlook' and 'intercultural competence' for students

From the student (TNE and non-TNE) perspective the most positive attribute of TNE is the opportunity to gain a more 'international outlook'. TNE students also rated 'international outlook' as the second most enhanced skill – behind analytical thinking – from a list of ten options. The message about the importance of increased awareness and knowledge about international issues and events has been clearly understood by students and they believe that TNE can help them gain this international understanding.

The opportunity to 'strengthen their intercultural awareness and competence' was highly ranked by students as a motivation for choosing their TNE programme. However, there is some evidence to suggest that the cultural experience of studying TNE programmes may fall somewhat short of student expectations. More research and reflection on how to capture and study the social, cultural and political impacts of TNE on students, and host country institutions and society is needed.

4. Cost of TNE – both a positive and negative

All the non-student groups surveyed were of the view that 'affordability of TNE relative to study abroad' represents the most positive attribute of TNE for students. This is worthy of serious reflection and is a key finding for two reasons: 1) respondents acknowledge the importance of study abroad, and 2) TNE is considered a positive and affordable alternative to taking the full foreign degree programme abroad. This provides evidence that increasing demand for international education can be partially met through programme and provider mobility, and also highlights the extent to which the lines between TNE and traditional student mobility have become blurred.

On the other hand, all of the groups surveyed – including TNE and non-TNE students – were of the view that the 'high cost of TNE compared with local programmes' represents the main negative attribute of TNE. The level of consistency in views on this issue across all survey groups is very striking and provides for a robust finding. Issues about pricing, affordability and how TNE tuition fees compare with alternative education options are clearly very important and require further investigation. In studying the costs and benefits of TNE, more attention needs to be given to

differentiating between the various modes of TNE, such as branch campuses, franchise/twinning, distance education including (MOOCs) and joint/double degree programmes.

5. Academic impacts of TNE predominate at the national level

The study sought to engage with TNE stakeholders who could provide some insight on the impacts of TNE at national level in the host country. Feedback received from groups such as senior TNE leaders, higher education experts, government agencies and employers suggests that TNE is having the greatest impact by 'providing increased access to higher education for local students' and 'improving the overall quality of higher education provision'. However, it also appears that TNE, in general, is not providing different programmes to those offered locally, which somewhat dispels the myth that TNE is about offering specialised niche programmes not available in the host country. For the most part, TNE programmes appear to be responding to student demand. Further work is needed on obtaining and studying TNE enrolment data to ascertain whether the perception of 'increased access' is borne out by actual increased numbers registered in higher education in host countries.

6. Lack of awareness of TNE

One of the most surprising findings is an overall lack of awareness about TNE programmes in the host country. The majority of non-TNE students and non-TNE faculty surveyed were not aware of the TNE opportunities in their country. And employers surveyed often expressed a certain lack of understanding or confusion about what actually constitutes a TNE experience. This revealing finding suggests that the full potential of these programmes is not being realised and that much work is needed to publicise TNE opportunities in the host country. This speaks as much to the sending countries as it does to the host countries. In-depth national case studies would provide a window to understanding the different sectors and stakeholders' awareness of TNE and its potential.

7. TNE graduates highly skilled but not necessarily addressing local skills gaps

All groups, including non-TNE students and non-TNE faculty, believed that TNE graduates are better equipped than locally educated graduates in 'all' ten skills areas listed. TNE students perceived their 'analytical thinking' to be the most enhanced of the skills, which ties with their views that teaching methods on TNE programmes rely more on critical thinking and voicing of opinions compared with local programmes. Interestingly, all of the other survey groups selected 'international outlook' as the skill most enhanced in TNE students, with analytical thinking only ranked fifth on average.

While TNE graduates are perceived as relatively skilled, the research suggests that TNE may be only 'moderately' addressing skills gaps in the local labour market, depending on the type of programmes being offered. Specialised TNE courses covering niche topics were felt to have a positive impact on addressing local skills gaps. However, it was also felt that many TNE providers are offering programmes already available locally. This finding warrants further investigation and raises an interesting question about the extent to which TNE graduates are targeting local versus international jobs. It also highlights the importance of understanding and addressing information asymmetries that exist between academia and industry as regards the skills needed by employers in the host country.

8. Study abroad and internships – important components of TNE

About half (49 per cent) of TNE students reported having a study abroad experience as part of their TNE programme. This is a positive trend which hopefully will continue to increase. The opportunity to visit a foreign country may explain why 'strengthening an international outlook' and 'promoting intercultural awareness and competence' are ranked as the two most important positive features of TNE by students and graduates of these programmes.

Over two-fifths (42 per cent) of TNE students reported having an internship or work experience opportunity as part of their TNE programme, sometimes overlapping with study abroad. Many of these internships appear to have been core or mandatory components of the TNE programme, with a noticeable link between teaching and engineering programmes, and placements in academic and industry. The connections between TNE programmes and the labour market are more significant than expected and dovetail well with students' career development aspirations and employers' demands for graduates with work experience. Further research is required to evaluate the lasting outcomes of study abroad and internships for students, and how these opportunities differs depending on the mode of TNE and the subject area.

9. Benefits outweigh the risks

Overall, the positives of TNE were perceived by respondents to be significant and allow for fairly robust conclusions. The negative attributes or consequences were generally not perceived as being very important or relevant by survey respondents, with the exception of the 'high cost of TNE programmes compared with local programmes'. It is enlightening to see that the non-TNE students and non-TNE faculty groups – while more sceptical than the other groups – were generally positive about the impacts and implications of TNE for the host country. However, this is framed against a backdrop of significant levels of uncertainly and lack of awareness by some of the survey groups about the extent and nature of TNE in the host country. And while the research findings are positive overall, enough concerns were raised to demonstrate that the outcomes of TNE can vary significantly from institution to institution.

10. Outlook for TNE

Respondents were generally optimistic about the outlook for TNE and it appears likely that both the number of new programmes and the capacity of existing programmes will expand over the medium term. In academic areas such as developing the local knowledge economy and producing collaborative research output, TNE looks well placed to play an increasing role in the host country. Economic considerations, such as the capacity of TNE to attracting foreign direct investment and improve local infrastructure, appear less pronounced and will largely depend on host country government policy and country-specific circumstances.

The data produced in this report was drawn almost exclusively from opinion and views provided by the various TNE stakeholder groups. While these views are valid and informative, hard data relating to TNE programmes and students enrolled on those programmes is necessary for a concrete understanding and appreciation of the impacts and implications of TNE for the host country. This issue of data availability is something which host countries will need to work towards with the support of their foreign partners.

Appendix C

TNE Data Collection Systems: Awareness, Analysis, Action

McNamara, J and Knight, J (2015) *Transnational Education Data Collection Systems: Awareness, Action, Analysis.* British Council and DAAD. Available online at: https://www.britishcouncil.org/education/ihe/knowledge-centre/transnational-education/tne-education-data-collection-systems

Executive summary

Background

Transnational Education (TNE) is a dynamic, vibrant sector of higher education internationalisation. In general terms, TNE refers to the movement of higher education providers and programmes across national borders, allowing students to study foreign programmes without having to leave their home country. Not only has there been an exponential increase in the number of new TNE programmes being offered, there are new forms of TNE partnerships and delivery modes emerging onto the higher education landscape. However, the research and monitoring of these new developments is simply not keeping pace with the accelerated rate of change. While opinion and anecdotal evidence reveal the benefits and risks attached to this burgeoning field, there continues to be a significant lack of research, robust data and information regarding TNE programmes. This is especially true in terms of host country TNE activity. This reality, and the imperative to address it, gave rise to the current British Council and DAAD study, which focuses on the existence and characteristics of TNE data collection systems in host countries and the capacity to produce robust data on TNE programmes and enrolment rates. The three primary aims of this report are:

- to raise awareness about the lack of TNE information and data in a field that is both growing and changing rapidly
- to provide an overview of ten host countries and three sending countries, all of which are at different stages of developing and operating a TNE data collection system, in order to identify good practices, as well as key issues and challenges
- to advocate for commitment and action by TNE active countries – both sending and host – to work towards a set of common definitions of TNE modes and programmes, and to adopt a more systematic approach to TNE data collection.

Approach to research

For continuity and consistency, the ten host countries chosen for this study are the same ten countries included in a previous 2014 British Council/DAAD study entitled *The Impacts of TNE on Host Countries*. These countries represent a cross-section of TNE host countries from all regions of the world, listed below.

The TNE data collection systems in three sending countries – Australia, Germany and the UK – were also reviewed in order to assess whether there are lessons that can be learned for the benefit of host countries. In addition to extensive desk-based research, a number of telephone interviews were conducted, and standardised information requests administered, with key people across the ten host countries and three sending countries.

Asia	Africa	Americas	Middle East	Europe
Malaysia	Botswana	Mexico	Jordan	Turkey
Hong Kong	Egypt		UAE	
Vietnam	Mauritius			

Main findings

A review of higher education data collection systems across ten host countries has proven a difficult but ultimately illuminating and rewarding experience; difficult because of the complexity and diversity of the higher education landscapes reviewed, as well as the challenge of reaching people with detailed knowledge of TNE data collection systems; illuminating and rewarding because of a number of important data collection issues identified, the consistency of the challenges and enablers identified and the overall potential arising out of this research for establishing or improving data collection systems in any host country.

Across the ten host countries reviewed, there are vast differences in terms of the extent and form of TNE activity taking place. For large countries such as Egypt, Mexico and Turkey, TNE represents a small fraction of overall higher education activity, and internationalisation is framed mainly within a student and faculty mobility context. Other host territories reviewed, such as the Emirate of Dubai, or the special administrative region of Hong Kong, have vast experience as hosts of foreign providers and programmes and TNE is a core component of their higher education system. The diversity of TNE delivery modes and institutions involved, as well as the plethora of local terms used to describe these activities and actors, are staggering and pose serious challenges from a research perspective. Nevertheless, the depth of research and analysis undertaken has allowed for a number of important observations and findings to be identified that have particular relevance for newly developing or improving TNE data collection systems.

Rationale for collecting TNE data

One of the main rationales for collecting TNE data relates to the regulatory functions associated with registration, accreditation and, to a lesser extent, quality assurance, of TNE providers and programmes. Even countries at an early stage of collecting TNE data appear to be primarily motivated by this factor. This highlights the important role that regulatory bodies, as opposed to statistical agencies, play in gathering TNE data across the host countries reviewed. The motivations for collecting TNE data are also framed within a policy development and decision-making context. Examples of policy areas influenced by the existence of TNE data include: internationalisation strategies, accreditation and quality assurance, recognition of foreign qualifications, visa and immigration policies, promoting access to higher education, and knowledge and research development. The scale of TNE activity relative to domestic programmes appears to be an important factor in establishing data collection systems, and the most active data collection systems are generally in countries with most experience of hosting TNE programmes. In some cases, the reason for collecting TNE data is simply explained as being a natural extension of the data collection culture that exists more generally in the host country.

Systematic approaches to collecting TNE data

An important distinction is whether TNE data is collected independently or as part of the general higher education data collection system. Three host countries (Hong Kong, Vietnam and UAE [Dubai]) have been identified as having a 'dedicated' TNE data collection system, producing relatively robust TNE data. By contrast, three of the host countries reviewed (Botswana, Mauritius and Malaysia) collect data on public and private higher education providers and programmes as part of the national higher education data collection system. For these 'integrated systems', the published data does not clearly identify whether the programmes are offered by local or foreign higher education institution (HEI)/providers. Only with some knowledge and considerable effort can the data be manually reorganised to produce a TNE database. Given the work involved in extricating the TNE data, it is obvious that TNE data collection is not the primary objective of these systems. The three countries with dedicated systems in place all have a regulatory framework that makes explicit reference to foreign education providers and programmes. Therefore, it appears that the legislative underpinning for TNE has a bearing on the data collection systems that are subsequently developed.

How TNE data is collected

All agencies collecting TNE data in the host countries reviewed are government agencies: either departments within the Ministry of Education (MoE), or regulatory bodies, usually reporting to the MoE. Given that TNE data is collected as part of a registration or accreditation function, there is generally a two-step process in place:

- initial registration of institutions and accreditation of their TNE programmes
- follow-up survey/information request/annual return or review to monitor the registered institutions and accredited programmes.

The extent to which the programmes are reviewed depends on the level of maturity of the quality assurance and accreditation system. Less mature quality assurance and accreditation systems usually concentrate on the status of the foreign parent university, ensuring that it is recognised in its home country. More mature quality assurance and accreditation systems place more emphasis on evaluation of the programmes and whether they are in line with host country requirements and priorities.

Data templates are usually sent to the HEIs for completion and are crucial in collecting detailed TNE programme and

enrolment data. Online data collection systems can work well and there are examples of good practice that host countries can learn from sending countries in this regard. Guideline documents are useful in assisting HEIs with completion of templates, and close communication and co-ordination between the data collection agency and HEIs is highly recommended. Overall, templates and guidelines are a priority area which requires significant attention and which can result in major improvements in the TNE data collected by host countries.

TNE data produced

TNE data collected and published by host countries provides a fascinating insight into the main foreign partner countries, the main modes of delivery and the topography of local actors involved. For the integrated systems of Botswana, Mauritius and Malaysia, local public HEIs appear not to be significantly involved in TNE, whereas, in two of the dedicated systems, Hong Kong and Vietnam, public HEIs account for the bulk of TNE activity. It is interesting to observe the extent to which different modes of TNE are included for data collection purposes. Analysis of the published data raises an important point about differing sending and host country perspectives on what constitutes an independent, as opposed to a collaborative, programme, as well as the confusion caused by labelling an international branch campus as a local private HEI.

Distance education is part of the TNE landscape, but it is not well researched or understood. Only one of the ten host countries reviewed has adopted a systematic approach to capturing this activity, by co-ordinating and cross-referencing data from a number of governmental and private sector sources – but this does, at least, demonstrate that it is possible. One of the surprising findings of the research is the lack of priority attached to collecting TNE enrolment data in the host countries. This may be a consequence of the data collection agencies being regulatory bodies and, consequently, their primary duty is to ensure the quality of the institutions and programmes. However, the sending countries of Australia and the UK place greater priority on collecting enrolment data than on collecting programme data.

How TNE data is used

Register of approved providers and programmes

All six countries with dedicated or integrated systems place details of their approved providers and programme on a register or directory hosted on their website. The register of approved programmes is primarily used by prospective students, whether local or international, to inform them that the programmes have met the minimum registration criteria and are, therefore, formally approved. Employers of TNE graduates can also find a register of programmes of use, although, in general, employers are often unaware of TNE, and how it differs from local programmes. These registers are an important self-enforcing mechanism by which HEIs can engage in the data collection process, since not being listed effectively places providers outside the official system, which may limit their credibility or attractiveness to potential students.

Quality assurance and enforcement action

Although apparently a factor driving TNE data collection, quality assurance systems are still developing in a few of the countries reviewed (and other countries around the world). Consequently, the data appears to be used more for registration than for ongoing quality-assurance reviews.

Higher education planning and policy development

TNE data is normally summarised and discussed in the annual report of the data collection agency or Ministry of Education. Overall, it is encouraging to see the extent to which the more active systems have incorporated TNE data into their higher education planning, policy development and strategies to increase access to higher education. However, integrated systems are not making optimal use of their data, primarily because the concept of TNE is not clearly defined, even when TNE programmes have been hosted for over a decade.

Main challenges for collecting TNE data

Categorisation of TNE for the purposes of data collection is perceived as a significant challenge across the full spectrum of systems and actors reviewed. The country profiles presented in the report and the comparative cross-country analysis clearly illustrate the confusion within and among countries about what the different types or modes of TNE actually mean and involve. And, in some host countries, the overall concept of TNE is not clearly understood at national policy level, leading to confusion from the top down.

A number of concerns were raised by data collection agencies concerning the quality of the data provided by HEIs, including: non-response to information requests, late provision of data, poor quality of data provided, and a lack of capacity at HEIs to assist with queries. However, HEIs themselves raised concerns about the data collection process administered by the data collection agencies, including: poor co-ordination between different government agencies, resulting in duplication of data requests; data request overload for HEIs; time constraints; poor lines of communication

with HEIs; lack of detailed guidelines to assist with completing the data templates; and lack of expertise in government agencies. Use of outdated or poorly structured data templates is considered a major reason for lack of TNE data in a few countries, and lack of clear guidelines can result in HEIs developing their own templates, resulting in inconsistent data returns.

Main enablers for collecting TNE data

A coherent strategic approach at policy level is considered an important enabler for collection of TNE data. This includes having a well-developed regulatory environment in place, providing for the establishment and recognition of TNE providers and programmes. For HEIs, clear and efficient lines of communication between the data collection agencies and HEIs is the main issue. The optimal approach involves education and training for HEIs on the importance of providing the requested information, including briefings and meetings between HEIs and data collection agencies. Development of online data collection portals is generally enthusiastically supported; linking HEI and government data collection systems is considered a good way to drive data consistency and comparability across the HE sector. Finally, the importance of having a legal requirement, or clarification of existing requirements, for private HEIs to provide data to government is considered an important enabler.

Towards a common TNE categorisation framework

This report begins a process necessary to addressing the complexities of TNE terminology by proposing a common framework of TNE terms. A key issue is the necessity of delineating 1) whether the TNE activity is a joint effort between host and sending HEIs or 2) whether the TNE activity could be described as a standalone or independent activity, without direct academic involvement with a local partner HEI. Descriptions of different forms or modes of TNE programmes are provided for collaborative arrangements (twinning, joint/double/multiple degree programmes and locally supported distance education) and independent arrangements (international branch campuses, franchise university, foreign private institutions and pure distance education). The framework provides an overview of the different modes of TNE in relation to the following key features: curriculum/knowledge; qualification(s) offered; academic oversight; and faculty delivering the programmes. It is important to note that this framework provides a starting point only, and will require considerable political leadership within and across countries to produce an international framework that is robust enough to ensure that the characteristics of each mode of TNE are clearly defined, but flexible enough to reflect the realities faced by the more than 120 countries involved in TNE.

Guidelines and recommendations

One of the main objectives of this report is to advocate for commitment and action by TNE active countries, sending and host, to improve their TNE data collection systems. In this spirit, a number of recommendations have been produced, targeting specific TNE actors. The recommendations are supplemented with a set of practical guidelines that identify important issues and steps for national governments and HEIs. The recommendations and their target audience are summarised as follows:

National government: Ministry of Education and affiliated agencies

It is recommended that national governments in TNE host and sending countries begin to develop a TNE data collections system or strengthen existing ones with reference to the guidelines provided in Chapter 7 of this report.

Higher education institutions engaged in TNE activities

It is recommended that HEIs engaged in TNE activities collaborate with national governments and organisations in the design, operation and use of a TNE data collection system. HEIs will need to develop capacity and commitment to contribute to and benefit from a national TNE data system.

Non-governmental higher education associations

It is recommended that national and international higher education non-governmental associations work individually and together to support national governments and HEIs to develop and implement national TNE data education systems using a common TNE framework.

International governmental agencies

It is recommended that international governmental agencies such as OECD and UNESCO work towards the development of an international agreement and set of procedures, so that data on TNE programmes and enrolment can be collected from TNE active countries using a common TNE framework of categories and definitions.

Awareness, Analysis, Action

The goals of the research project will be met if further advocacy and action steps are taken towards developing a common TNE framework to support HEI and country-level TNE data collection systems, and an international commitment is made to gather comparable and reliable TNE data across TNE active countries.

Notes

Notes