

Volume I

Global Trends in Transnational Higher Education

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Acknowledgements

I would not have embarked on this journey some 13 years ago to work on a PhD had it not been for my Father's influence in my life. He raised me to believe that I could achieve anything that I set out to do. Sadly, I lost my Father (Felix Noronha) before completing my study but I owe him immense gratitude. By completing this study, I have in some small way fulfilled my Father's aspirations for me.

Many thanks go to my supervisor, Professor Helen Ware who has provided exceptional support through this journey, patiently encouraging me despite my absconding at times to meet the demands of full-time work and family across two continents. After undertaking my initial research, I took almost 4 years away from my thesis project while dealing with some personal and health issues and therefore, I owe Professor Ware a ton of gratitude for allowing me the opportunity to continue my project after the long break. I would also like to acknowledge my other supervisor, Dr. Brian Denham who encouraged me to pursue my study plan.

Finally, I wish to acknowledge the work done by many individuals to make education accessible to all people which is what motivated me to study and better understand the opportunities offered through transnational education. It is my hope that the newer initiatives in transnational education and the availability of open learning courses will make education accessible to all parts of the world.

Abstract

Less than 25 years ago, transnational education (TNE) was new and considered somewhat rare. The early relationships in TNE were often 'twinning' programs where two universities worked in partnership across international borders. Soon, TNE was also seen as facilitating and supporting local institutions in the developing world with a range of curriculum options to meet unmet demand. Today TNE fueled by technology sees no barriers to its unprecedented growth across almost all regions of the world whether it crosses borders into the developing or indeed the developed world. While TNE has continued to grow, competition has impacted some TNE providers.

Despite the considerable growth in TNE and much research being undertaken on this phenomenon, what is currently lacking is: (a) more knowledge about whether students from TNE programs received the same student experience as students that actually went abroad to a university's main campus; (b) a comprehensive understanding of the many forms of TNE from a provider and receiving country's perspective (because these can be different) and (c) comprehensive data on TNE enrolments in the different forms of TNE based on the varied perspectives referred to in (b). This research project sought to gain a better understanding of these issues from the standpoint of why institutions engage in TNE and why students consider TNE; how employers view qualifications earned through TNE, the limitations of TNE and how the TNE student experience differs from the student who went abroad to study.

The study initially set out to survey universities, TNE students, employers, international education organizations and government departments. (*Refer the project's website at www.transnationalstudy.com*). When the study got underway, it became clear that there was sensitivity amongst universities and governments about discussing openly their views about TNE from the standpoint of student outcomes. There was concern expressed by some that the

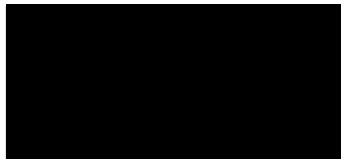
research would reveal that TNE offered a different 'form of education' and that such information may be detrimental to all the good work universities were undertaking in TNE. It also became clear that without the support of universities that offered TNE programs, it would be impossible to reach TNE students and therefore, gather sufficient data (surveys) from students to draw conclusions. A further complication was that employers contacted for feedback and for completion of surveys did not quite understand qualifications from TNE providers; most believed students completed a major component of study at the university's main campus abroad. *With limited survey returns from universities, governments/international education organizations and students and none from employers, this study relied heavily on secondary sources including an extensive reliance on visual aids (usually snapshots of web pages) which showed the rapid evolution of TNE.*

Some of the conclusions drawn from the research study were that: (a) TNE is an extremely important aspect of the overall work done by many governments, international education organizations and universities to educate the world; (b) while the student experience of TNE students was different to the students that travelled abroad to study, this did not diminish the value of TNE; (c) universities now service a global student audience and the survival of the higher education sector would depend on the sector's ability to service students wherever they might be, because of dwindling government funding, fewer domestic students and a diminishing flow of international students to the west; (d) while there is work underway to establish standard guidelines to define the many forms of TNE and gather data on TNE students, this work is far from complete; and (e) it is highly likely that in the future, some of the international branch campuses of today will evolve into independent institutions (breaking ties with their parent institution).

Certification

I certify that the substance of this thesis has not already been submitted for any degree and is not currently being submitted for any other degree or qualification.

I certify that any help received in preparing this thesis and all sources used have been acknowledged in this thesis.



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Signature

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List of Acronyms

ACA	Academic Cooperation Association
ACE	American Council on Education
ACU	Association of Commonwealth Universities
AEI	Australian Education International
AIEA	Association of International Education Administrators
AUF	Francophone University Agency
AusAid	Australian Development Assistance Agency
AUCC	Association of Universities and Colleges of Canada
AUQA	Australian Universities Quality Agency
BC	British Council
BCG	Boston Consulting Group
C-BERT	Cross-Border Education Research Team
CBIE	Canadian Bureau of Education
CIDA	Canadian International Development Agency
CHEA	Council for Higher Education Accreditation
DAAD	Deutscher Akademischer Austausch Dienst (The German Academic Exchange Service)
DIAC	Dubai International Academic City
DFAIT	Department of Foreign Affairs and International Trade
DFAT	Department of Foreign Affairs and Trade
EAIE	European Association of International Education
ENZ	Education New Zealand
EY	Ernst & Young

EU	European Union
EUA	European University Association
FCE	Federation of Continuing Education in Tertiary Institutions
GATS	General Agreement on Trade in Services
GDP	Gross Domestic Product
GMU	George Mason University
GUS	Global University Summit
HE	Higher Education
HESA	Higher Education Statistics Agency
HREC	Human Research Ethics Committee (HREC) at UNE
IAU	International Association of Universities
IBC	International Branch Campus
IDP	IDP Education
IEAA	International Education Association of Australia
IIE	Institute of International Education
IFC	International Finance Corporation
IGC	Incheon Global Campus
IPPM	International Programme and Provider Mobility
JCU	James Cook University
JDNP	Joint Development of Niche Programs
JISC	Joint Information Systems Committee (now referred to as Jisc)
KHDA	(Dubai's) Knowledge and Human Development Authority
LE	Laureate Education
LIU	Laureate International Universities
MAEE	Ministry of Foreign and European Affairs

MDGs	Millennium Development Goals
MIT	Massachusetts Institute of Technology
MOOC	Massive open online course
MOU	Memorandum of Understanding
NAFSA	National Association for International Educators
NIIED	Korean National Institute for International Education
NUFFIC	Netherlands Organisation for International Cooperation in Higher Education
NUS	National University of Singapore
OBHE	Observatory on Borderless Higher Education
OECD	Organisation for Economic Co-operation and Development
QS-MAPLE	QS Middle East and Africa Professional Leaders in Education
SEAMEO	The Southeast Asian Ministers of Education Organization
SUNY	State University of New York
SDG	Sustainable Development Goals
TDB	i-graduate's Transnational & Distance Education Barometer
TNE	Transnational education
UA	Universities Australia
UA	University of Arizona
UAE	United Arab Emirates
TDB	Transnational and Distance Education Barometer
UKCOSA	UK Council for International Student Affairs
UN	United Nations
UNESCO	United Nations Educational, Scientific and Cultural Organization
UNHCR	United Nations High Commissioner for Refugees

UNICA	The Network of Universities from the Capitals of Europe
UQAIB	University Quality Assurance International Board
VET	Vocational education and training
VLE	Virtual Learning Environment
WB	World Bank
WECD	Warwick Economics & Development
WENR	World Education News Review
WTO	World Trade Organization

Chapter 1 - Introduction

This chapter introduces and discusses transnational education (TNE) within the context of international education and globalization and the role played by institutions of higher learning in educating the world's people. Transnational education is an important aspect of international education.¹ The chapter highlights some of the global challenges faced by universities and defines TNE's role as it evolved in meeting the demands of a world thirsty to acquire knowledge while also providing much needed revenue for the world's education sector which has had to deal with diminished funding from governments, fewer domestic students and competition for international students.

1.1 Overview

The early days of TNE saw the development of twinning programs between institutions in the developed and the developing world. The terms, 'transnational' and 'TNE' were seldom used in the early days to describe these relationships. It was rare at the time to see TNE offered in the developed world. Leading universities and institutions of higher learning invested heavily in building relationships but it was impossible in the early years to find a university from a developed country form an alliance in terms of twinning (shared courses/programs) with a university from another developed country.

Historically most universities have had modest numbers of international students and scholars come to their campuses due to their international connections including collaborative research projects with overseas partners. Generally, if managed properly, international connectivity amongst universities provides great dividends (to all) in terms of a return on investment whether it is in research, TNE and/or exchange of faculty and other initiatives. While different factors drive internationalization on individual campuses, there seems

¹ Stephen R. White, 'Political Education and Social Reconstructionism: Contextualizing the Philosophy of Sri Aurobindo', The University of Tennessee, *International Education Journal*, Spring 2005, n. 2, p. 31.

to be a common acknowledgement that the goal is to create an environment where students can become interculturally effective people and global citizens.²

When discussing TNE, the word 'cross border' is also used because 'in many cases it is necessary to capture the importance and relevance of geographic and jurisdictional borders'.³ Sometimes the terminology used is specific to certain regions or countries but essentially TNE, borderless education or cross borders education means the same. It means the delivery of education across borders.

It is important to also understand the origin of the term 'borderless' in the context of education. Originally this term was raised by Australian academics and is referred to in the Observatory on Borderless Higher Education (OBHE) 2001 publication *Mapping Borderless Higher Education: policy, markets and competition*. The OBHE publication refers to the term borderless as crossing traditional boundaries and included boundaries of:

- **Time and space - enabling learners to study at a time and place convenient to them rather than in the traditional classroom;**
- **Level - the blurring of boundaries between higher, further and technical education, continuing professional development and lifelong learning.**
- **Control - the growth of private (including for-profit higher education); corporate universities; public-private partnerships; and public universities operating private/for-profit entities.⁴**

More recently, TNE is sometimes being referred to as 'international programme and provider mobility or IPPM, to clarify the misunderstanding about the differences between transnational, cross-border, offshore and borderless education'.⁵ *However, for this study the term TNE will be used broadly to describe cross-border, offshore and borderless education.*

² Kristin Sheppard, 'Global Citizenship: The Human Face of International Education', Institute of International Education, *IIE Journal*, Fall 2004, v. 34, n. 1, p. 34.

³ Jane Knight, *Trade in Higher Education Services: The implications of GATS in Mapping Borderless Higher Education: policy, markets and competition*, The Observatory on Borderless Higher Education (UK), London, 2004, p.6.

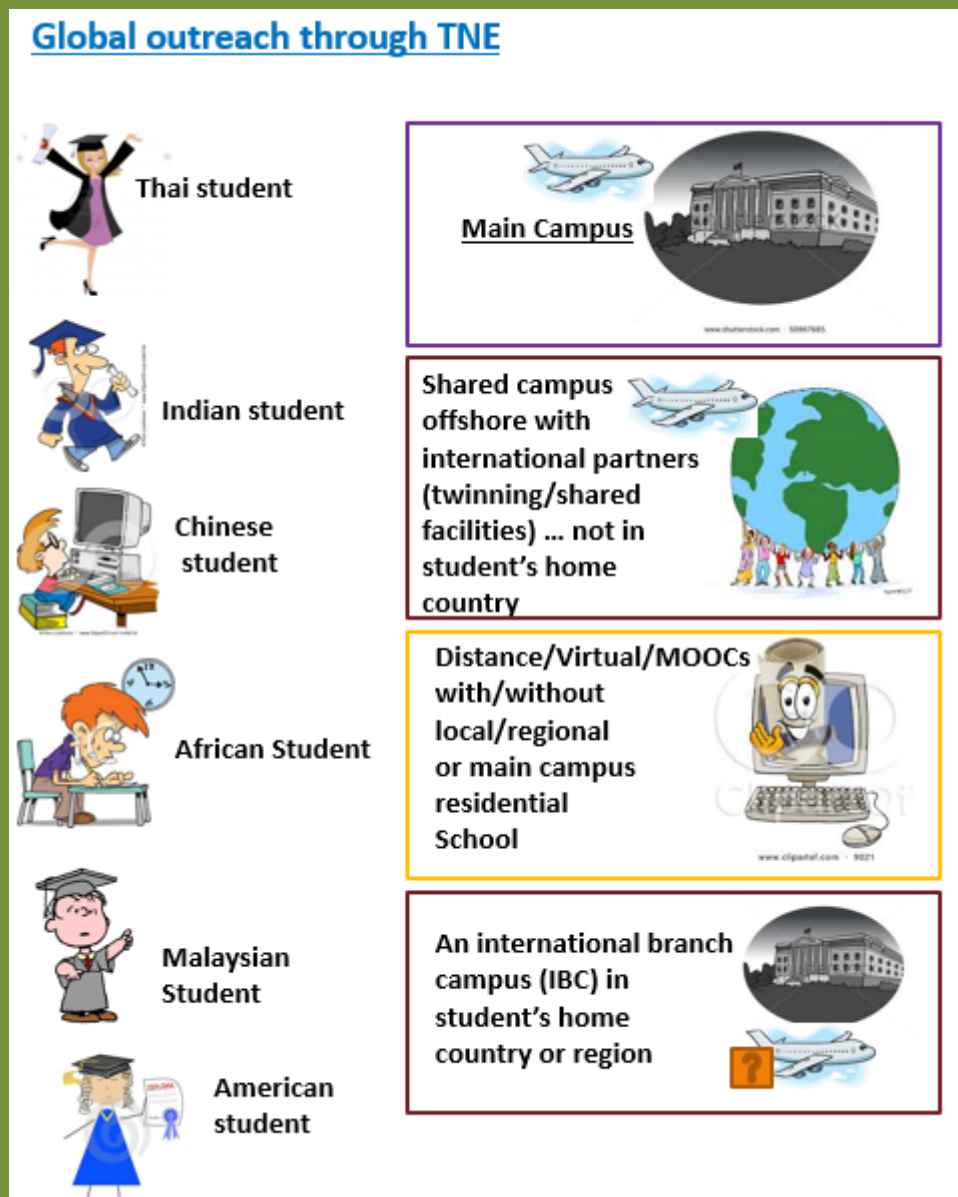
⁴ *Ibid.*, p. 4.

⁵ Jane Knight. *The new faces of transnational higher education*, University World News Online. 27 October 2017. Also available at: <http://www.universityworldnews.com/article.php?story=20171024133538586> (accessed 16 January 2018)

1.2 Defining and Understanding Transnational Education in Today's Globalized World

All forms of TNE require the delivery of TNE in local settings. In the case of transnational education, the students do not move to study in other countries – they study in their home country or even at home, but the credentials are

CHART 1: A Single University Can Offer Multiple TNE Options in Multiple Student Markets



Source: Author

awarded in the name of a foreign institution.⁶ Having said this, TNE students can study regionally i.e. beyond their own borders but remain a student of TNE if the university in a regional location, is a foreign university. Chart 1 on p. 3 demonstrates the many options available to students to undertake a foreign qualification through TNE. The 2016 HE Global Report titled '*The Scale and Scope of UK Higher Education Transnational Education*' commissioned by the UK Higher Education International Unit and the British Council (BC) stated that TNE 'can include but is not limited to branch campuses, distance learning, online provision, joint and dual degree programmes, flying in faculty for short courses, or mixed models (known as blended learning).'⁷

The transformation of TNE from its early days to its current form where there are no geographic restrictions on growth has meant that it is possible to undertake a degree program of a foreign university without leaving home. Students from the developed world can also now undertake degrees from other developed countries and indeed from the developing world. Moreover, students have options to pursue degrees of universities from the developed world in the developing world, where the overall living and tuition costs may be lower. For example, a student in Australia can now undertake a degree of an American university in China and receive a qualification from the American university without ever setting foot on American soil. TNE is now truly global.

Increasingly foreign universities from the United States, Australia and England have opened branch campuses in major cities in the Third World and are able to attract students by selling their "name brand."⁸ It is now not just universities in the developed world that have campuses overseas, increasingly universities from the developing world also have campuses in other countries. For example, Turkey has an IBC in Germany and Iran has an international branch campus

⁶ Andreis Rauhvargers, *The European Perspective Towards an Important Challenge Brought by Globalisation: Recognition of Transnational Education Qualifications*, Committee of the Convention on the Recognition of Qualifications Concerning Higher Education in the European Region. 2002. Also at: http://www.aic.lv/AR_public/UNESCO_expert%20meet1.pdf (accessed 10 March 2018)

⁷ HE Global. *The Scale and Scope of UK Higher Education Transnational Education*. Report commissioned by the UK Higher Education International Unit and British Council with research from Warwick Economics & Development (WECD), June 2016, p. 7. Also available at: <https://www.britishcouncil.org/sites/default/files/scale-and-scope-of-uk-he-tne-report.pdf> (accessed 9 December 2017)

⁸ Munir Qaddus and Salim Rashid, 'The Worldwide Movement in Private Universities: Revolutionary Growth in Post-Secondary Higher Education', *The American Journal of Economics and Sociology*, 2000, v. 59, n. 3, p. 487-516.

(IBC) under development in Canada. More detailed information on countries involved in TNE is in Chapter 3, pp. 177-238.

There were some key factors which led to removing the somewhat restricted geographical boundary of TNE of the early days, where activities took place mainly through twinning arrangements by institutions in the developed world with institutions in the developing world. Students from developing countries can now source TNE programs in another developing country. This has been possible because the advent of the internet and globalization brought the world beyond one's own borders into people's homes. This created a thirst for knowledge and this need for knowledge was not restricted to people from specific regions or socio-economic backgrounds. The internet including mobile phones and other social media made it possible for people even from the developing world with nil qualifications, understand that they could advance their socio-economic status by learning about the outside world and adopting some of the strategies already implemented elsewhere for their own advancement.

Higher education institutions were already well acquainted with international students on their campuses as well as with the experience of collaborating across borders through cross-cultural exchanges, research and technology. The United Nations Educational, Scientific and Cultural Organization (UNESCO) data indicates that in 1975 there were 0.8 million international students globally and that number increased to 4.1 million by 2013.⁹ Higher education institutions took on the challenge to deliver education through TNE by adapting and evolving their systems to ensure that they are at the cutting edge of TNE program delivery, using modern technologies including social media and other channels to reach out to students also in distant shores. The challenge of adding TNE to their onshore international student program was not surprising given that 'higher education drives and is driven by globalisation'.¹⁰

⁹ https://en.unesco.org/sites/default/files/1-4_growth_international_students.pdf (accessed 17 March 2018)

¹⁰ The Organisation for Economic Co-operation and Development (OECD), 'Higher Education to 2030', Executive Summary in Globalisation, *OECD Series: Educational Research and Innovations*, 2009, v. 2, p. 13. Also at: http://cyber.law.harvard.edu/communia2010/sites/communia2010/images/OECD_2009_Higher_Education_to_2030_Volume_2_Globalisation.pdf (accessed 14 December 2013)

TNE has many forms. In the early days distance education was simply referred to as distance education. These days if distance education is offered across international borders it becomes a form of TNE. 'Distance education is different from conventional classroom-based education in that it allows you as a student to complete courses and programs without attending scheduled group classes in a central location, such as a university campus'.¹¹ TNE is also sometimes a 'franchise' arrangement. 'Franchising is when a university subcontracts a TAFE or private provider to deliver a qualification on its behalf that carries the university's badge'.¹²

As the demand for education increased higher education systems around the world including those in the developing world were presented with opportunities that had previously not been heard of. Universities went 'global', realizing that they could indeed reach more international students in a far more cost-effective manner by using modern technologies and reinforcing partnerships offshore. Institutions in the developing world were also able to source institutions in the developed world and work through partnerships that would enhance overall study options for their local students. For example, in China it was possible for local institutions to attract overseas universities and offer their campuses to run TNE programs. Mobility was encouraged at universities where students participated in study abroad and even joint study schemes with outside universities. There was an understanding that 'mobility plays an increasingly crucial role in science, technology, industry, business, politics, culture and all possible dimensions of a global society'.¹³ The interactions that now take place amongst institutions of higher learning and students from around the globe, have not before been seen in the history of humankind.

¹¹ <http://www2.athabasca.ca/aboutau/distanceeducation.php> (accessed 18 November 2014)

¹² Andrew Trounson, 'Franchise deals only a short-term fix', *The Australian*, 22 September, 2010. Also at: <http://www.theaustralian.com.au/higher-education/franchise-deals-only-a-short-term-fix/story-e6frgcjx-1225927492117> (accessed 14 February 2013)

¹³ Bart De Moor and Piet Henderikx, *International Curricula and Student Mobility*. League of European Research Universities, Advice Paper, April 2013, n. 12, p. 5.

There is very little doubt that higher education institutions played a crucial role through TNE in providing more people in a globalized world with skills and education that would help them prosper in a world that has become increasingly interdependent. The concept of globalization is a social phenomenon and a humanistic idea of paramount importance.¹⁴ The need to learn created a 'market' for education institutions to offer their study programs in just about any part of the world as long as:

- There was an identifiable student market;
- The initiative was doable in terms of meeting various important criteria such as meeting local regulations and safety issues and would cover costs and/or deliver profits; and
- There were quantifiable outcomes for an academic institution which were beyond earning a 'profit' - examples included goodwill and diplomacy; shared research; broadening the horizons of one's own students.

The following were considered some of the fundamental drivers of TNE:

- *An increase in demand for Local/Regional delivery* - Due to a range of reasons including family, employment, cost of going abroad and visa issues;
- *The necessity for governments and universities to source additional income streams* - As government funding for education was decreasing and/or universities required more funding, TNE offered a greater pool of students round the globe; institutions could also work 24/7 (different time zones meant distance education through webcam lecture delivery could happen round the clock to deliver to different countries);
- *The awareness by governments and universities that there were clear benefits from global engagement in education* - Governments and universities believed this was a good thing to do - helping development of education infrastructure; supporting students wherever they are

¹⁴ Stephen R. White, *op. cit.*

located and especially those in the developing world. TNE could also provide support for the world's refugee population which was usually housed in the developing world. With displacement projected to be protracted for refugees, there is a clear need for a stronger international response to integrate them into existing higher education systems worldwide.¹⁵

The importance of TNE was the reason why the Observatory on Borderless Higher Education (OBHE) came into existence and carries out much research on TNE. Refer Visual Aid 1, p. 9. Country specific international education organizations such as the British Council also became active in supporting their country's TNE activities. It is worth noting that the British Council states in its summary report "*The shape of things to come: higher education global trends and emerging opportunities to 2020*" that opportunities for UK universities in TNE exist in:

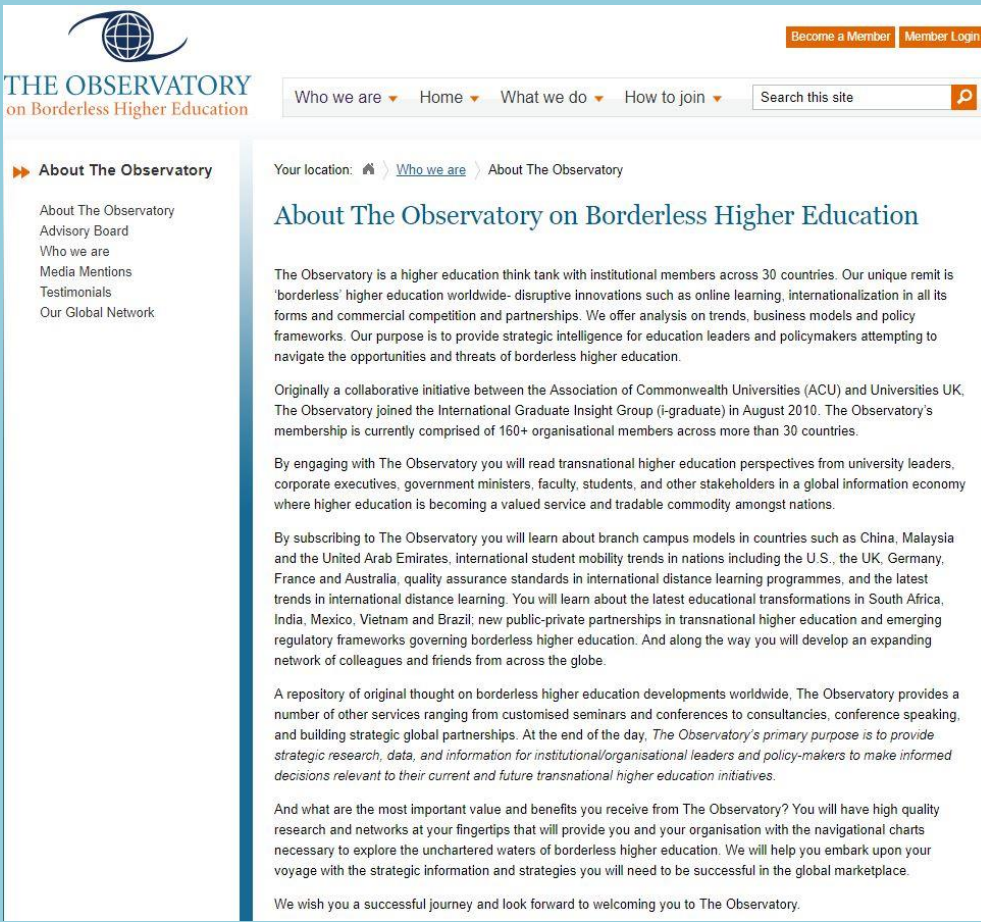
- **Dual and joint degrees: China, US, France, India, Germany**
- **Franchising and validation: Asia, Latin America, possibly Africa (Nigeria)**
- **Branch campuses: Far East, possibly Middle East**
- **Online: Gulf countries, Asia, possibly Scandinavia¹⁶**

National trade bodies such as Australia's Austrade and New Zealand's NZ Trade and Enterprise also supported their education institutions and international education organizations and collaborated with government departments to undertake research on education as an export commodity. These organizations also interacted with international bodies to safeguard their country's export positions in international forums, e.g. the General Agreement on Trade in Services (GATS). More discussion on GATS is in Section 2.2.9.1, p. 156.

¹⁵ IIE. *A World on the Move: Trends in Global Student Mobility*. IIE Online. Issues 1. P. 5. Oct 2017. Also at: <https://www.iie.org/en/Research-and-Insights/Publications/A-World-on-the-Move> p. 5 (accessed 15 March 2018)

¹⁶ British Council. *The shape of things to come: higher education global trends and emerging opportunities to 2020*. Report of the British Council released at the Go Global Conference, p. 7. 2012. Also at: https://www.britishcouncil.org/sites/default/files/the_shape_of_things_to_come_-_higher_education_global_trends_and_emerging_opportunities_to_2020.pdf (accessed 23 October 2017)

VISUAL AID 1: The Observatory on Borderless Higher Education's Web Presence



The screenshot shows the website's header with the logo and tagline 'THE OBSERVATORY on Borderless Higher Education'. Navigation links include 'Who we are', 'Home', 'What we do', and 'How to join'. A search bar is present on the right. The main content area is titled 'About The Observatory on Borderless Higher Education' and contains several paragraphs of text. A sidebar on the left lists various sections under 'About The Observatory'.

Web image extracted from:
[http://www.obhe.ac.uk/who we are/about the observatory](http://www.obhe.ac.uk/who-we-are/about-the-observatory)
 (Access Date: 11 November 2017).

An emerging trend in TNE shows students from the developed world are also now crossing international borders to undertake full degree programs and they are not all going to the Anglophone world. The Institute of International Education (IIE) in New York has historically been at the forefront of research related to US students abroad but since 2010 commenced collecting data on US students undertaking full degrees through TNE. IIE views the movement of US students abroad to undertake full degrees via TNE as an emerging trend. IIE research indicates that:

The field of international higher education in the 21st century is seeing the emergence of new patterns of student mobility. Student mobility flows are no longer defined solely by historical trajectories from the global South to the global North and from East to West. To the contrary, emerging host countries are creating

incentives for students to study in non-traditional destinations, redrawing the map of global student mobility. The most notable example of this is China, which continues to be the largest sending country and is also now the third largest host of international students, having hosted over 292,000 international students in degree- and non-degree programs in 2011 (Project Atlas). As the appeal of international education grows, host countries will continue to develop more diverse, demand-driven and competitive opportunities for international students.¹⁷

TABLE 1: IIE Data of US Students Going Abroad for Full Degree Programs – 2010/11 and 2011/12

Country	2010/11	2011/12	Percent Change
United Kingdom	16,185	16,745	3.5
Canada	9,310	9,280	-0.3
France	4,358	4,449	2.1
Germany	3,704	4,057	9.5
New Zealand	1,839	2,467	34.1
Australia	2,570	2,498	-2.8
China	1,666	2,184	31.1
Netherlands	1,500	1,650	10
Ireland	915	991	8.3
Spain	1,036	951	-8.2
Sweden	460	540	17.4
Japan	560	505	-9.8
Denmark	142	154	8.5
Malaysia	158	100	-36.7
Total	44,403	46,571	5.2

Data extracted from Institute of International Education (IIE) website:
<https://www.iie.org/Research-and-Insights/Publications/US-Students-In-Overseas-Degree-Programs>
 (Access Date: 15 October 2017)

Table 1 above provides a 2-year update from the IIE on US students at TNE campuses abroad. The data indicates that countries such as China, New Zealand and Sweden had double digit increases of full degree US students on their campuses and numbers were expected to continue to rise. Most of the international students in China were studying at foreign universities in China.

Visual Aid 2 provides an example of a network of TNE options for students provided by a US university.

¹⁷ IIE. *New Frontiers: US Students Pursuing Degrees Abroad*. IIE Research Online. P. 4. May 2013. Also at: <https://www.iie.org/Research-and-Insights/Publications/New-Frontiers> (accessed 11 March 2018)

VISUAL AID 2: The Many Transnational Study Options Offered by Massachusetts Institute of Technology (MIT)

The screenshot shows a web browser window displaying an article from 'THE CHRONICLE of Higher Education'. The article title is 'From Massachusetts to the World: MIT's Global Footprint', dated October 22, 2012. Below the title is a world map with several blue location pins placed over various countries, including the United States, Canada, Europe, Africa, Asia, and Australia. The browser's address bar shows the URL: http://chronicle.com/article/From-Massachusetts-to-the-1351367/cid=gn&utm_source=gn&utm_medium=en. The browser's taskbar at the bottom shows several application icons.

Web image extracted

from: https://www.google.com/maps/d/viewer?mid=1SjFPc67Y_wgArYKmgZcKkfw4roo&msa=0&ie=UTF8&t=m&ll=19.973349000000166%2C38.32031199999944&spn=141.785314%2C281.25&z=2&source=embed

(Access Date: 15 October 2017)

1.3 The Many and Evolving Forms of Transnational Education

In simple terms, TNE is the delivery of education from one country to another. TNE is also referred to as borderless education. There are many elements of TNE with the more frequently used being twinning, distance and e-learning, international branch campuses (IBCs), and the less known micro-campuses and franchising of the education product.

To summarize the most common forms of TNE:

International Branch Campus (IBC): A university establishes its own campus although it could rent/share space from/with a local or indeed a foreign university. It may also have an infrastructure partnership of some sort – example, where a university uses infrastructure and in return will provide infrastructure in the home country to the institution and yet it is different to twinning because the curriculum is not usually shared. There are also foreign universities which operate out of regional or local hubs and receive infrastructure and in some cases other ongoing support from local governments. Note however, there are many versions of IBCs making a comprehensive definition almost impossible.¹⁸ There is more detailed discussion on IBCs in pp. 18-19.

Twinning: A university enters into a partnership with an offshore university and 'shares' the course through different modes –this can be a joint degree program or the local university may be involved only in the delivery phase; it is possible also that the local university collaborates on curriculum design and delivery.

International Joint University/Binational University: This form of collaboration can happen when two institutions join forces to create a *new* structure, having its own identity. A good example is the Singapore University of Design and Technology, which was established in 2009 by Massachusetts Institute of Technology, Zhejiang University and the Singapore Management University.¹⁹

Franchising: It is rare for universities to 'franchise' but it is still possible to do so with third party providers e.g. publishing companies and/or private providers (e.g. Navitas – refer <https://www.navitas.com>) who may deliver some of the programs although this is a changing landscape and very difficult to grasp the variances under the franchising arrangements model.

¹⁸ Jason Lane and Kevin Kinser, 'International Branch Campuses: One Definition to Rule them All?', *The Chronicle of Higher Education Online*, 18 January 2012. Also at: <https://www.chronicle.com/blogs/worldwise/international-branch-campuses-one-definition-to-rule-them-all/29051> (accessed 17 April 2017)

¹⁹ Jane Knight, 'The New Faces of Transnational Education', *University World News Online*, 27 October 2017. Also at: <https://www.universityworldnews.com/post.php?story=20171024133538586> (accessed 14 December 2017)

Distance Education/Massive Open Online Courses (MOOCs): Increasingly distance education and MOOCs have become popular amongst universities as less infrastructure development in overseas countries is required; initial costs may be high locally at the main campus to initiate the program however in the medium to long term these costs would still be considered far lower when compared to the cost of establishing IBCs or entering into twinning arrangements which would cost much more. Note that distance education and MOOCs are considered TNE only when these cross a country's borders. There is more detailed discussion on MOOCs in pp. 24-27.

Joint or Dual Degrees: The distinction between joint and dual degrees is that in the case of a joint degree, there is usually a Memorandum of Understanding (MOU) in place which there are guidelines on usually two universities cooperating and issuing a joint Testamur and/or teaching the program but there are instances where variances are put in place. For example, where a student wants to undertake curriculum managed fully by one university it is possible to get a Testamur of the 'preferred' university. This is rare but does happen. In the case of a dual degree, both universities will offer their own degree.

Micro-Campus: This is an emerging form of TNE. The University of Arizona (UA) introduced the 'micro-campus' as a form of TNE in 2014. In many respects, micro-campuses use some or many of the elements of twinning programs, distance education/MOOCs as well as joint and dual degrees as listed above. Yet micro campuses seem to be different to other forms of TNE because they move away from the concept of 'going it alone' as was the case with the initial IBCs which had opened up. Based on current literature unlike the IBC, micro-campuses form partnerships with multiple partner institutions across multiple countries. This creates a network for students, faculty and researchers to access (and travel) within a network across multiple countries. Note that it is early days for the micro-campus form of TNE and it is likely that the micro-campus is another form of twinning. However for this study the micro-campus has been included separately given the UA announcement of a 'newer' form of

TNE. (More detailed information about the advent of the micro-campus is at pp. 19-24.)

VISUAL AID 3: Kaplan University Promoting Online Distance Learning

What is Distance Learning?

This is a course you study independently in your own time, at your own pace. You'll have a range of online and printed learning materials, plus instant access to tutor support when you need it.

[Try a free demo >](#)

Who's it for?

If you need to fit your studies around work and life commitments – and you have the motivation to push yourself to study independently – Distance Learning could be the perfect answer. This can be a very cost-effective way of achieving your qualification.

Key features

- Online learning resources covering the full syllabus.** Interactive study guides, regular knowledge checks, online learning modules and practice questions.
- Choose from online or printed study materials** to supplement your online learning content
- MyKaplan - your personalised online**
- Marked mock exams that look just like**

Web image extracted from:
<http://financial.kaplan.co.uk/trainingandquals/accountancy/acca/pages/distance-learning.aspx>
 (Access Date: 14 October 2017)

TNE also serves to improve access to rural communities. Telecommunications and the advent of the internet fueled the delivery of distance learning and improved access to rural and other communities that were previously inaccessible due to the tyranny of distance. TNE took traditional distance education a step further by allowing the `transfer' of education from an institution's home campus in the country to an external campus or a student's home computer in a different country or multiple countries. This form of delivery allowed a large group of students to be serviced in just about any

location around the world via the internet. Universities were able to offer TNE either directly (to students) by taking responsibility for curriculum and delivering to their local campuses or partners abroad. Universities could also directly through the internet - webcam and other technologies - deliver directly to student homes abroad or students in classroom settings abroad. In Visual Aid 3, p. 14, Kaplan University from the USA offers study programs to students anywhere in the world through their online distance education programs. Students enrolled in Kaplan are serviced through a very sophisticated and integrated online system which provides advisory services including financial aid planning, online chat rooms facilitating dialogue with students and faculty round the world, and in some cases also provides opportunity for face to face meetings with advisors and faculty where Kaplan visits occur e.g. in the Middle East.

As discussed earlier, TNE offers universities different approaches in education delivery. TNE can take one or more forms. *There is no 'one size fits all' approach to TNE.*

It is accepted that TNE is offered through many modes of delivery. There are also variances within each mode. For example, study at some IBCs could entail an online component of study. Therefore, TNE encompasses a range of options. The British Council describes TNE as:

Some people call it 'programme and institution mobility', others call it 'cross border', 'off shore', 'borderless' or transnational education (TNE). Whether these terms are familiar to you or not, the general idea is one where students can gain a qualification from another country without leaving home - and it's something which is growing in popularity among students and universities alike.²⁰

TNE opens markets for students beyond their own borders. As universities and countries compete for international students to come to their campuses, there is a growing trend for universities to offer programs in the student's home country or in lower cost countries. Universities generally adapt the mode of TNE based

²⁰ Michael Peak, 'How does transnational education affect host countries?' *British Council Voices Magazine Online*. 20 March 2014. Also at: <https://www.britishcouncil.org/voices-magazine/how-does-transnational-education-affect-host-countries> (accessed 11 July 2017)

Table 2: Stages of Development of TNE Programs				
Key Requirements	IBC and Franchising	Twining/Joint Degrees	Online/Web Delivery with Residential School and/or Home School Faculty Visits	Total Online/Web Delivery without Residential School or Home School Faculty Visits
<i>1. A student market</i>	Required	Required	Required	Required
<i>2. Support Services from main campus at start up point</i>	Required	Required	Required	Required
<i>3. Government Approval in Country where relationship is to be established</i>	Required	May be required	Usually not required	Usually not required
<i>4. On-going support services from main campus</i>	some management required; depends on arrangement	some management required; depends on arrangement	Required	Required
<i>5. Government Approval may be required from TNE provider country</i>	Most countries require this	Required	May be required	May be required
<i>6. Funding/Investment Monies</i>	Required	Required	May be required	Usually not required
<i>7. Purchase and/or Infrastructure Support or Development of New Infrastructure</i>	Required	Usually not required	Usually not required unless course specifically developed for market	Usually not required unless course specifically developed for market
<i>8. Local on the ground connections either with partner Universities, Institutions, faculty and/or corporate structures</i>	Required	Required	May be required	Not required

9. Curriculum development, adaption of existing curriculum to suit specific student markets	Required	Required	Not required unless course specifically developed for market	Not required unless course specifically developed for market
10. Create a University brand/TNE identity campaign	Required	Required	May be required	May be required
11. Monitoring - compliance, effectiveness, reporting	Required	Required	Minimal	Minimal

Source: Author

on what is required in the specific market. An *Ernst and Young Report (2012)* refers to TNE as a model of education which will transform the world, creating new opportunities for millions of young people, their families and the societies they live in.²¹

The academic content of the TNE program that is offered by the university offshore is usually the same as the onshore program if it is offered through an IBC model, although some will have some local content. It is also possible that a TNE program has been developed for the local market. An example of this is where the study requires a mandatory internship component such as in the case of health sciences. In such cases it is possible that the IBC adapts the home school curriculum to meet local IBC needs. Clearly there is some 'experimentation' going on where universities are considering degrees to suit specific markets, particularly where the university has had substantial work already done in the field. For example, Monash and Victoria Universities in Australia offer some programs offshore which are not offered in Australia, but this is because the universities may not have enough demand amongst Australian students for the degrees whereas the demand exists offshore.

²¹ <http://www.ey.com/AU/en/Newsroom/News-releases/Australian-universities-on-the-cusp-of-profound-change—Ernst-and-Young-report> (accessed 15 May 2018)

It is sometimes difficult to capture the exact form of the TNE relationship in a student market, because what a TNE venture is called is sometimes dependent on the perception of the provider and receiver countries. Where an overseas university places its brand name on a campus or within an education hub and is referred to as an IBC, it may in fact be a twinning arrangement and in transition to an IBC or a separate entity altogether.

In May 2017 a report by Knight and McNamara titled *Transnational Education: A Classification Framework and Data Collection Guidelines for International Programme and Provider Mobility (IPPM)* prepared for the BC and DAAD has suggested guidelines for data collection.²² There is more discussion in Chapter 2 about the issues related to definitions of the many forms of TNE and TNE student data collection.

1.3.1 International Branch Campus (IBC)

There is some ambiguity when describing an IBC. An IBC is an educational facility where students receive face to face instruction in a country different to that of the parent institution.²³ There are some variations in the way in which IBCs are structured. Usually the overseas university establishes an IBC in its own right but in some cases the overseas university will receive incentives from local governments. This is usually the case when an IBC operates within a local government or agency's education hub. (There is more discussion on Education Hubs in Section 3.12 of Chapter 3, pp. 234-238.)

Given the number of IBCs in operation, it is common to find variables in how each IBC operates but at the same time 'the common idea is to replicate the

²² Jane Knight and John McNamara, *Transnational Education: A Classification Framework and Data Collection Guidelines for International Programme and Provider Mobility (IPPM)*. A Report commissioned by the British Council and DAAD. 2017. Also at: https://www.britishcouncil.org/sites/default/files/tne_classification_framework-final.pdf (accessed 11 February 2018)

²³ Stephen Wilkins and Melodena Stephens Balakrishnan, 2012, 'Student perception of study at international branch campuses: implications for educators and college managers', in V. Huang, M. Balakrishnan and I. Moonesar (eds), Conference Proceedings and Program: Academy of International Business - Middle East North Africa Chapter 2nd Annual International Conference, Academy of International Business, Middle East North Africa Chapter, (AIB-MENA), Dubai, pp 61-81. Also available at: <http://ro.uow.edu.au/cgi/viewcontent.cgi?article=1256&context=dubaipapers> p. 1 (accessed on 14 February 2016)

academic and other experiences of the home campus, while injecting appropriate local flavor into the mix'.²⁴

Some overseas universities, although this is rare, provide a 'franchising' type agreement (as part of the IBC) whereby a relationship is formed with a local provider who then delivers the University's curriculum within an IBC. In some cases, the local provider inputs some course content to ensure suitability for the local market. In other instances, an IBC can be a shared arrangement with a local provider but usually would have most of the direction coming from the qualification granting institution.

The financing model of IBCs has also changed over the years. Initially most IBCs were funded exclusively by their parent institution but in recent times there have been IBCs established within education 'hubs' where some or most infrastructure support is provided by federal or local government. (Refer information on Education Hubs in Section 3.12 of Chapter 3, pp. 234-238.)

While IBCs have generally been a successful form of TNE, data available indicates that IBCs have also closed.²⁵ There is more discussion on IBC closures in Chapter 2.

1.3.2 The Micro-campus

The micro-campus is a more recent development in TNE. The University of Arizona (UA) has introduced the micro-campus to the world of TNE. Refer Visual Aid 4 on p. 23. UA launched into a program of micro-campuses to ensure its presence in strategic student markets and where it believed there were benefits not only for its own students, faculty and researchers but also for partners offshore. The micro-campus appears not to have the extensive regulatory work and expense which is associated with developing IBCs.

²⁴ Nicholas B. Dirks and Nils Gilman. 'Berkeley's New Approach to Global Engagement: Early and Current Efforts to Become More International', *Research & Occasional Paper Series CSHE 12.15*, Centre for Studies in Higher Education, University of California Berkeley, December 2015, p. 4. Also at: https://cshe.berkeley.edu/sites/default/files/publications/rops.cshe_.12.15.dirksgilman.globalizationhed.12.14.2015.pdf

²⁵ http://cbert.org/?page_id=34# (accessed 26 December 2017)

Each micro-campus within a network `represents a unique partnership with distinctive characteristics but with a common base, from where both partners can start adapting, depending on the local context'.²⁶ When describing its micro-campuses, the UA states that the UA's micro-campus `is a UA space on the campus of a partner university, which enables the international delivery of UA degree programs to local students, collaboratively with our partner university.'²⁷

There appear to be more benefits of the micro-campus to the home university when compared to the management of an IBC. Some of these benefits include the following:

- *Limited to no offshore infrastructure cost with the set-up of a micro-campus:* Usually the home university setting up the micro-campus takes up the existing space at an established local university. It is also possible for this to be `shared' and not separate space – whereby the home university may be teaching its courses in the same space during the day and the micro-campus courses are offered after hours. Therefore, the offshore infrastructure cost of a micro-campus would be negligible when compared to the cost of setting up an IBC.
- *Limited maintenance costs:* As the space is already available at the host university, the maintenance cost would be minimal and it is possible to offset the maintenance cost based on the benefits provided to the host university students – example: operating a micro-campus at a local university and offering local university students access into the micro-campus courses at the local university tuition costs could be seen as a win-win situation and the shared resources will ensure limited maintenance costs to the micro-campus. (For example, a micro-campus can use the existing library and student services of the local campus.)

²⁶ Santiago Castiello-Gutierrez and Sowmya Ghosh. `The International Micro-Campus: An Evolution to Transnational Education Models', Proceedings of Conference on Innovative and Inclusive Internationalization, Laura E. Rumbley and Hans der Wit, Eds., Proceedings of the WES-CIHE Summer Institute, Boston College, June 20-22, 2018, p. 14.

²⁷ <https://microcampus.arizona.edu/> (accessed 9 April 2018)

- *Overall less financial risk and yet possibilities for expanding student, faculty and researcher networks:* Unlike IBCs there is less financial risk in setting up a micro-campus network while providing an instant network of local university students, faculty and researchers.
- *Less government regulation:* Unlike IBCs, the micro-campus would not need to meet extensive regulation and the local partner university is more likely to be the party that undertakes the necessary clearances if, and when required.
- *More extensive opportunities for collaboration rather than competition:* While an IBC would have greater financial pressures to compete for students, including competition with local institutions, a micro-campus would have a ready stock of students at the local institution and would be seen less as a competitor or an income producing commercial venture and more as a ‘team’ player.
- *Not competing with local providers or IBCs:* The micro-campus has instant access to its partner university and provides options to its own home university campus as well as students from the entire network of its micro-campuses, so it does not have to compete with local providers and IBCs. This makes the micro-campus rather unique in that it has an almost instantaneous pool of students.
- *Greater pool of students and researchers for collaboration, particularly at the research level:* Unlike IBCs who are focused on their local market (including international students coming into the local market), a micro-campus is modeled on shared resources and creating somewhat seamless networks that have the potential to collaborate right across the world. For example, the UA micro-campuses operate in Cambodia, China, Jordan, Vietnam, Mexico, United Arab Emirates, Philippines, and Beirut and this means opportunities for UA students as well as the students from the local partner campuses to travel within the entire network of micro-campuses and undertake study and research.

- *Greater opportunity for students to access the 'home university' experience:* As students are allowed almost seamless movement within the network of micro-campuses (which includes the home university campus), it could mean that a student undertaking a degree at a micro-campus could travel to the home university campus only for one or two semesters which would entail less costs and less period away from the student's home environment yet the student is able to access the home university and country experience. This is of great benefit to students who are working and want to hold on to their jobs while studying as it means less time away while still being able to access that home university and country experience.
- *Lower overall cost to students:* This is a major advantage of a micro-campus where students pay fees that are comparable to their home institution fees. The IBC model on the other hand is usually based on profits and sustainability and the higher cost of managing an IBC makes it impossible to offer lower tuition costs as is possible with the micro-campus model of TNE.

The micro-campus strategy appears to take the IBC model of TNE delivery even further in that it provides a greater network of countries, programs and research facilities internationally which ensure that a student, researcher and faculty member has almost instant access to a host of countries as well as home campuses. Micro-campuses leverage technology to deliver cutting-edge education to students wherever they are in the world, while preserving an in-class, on-campus experience.²⁸ For example, it would be possible under the micro-campus arrangement for a student of the Princess Sumaya University of Technology in Amman (Jordan) where a UA micro campus exists to undertake a joint program so that the student receives a degree from Princess Sumaya University of Technology as well as UA. The micro-campus student can study

²⁸ Brent White, 'Are micro-campuses a new model for international HE?', *University World News Online*, 26 May 2017. Also at: <http://www.universityworldnews.com/article.php?story=20170522232833803> (accessed 11 January 2018)

at multiple campuses within the network thereby increasing international study and work opportunities for the student.

In summary, the UA micro-campus 'model' advantages are: shared space with local providers, shared students, lower and affordable tuition fees for students who pay fees based on local fee structure, collaborative relationship between a network of institutions across a number of countries, emphasis on collaboration rather than competition, shared teaching and possibilities for faculty movement within network, dual degrees are possible whereby students can receive their local university degree as well as the degree of UA, opportunities for students at the micro-campus to proceed to study at UA's main campus or go to any other networked institutions within the micro-campus network; UA main campus students also have the opportunity for semester and year abroad through the network of micro-campus.

VISUAL AID 4: The University of Arizona's Micro-Campus Network



Web image extracted from:
<https://microcampus.arizona.edu/>
 (Access Date: 10 April 2018)

It is still early days for the micro-campus. However, if successful, this form of TNE may have an impact on existing IBCs. This is because the micro-campus, unlike the IBC offers much greater benefits to students with lower tuition costs and access to move within the micro-campus network as well as the home university and it less costly in maintenance and infrastructure costs. Note also that there is limited information available on this form of TNE.

To date, the UA appears to be the first university that is setting up micro-campuses across several countries. *It is possible that in fact the micro-campus is not a different form of TNE but a different form of 'twinning' or IBC – whereby the twinning or IBC operates across multiple countries with the students, faculty and researchers of multiple partner institutions networked.*

1.3.3 Distance Education and Massive Open Online Courses (MOOCs)

Traditional distance education required students to participate in the institution's program offered by the main campus through online classrooms, delivery of materials via the mail and the internet. Therefore, distance education students from around the world including the home campus could usually participate in the same 'class' of students wherever they might be. Whereas students in TNE programs don't always connect with main campus students and sometimes their curriculum is also different and catered specifically to the TNE program.

Another element of distance education is that one does not usually attend scheduled classes in a different or fixed location although some distance education courses can have residential requirements. While most programs offered through IBCs and twinning and other forms of TNE may have an online component, there is some on-campus study experience, even if there isn't the international experience. However, there are TNE programs such as those offered at Penn State University in the USA and Swinburne University in Australia which offer degree programs wholly through the online mode.

While recognizing that the student will benefit from a qualification through the online mode, it is still clear that an international student who has not ever set foot on Penn State or Swinburne campuses would not receive the full campus

VISUAL AID 5: Penn State University Promoting Online Degree Programs which are also Available to Offshore International Students

The screenshot shows the Penn State World Campus website. At the top, there is a navigation bar with links for 'Home', 'About Us', 'Degrees and Certificates', 'How Online Learning Works', 'Admissions', 'Tuition and Financial Aid', and 'Military'. Below this is a section titled 'Why Penn State World Campus' with 'Apply Now' and 'Request Info' buttons. A sidebar on the left lists 'About Us', 'Mission', 'Why World Campus' (highlighted), 'Media/Press Room', 'Student Stories', and 'Video Stories'. The main content area features a photo of a speaker at a podium, followed by the heading 'Penn State World Campus is Penn State — Online' and a paragraph explaining the history of online learning. Below this are sections for 'Nationally Recognized University' and 'Academically Rigorous, Accredited Programs', each with a brief description and a link to the Middle States Commission on Higher Education accreditation page.

Web image extracted from:
<https://www.worldcampus.psu.edu/about-us/why-penn-state-world-campus>
 (Access Date: 21 April 2018)

experience as would be the case with onshore main campus students. *Please note that both Penn State and Swinburne are fully accredited universities with stellar records. They are not the only universities offering fully online TNE courses. They are simply listed as examples of online options that are now available through the TNE mode.* The Penn State website advises students that: ‘Our online courses are the same courses that we offer on campus. Therefore, your diploma will look no different from the one earned by students on our physical campus. It will not differentiate the method of delivery or state that your degree was earned online.’²⁹ This indicates that students who have not been to the USA or to the Penn State campus would receive the same degree

²⁹ <https://www.worldcampus.psu.edu/about-us/why-penn-state-world-campus> (accessed 18 April 2018)

Testamur as the student who has studied at Penn State. Refer Visual Aid 5 on p. 25 to learn more about the Penn State University online programs which require no campus study.

Visual Aid 6 below shows the fully online (TNE) programs offered by Swinburne University in Australia.

It is also important to understand that when distance education crosses national borders it falls within the realms of TNE. Some TNE students studying in other forms of TNE such as IBCs may participate in blended learning whereby some component of the study is undertaken through distance education (usually with online delivery of course content and/or teaching done via webcam and other arrangements) but then has a mandatory or other component where a student is required to attend face to face teaching at the IBC.

VISUAL AID 6: Swinburne University Promoting Online Degree Programs which are also Available to Offshore International Students

The screenshot shows the Swinburne University Online website. The navigation bar includes links for About, Contact Us, FAQs, Blog, On Campus Courses, Key Dates, Current Students, and a search bar. The main navigation includes Courses, How Online Study Works, Support, and International Students. The page title is 'International Students'. The content area includes a breadcrumb trail 'Home > International Students', a sub-header 'Why study online with Swinburne University of Technology', and a list of benefits:

- Ranked in the **top 2% of universities** worldwide
- Taught by **industry professionals**
- More than **60,000 students** enrolled globally
- More than **100 years** of experience
- Support **seven days** a week
- Study at a **time and place** that suits you

Web image extracted from:
<https://www.swinburneonline.edu.au/international-students>
 (Access Date: 21 April 2018)

A challenge faced by TNE is the onslaught of online courses, particularly free online courses offered by elite universities commonly referred to as MOOCs. Given that most parts of the world are accessible to the internet, students anywhere can now plug into online courses. Many of these courses continue to be offered free and can be considered as competition to other forms of TNE such as the courses offered at IBCs or as part of twinning programs. This will become even more important if credit granting agencies provide credit (or advanced standing) for free MOOC courses as this will have an impact not just on TNE but also onshore programs.

There is more information on technological developments in Chapter 2, Section 2.2.3, pp. 81-90.

1.3.4 Facilitating Transnational Education Delivery – Local and Regional Education ‘Hubs’

Governments around the world, mainly in developing countries have seen the need to establish and maintain TNE hubs with a view to building regional knowledge economies. Examples include Knowledge Village (Dubai), Education City (Qatar), Global Schoolhouse (Singapore), Songdo Global University Campus (Hong Kong) and Incheon Global Campus (South Korea).

The services provided by transnational hubs are not just for the local population but also draw in international students. In this way, countries such as China, Malaysia, Singapore, Dubai and Korea are attracting large numbers of international students to their shores. It is therefore, now possible for a student to study a degree of another country in a third country – example: a US student can undertake a UK degree in China. Or, a Singapore student could study a USA qualification in Dubai.

There is more detailed information about education hubs in pp. 234-238.

1.4 Summary of Key Differences in TNE Delivery

As there are many varied forms of TNE delivery, the key differences between them have only been listed for IBCs, micro-campuses and hubs. The research study does not provide sufficient time to cover every possible variable which exists in the many forms of TNE as well as key differences between all.

- IBCs are usually set up by individual universities whereas a micro-campus usually commences with one university taking the lead and developing a network as is the case with UA which involves a group of universities spread across multiple countries. Hubs on the other hand are set up mainly by federal or regional government agencies although there is some evidence that governments and industries can joint venture in the development of education hubs.
- Micro-campuses are a network of universities across multiple countries based on the literature available for the UA micro-campuses. Micro-campuses support students taking courses and programs across the network of micro-campuses. IBCs may permit a student to undertake a component of the program at the home campus, but this is not always a requirement. Usually IBCs operating in hubs require students to enroll at one of the foreign universities (within the hub) and then as part of that program also go abroad to that foreign university's main campus for some time. Some hubs have a requirement that students enrolled in a program at one of their foreign universities must undertake at least one year of the program at the university's main campus abroad. Example, the Incheon Global Campus (IGC) in South Korea.³⁰
- Students at micro-campuses can be dual-enrolled in the local as well as the overseas university. Clearly there are guidelines to follow but as micro-campuses are in the early stages of development it is difficult to understand exactly how much of a choice the students would have in

³⁰ <http://www.igc.or.kr/> (accessed 17 December 2017)

deciding how they choose the university which would grant them their Testamur. *For IBCs within hubs, it is general practice that students would receive the same qualification as if they have attended the foreign university's main campus for the entire course.* IBCs working more like a twinning arrangement may have different arrangements in place when granting Testamurs. *Also, many IBCs not operating within hubs do not require students to go to the university's home campus as part of their degree programs.*

- Universities operating within hubs have infrastructure and other support from local government and institutions than those that go it alone through the establishment of an IBC. The foreign universities who receive such support need to conform to a set of rules which are set down by the local or federal government who owns the hub. For example, George Mason University (GMU) was invited by the Incheon Free Economic Zone Authority to come to Songdo South Korea and become part of the IGC. Universities operating within the IGC hub are required as part of the agreement to have students undertake one year of their 3-year degrees on the foreign university's main campus abroad.
- Micro-campuses appear to have less scrutiny other than that of the local partner. If there are any regulatory requirements these would usually be fulfilled by the local partner. On the other hand, there is far greater and intense scrutiny when establishing an IBC within a hub as most hubs are usually the initiatives of governments. Universities that go alone in developing an IBC (and not within a hub) receive even greater scrutiny from local governments.

As stated previously, micro-campuses are in their early days and to date only UA have discussed micro-campuses. There is very little research available on micro-campuses. To date most researchers discussing forms of TNE do not refer to the 'micro-campus' as a separate form of TNE however, based on the UA model, it is clear that the micro-campus is different to IBCs and twinning

because it offers a somewhat seamless multi-country network for students and faculty.

1.5 The Importance of Transnational Education

The advent of the internet and social media networks has made today's student more tech savvy and much more aware of education as a commodity in the global market place. TNE is one such educational product that some students demand because they see it as providing them with an option to study locally or regionally while they continue their jobs, businesses or indeed better manage their personal family situations.

Regions of the world previously considered inaccessible are today very much accessible to the outside world due to technology and economic advances. This new 'transnational' context of education can no longer assume asymmetrical power relations that had in the past resulted in a unidirectional flow of students - from the rest to the west.³¹ The developing world is quickly playing catch-up to the west. In the context of education, whereas previously the universities in the west led internationalization activities, today developing countries have a lot more say in the movement of human capital across borders whether for study or work reasons. An example is economic migrants in developing countries who historically went in droves to the west in search of jobs, study and a better life but now less so as these countries offer more work opportunities than the west. TNE in this context was a natural fit for these countries as some embarked on a vigorous campaign to keep students within their own borders, thereby stemming the flow of currency out of their countries. Malaysia is a case in point. There is more discussion on Malaysia in Chapter 3, pp. 209-214. Marginson (2012) summarizes these developments as follows:

... The main changes of the last 15 years in the global landscape have been: (1) the advancing rates of participation in emerging systems across the world; (2) a dozen new nations now have self-reproducing science systems capable of generating at least 1000 Web of Knowledge journal papers per annum; (3) the consolidation of the European Higher Education area and improved research performance of many universities in northwest Europe, with Germany likely to take off; (4) the rise of research universities in northeast Asia and Singapore, plus the more recent and

³¹ Fazal Rizvi. 'Student Mobility and the Shifting Dynamics of Internationalisation' in Making a Difference - Australian International Education, Edited by Dorothy Davis and Bruce Mackintosh, UNSW Press ,2011, p. 8.

slower growth of research in India; (5) the beginnings of modernized science systems in Latin America, primarily in Brazil.³²

An article in the World Education News Review (WENR) Choudaha (2012) states that there is a growing consumer class in Asia 'who are willing to pay for a global educational experience while staying in their home country or region' and this consumer class is referred to as glocals - people with global aspirations with local experiences.³³ The WENR report is based on a more comprehensive report by the Boston Consulting Group which stated that nearly 100 million of the world's population would be entering the consumer class with annual income of more than \$5000 by 2015 in six south-east Asian countries (Indonesia, Malaysia, the Philippines, Singapore, Thailand and Vietnam) and also a report by the McKinsey Global Institute which 'asserts that between 2005 and 2025, China and India will see their aggregate urban consumption increase seven-fold and six-fold, respectively'.³⁴

While there has been some questioning of the requirement for a 'degree' given the lack of jobs in some countries and graduates undertaking employment in fields that do not require a degree, there is still a thirst for knowledge and a need for continued study to improve skills to obtain or remain in employment. Employers also continue to value employees that are not just educated but are able to devolve and have a broad range of skill sets. Therefore, lifelong learning is an important facet of today's student/employee. TNE which offers students even more opportunities locally to study courses from almost round the world (particularly when one considers the availability of MOOCs) is considered a value-added service by universities to students.

Increasingly employers have also been demanding a far more sophisticated education product from institutions so that graduates are 'work ready'. Results

³² Simon Marginson, 'A vision for Australia-UK cooperation in international higher education', in Outcomes Report 'Beyond Competition - Policy dialogue on cooperation between the UK and Australia in international higher education', International Education Association of Australia (IEAA), p. 19. Also available at: <https://www.ieaa.org.au/documents/item/56> (accessed 14 July 2018)

³³ Rahul Choudaha, 'The rise of 'glocal' students and transnational education', *The Guardian Online*, 21 June 2012. Also at: <http://www.guardian.co.uk/higher-education-network/blog/2012/jun/21/opportunities-in-transnational-education> (accessed 25 June 2017)

³⁴ *Ibid.*

from a survey of employers conducted by The Chronicle and American Public Media's Marketplace in 2013 suggested that employers do not believe that universities are preparing graduates for the workforce and that there is a disconnect between what employers want and what universities provide in the way of a qualification. Feedback from the employer survey in Chart 2, page 33 confirms that employers report difficulties finding 'qualified' graduates but believe colleges do a good job producing successful employees. The tension may lie partly in changes in the world of work: technological transformation and evolving expectations that employees be ready to handle everything straightaway.³⁵ Universities and campus leaders are surprised at some of these findings and question why employers would hire employees with qualifications that appear not to meet employer requirements. The response appears to be that 'though employers may kvetch about college graduates, they generally make better employees than those who finished only high school, says Paul E. Harrington, who leads Drexel University's Center for Labor Markets and Policy.'³⁶

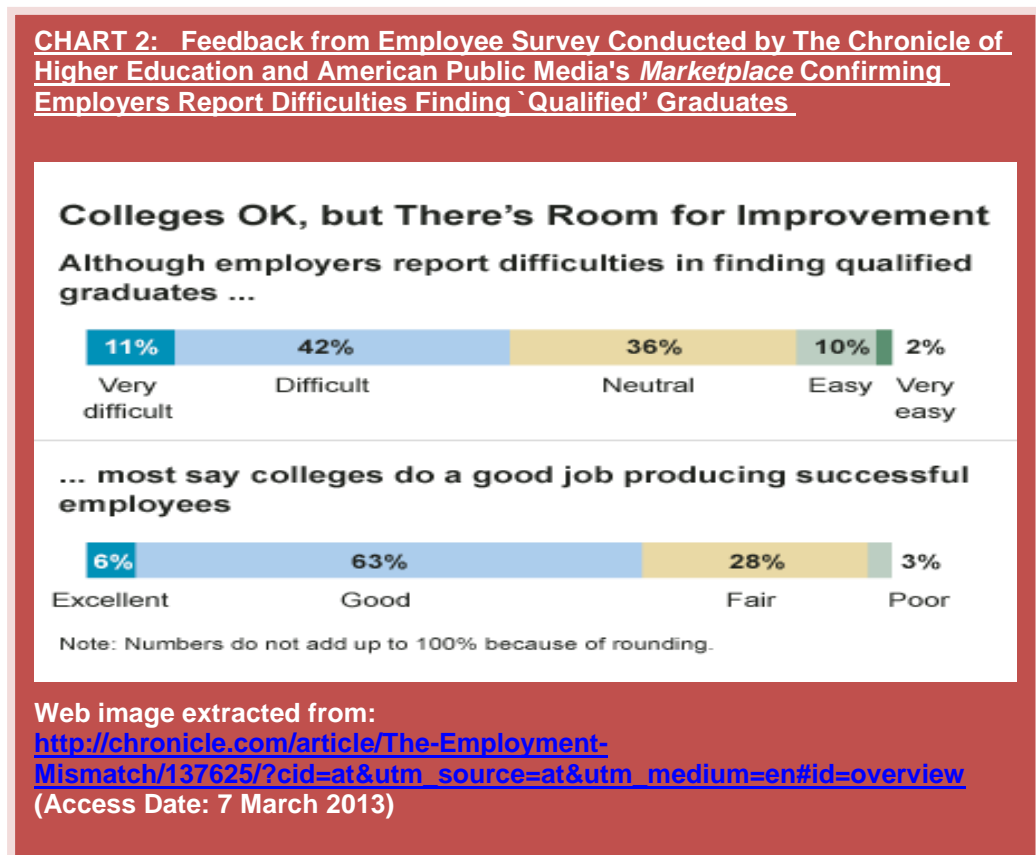
Serving local employer needs was another area where TNE seemed a good fit for higher education. *Going to where the students and jobs are and delivering the type of qualification that was required became important.* In many respects TNE supports the notion of 'giving the consumer what they want' and where they want it. By diversifying into individual markets and offering students choices (e.g. to study in their local or regional areas through IBCs, distance or twinning) universities could adapt curriculum to meet market expectations (and employer needs). This level of scrutiny to provide market specific courses is possible through TNE whereas, when bringing in international students into a university's main campus, the main campus curriculum usually caters to what the home campus market (and domestic students and employers) demand.

Additionally, as competition for onshore international students by many countries increased dramatically, universities sought to look for another segment

³⁵ http://chronicle.com/article/The-Employment-Mismatch/137625/?cid=at&utm_source=at&utm_medium=en#id=overview (accessed 11 September 2018)

³⁶ http://chronicle.com/article/The-Employment-Mismatch/137625/?cid=at&utm_source=at&utm_medium=en#id=overview (accessed 11 September 2018)

of the student market – international students who cannot afford to go abroad but value a qualification from an overseas university; or, those that will go abroad but to lower cost countries. This provided universities with opportunities

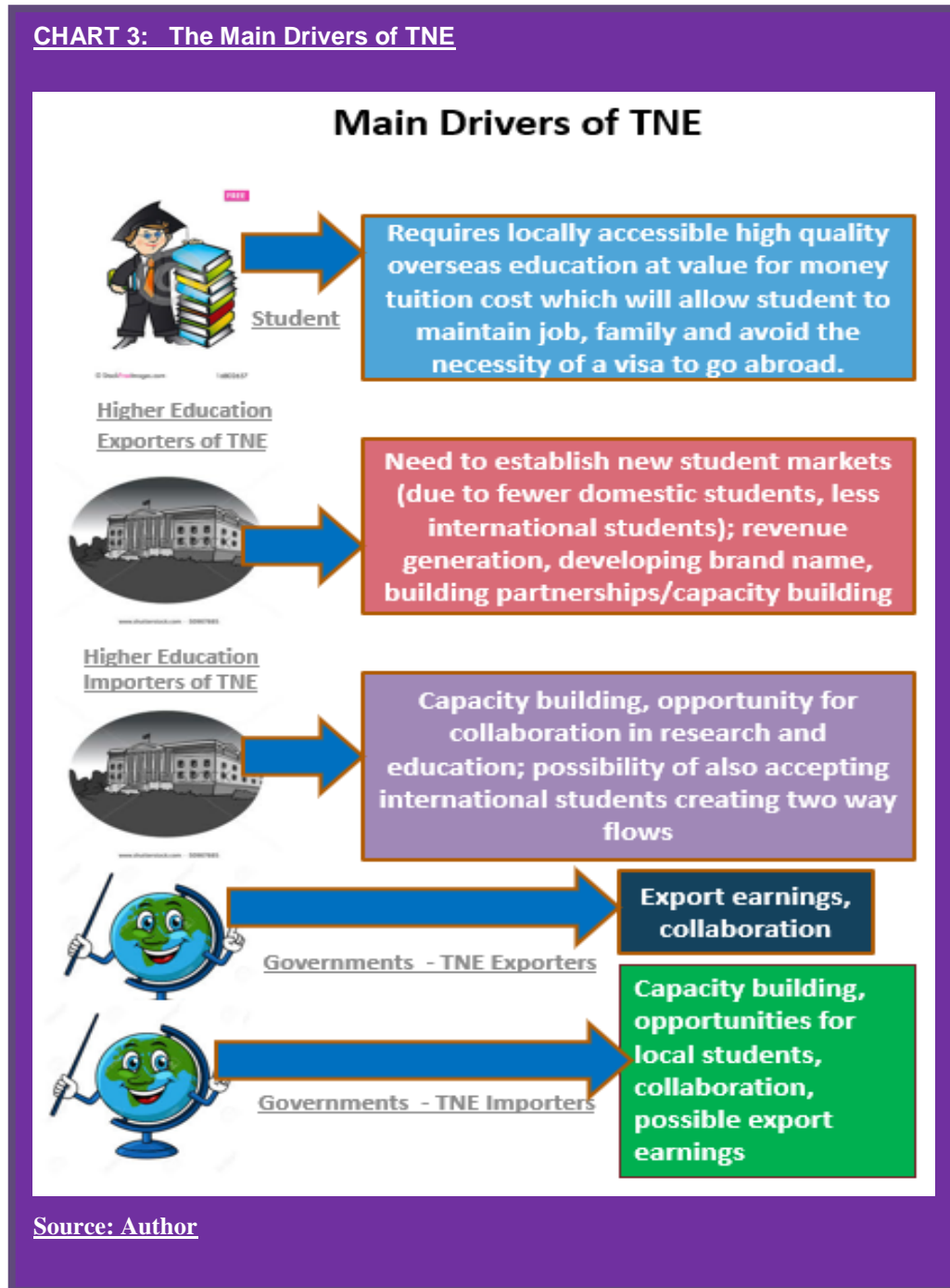


to set up TNE facilities in countries which may not necessarily be supplying all the students for their programs. An example is when an American university offers a degree in China and where the students participating in the program are not necessarily all Chinese students but may originate from other countries such as Bangladesh, the Middle East and even Europe.

In some countries decreasing domestic enrolments were also a factor in universities redefining their student markets. John Baworowsky, Vice President for Enrollment Management at Dominican University of California wrote in the Chronicle of Higher Education that 'In recent years, international student recruitment has become a key strategic goal for many forward-thinking universities responding to the cumulative effect of the decreased number of traditional students, declining U.S. birth rate, decreased state aid, increasing

number of international students studying abroad, and the importance of providing a global education.³⁷

As discussed earlier, there are also in some cases work, family and cultural barriers that prevent some students from going abroad. Given the lack of jobs globally, the previous trend of taking leave of absence to pursue study abroad is



³⁷ John M. Baworowsky, 'Taking a Closing Look at Emerging Asian Markets', *The Chronicle of Higher Education Online*, 11 December 2012. Also at: https://www.chronicle.com/blogs/headcount/taking-a-closer-look-at-emerging-asian-markets/33021?cid=pm&utm_medium=en&utm_source=pm (accessed 14 November 2016)

being used less frequently for fear that the job may 'disappear' whilst studying abroad. Similarly managing families and in some case cultural norms such as caring for aged parents etc can prevent normally eligible students who may have the financial means, to go abroad. Family commitments or cultural constraints may keep women from pursuing doctorates abroad, even as more earn college degrees.³⁸ Such constraints provide an impetus for universities to set up TNE study options that benefit these groups of students so that they can pursue study opportunities within their own countries and/or within regional areas closer to home.

The Education at a Glance 2017 Report by the Organisation for Economic Co-operation and Development (OECD) revealed that growth in outbound student mobility had slowed and that there was an expansion of TNE provision and adoption of online teaching and learning.³⁹

Experience and internships also hold much appeal as employers place more weight on experience, particularly internships and employment during school vs. academic credentials including GPA and college major when evaluating a recent graduate for employment.⁴⁰ Therefore, today's student is no longer prepared to only invest in an education; there is more and more effort being placed on internships and experience in locations where students have career paths. This means that whilst historically students may have gone from high school directly to university and continued with graduate degrees (Master and PhDs) today's student is likely to build their experience through working and/or interning while also studying. This is considered value added to the Resume for potential employers. This again provided opportunities for TNE and not necessarily only in offering academic degrees - TNE can be diversified to meet market needs including short courses, trade qualifications and other vocational training locally where the jobs are.

³⁸ Karin Fischer, 'Graduate Programs Have International Bent but Struggle to Produce Global Thinkers'. *The Chronicle of Higher Education Online*. Also at: http://chronicle.com/article/Graduate-Programs-Have/136207/?cid=pm&utm_source=pm&utm_medium=en (accessed 12 February 2015)

³⁹ https://www.oecd-ilibrary.org/education/education-at-a-glance-2017_eag-2017-en (accessed 10 June 2018)

⁴⁰ <http://chronicle.com/items/biz/pdf/Employers%20Survey.pdf> (accessed 11 May 2016)

Table 3: Understanding the Drivers of TNE		
OVERSEAS STUDENT (includes parents)	OVERSEAS GOVERNMENT (TNE RECEIVING COUNTRY)	OVERSEAS UNIVERSITY OR PARTNER
Usually <u>lower tuition cost</u> for studying in local or regional area (housing, medical insurance; travel and establishment costs can be avoided).	<u>Infrastructure support from overseas governments and universities</u> - reinforces local education infrastructure	<u>Infrastructure support from overseas governments and universities</u> - reinforces local institution/partnership
<u>Job retention</u> - does not have to give up work to study; can pursue part time study locally. Moreover, there are less jobs in Western countries so there is no reason to consider a future abroad.	<u>Country does not lose revenue</u> through students going abroad and taking huge sums of money for tuition and costs offshore.	<u>Research and teaching collaboration</u> can enhance the local institution's offerings.
<u>No culture shock</u> - Why learn another country's culture when student may have better job options locally or regionally?	More <u>business generated</u> locally as overseas income comes in to expand existing infrastructure or build new campuses - contractors, banking, teaching faculty, administrators, etc.	<u>Provides opportunities for students to have access to more than the local campus.</u>
<u>Diverse study options.</u> The multitude of options now available means that students can stay in country and access study through a number of offshore institutions via TNE.	Could <u>create reverse brain drain</u> in under-developed and developed nations whose expat communities abroad could return to take up positions in institutions or in related businesses	Seen to be <u>technologically sophisticated</u> ; a <u>modern-day institution due to the partnership</u> with offshore universities.
<u>Less visa regulations to go abroad</u>	<u>Less welfare concerns for students as they live locally or regionally</u>	Provides opportunities for <u>faculty to dialogue with faculty of offshore universities</u> ; staff development options
<u>Family consideration</u>	<u>Less likelihood of westernized or foreign doctrine</u>	<u>Greater pathways for domestic students to contribute to the domestic economy</u> by learning, interning and job placement (rather than immigrating).

CONTINUATION OF TABLE 3

GOVERNMENT OF TNE PROVIDER COUNTRY	TNE PROVIDER UNIVERSITY
<u>Export earnings for country</u>	University earnings due to diminishing domestic and international enrolments and less government funding
<u>Branding: profile building in another country</u> through the higher educator sector	<u>Branding; greater access to international students</u> who may undertake initial study locally but then travel to main campus for further study
<u>Other collaboration</u> - e.g. business hubs; future workforce training (internships); generate interest in migration, 'aid' to the area; 'soft power'.	<u>Opportunities to offer home campus students opportunities to study in offshore campuses/shared arrangements; internship and graduate placement opportunities for students.</u>
<u>Less investment for the local education sector</u> (as universities bring in fee revenue through offshore ventures	<u>Staff opportunity for travel and offshore teaching/research assignments</u>
<u>Fewer issues related to visas and border control</u>	<u>Often lower investment costs to build infrastructure</u>
<u>Fewer issues related to cultural integration</u>	<u>More opportunity to service students from countries where visa issue is a problem</u> - greater outreach to otherwise inaccessible markets; less cultural integration issues

Source: Author

There is a smorgasbord of information across most countries which indicates that funding for public education is on the decrease and universities are continuously reinventing the wheel to find sources of funding to continue programs. An Inside Higher Education Survey in 2012 of 502 American college campuses showed that more and more, higher education was having to look at obtaining the best returns for the highest cost of education. 'More cost-effective delivery, more online learning, increased sensitivity to pricing, greater

assessment of underperformance in academic departments⁴¹ were the issues that were gaining far more attention than any others. There was a clear response in the survey that there was a need to address the issue of the changing market for students.

There are a multitude of reasons why TNE has been seen to be the next frontier for universities. There are increasing costs of running programs against shrinking budgets. There is tremendous growth of places in higher education driven by local and international students and there are more and more for-profit institutions of higher learning that are entering the market for international students with very optimistic business plans. There is the issue of affordability and how to deliver programs that are affordable to students from around the world. A combination of these factors has changed the landscape of higher education and created a more level playing field for international engagement in education for institutions around the world. Today it is no longer important that it is a university from the west which has historically drawn international students. Now universities from the developing world can attract international students to their shores particularly as it is possible for these universities to form partnerships with well-established foreign universities.

Another element of TNE is the advent of the internet and the rise of `virtual' communities. The ability to make courses available to a wide range of students with almost no boundaries separating classes of students (domestic versus international or local versus regional) means that for `universities wishing to expand in a time of constrained resources, the use of the Web appears very attractive.⁴² In terms of TNE, institutions who own courses can use the internet to deliver their courses directly to students around the world by using local partnerships that provide additional value added support e.g. local classrooms for students to engage with counterparts, or local tutoring arrangements. While the web has been used to deliver distance education courses almost since the advent of the internet some 25 years ago, using local providers enhances the

⁴¹ http://www.insidehighered.com/news/survey/business_officer_2012#ixzz21pPTshBx (accessed 18 May 2017)

⁴² S. Ryan, B. Scott, H. Freeman and D. Patel. 2000. *The Virtual University - The Internet and Resource-Based Learning*. Kogan Page, London and Sterling., p.21.

TNE option because in some cases it provides the local services in a student's home country or region which enhances the study experience. It is the combination of providing the means to access a range and variety of resources located around the world and the ability to communicate, collaborate and interact that gives it its strength.⁴³

A foreign degree whether offered through distance education or some other mode of TNE e.g. IBC, is clearly valued by international students otherwise there would not be the level of interest amongst students to undertake a foreign qualification in their home countries or another country. There is growing evidence that suggests that enrolments in courses provided by universities through their TNE arrangements are on the increase. In earlier reports, the UK for example, expected to have more students in their TNE programs by 2020 than those studying onshore at UK campuses, however the UK surpassed these numbers in 2012. In Australia: 'Projections for the next 10 years suggests that growth in offshore provision is likely to outstrip onshore.'⁴⁴ There is more detailed discussion on UK and Australia student numbers in Chapter 3.

Offering programs in the student's home country and in other countries that are cheaper destinations for students also addressed other issues such as the tightening of visa policies for international students by many countries, following the terrorist attacks of 2001 in New York. Tightening of visa policies meant that students from some countries were particularly disadvantaged with stringent visa processing as well as unacceptable delays. The visa issue also created a need to access overseas qualifications in the student's home country or another country with less stringent security and/or visa concerns. This was yet another segment of the international student market that universities could service by offering TNE programs.

Regulations and demands placed on universities by incoming international students have made it far more expensive to manage on campus international students than those attending TNE courses in their own home countries and

⁴³*Ibid.*

⁴⁴ 'No Pot of Gold at the end of the Offshore Rainbow', *Campus Review Weekly*, June 22, 2005, n. 24, v. 15, p. 15.

regions. In most of the historically well known, receiving countries for international students (UK, USA, Canada, Germany, Australia, France, New Zealand) it is well documented that over the last 20-30 years as the flow of students into these countries increased dramatically, so did the need to have well spelt out 'after sales' services to ensure retention in the post-recruitment phase. Therefore, student services in country began to expand to cater to international students. Some universities set up international offices that focused on providing international students with the level of service necessary to retain them (once recruited) and give them a quality student experience. Compared to most TNE students, many international students coming onshore to the foreign university campus required far more additional services in the way of provision of accommodation, guidance counselling, on arrival orientation, English language testing, cultural integration, ongoing buddying or mentoring support, tutoring, career planning and advising, pre-departure, etc.

The UK Council for International Student Affairs (UKCOSA) conducts benchmarking surveys of their institutions to determine the level of service to international students and openly discusses the competitive nature of the student market and the importance of having service provision that will ensure a better experience for international students in the UK. In a position paper prepared by UKCOSA in 2008 it stated that 'Some of the marketing momentum will be lost if students return home and recount negative experiences.'⁴⁵ There are also far more regulations that govern the arrival of international students into a developed country for study than is the case with TNE students who remain in their home countries - less visa issues, less issues of compliance to ensure students attend full time study at their institutions whilst on a visa or maintain oversight of work rights and far greater scrutiny of institutions in terms of service delivery because the international student is a consumer or a client. TNE students do not undergo this level of scrutiny because usually they are in their home country or in a regional location where they are resident - therefore, the level of scrutiny on the institution delivering the course is far less than the institution which brings in the international students to their main campus.

⁴⁵ http://www.ukcisa.org.uk/about/material_media/reports_papers_reviews.php - refer Position Paper PMI Project on International Students Teaching and Learning Issues UKCISA TALIS Initiative (accessed 21 February 2017)

Table 4: Differences in Service to Students		
Onshore (main campus) versus TNE		
UNIVERSITY INVESTMENT IN SERVICES	International Student arriving at main campus	Transnational Student studying a foreign university's program locally
Investment in marketing programs	X - Far more expensive	Less costly
Pre-departure advising	X	Not intensive
Support for visa	X	Not required
Meet and greet at airport	X	Not required
Language testing	X	Less costly
Foundation studies	X	If required, less costly
Academic skills support	X	When required, less costly
Ongoing academic advising	X	Less support than onshore
Cultural assimilation - budding, mentoring and other schemes	X	Not required, seldom discussed; may be a factor for regional students
Internships	Possible	If required better possibilities in booming economies
Work Opportunities (usually under visa provision for international students)	Most countries offer some work rights	Not required unless regional students who don't have permission to work
Medical insurance arrangements	X	Not usually required
Government compliance with visa, attendance, work arrangement, failure management, etc.	X	Not required
Post study guidance and support - pre-departure	X	Rare
Advising/training of academic and administrative staff to meet the needs of international students on campuses (e.g. cultural sensitivity training, dealing with sensitive academic issues such as failures, etc.)	X	Not required or rare
Legal issues in terms of dealing with students as 'consumers'	Far greater legal implications when bringing international students onshore	Far fewer legal implications when a branch campus or sharing the burden with local providers
Greater scrutiny on health and safety and other compliance e.g. faculty/student ratios, availability of minimum level of support staff (counseling, academic skills, etc.)	Far greater scrutiny when bringing international students onshore	No set requirements

Source: Author

Historically universities have engaged with local (and national) organizations to form partnerships that can enhance their student experiences and/or contribute to a country's economy. An example of this is when governments believe there is a shortage of professionals in a sector and therefore, develop policy that stimulates discussion between education institutions, employer and industry groups to create broad based discussion channels which would ensure that the country has a highly developed labour force to deal with future opportunities in the labour market. Universities have also built effective partnerships in internships for their students e.g. nursing and medical students and the relationship between universities and hospitals. Effective partnerships by universities and industries in support of economic development are formed around mutual needs, market demands, and the potential of value added as a result of teaming.⁴⁶ Therefore, while external partnerships in TNE may be a more recent phenomenon, this is not unusual given the history of universities to develop partnerships which serve their missions.

As newer communication technologies are being developed, there are more and more alternate pathways that deliver higher education, and these are no longer the exclusive domain of public institutions. Now there are private universities and for-profit education centers and even media companies involved in TNE and more and more there is also a mix of public-private partnership to engage in cross border development of TNE opportunities. Alternative types of cross border program delivery such as branch campuses, franchise and twinning arrangements are being developed.⁴⁷

Many developing countries view higher education as a driver of economic growth and social change but do not have the capacity to deliver quality higher education to their own citizens. Overseas study is usually available only to a minority of those who desire it, and thus TNE provision has the potential to offer host nations cost-effective access to high quality international higher education. TNE offered to students in many developing countries can provide

⁴⁶ James H. Ryan and Arthur A. Heim. *Promoting Economic Development Through University and Industry Partnerships* in Pappas, J. (Ed) *The University's Role in Economic Development: From Research to Outreach*. New Directions for Higher Education, n. 97, p. 43, Spring 97, Jossey-Bass Publishers, San Francisco.

⁴⁷ Knight, *Trade in Higher Education Services: The implications of GATS*, *op. cit.*, p. 5.

local students an opportunity to gain an education which would otherwise not be possible.

While some developing countries are attracting international students without having sufficient places for their own local students, it must be understood that this is because international students are usually paying premium tuition fees and therefore, infrastructure can be developed (and paid for) from this income stream (international students). For source countries, such as Australia, TNE delivery of higher education opens up new markets, reaching potential students unable to afford studies abroad.

Given the competitive nature of the international student market, some universities believe TNE is an attractive option to increase revenue for their institutions, but is TNE truly an international experience? Does it provide the student the same opportunity as the student that goes abroad to study? Whilst clearly there are the obvious benefits of a foreign qualification to the student, there remains some concern whether the student is receiving the same benefit as the student coming onshore to pursue a qualification at the host school/country.

1.6 Barriers to Transnational Education

A few higher education institutions including private organizations commenced and then ended their TNE activities because it appears that they had not done their homework before commencing TNE activities. Based on the evidence, it becomes clear that higher education institutions, are competing in many markets for TNE students. One of the barriers to TNE is the development of sound institutional policies, before considering entry into TNE activities. These include the consideration of the following:

- *Mission and Priorities* – The reasoning for setting up TNE programs
- *Type of TNE delivery* – IBC, twinning, fully online, blended learning.
Why is one type better than the other? Is delivery market specific?

Table 5: Barriers to Transnational Education – Various Perspectives
Teaching Staff of Main Campus of University proposing to offer TNE
1. The quality of programs will diminish if programs are offered offshore.
2. There will be fewer international students wanting to pay to come to study at the main university which will reduce income for the main campus; domestic students will not receive the benefit of cultural immersion; also, TNE students will not receive the benefits of an 'abroad experience' if they study locally or regionally.
3. As TNE programs are more likely to use technology and online systems with the use of local staffing, there are likely to be job losses at the main campus.
4. Income on programs from offshore activities will remain offshore.
5. Offshore universities will start to come on to our shores to compete for our domestic students.
6. Faculty hired locally (offshore) to teach TNE programs may be trained, but it reduces emphasis on main campus capabilities
Government of TNE receiving country accepting application from overseas university to set up TNE campus
1. Will the quality of program be the same for our local students?
2. Will the curriculum of overseas institutions provide opportunity to influence local students with foreign doctrine?
3. Will our local institutions survive? (Will TNE reduce the value of the local education provider?)
4. Is this initiative income driven or an opportunity to educate our students and/or help with our infrastructure? Is this capacity building?
Local Institutions in Country where an Overseas University wishes to set up TNE campus
1. Will this reduce the credibility of our own institutions? Increased competition?
2. Will this reduce the curriculum style of our region? Diminish the values of our institutions? Promote foreign doctrine?
Employers
1. Will this degree have the same value as the degree where the student goes abroad to the main campus?
2. Where is the cultural content of the student experience from studying abroad?
3. Will the qualification distinguish the type of qualification and where it was obtained? How can we distinguish between students studying TNE locally and those that have gone abroad?
Source: Author

- *Long term sustainability – Market? Competition?*
- *Regional demographics- Are there religious and cultural norms that require courses to be delivered based on gender-based classrooms? Have the specifics of the market been considered?*
- *What component of the program delivery, if any is based on technology?*
- *Capability and capacity of local partners*
- *Management of course content/curriculum and administration - `shared' arrangements based on contractual obligations with partners and how are these to work (contractual arrangements)*
- *Quality and currency of content/curriculum and services to students and partners*
- *Local and overseas government policies and regulatory framework*
- *Managing media and any negativity in relation to TNE*
- *If a `shared' TNE, who will manage examinations and issue Testamurs?*

The number of bureaucratic hurdles to be overcome in operating TNE is based on the form of TNE delivery. Some forms of delivery are easier to set up than others. There are local and regional factors to consider and the working environment can be fraught with threats and opportunities for the overseas university contemplating TNE as well as to partner institutions if relevant.

The barriers to most forms of TNE are the following:

- *Resistance to immersion of `foreign' doctrine in curriculum and the fear of imperialism. As globalization leads to an internationally integrated production and consumption of goods, cultural products, and services, local and national identities are challenged.⁴⁸ In many under developing and developing countries which are grossly underfunded for public education, the arrival of institutions of higher learning is a great advantage. However, there may be issues related to a total immersion of `foreign' doctrine in the curriculum, thereby diluting local norms,*

⁴⁸ <http://aicaworld.org/events/conf2008.htm> (accessed 11 May 2016)

customs and cultural attributes. Betsy Banner (2016) states that ‘Given the multinational reach of many institutions in English-speaking nations, it is easy to understand why educational imperialism is a serious global concern.’⁴⁹ Jane Knight (2004) also takes this point further by stating that when discussing GATS and trade liberalization of higher education, some developing countries are keen to see foreign suppliers (of education) provide access to their students and build their education infrastructure but she also states that the ‘threat of foreign dominance or exploitation of a national system and culture is expressed by others.’⁵⁰ Some institutions such as Australia's RMIT University are already addressing this issue through dialogue amongst researchers with the ‘Community Formation and Transnationalism’ project which provides researchers with an opportunity to work together as an umbrella organization to explore communities particularly in the Asia-Pacific region. It involves a global network of researchers, scholars and engaged community-activists, working together to better understand the nature of community from the local to the global; to collectively respond to key cultural political issues of the new century across all levels of community and polity; and to develop responses to deal with real-world problems.⁵¹ Also during a 2009 visit by bilingual and bicultural academic, Dr Ting Wang, mention was made of encouraging ‘exchanges of diverse perspectives and supports students to build new frameworks rather than simply accepting imported wisdom.’⁵²

- *Nationalism and anti-immigrant sentiments are working in some cases against the need to internationalize or ‘integrate’.* In an article in University World News mention is made of the barriers faced by those

⁴⁹ Betsy J. Banner, ‘Global Trends in Transnational Education’, *International Journal of Information and Educational Technology*, v. 6, n. 1, p. 82. Jan 2016. Also at: https://www.researchgate.net/publication/280758526_Global_Trends_in_Transnational_Education (accessed 30 April 2018).

⁵⁰ Knight, *Trade in Higher Education Services: The implications of GATS*, *op cit.*, p. 21.

⁵¹ <http://www.rmit.edu.au/browse;ID=bawbmmk3cnwm> (accessed 11 February 2016)

⁵²

https://www.researchgate.net/publication/272369913_Exploring_Chinese_Educators'_Learning_Experiences_and_Transnational_Pedagogies (accessed 14 May 2017)

seeking global engagement from rising nationalistic and anti-immigrant policies.⁵³ Dealing with local issues has become a priority in the political landscape in some countries.

- *Lack of proper planning when setting up transnational education arrangements and quality issues.* The fast-evolving pace of TNE has sometimes led institutions to set up arrangements offshore without proper planning; this has led to some universities pulling out because the IBC or the twinning/franchising relationship has simply not worked. This can disadvantage students and damage the credibility of TNE programs. It also leads to bad publicity which can also hurt a country's onshore international education programs. There have been some instances where a lack of proper planning or rushing into an overseas market to set up an IBC has led to questions being raised about academic integrity. In recent years however, more and more governments have introduced regulatory mechanisms that will avoid or at the least minimize the problem.
- *Lack of 'university experience' and the phasing out of the 'international experience' when it comes to TNE programs.* Academics within universities have expressed 'fear that money and efficiency may gradually come to have too dominant a place in academic decision making and that the verdict of the market will supplant the judgment of scholars in deciding what to teach and whom to appoint.'⁵⁴ There is some concern that the study experience with TNE is simply the academic study and not the entire university experience which includes the interaction with other students from the home university, the learning of the cultural norms of the country where the university's main campus is located and the sheer experience of going abroad.

⁵³ University World News, *Why universities must innovate in global engagement*, 21 October 2017. Also at: <https://www.universityworldnews.com/post.php?story=20171021053709667> (accessed 18 July 2018)

⁵⁴ Derek Bok. 2003. *Universities in the Marketplace - The Commercialization of Higher Education*. Princeton University Press. Princeton and Oxford. p 19.

- There is no clear evidence that the outcomes for students undertaking study through the TNE mode are the same as those going overseas to study:* There is limited research currently available about whether the outcomes for students undertaking degrees in their home countries through the TNE mode are the same as those received by the onshore student. Clearly there is recognition that there is the benefit of obtaining an overseas qualification. However, there is no clarity on whether students pursuing programs in their home country would have the same or better outcomes than those students that go and truly engage with the international community by leaving their own shores for a foreign experience. The lack of research in this area does not mean that TNE is lacking because given that some developing countries do not have sufficient places for their own students, TNE is a viable option, however, the question remains: Does the student following the TNE pathway who does not leave home have the same outcomes as the student that goes abroad to study? When discussing outcomes, it is important to also understand that TNE qualifications are generally geared to the specific market. Part of the reason why the local TNE experience is different is also due to social and cultural reasons where 'pushing' western doctrine could blur the 'conventional distinction between teacher and student'.⁵⁵
- The degree/certificate issued to students through the TNE qualification in most cases is usually the same as the one offered to students that go abroad to study yet the TNE student receives a different experience and not all the other benefits of the main university or country experience e.g. the Oxford experience or the Yale and Princeton experience assumes that the student has been to England or the USA.* Employers often do not even ask if the applicant studied in the country where the main campus is located. Employers may be offering positions to applicants based on the qualification being offered by a particular university (and country) and the assumption is that the applicant would have adapted to that country's cultural norms. Over a period of time if (a) employers begin to better

⁵⁵ Nigel M. Healey, 'The challenges of leading an international branch campus: the 'lived experience' of in-country senior managers', *Journal of Studies in International Education*, 2015, p. 5. (DOI: 10.1177/1028315315602928). Also at: http://irep.ntu.ac.uk/id/eprint/27649/1/PubSub5210_Healey.pdf (accessed 21 January 2018)

understand TNE and consider the student going abroad as having better skills than the TNE student who did not leave home or (b) employers recruiting students through the TNE mode may find that the outcome for employers is not the same as those for those students that studied at the university's main campus, this may raise issues of quality of the TNE student's university experience and diminish the value of a qualification through TNE. *Current evidence suggests that employers do not notice that the same degree is issued by the University to its onshore and offshore TNE students.* (There is more discussion about this in Chapter 2- Literature Review.) Therefore, once employers become more aware of TNE, how would they view qualifications gained through the TNE mode?

- *Competition between institutions in the student market diminishes the value of the qualification:* Competition has continued to increase amongst countries and institutions. All want a share of the student market, particularly in regions of the world where there is a strong student market. Given that government funding on a per capita basis in many countries has continued to diminish, universities cannot simply invest in countries on the basis that the investment is good for humanity alone; rather there is much consideration given to the 'return' on investment. This has diminished the value of the qualification as issues are raised about whether institutions are in the region to teach or to make money. It is of the first importance for a university to keep a watchful eye on the standing of its degrees, both within and outside the institution.⁵⁶ The closure of some campuses after starting operations has already raised issues in some countries which viewed the closures from the point of view that the universities did not have sufficient fee revenue and therefore, closed and were not there to support local students.
- *Capacity building offshore particularly of local infrastructure (with local partners) will decrease a university's institutional worth over time:*

⁵⁶ G.R. Evans. 1999. *Calling Academia to Account - Rights and Responsibilities*. The Society for Research into Higher Education and Open University Press. p. 139.

While there is recognition that TNE is the new 'norm' in higher education and is very much part of the internationalization efforts of universities, there remains a concern about protecting 'market intelligence' in terms of an individual university's ability to build capacity, specialized curriculum and other nuances specific to a university's culture. This concern in turn also raises issues of 'diluting' a university's image to the point where say, a university which is seen to be special in some way - an example could be Oxford University may not be as special if there are 10 other local providers that begin to offer Oxford degrees through the TNE mode and therefore, increase capacity as well as access.

- *Governments encouraging the 'export' of higher education may decrease funding for education domestically expecting that 'export' earnings will support local funding for education:* Such complacency with domestic education spending could eventually undermine the well-established education systems that are currently in existence. In the case of Australia, with government funding frozen, universities 'have become increasingly reliant on full-fee paying international students.'⁵⁷
- *TNE can indirectly cause the demise of local education institutions and systems:* As an overseas qualification will usually be more popular compared to programs from local institutions, it is likely that universities that offer TNE programs will tend to offer programs that are in high demand and more profitable, leaving the balance to local institutions who could struggle to keep their operations open. 'The strong link between commercialization, commodification and trade is noted and underlines the point that it is often difficult to separate the challenges related to trade from these two issues.'⁵⁸

⁵⁷ Belinda Parkes, 'As Government funding drops, how do Australian universities respond?', *In the Black Online*, 1 May 2018. Also available at: <https://www.intheblack.com/articles/2018/05/01/university-government-funding-drops> (accessed 15 October 2019).

⁵⁸ Knight, *Trade in Higher Education Services: The implications of GATS*, *op cit.*, p. 57.

- *More focus on income generation and the 'export' of education by some countries and institutions and less emphasis on quality:* Clearly foreign institutions need to consider budgets before they enter markets to offer TNE programs as setting up infrastructure and managing programs costs money. But there is some evidence that while this is acceptable, that not enough emphasis is being placed on quality and other more important reasons for managing TNE programs e.g. providing support for developing countries. Internationally, a growing tension between national education systems and TNE is emerging with importing countries focusing on building domestic capacity and exporting countries mainly motivated by income generation.⁵⁹

1.7 Aims and Objectives of the Research

This research study aims to examine the advantages and disadvantages of the TNE model of delivering education to the world at large and draws conclusions on how TNE benefits three specific groups:

- students
- employers
- education institutions, specifically universities.

As TNE has become the next frontier for universities, there are some concerns being raised on the overall quality of the student experience and actual outcomes for students. Issues arise about the total university experience - does the student studying through TNE, away from the university's main campus have a real university experience, as do other international students coming to the home campus? Does the provision of a traditional classroom in a distant land following local norms and surrounded by mainly local students provide the same experience as the student who goes abroad and studies at a university's foreign campus? "There is an expectation among stakeholders - such as

⁵⁹ Ning Tang and Andrea Nollent, 'UK-China-Hong Kong Trans-national Education Project', Report to the British Council, January 2007, p. 4. Also at: <http://globalhighered.files.wordpress.com/2008/04/tne-1-final-report-hk-china-01-07.pdf> (accessed 14 September 2013)

students, parents and employers - that an international branch campus will deliver the same programmes and adhere to the same standards and procedures that apply to its home campus.⁶⁰

Additional concerns include whether the quality of the study program is the same as the program offered at the university's main campus? This question becomes even more relevant if the program was designed for the local TNE market. Will the TNE student benefit in the same way in terms of job outcomes and career paths as the student that has traveled abroad for study? These are important questions, particularly as the debate about quality has already commenced because of the move to have more and more students complete a higher degree qualification. The credibility of higher education programs and qualifications is extremely important for students, employers, the public at large and the academic community itself.⁶¹

In the context of quality, it is important to state there is an active move by countries to reign in issues of quality when discussing outcomes in education. The issue of quality and the student experience will therefore, have a greater focus as more and more of the world's population are educated. The research is timely as it begins to consider these issues in the broader context of qualifications that are issued by universities through their TNE mode in faraway lands particularly when there are already questions being raised about learning outcomes for students that have studied locally versus those at the main campus of the university. At the same time, issues of quality should not portray TNE programs as being inferior to main-campus offerings – indeed, the TNE program designed specifically for the local market may be a well-designed, high quality program. The question however, is whether the qualification being awarded equates to the actual experience and the curriculum being taught.

While governments are keen to see their institutions take on TNE opportunities that have clear benefits for the country - e.g. promote the country education brand internationally and benefit through an increase in export earnings, create

⁶⁰ Wilkins, Balakrishnan and Stephens, *op. cit.*

⁶¹ Knight, *Trade in Higher Education Services: The implications of GATS*, *op cit.*, p. 63.

international student ambassadors for the country which have long term benefits in the way of trade, international relations, etc., there is little research undertaken to assess whether students completing programs via the TNE mode of study receive the same benefits as those that have studied at the institution's home campus.

The research undertaken to date on the student experience is somewhat limited and mainly targeted towards student services in the way of access to counselors and support staff, programming, etc. but it does not deal with whether the students have the same outcome in terms of employability with a degree through the TNE mode and even the overall experience of studying in the home country or a third country and not the university's home campus. Archer and Brett (2009) provided their findings from surveys conducted by i.graduate International Insight to the 2009 Australian International Education (AEI) Conference in Sydney about the transnational student experience.⁶² The nature of the survey was based on how decisions were made related to choice - between TNE and traditional programs and the reasons for this (i.e. already working and therefore, can study only through the TNE mode) rather than seeking out what the differences were in the student experience in terms of knowledge based or acquired knowledge between TNE and traditional international students going abroad to the university's main campus.

An OBHE online article stated that 'i-graduate's Transnational & Distance Education Barometer (TDB) provides unprecedented insight into the opinions of students studying remotely or transnationally'⁶³. However, the TDB could still not comprehensively provide data on the actual outcomes from the different student experiences between going abroad to the university's main campus or studying through the university's branch campus locally. This is because students pursuing TNE study will not be able to compare their experience with the student going overseas both in terms of the experience whilst studying but

⁶² Will Archer and Kevin Brett, '*i-graduate. Research findings on The Transnational Student Experience*'. Power Point presentation by the Graduate Insight Group to the Australian International Education Conference, Sydney, October 2009.

⁶³ The Observatory on Borderless Higher Education, 'TNE and the Transnational & Distance Education Barometer', http://www.obhe.ac.uk/newsletters/tne_and_the_tne_barometer (accessed 11 February 2017)

Table 6: Differences in Outcomes for TNE and Main Campus International Students		
<u>OUTCOMES</u>	<u>TNE Students</u>	<u>International Students Going Abroad</u>
Culture immersion	Local students not required; regional students may be required	Opportunity to engage with a foreign culture and exposure to other cultures (other international students)
Greater familiarity with language	Less bureaucracy related to minimum requirements for language training; may live locally so greater proficiency may not be required	More bureaucracy with meeting minimum requirements for language but greater opportunity to study the language
Quality of Program/Value of Qualification	Quality and Value of Qualification may be perceived as not being as high as that of the student who goes abroad	A degree earned in a foreign country is likely to be valued more so the returned student will have greater prospects of employment.
Engagement with international faculty	Less opportunity for access to international faculty	A 'greater' international study experience through exposure to foreign faculty.
Post-graduation career prospects	As TNE grows and HR managers become familiar with TNE, there will possibly be less value placed on a TNE qualification when compared to the qualification of the student who goes abroad to the main campus.	A degree earned in a foreign country is valued more so the returned student will have greater prospects of employment.
Exposure to work and internships abroad	Fewer possibilities for 'international' experience	Most countries accepting international students offer some work rights and internship arrangements
Networking Opportunities with offshore students	Fewer networking opportunities with offshore students (may have access to regional students)	Greater opportunities to network with home campus students and international students from other regions of the world.

Source: Author

also post-study in terms of career outcomes, opportunities for migration, further study abroad, etc. The student experience should not always focus on just the quality of the course but also on actual outcomes post the study experience.

Another element of the TDB is that currently (besides Yale University's operations in Singapore where students clearly receive a qualification that shows they have studied in Singapore and not Yale's US campus), most universities offering TNE provide their TNE students the same University Testamur as the one offered to their onshore students which means post study, TNE students can be treated by overseas recruitment agencies as having 'assumed' knowledge of the home country of the university that offered the degree so there may actually be an advantage to the TNE student compared to say students who have studied at local institutions, yet the TNE student has not left home or the region. Therefore, current research on outcomes for TNE students is somewhat limited in nature.

A survey conducted in 2011/2012 for a research paper on '*Student Perceptions of Study at International Branch Campuses: implication for educators and college managers*', by Wilkins and Balakrishnan provides limited feedback on the issue of student perceptions. The research is useful from the perspective of gaining an understanding of norms of branch campuses and the satisfaction rate amongst students pursuing study at branch campuses. However, the research does not add to the understanding of whether students believe they received the same outcomes from their degrees as the home university's main campus students. There is also a concern that one of the authors of the research project is a member of the staff of the University of Wollongong Dubai Campus where students were surveyed - thereby raising conflict of interest issues. It is expected that 'virtually all HEIs attempt to assess their service quality by measuring student satisfaction using internally created and distributed evaluation and feedback surveys'.⁶⁵

Governments have placed an emphasis on institutions to manage the quality of their TNE programs. Quality assurance is also fundamental to the security of qualifications and the mobility of professionals.⁶⁶ Whilst there is every reason to believe that issues of quality are being addressed, there is some ambiguity

⁶⁵ Wilkins, Balakrishnan and Stephens, *op. cit.*

⁶⁶ Robin Middlehurst and Carolyn Campbell. *Quality Assurance and Borderless Higher Education: Finding Pathways through the Maze*. Report presented to The Observatory on Borderless Higher Education, p. 3, Aug 2003.

about how institutions would ensure that students participating in their TNE programs would receive the same outcomes in terms of their education and broader (student) experiences as those at their home campuses. The BC in the UK has undertaken considerable research on why TNE should be encouraged as an export earner and in its *Vision 2020* research project states that: 'The global demand for UK transnational education (TNE) in 2020 is predicted to outstrip that for UK onshore international education.'⁶⁷ Again, there is little written about student outcomes.

It is clear that many universities have had to use local partners in order to offer their programs in some countries where government regulations do not allow overseas universities to operate without local partners. Some universities have been plagued with scandals about their offshore partnering arrangements. As universities have become dependent on local partnerships to make their TNE plans a reality, more and more private providers have taken over the actual delivery of TNE programs. Now it is possible that a university's partner offshore could be an internet company, a publishing house or simply a private school or college. (Most public institutions do not have the necessary 'authority' to administer or manage a TNE program for a foreign university.) The relationship with a foreign university delivers to the local private provider a higher status in the local market. Partnering in the delivery of TNE university degree programs also provides local private providers a form of 'quasi' recognition for other qualifications that they may be offering.

There is much debate currently undertaken in Europe about recognition of qualifications by private providers based on varying measurements of learning outcomes. However, it would be difficult to argue that a private provider that manages or partners an offshore university's TNE program would not be competent in running a parallel higher education program which deserves international recognition. Therefore, while accepting that usually universities will require local partners offshore to offer TNE programs, there will have to be some thought given to the idea that somewhere in the future these local partners may be so well recognized in their home countries for offering quality programs

⁶⁷ <https://www.britishcouncil.org/sites/default/files/vision-2020.pdf> p. 8 (extracted 15 April 2018).

that there may not be the necessity for foreign universities to continue to offer programs there. Indeed, these private providers may well be fairly entrenched in the educational systems of their countries and be open to business for foreign students wanting to visit their countries. In other words, these local partners may later be competitors of the overseas universities in terms of attracting international students. *One of the issues that needs to be considered is whether universities involved in TNE may inadvertently do more than intended in capacity building of educational institutions (mostly private providers) abroad and if so, how does this impact on student outcomes and university business?*

Unlike TNE, distance education has been in place for at least four decades and now the delivery of distance education programs happens via teleconferencing, online computer sessions and student chat rooms based on particular class schedules. Distance education is considered a part of TNE if it is offered to students outside the country where the university's main campus is located. There are universities which offer TNE using distance education; in some cases, with 'residential' or regular seminar style classroom study.

In many respect students undertaking distance education in TNE have more opportunity for integration with local (home university) students through the online student chat forums and various email exchanges on list servers, whereas students in transnational facilities usually do not have access to the local (home university) students and share their study experience mainly with students from their home countries or regions. Therefore, on the one hand TNE provides a huge marketing or branding opportunity for the university by making its presence known in a foreign country and on the other hand, students undertaking TNE may actually have less advantage than those undertaking their programs through distance education. *In the absence of evidence-based research we need to ask - What impact does this have on the student's qualification? In what way will the student experience differ from the student that obtained the degree from the university's home campus?*

1.8 Significance of the Research

There is much reported in the media about TNE and how universities in particular opt to fund TNE programs abroad as a new way of reaching out to international students in countries where there is much demand for education and where the local education systems cannot meet this demand. Competition in the international student marketplace has also meant that universities must be proactive in reaching out to the many segments of the market.

TNE policy is part of the internationalization agenda at many institutions of higher learning today. Yet research is fragmented because internationalization in itself is broad and it can be interpreted differently based on the perspective of researchers. Perspectives range from qualitative and quantitative studies from the standpoint of business (how a university can influence and participate in global business) to the quality of the education program when delivered offshore; sociologists also raise issues of how TNE can influence local thinking and develop minds that can distort local cultures in almost the same way as colonization. To understand the various standpoints Sidhu (2006) states that 'research on international education continues to focus on teaching, learning, supervision and support issues for international students' and at the same time 'in Business, the preoccupation has largely been with issues of marketing, branding strategies and predicting future demand.'⁶⁸ Therefore, the research related to the student experience of TNE (compared to the traditional form of international study - going to a foreign country and studying at the university's main campus) seems to warrant some urgency given that this area appears to be the least thought of when it comes to the TNE agenda within the globalization initiatives at a growing number of universities. *While there appears to be some discussion about the TNE experience, there is very little work done on whether the TNE experience is comparable to going abroad and studying at the main campus in the foreign country.*

⁶⁸ Ravinder K. Sidhu, 2006. *Universities and Globalization - To Market, To Market*. Lawrence Erlbaum Associates, NJ. p.134.

A report commissioned by the British Council (*Vision 2020*) in 2004, alluded to the fact that there should be more work undertaken so a UK institution can 'ensure that the international student enrolled on a TNE programme receives a comparable experience to one following a programme on the UK campus'.⁶⁹ Yet there has not been detailed analysis of comparative experiences of students studying at UK campuses in the UK and abroad. There is already a parallel debate about the value of the study experience particularly for students going abroad. *What is meant by the international experience?* Although internationalization, alas, is increasingly a matter of numbers, profile, and branding, the real measure of success should be how well students are equipped to live and work in a rapidly changing global environment.⁷⁰

In a study '*Impacts of transnational education on host countries: academic, cultural, economic and skills impacts and implications of programme and provider mobility*' by the BC and The German Academic Exchange Service (DAAD) in 2015⁷¹, there was acknowledgement that there is much research on TNE but it is focused on TNE perspectives and therefore a study was conducted to gain a better understanding of the impact of TNE from a host university perspective. The BC and DAAD study provided valuable information on the impact of TNE including outcomes of TNE but does not go far enough in determining whether the student experience through the TNE mode is comparable to the experience of students going abroad for their study. At the same time, it is worth stating that researchers are also somewhat limited in how to obtain relevant data when TNE students who have not had any component of their study abroad, cannot compare their experience with those students that are studying overseas at the main campus. One of the conclusions drawn from the BC and DAAD study which is worth noting is that most employers did not have knowledge of TNE. *This suggests that when Testamurs of foreign universities*

⁶⁹ <https://www.britishcouncil.org/sites/default/files/vision-2020.pdf> p. 72 (accessed 15 April 2018)

⁷⁰ Madeleine F. Green, 'Rethinking the Bottom Line for Internationalization: What are Students Learning?' *The Chronicle of Higher Education Online*, 21 March 2013. Also at: <http://chronicle.com/blogs/worldwise/rethinking-the-bottom-line-for-internationalization-what-are-students-learning/31979> (accessed 14 June 2016)

⁷¹ The British Council and the German Academic and Exchange Service (DAAD), '*Impacts of transnational education on host countries: academic, cultural, economic and skills impacts and implications of programme and provider mobility*', Research presented to the Going Global 2014 Conference. Also at: https://www.britishcouncil.org/sites/default/files/tne_study_final_web.pdf (accessed 20 February 2018)

are issued in TNE receiving countries, that it is more than likely that employers assume that the prospective employee has studied and lived abroad. If so, this raises another important issue - The rate of return on investment for those students that have invested substantial sums of money to go abroad to undertake their study (and the related benefits of the abroad experience) compared to TNE students. If employers don't know about TNE, is going abroad for study worthwhile and what if any, will be the long-term effect on international student numbers on campuses abroad? Refer Chart 4 on page 63.

Why the TNE student experience is important and why more thought needs to be given to TNE students having at least a comparable 'study abroad' experience to students going abroad, was summarized in a National Association for International Educators (NAFSA) 2003 *Report of the Strategic Task Force on International Student Access* which stated: 'When the next generation's crises occur, and the United States needs friends and allies to confront them, we will look to the world leaders of that time who are being educated in our country today' and 'The millions of people who have studied in the United States over the years constitute a remarkable reservoir of goodwill for our country, perhaps our most undervalued foreign policy asset.'⁷² Therein lies some of the value in the international study experience and the reason why TNE providers need to consider not just the short term outcomes for students (for example employment) but also the long term engagement with TNE provider countries. Perhaps one of the 'conditions' for introducing TNE programs should be a mandatory requirement that the TNE student has to undertake at least a small component of their study abroad.

There is also the issue about the pace at which TNE has moved. It has been a rapid process which has been fueled by a range of motives from different constituents. There is the rapidly evolving operational environment in which higher education operates these days. While universities still work on strategic plans covering 3 to 5 year periods, globalization has meant that world events quickly affect the bottom line and have seen government funding reduced for

⁷² NAFSA Association of International Educators, *In America's Interest: Welcoming International Students*, Report of the Strategic Task Force on International Student Access, p. 2 and 5, January 2003. Also available at: http://www.nafsa.org/uploadedFiles/NAFSA_Home/Resource_Library_Assets/Public_Policy/in_america_s_interest.pdf (accessed 11 October 2017) pages 2 and 5.

public education and the move by institutions of higher learning towards a more corporatized business structure where it is almost survival of the fittest institutions.

In many instances Governments and international education organizations are generally open to sharing their research - the dependence on the many reports from these bodies suggests the amount of work governments and international organizations undertake in internationalization and their openness to `share' their data. Despite this there are instances where some aspects of the research and market intelligence is `guarded' and meant only for the direct benefit of constituents. Visual Aid 7 below, provides an example of how the British Council disseminates information about TNE opportunities to its members.

VISUAL AID 7: British Council Providing Market Intelligence Data for Members Only

The screenshot displays the British Council International Education Services website. At the top, there is a navigation bar with tabs for 'Education Intelligence Subscription', 'Hong Kong Exhibition July', and 'NAFSA 2018'. The main content area is divided into several sections:

- BRITISH COUNCIL INTERNATIONAL EDUCATION SERVICES:** A teal box containing a description of the services and a 'Find out more ...' link.
- Insights Blog:** A section featuring a blog post titled 'New Year, new-ish data: Can two-year-old statistics help our strategies for the present?' with a date of 15/01/2018.
- OPPORTUNITIES:** A section listing various opportunities, including:
 - Maritime College in Mombasa, Kenya looking for UK Institution to partner in curriculum development:** A post dated 10/04/2018.
 - Annual digital campaign: Leverage China's latest digital trends with short video and content production by the British Council:** A post dated 10/04/2018.
 - Opportunity for UK universities to partner with Kuwait University College of Business for student exchanges:** A post dated 09/04/2018.
 - UKCISA Benchmarking Survey about the provision of support for international students:** A post dated 06/04/2018.
- Global activities by country:** A list of categories with right-pointing arrows, including Education Intelligence, Partnering and Consultancy, Exhibitions, Marketing Products, Professional Training and Development, Outward Mobility, and Study UK: Discover You.

At the bottom of the screenshot, it states: 'Web image extracted from: <https://education-services.britishcouncil.org/> (Access Date: 7 March 2018)'

Despite the many successes reported in TNE, there are the news reports which also refer to universities that withdraw from some markets due to difficulties with local partners and/or government regulations. *Irrespective of the many positives of the phenomenon of TNE, there are growing concerns about the student experience and how this will impact on the future of the global job market, business and society generally.* Some argue that when students come to an overseas campus and learn about the culture of the country and mix with local students and populations, they learn much about living as part of the 'one world' international community; therefore, creating global ambassadors whereas TNE, whilst providing academic content does not provide the same outcomes.

Students with TNE qualifications from overseas universities that have never been abroad could be disadvantaged when they eventually go abroad either to work, for business, as immigrants or to undertake a further degree. They could discover that whilst the academic content of their qualifications may be on par with students that had studied at the university's main campus, their ability to integrate and understand the 'foreign' world would be limited. The research aims to better understand the phenomenon of TNE and find out more about the outcomes for students with qualifications from TNE programs.

The issue of 'capacity building' of foreign private providers (whether organizations, schools or colleges) through joint collaboration is also an issue that is worthy of investigation. On the one hand capacity building in developing countries whilst earning an income for the university is essential, on the other hand if it creates a type of monopoly in the future of private providers in developing countries having a quasi-university status due to their links/collaboration with an overseas university than this may lead to more local students studying in their home countries rather than pursuing options to study abroad; it could also lead to overseas universities not being welcome into these countries once their own institutions are up to par. This could lead to a reverse form of internationalization.

Drawing on the earlier work done on TNE it becomes apparent that there is disconnect between the goals of globalization (and TNE as a part of that process) and the outcomes for individual students who have pursued further

CHART 4: The International Student Experience and Employment Prospects – TNE Students Versus Students Going Abroad

The International Student Experience & Employment Prospects – *TNE Students versus Students Going Abroad*



Pool of Applicants

-varying education backgrounds
-qualification from a foreign university

Pool of Applicants include:



1. Students studying at local institutions

2. TNE Students that study a foreign qualification through an international branch campus, distance education, twinning programs, etc

3. Students that have gone abroad to study



Likely priority list:

3. Student who have studied abroad and have gained international experience
2. TNE students who undertake a foreign program locally or regionally (TNE student)
1. Students that study at local institutions

NOTE: The research indicates that currently employers do not fully understand TNE. Therefore, both categories of students listed as Nos 2 and 3 are likely to have the same advantage given that Testamurs to TNE students studying at IBCs are usually the same as Testamurs offered to international students who travel abroad to the main campus for study.

Source: Author

education through TNE. It becomes clear that TNE is grounded in the theory that it does contribute to the good of societies from many standpoints but clearly there is a gap in knowledge about whether pursuing TNE adequately addresses the issue of equity. For example, does TNE in some way provide a less

favourable student experience than the onshore student who goes abroad to study? If so, those that cannot afford to go abroad, often in some societies these are women and therefore, could they experience more disadvantage than their counterparts who go abroad? Clearly those that have the financial means will go abroad for the total experience; if the plan is to get an overseas qualification then the person would go abroad to the university's main campus; therefore, those that pursue TNE may be those who do not necessarily belong to the upper echelons of society. There is also therefore, an issue of equity with TNE particularly when it comes to discussing outcomes i.e. are students through the TNE mode more financially well to do than counterparts who study at a foreign university's main campus? These are important questions and worthy of consideration from the standpoint of moral and ethical issues.

Currently there is an international push for TNE. Institutions of higher learning (particularly universities) are focused on creating interest groups, committees, separate divisions and infrastructure to develop (often parallel to their current onshore international student programs) and manage TNE programs/projects. When a TNE program is launched and places filled in the program, the program is considered successful. Some governments and national bodies believe that the TNE program has been a success if it meets its targets; the academic institution also believes filling places means tuition is earned for the institution and therefore, there is a return on investment; overall the thinking from an 'aid' and 'foreign affairs' perspective is that whilst earning revenue through education exports, the country has also assisted in providing education to students that would otherwise not go abroad to the university's home campus and at the same time there has been capacity building locally which enhances local partnerships and improves education delivery locally.

This study is important because TNE is gaining significance among the education communities round the globe. It is no longer a national issue and indeed it is borderless and international in nature. Moreover, in the past decade, the complexity, interconnectivity, and scope of these communities have increased dramatically; a trend that most agree will continue and even

accelerate.⁷³ The research will aim to understand the very different imperatives that exist with internationalization at universities. This includes the need to support, in whichever way possible, education delivery to the masses for the greater good of society, to funding and mobility issues in the age of globalization. Whether these are mutually exclusive imperatives or run as parallel agenda for different areas of higher education, these imperatives still raise broader issues about TNE within the framework of the internationalization at universities.

1.9 Research Methodology

Originally the research project sought to survey TNE students and universities. However, soon it became apparent that there were limitations in collecting surveys from TNE students and universities. Refer Limitations of the Research in Section 1.11. The original research project (surveying of TNE students and universities) was therefore expanded to include:

- random surveying of employers/employment agencies, international education organizations and government departments (refer Chapter 5)
- random surveying wherever possible of TNE students who may be accessible via student blogs or messages sent to student magazines. (That is, because universities involved in TNE did not provide access to their students even via their own list servers and blogs.)
- feedback via an interview process with senior personnel from international education organizations and government. Again, there was resistance on the basis that conclusions from the research would somehow impinge on the valuable advances already made by TNE providers. (In all cases, confidentiality became critical as personnel did not wish to speak on the record.)
- an expanded Literature Review (Chapter 2), which included newspaper articles, blogs and newsletters. Knight and Liu (2017) discussed the limitations of research on TNE. They stated that: With TNE research

⁷³ <http://aiceworld.org/events/conf2009.htm> (accessed 16 October 2016)

still being a relatively young field, it is not surprising that there is more grey literature than academic literature.⁷⁴

- collection of country specific information and data (Chapter 3)
- gathering information through visits to a mix of private and public universities and participation where possible at international education conferences and/or specifically targeting literature/materials on TNE prepared for conferences. (Refer Chapter 4, Sections 4.6 and 4.7)

The pace at which TNE has been moving has also meant that the most reliable and up to date information about this phenomenon has usually been drawn from media reports, journals and education organizations rather than an emphasis on published books. Therefore, much material for this research study was sourced from:

- media reports in the Chronicle of Higher Education
- reports by the Observatory on Borderless Higher Education (OBHE).
- press reports – including online articles and blogs
- conference papers/reports

The extensive use of visual aids which captured web pages of institutions, organizations, relevant government agencies and media was an important feature of the research because it provided comprehensive evidence of how TNE had evolved in its many forms. These visual aids present some ‘proof’ of the evolution from the perspective of institutions, governments and related organizations because often material was removed from websites as newer material was made available or the priorities within organizations and governments changed.

1.10 Research Questions

Many institutions of higher learning, specifically universities have invested substantial resources in developing models of TNE to promote their courses

⁷⁴ Jane Knight and Qin Liu, ‘Missing but Needed: Research on Transnational Education’, *Journal of International Higher Education*, n. 88, p. 16, Winter 2017. Also at: <http://ejournals.bc.edu/ojs/index.php/ihe/article/download/9686/8560> (accessed 11 February 2018)

beyond their home campuses. The research examines the hypothesis that more persons are educated around the world because of TNE while also considering the quality of education, the student experience and outcomes for students as well as employers. In doing so, the research critically appraises global trends in TNE and investigates the following questions:

1. Does the student attending a foreign university's program in their home country (or another country) receive the *same benefits* as the student that travels to the university's home campus?
 - Is the university experience different and why?
 - What are the future implications for graduates holding qualifications of foreign universities that have not stepped outside their home countries?
2. What are the lessons for universities contemplating TNE opportunities for international students?
 - Has TNE diminished the value of the international qualification and the on-campus/foreign country experience?
 - Will a university's international standing be compromised in some way by offering degrees to international students through the TNE delivery mode (in the student's home country or another country) as if it does not offer the 'total' university specific experience afforded to the on-campus student in the university's home country?
 - Will university involvement with local partners ensure capacity building of local institutions and if so, what are the longer-term implications if any for internationalization?
3. How will human resource managers view degrees offered through the TNE mode? Is it likely to become an issue as more and more institutions begin to deliver courses through the TNE mode?
4. Who benefits from TNE?

1.11 Limitations of the Research

The caveat to this research is that much needed data (through a response to survey questionnaires from current transnational students) is not readily

available as universities and other institutions of higher learning showed a reluctance to pass information about the research project to their TNE students for fear that the research outcomes may lead to a diminished view of TNE or a view that may not favour an increase in TNE operations. Similarly, some government departments/agencies and international education organizations also held the view that the research findings may provide pause for rethinking TNE; this general lack of interest/support in/for the research constrained the overall project.

While there are many institutions of higher learning including universities undertaking TNE, the focus of this study has been universities. Therefore, there has not been widespread consultation with other institutions of higher learning such as community or technical colleges.

Various investigative methods were chosen to ensure validity and reliability of the data presented. For example, when there was resistance from institutions in completing surveys due to concerns that the research may project a negative view of TNE, a greater emphasis was placed on finding country specific data.

The evolving nature and rapid transformation of TNE over the last decade has at times hindered the study because it has been difficult to follow a specific path with data collection. Nevertheless, to minimize the impact on this study a balance was sought between identifying relevant statistical and other data and where necessary, substituting the lack of data with interviews and/or discussions with personnel involved in TNE.

The rapid pace at which TNE has evolved has also presented significant challenges in completing this research project. *As material is gathered, studied and if relevant, included in this research study, more and more updates take place in how TNE is perceived, delivered and/or adapted to suit student markets as well as sending and receiving institutions and governments.*

In some cases, the shifting of responsibilities between government agencies was also a challenge. For example, some material accessed and cited in relation to

Australia's former aid agency, AusAid was no longer accessible on the website as the Department of Foreign Affairs and Trade absorbed AusAid operations and removed many of the previously held AusAid reports from the website.

The extensive use of visual aids increased substantially the length of this thesis, although the word count (under 100,000 words) is within the limitations of a PhD thesis study.

When compared to other subject areas, there have been very few books that have been written on TNE although TNE is reported in most recent material on international/global education.

As a substantial amount of information for the research was gathered prior to August 2013 and there was a gap of some 4 years before the written work for the research project recommenced in 2017, Chapter 4, pp. 292-295 includes 'A 4 Year Update (2013-2017) on Trends in Transnational Education' to cover any gaps in the information gathering for this research project.

Despite the caveats mentioned above (particularly in relation to institutional/organizational 'resistance' to a broad discussion on whether TNE offered the same outcomes for students as students going abroad to a foreign institution), the adaptations made to the original research proposal with a greater reliance on a literature review and an emphasis on the more recent trends in TNE, provided sufficient material to develop a quality research study. *Also, to facilitate future research a 'List of Researchers and Organizations Active in Transnational Education (TNE) Research' was compiled as part of the thesis. Refer APPENDIX 1 in Volume II of this thesis.*

Chapter 2 - Literature Review

There is a plethora of literature on TNE written over the last approximately 25 years within the context of international education and globalization. Indeed, there is a deluge of popular literature and scholarly research that seeks to define globalization, to explain its genesis, and to clarify the complexities of the economic, political, cultural, and social contours of globalizing processes.⁷⁷ The literature provides various perspectives and researchers whilst sharing a wealth of knowledge about the phenomenon of TNE have not credited a single factor for its advent, rather combining the age of the internet, the demand for education and the need for institutions and governments to raise revenue.

Regrettably the literature on TNE falls short on providing comprehensive data on TNE student numbers although some countries and the OECD do collate some data. There is also a lack of definitions for all the many forms of TNE and how they differ from one another. Part of the reason for this shortcoming is that TNE is still fairly new and importantly, TNE is developing at a rapid pace so some forms of TNE can sometimes change or vary and this makes it difficult to define these 'evolving' forms of TNE, creating further confusion about how TNE students are counted in available statistical data.

There were various methods used to gather data for this research project including providing descriptive data and survey questionnaires. The data collected in the research came from a variety of sources and includes data collected from government bodies as well as international organizations. The survey questionnaire returns were quite limited and came from universities, international education organizations as well as students. Bennett and George (1997) suggest that research should be grounded in theory, but they also state that "No one case study design is appropriate to all possible causal assertions, modes of theory-building, and research objectives."⁷⁸

⁷⁷ Michael Apple, Jane Kenway, and Michael Singh. 'Globalizing Education: Perspectives from Above and Below' in *Globalizing Education - Policies, Pedagogies, & Politics* by Michael Apple, Jane Kenway and Michael Singh. Peter Lang NY. p. 2. 2005.

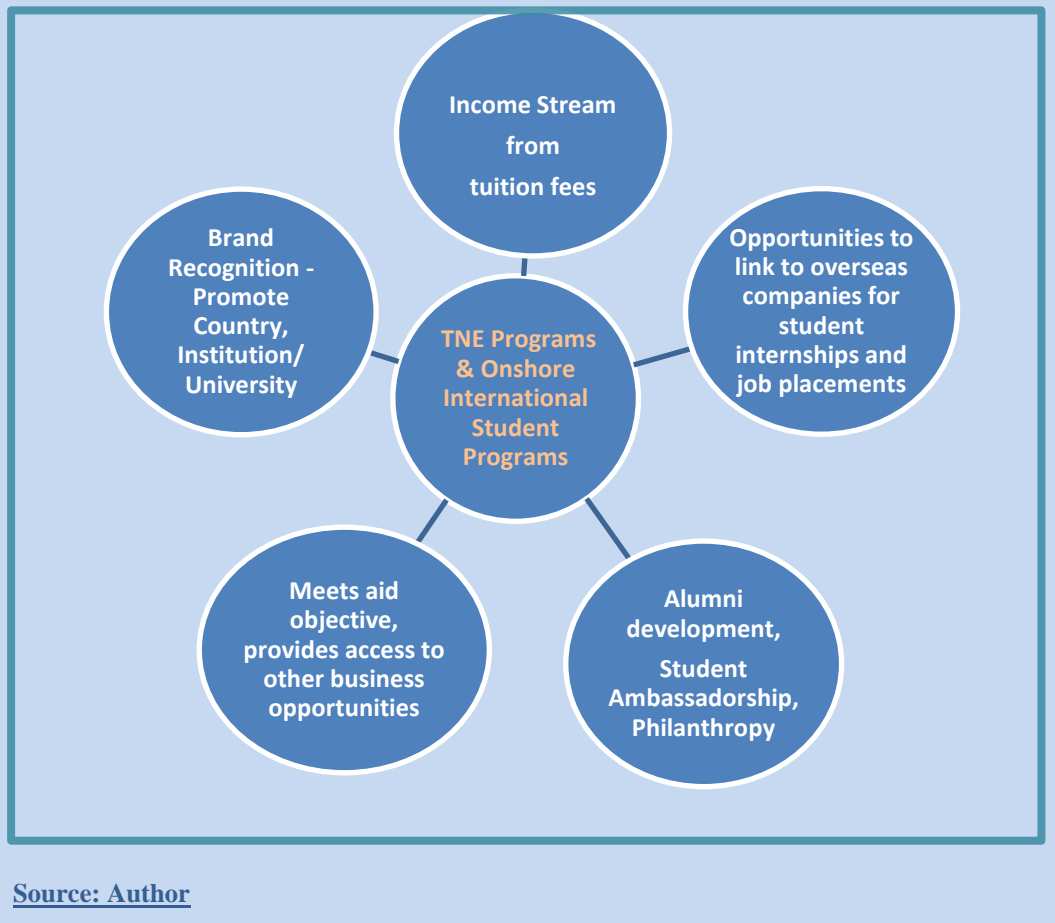
⁷⁸ Andrew Bennett and Alexander George. 'Research Design Tasks in Case Study Methods'. Paper presented at the MacArthur Foundation Workshop on Case Study Methods, Belfer Center for Science and International Affairs (BCSIA), Harvard University, p. 1. 1997.

Once the research project commenced it soon became apparent that there were several barriers which could potentially provide an unrealistic or unclear finding. As this research is a global study, most of the major organizations across a number of countries were approached to gather data on trends within their own countries. Every possible attempt was made to provide as wide a grouping of countries as possible but there were some constraints in how much information could be gathered within a reasonable timeframe for data collection given the tyranny of distance and the varying degrees of importance given to TNE by the specific organization or institution. There was also a great deal of reluctance by some organizations and institutions to discuss TNE – providing information on TNE activities was seen as passing market intelligence to competitors. One reason that was often provided by institutions was that they are still 'finding their way'.

There is some discussion about the limitations of the research in Chapter 1, pp. 66-69. The limitations can be summarized as follows:

- discussions with personnel at universities indicated a concern that the research findings may suggest that there were quality issues being raised about TNE and therefore, it was better not to be involved in the surveying part of the project;
 - students studying through the TNE mode were inaccessible for the completion of survey questionnaires because universities involved in TNE were not keen to provide access in case the findings of the research raised issues about the quality of TNE programs; and
 - employers contacted were aware of TNE but were not familiar with the many variations of TNE (offshore campuses, twinning arrangements, etc.); others were totally unaware of TNE; all employers contacted did not feel confident about completing survey questionnaires forms without really knowing TNE.
-

CHART 5: Similarities between TNE and Onshore International Student Programs at Universities



2.1 The Need for an Expanded Literature Review

Due to the barriers listed above in collecting a sufficient number of survey questionnaire returns from students and universities, there was more emphasis placed on an expanded review of the literature. Refer also to 'Limitations of the Research' in Chapter 1 on pp. 66-69. Additionally, the researcher also provided far more extensive information on TNE in the Introduction (Chapter 1), than would otherwise have been necessary. The expanded Introduction and Literature Review chapters compensated for the short fall in data collection as a result of limited survey returns from students and universities/organizations involved in TNE.

The Literature Review sought to provide a better understanding from a historical perspective how TNE evolved from its inception within the framework of the

international student program. The chapter also discusses the views of scholars and researchers about globalization and how TNE was a natural fit within the higher education sector's move to 'globalize'. The views of other interested parties in TNE – such as media and those employed or working for the cause of TNE were also considered important to this study and therefore, their views are included in this literature review.

It is not rewarding to discuss TNE as a stand-alone initiative of institutions; it is more meaningful to see it in context as a part of the globalization of higher education.

Dependence on qualitative data did not in any way compromise the integrity of the research project because emphasis was placed on drawing as much data as possible from a wide audience spanning the globe. This included international education organizations as well as government agencies, some of whom were not necessarily as involved in TNE or did not see the research as a 'threat' to their income streams in the same way as universities/institutions involved in TNE did. To ensure integrity of the research, there was also emphasis placed on providing a realistic rather than a minimalist international perspective. For example, the research did not focus on a sample of countries, say one country in Asia and another in Europe and then Australia to present a global perspective. Instead wherever possible, the research focused on gaining as wide a perspective as possible on what individual countries were doing in terms of TNE.

Additionally, the researcher also approached international education agencies which have multi country representation such as the European Association of International Education (EAIE) and the National Association for International Educators (NAFSA). Where it was not possible to gain first hand interviews, an emphasis was placed on reading materials available in the public domain from these organizations. This included a search of recent conference reports including published and unpublished conference papers.

Secondary data for the research was drawn from both published and unpublished conference papers, organizational and institutional internal reports, TNE articles from educational newspapers and journals as well as data from government departments. Where accessible, material from PhD and Master level theses and dissertations as well as reports by individual universities and colleges were also examined. While the survey responses in this research from universities/institutions and students who have been involved in TNE was limited in extent (that is very few survey questionnaires were returned), it is hoped that the literature review as well as the data sourced from a variety of organizations provide sufficient insight into global trends in TNE which will stimulate future debate within the academic community.

The primary purpose of drawing heavily on non-traditional literature (such as media reports) to compliment the traditional literature (such as journals and books) was to provide as comprehensive as possible an overview of global trends in TNE. This includes who is doing what and why? What are the lessons learned to date? Where does TNE go next? Given the fast pace at which TNE developed it was felt that utilizing non-traditional sources would lead to a better grasp of TNE in the context of globalization and how it fits into the agenda of governments and institutions of learning. It was also hoped that by providing as comprehensive a view as possible on global trends in TNE, the research findings could be disseminated to relevant government agencies and international education organizations, in the hope that more emphasis is placed on TNE being developed as a global policy on educating the world's peoples.

Refer also to Chapter 1, Section 1.5 'Importance of the Research' in pp. 58-66.

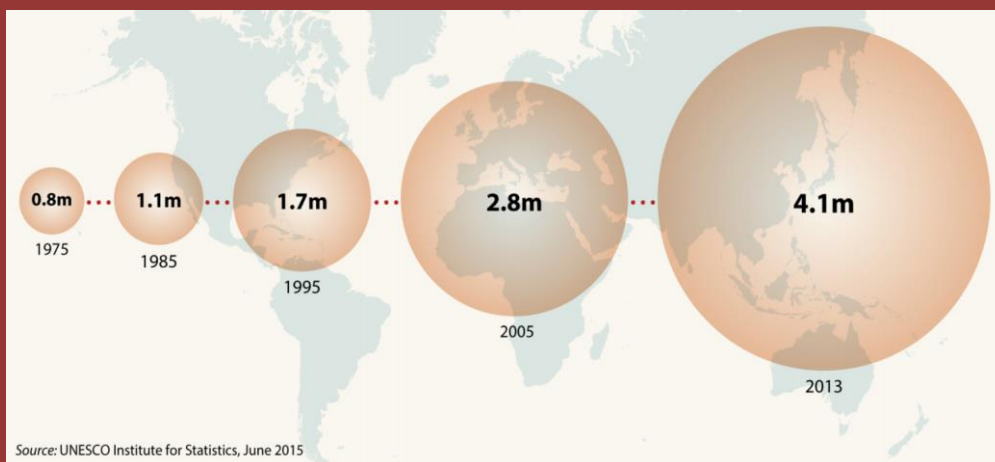
2.2 The Literature

There is extensive discussion on 'Defining and Understanding Transnational Education in a Globalized World' in Chapter 1 which should also be read within the context of this section. *The literature review has been placed within sections to better characterize the evolving nature of TNE.*

2.2.1 The Full Fee International Student Program and TNE

The world's well known, established institutions of higher learning were well acquainted with international students and internationalization long before TNE. A joint draft statement in September 2004 by the International Association of Universities (IAU), the Association of Universities and Colleges of Canada (AUCC), the American Council on Education (ACE) and the Council for Higher Education Accreditation (CHEA) states that 'Higher education's tradition of

VISUAL AID 8: Growth of Tertiary-level International Students Worldwide - 1975-2013



Web image extracted from UNESCO:

https://en.unesco.org/sites/default/files/1-4_growth_international_students.pdf
(Access Date: 10 February 2017)

exchanging ideas and people across borders has long served to advance its contribution to society's cultural, social, and economic goals'.⁷⁹ Kozmutzky and Krucken (2014) indicated that globalization was not entirely new to higher education because there had already been 'a long tradition of combining different spatial orientations' and that from the very beginning universities had a two-fold agenda – one that was local and provided its identity in the city it operated and its name and 'at the same time the university was an equally international or transnational institution that has always served the transfer of universal knowledge, and had appropriate curricula and 'internationally mobile'

⁷⁹ International Association of Universities (IAU), the Association of Universities and Colleges of Canada (AUCC), the American Council on Education (ACE) and the Council for Higher Education Accreditation (CHEA), 'Sharing Quality Higher Education Across Borders: A Statement on Behalf of Higher Education Institutions Worldwide', A Joint Statement, p. 1, January 2005. Also at: https://iau-aiu.net/IMG/pdf/statement_sharing_quality.pdf (accessed 19 December 2017)

teachers and students.⁸⁰ Therefore, there was no surprise that for more than half a century, students had been undertaking exchanges and field work training (e.g. in France, USA and the UK), as well as studying overseas. The acceptance of foreign full fee students however, started in earnest in the early 1970s mainly by US institutions. Some countries were offering international student placements but not on a full fee-paying basis – for example, Australia which accepted international students to undertake university study free of charge until the establishment of the full fee international student program in the late 1980s. The recruitment of full fee students was the first 'visible' phase of internationalization operations at universities.

There was very little variation amongst researchers in views as to why institutions were internationalizing their campuses and broadening their horizons in terms of opening their home campuses to international students as well as delivering courses and programs to students beyond their shores. Sidhu (2006) posited that globalization placed pressure on universities to become internationally competitive and therefore it 'is in this context that the recruitment of fee-paying overseas students emerges as the most rational response toward acquiring world-class status.'⁸¹ Chirikov (2016) stated that 'to gain competitive advantage, universities focus on expanding their market share in talented students and faculty, in research funding and outputs like patents, engage in profit-oriented activities, and eliminate inefficiencies'.⁸² At the same time Spencer-Oatey and Dauber (2016) stated that there were a range of organizational and structural goals for internationalization with international student recruitment and student mobility being the most common goals of universities.⁸³ The European Union (EU) in a 2016 report on

⁸⁰ Anna Kozmutzky and Georg Krucken. *Macro-environmental Mapping of International Branch Campus Activities of Universities Worldwide*. Research & Occasional Paper Series CSHE 2.14, Centre for Studies in Higher Education, University of California, Berkeley, p. 1, March 2014. Also at: https://cshe.berkeley.edu/sites/default/files/publications/rops.cshe_2.2014.kozmutzky_kruecken.mappingbranchcampus.3.17.2014.pdf

⁸¹ Sidhu, *op. cit.*

⁸² Igor Chirikov. *How Global Competition is Changing Universities: Three Theoretical Perspectives*. Research & Occasional Paper Series. CSHE 5.16. Center for Studies in Higher Education, University of California, Berkeley, p. 3, June 2016. Also at: <https://cshe.berkeley.edu/sites/default/files/publications/rops.globalcompetition.igorchirikov.6.2016.pdf>

⁸³ Helen Spencer-Oatey and Daniel Dauber. *How internationalised is your university? How can you know and what can you do?*. The Association of Commonwealth Universities. Bulletin No 187, p 10, April 2016. Also at: <https://www.acu.ac.uk/publication/download?publication=546> (accessed 21 January 2018.)

Internationalisation of Higher Education viewed higher education as being influenced by 'globalisation of our economies and societies and the increased importance of knowledge' and this was 'driven by a dynamic and constantly evolving combination of political, economic, socio-cultural and academic rationales' and therefore took different forms based on the different country, region, institution dynamics.⁸⁴ Lane (2018) states that governments were keen to engage in internationalization as it advanced national policy priorities which enhanced economic competition and international reputation.⁸⁵

2.2.2 Declining Public Funding for Higher Education

It was quite clear that as governments reduced funding for universities more had to be done by universities themselves to sustain their core operations.

Universities becoming more creative.

Beginning international student recruitment and later initiating TNE programming was one way to address the reduced funding issue at universities.

The funding situation for universities was also further exasperated in 2008 after the financial crisis. Tsiligiris (2012) states that this led to a 'rejustification of the role of higher education and a redefinition of its funding relationship with government.'⁸⁶

In 2015 the IOU, AUCC, ACE and CHEA suggested that the trend was for the 'growth of market-driven activities, fueled by increased demand for higher education worldwide, declining public funding in many national contexts, the diversification of higher education providers, and new methods of delivery.'⁸⁷

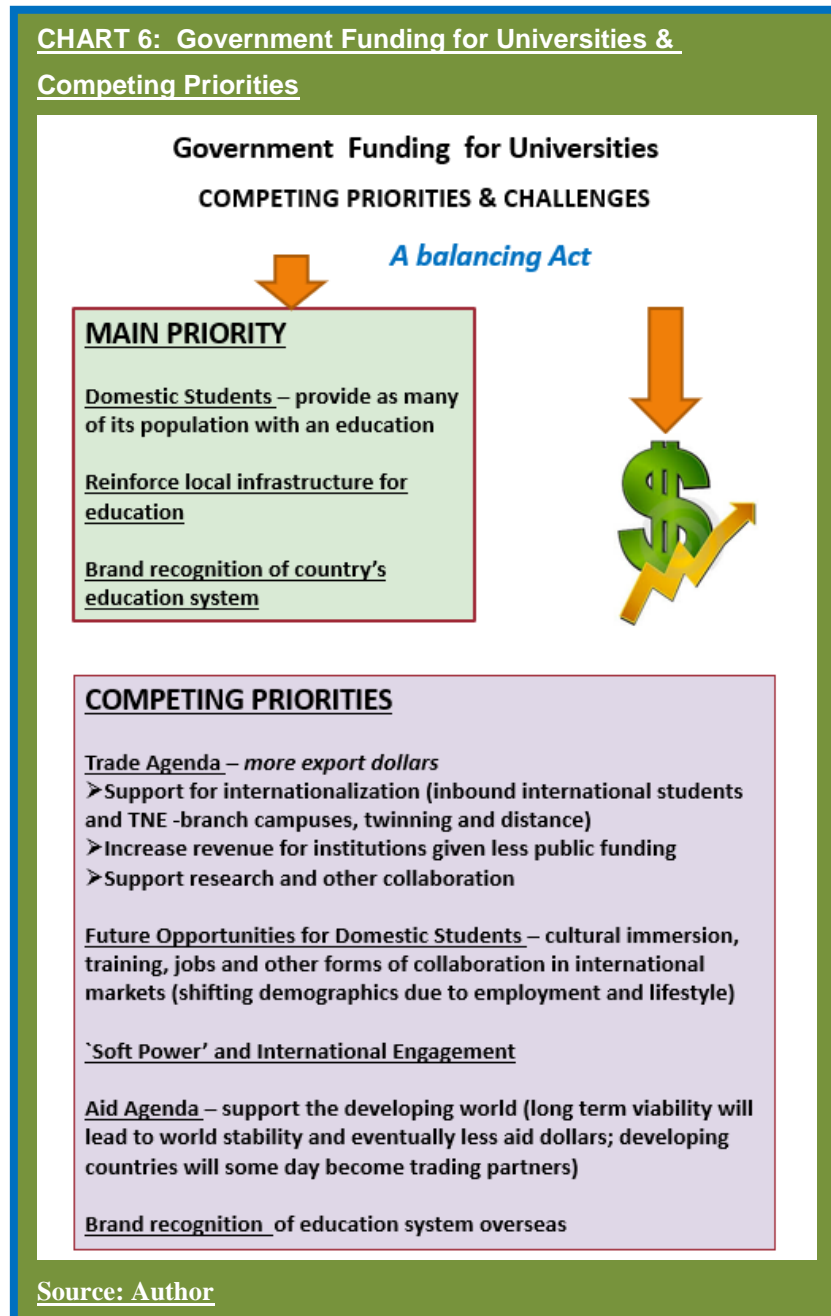
⁸⁴ Hans de Wit, Fiona Hunter, Laura Howard and Eva Egron-Polak, '*Internationalisation of Higher Education*', Report prepared for the European Parliament's Committee on Culture and Education, Brussels, p. 27, July 2015. Also at: [http://www.europarl.europa.eu/RegData/etudes/STUD/2015/540370/IPOL_STU\(2015\)540370_EN.pdf](http://www.europarl.europa.eu/RegData/etudes/STUD/2015/540370/IPOL_STU(2015)540370_EN.pdf) (accessed 14 May 2018)

⁸⁵ Jason E. Lane, '*Importing Branch Campuses to Advance Egypt's Development*', *International Higher Education*, Number 95, Fall 2018, Boston, p. 7.

⁸⁶ Vangelis Tsiligiris, 'The impact of the economic crisis on higher education', *University World News*, 18 March 2012. Also available at: <https://www.universityworldnews.com/post.php?story=20120314055536933> (accessed 8 April 2019).

⁸⁷ International Association of Universities (IAU), the Association of Universities and Colleges of Canada (AUCC), the American Council on Education (ACE) and the Council for Higher Education Accreditation (CHEA), *op. cit.*, p. 1.

Malete (2016) also referred to the need for 'non-traditional sources of funding' as being absolutely necessary for the higher education sector and leading to



offshore campuses as a means of sourcing additional revenue from international students.⁸⁸ The EU suggested that two of the ten key challenges faced by higher education included funding and privatization of higher education to ensure revenue generation.⁸⁹

In the case of Australia, Welsh (2017) stated that 'by transforming themselves into major engines of export earnings, now earning a collective AU\$20 billion

⁸⁸ L. Malete. 'Transnational Education and Internationalization of Education as Tools for Higher Education Transformation and Economic Development in Emerging Economies' in Perspectives in Transnational Higher Education, Emmanuel Jean Francois, Mejai B.M. Avosehand Wendy Griswold (Eds.), 2016, Sense Publishers, p. 39, 2016. The Netherlands. Also available online at: https://www.researchgate.net/profile/Oscar_Espinoza2/publication/312155107_Transnationalization_of_Chilean_and_Mexican_Higher_Education_Perspectives_and_Challenges/links/5872b94808ae329d621bc39a/Transnationalization-of-Chilean-and-Mexican-Higher-Education-Perspectives-and-Challenges.pdf (accessed 3 January 2018)

⁸⁹ De Wit, Hunter, Howard and Egron-Polak, *op. cit.*, p. 27

annually from international student fees, universities have come to be seen by government as cash cows to be milked at will.⁹⁰

Revenue generation was also not just for higher education institutions from the west as more and more governments and universities within TNE receiving countries were attracting international students to their campuses. Hallak and Poisson (2017) stated that there was a new wave of cross border providers such as Taiwan, South Africa and Brazil who were attracting international students to their shores and while this was contributing to opening access to tertiary education it was also making higher education a major source of income for provider countries.⁹¹

While it is agreed that universities are meant to educate students, there are varying positions put forward about the role universities play in being self-sufficient through revenue generation. Marginson in Teixeira et al (2004) stated that 'Universities strive on the one hand for social and academic prestige, on the other for economic capacity and revenues.'⁹² De Santis (2012) refers to a report in Australia by Ernst and Young which highlights the need for Australian universities to rethink their strategy on funding, particularly in light of reduced government funding and the increasing availability of free online courses. The report states that 'in 15 years, public institutions will increasingly be run like corporations' and 'private institutions will find other ways to profit by taking advantage of new markets for education.'⁹³ The view from the EU (2016) was that from the second half of the 1990s a gradual shift took place as to how internationalization was viewed: the shift moved from political to economic reasons for internationalization.⁹⁴

⁹⁰ Anthony Welsh, 'Another Missed Opportunity? Underfunding Australian Higher Education', International Higher Education, n. 91, Fall 2017, p. 18.

⁹¹ Jacques Hallak and Muriel Poisson. 'Keeping the promises of cross-border higher education by fighting corruption risks', pg 24. IAU Horizons Magazine, v. 22, n. 2, May 2017. Also at www.iau-aiu.net (accessed 14 August 2017)

⁹² Simon Marginson. *Australian Higher Education: National and Global Markets*. In Teixeira P., Jongbloed B., Dill D., Amaral A. (eds) *Markets in Higher Education*. Higher Education Dynamics, v. 6, p. 209, Springer, Dordrecht.

⁹³ Nick De Santis, 'Australian Universities Must Evolve to Survive Next Decade, Report Warns', *The Chronicle of Higher Education Online*, 23 October 2012. Also at: http://chronicle.com/blogs/ticker/australian-universities-must-evolve-to-survive-next-decade-report-warns/51048?cid=gn&utm_source=gn&utm_medium=en (accessed 18 November 2013)

⁹⁴ De Wit, Hunter, Howard and Egron-Polak, *op. cit.*, p. 43

2.2.3 Online and Technological Developments - The Game Changer

In the early days of TNE there was more emphasis placed on using modern technologies such as electronic delivery to students and there were entire new institutions and specialized programs which were built on the premise that learning at a distance was not merely viable, but might reach student demographics that otherwise were not able to participate in higher education.⁹⁵ Quinn (2015) posits that higher education had to some extent always had an international outlook but developments in technology, communications and transport led to an explosive growth in partnerships between institutions and this may be through formal and informal arrangements, from one-off contacts between academics and administrators, to more substantial investments by universities in buildings, staff, and finances.⁹⁶ The OBHE is undertaking a study to better understand the many forms of online courses. In a preview of a forthcoming report, the OBHE states that: ‘The Observatory’s remit is a big one- the multitude of transnational higher education models, the plethora of commercial players active in the sector, and the complexities of online learning’ and that ‘Our definition of online learning is broad, encompassing fully online degree programmes as well as blended and hybrid models; and online delivery as a component of conventional campus courses’. At the same time, the OBHE reports that ‘data for online students is rarely reported at institutional or national level’.⁹⁷

The role of the internet in the post-industrial society and its impact on education is discussed throughout the literature. TNE would not have been fueled at the level it has, had it not been for the advent of the internet. As stated in the previous paragraph, the emphasis in the early days of TNE and even at the start

⁹⁵ Jon Rubin. ‘*Embedding Collaborative Online International Learning (COIL) at Higher Education Institutions*’, *Internationalisation of Higher Education*, v. 2, p. 28. 2017.

⁹⁶ Robert Quinn, ‘Can Universities Go Global Without Losing their Values?’ *British Council Online*, 1 June 2015. Also at: <https://www.britishcouncil.org/voices-magazine/universities-go-global-without-losing-their-values> (accessed 14 May 2017.)

⁹⁷ The Observatory on Borderless Higher Education, ‘*Whatever Happened to the Promises of Online Learning? Lessons from Country Case Studies*’, Preview of a Forthcoming Observatory Report, 2018. Also at: http://www.obhe.ac.uk/who_we_are/Brochures/2018onlinehereportflyer (accessed 11 April 2018)

of this century was still in the digital online delivery space within the context of TNE. Ryan et al (2000) question whether the following UK Open Learning University ideals are worth striving for:

'Liberation' is the opposite of 'domination' and also asks these questions. Will barriers of access be removed for the disabled and poor? Can open and distance education increase international understanding, give greater esteem to minority cultures and spread knowledge among the dispossessed? ⁹⁸

While Ziguras and Rizvi (2001) discussed the growth in online delivery in terms of expanding the global distance education market the view was that students were also interested in or preferred the campus experience whether this was taught by face to face teaching or web based teaching via video conferencing.⁹⁹ Ziguras and Rizvi also pointed out that the purpose of the establishment of the Universitas 21 and the Global Universities Alliance was to ensure that member institutions could create online courses for larger numbers of students in global markets and at the same time they warned that when considering online borderless education it was important to consider local cultural and education traditions. A position put forward by the researchers was that web-supported on campus TNE rather than full online programs could provide students an enriching experience.

Brown (2005) placed a great deal of emphasis on the impact of technology on education stating that 'In the twenty-first century, both the media and education are converging in cyberspace, providing resources for developing a global reflexive consciousness among students, with the information "superhighway" stimulating needs, threats, and opportunities by expediting data flows and programming possible responses.'¹⁰⁰ At the same time Bannier (2016) acknowledges that TNE 'is the logical outgrowth of online and distance education programs, which are currently experiencing globally unprecedented

⁹⁸ S. Ryan, B. Scott, H. Freeman, and D. Patel. 2000. *The Virtual University - The Internet and Resource-Based Learning*. Kogan Page, London and Sterling., p. 176.

⁹⁹ Christopher Ziguras and Fazal Rizvi. Future directions in international online education in Dorothy Davis and Denis Meares (Eds) *Transnational Education: Australia Online*. Sydney: IDP Education Australia. pp.151-164, 2011. Also at: https://www.researchgate.net/publication/230578171_Future_directions_in_international_online_education (accessed 11 October 2015)

¹⁰⁰ Apple, Kenway and Singh, *op. cit.*, p. 171.

growth in both scope and scale'¹⁰¹ and Crews and Parker (2017) state that technology is increasingly seen by the governments of developing countries as having huge potential because 'online learning, mobile technologies, and open educational resources offer for increasing access, equity, quality and relevance of higher education, especially for marginalized groups in rural areas.'¹⁰²

There was also a flurry of activity amongst many higher education institutions when MOOCs appeared on the scene. Even though many MOOCs are offered free, the investment was considered worthwhile, given that MOOCs help with the branding of an institution across borders in a very effective way and this has other benefits for the institutions. Murray and Ilieva (2012) state that 'technological advances have facilitated the rapid worldwide expansion of mass open online courseware (MOOCs) provided by some of the world's best universities.'¹⁰³ Ziguras (2012) supports that view:

This new world is best glimpsed through the emergence, over the past year, of a number of so-called MOOCs – massive open online courses. A not-for-profit version, edX, was launched by MIT and Harvard this year. A for-profit spin-off from Stanford, Coursera, is attracting research universities with international profile; from the UK or Australia, Edinburgh, London and Melbourne have jumped aboard to date. Others are surely considering its potential benefits as part of an internationalisation strategy, including, for those with branch campuses, as a fresh recruitment pool.'¹⁰⁴

For universities involved in distance education and e-learning, 'knowledge is virtually free to ship, with the potential to amortise development costs across global markets.'¹⁰⁵ Many universities historically have commenced some distance education and/or e-learning before embarking on other types of TNE activities. Usually e-learning is mandatory in today's distance education, as gone are the days of sending packages of study materials in the mail. Participation in

¹⁰¹ Bannier, op cit., p. 80.

¹⁰² Julie Crews and Jenni Parker. 'The Cambodian experience: Exploring university students' perspectives for online learning' in *Issues in Educational Research*, 27(4), p. 697, 2017. Also at: <http://www.iier.org.au/iier27/crews.pdf> (accessed 2 January 2018)

¹⁰³ IEAA. *Op cit.* p. 33.

¹⁰⁴ IEAA. *Op cit.* p. 42.

¹⁰⁵ Stephen Matchett, 'High Wired Update: Degrees don't deliver like they used to', *The Australian Online*, 12 July 2013. Also at: <http://www.theaustralian.com.au/higher-education/high-wired-update-degrees-dont-deliver-like-they-used-to/story-e6frgcjx-1226677869892> (accessed 4 January 2014).

this evolving international economic order depends increasingly on the ability to use the new information technologies - computers and telecommunications.¹⁰⁶

Several key agencies are pushing for the recognition of online learning and credit being granted to students that complete some of the MOOC online courses. An example of this is the American Council on Education (ACE) which in late 2012 agreed to consider offering credit for a handful of free online courses taught by elite institutions. Such credit would allow students to fast track their college degrees. ACE received \$895,453 from the Bill & Melinda Gates Foundation in November 2012 in MOOC related grants. ACE will set up the `Presidential Innovation Lab that will bring together college leaders to discuss the potential of MOOC's and new business models for higher education.¹⁰⁷

Katsomitros (2013) stated that E-learning was seen as integral to educating the masses and ensuring that 'investment in online learning will allow universities to benefit from economies of scale and meet increasing demand from developing countries'.¹⁰⁸ Richardson (2015) when making the case for more students in mobility programs states that, for cost reasons, institutions need to 'tap into the opportunities provided by online modes of learning.'¹⁰⁹ While it is true e-learning is complimentary to traditional face to face teaching, the greatest benefit of e-learning is outreach to students who can't come into a classroom to study. Indeed, today students demand to be connected via social media. In this post-industrial information age, children interact and communicate with others

¹⁰⁶ Will Clark. 'The Global Information Economy and its Effect on Local Economic Development'. *New Directions for Higher Education* 1997, no. 97 (1997), pp. 51-61.

¹⁰⁷ Jeffrey R. Young, 'American Council on Education May Recommend Some Coursera Offerings for College Credit', *The Chronicle of Higher Education Online*, 13 November 2012. Also at: http://chronicle.com/article/American-Council-on-Education/135750/?cid=pm&utm_source=pm&utm_medium=en (accessed 11 May 2016)

¹⁰⁸ Alex Katsomitros, 'Why global universities should adopt e-learning', The Observatory on Borderless Higher Education, Borderless Report October 2013. Also at: http://www.obhe.ac.uk/newsletters/borderless_report_november_2011/why_global_universities_should_adopt_elearning (accessed 19 July 2014)

¹⁰⁹ Sarah Richardson, 'Enhancing cross-border higher education institution mobility in the APEC region', Report prepared for the Australian Council for Educational Research and the Australian Department of Foreign Affairs and Trade and presented to the Asia-Pacific Economic Cooperation (APEC), p. 67, 2015. Also at: <https://www.apec.org/Publications/2015/06/Enhancing-cross-border-higher-education-institution-mobility-in-the-APEC-region> p. 67 (accessed 11 September 2017)

in sophisticated ways in virtual spaces.¹¹⁰ At the same time Lawton and Jensen (2015) state that in TNE programs 'if local network infrastructure were sufficient, more live video streaming, webinars, and peer-group workshops could be employed' as a way of 'using technology in classrooms.'¹¹¹ This view is supported in a number of reports including the EU in a 2016 report stating that internationalization will 'see an increase in virtual exchanges, collaborative online international learning, and blended learning, which combines face-to-face learning with online learning experiences'¹¹² and a 2018 report by Ernst & Young for Australian universities states that as 'every consumer activity shifts to the digital realms of web, mobile, social, mixed reality and virtual reality, digital natives are developing new radically different learning behaviours and expectations.'¹¹³

The Gates Foundation, established by Bill and Melinda Gates, has invested substantial resources in the understanding and operations of MOOCs with a view to treating MOOCs in much the same way as colleges have treated advanced placement (AP) programs whereby students could fast track their college degrees by taking advanced placement classes at their own pace and paying for tests to confirm their standing in relevant courses; thereby, gaining credit for some of their courses through AP, which was cheaper than attending classes.¹¹⁴ Many of the grants by the Gates foundation concerning MOOC's are focused on the use of free open courses as a supplement to traditional courses, rather than as a replacement for them.¹¹⁵ There are two issues that arise from such credit granting: students would be able to complete their degrees quicker because they could be studying at colleges as paying students whilst also

¹¹⁰ Susan Grieshaber and Nicola Yelland. Living in Liminal Times: Early Childhood Education and Young Children in the Global/Local Information Society. Apple, Michael, Kenway, Jane and Singh, Michael (Eds). *Globalizing Education - Policies, Pedagogies, & Politics*, p. 198, Peter Lang New York.

¹¹¹ William Lawton and Saskia Jensen, 'An Early Warning System for TNE – Understanding the future global network connectivity and service needs of UK higher education', Report commissioned by The Observatory on Borderless Higher Education in conjunction with Jisc and i-graduate International Insight, p. 15, January 2015. Also at: <http://www.obhe.ac.uk/documents/download?id=955> (accessed 21 December 2017)

¹¹² De Wit, Hunter, Howard and Egron-Polak, *op. cit.*, p. 49.

¹¹³ Ernst and Young Australia. 2018. Can the universities of today lead learning for tomorrow? The University of the Future. A Report by Ernst and Young. p. 9. Also at: <http://cdn.ey.com/echannel/au/en/industries/government---public-sector/ey-university-of-the-future-2030/EY-university-of-the-future-2030.pdf> (accessed 8 May 2018)

¹¹⁴ <https://postsecondary.gatesfoundation.org/areas-of-focus/innovation/digital-learning/> (accessed 18 February 2018)

¹¹⁵ Young, *op. cit.*

undertaking free online courses from elite institutions which would mean cutting down on their paid courses. The degree would therefore, be cheaper. The second issue was that universities/colleges would lose revenue because they would now have students spending less 'paid' time at college - this would further compromise the financial viability of institutions who are already under increasing pressure to do more for less.

TNE providers have a real challenge in light of the decision by some organizations to consider 'credit' for free online courses because gradually as credit for free courses takes off, the reality will be that students could fast track their degrees with less time at an institution (and as paying students). If free MOOCs mean the student attends only a limited number of classroom courses say via the TNE mode of study domestically, then there is a real concern about the phasing out of the current traditional university. The move could lead to a world in which many students graduate from traditional colleges faster by taking self-guided courses on the side, taught free by professors from Stanford University, the University of Michigan at Ann Arbor, and other well-known colleges.¹¹⁶

ACE is opening a new front in its groundbreaking initiative to evaluate massive open online courses (MOOCs) for possible college credit and explore how this new learning mode can best spur student success.¹¹⁷ Therefore those institutions who invested in TNE needed to consider carefully their projected numbers in TNE courses as free online courses may reduce the numbers of students for paid TNE. An OBHE article in 2013 states that 'If young Indians or Brazilians are able to get a skilled job with an edX or Coursera certificate, those parts of the HE sectors in the US and the UK that base their business model on international student recruitment will be in trouble'.¹¹⁸ In light of the onslaught of online

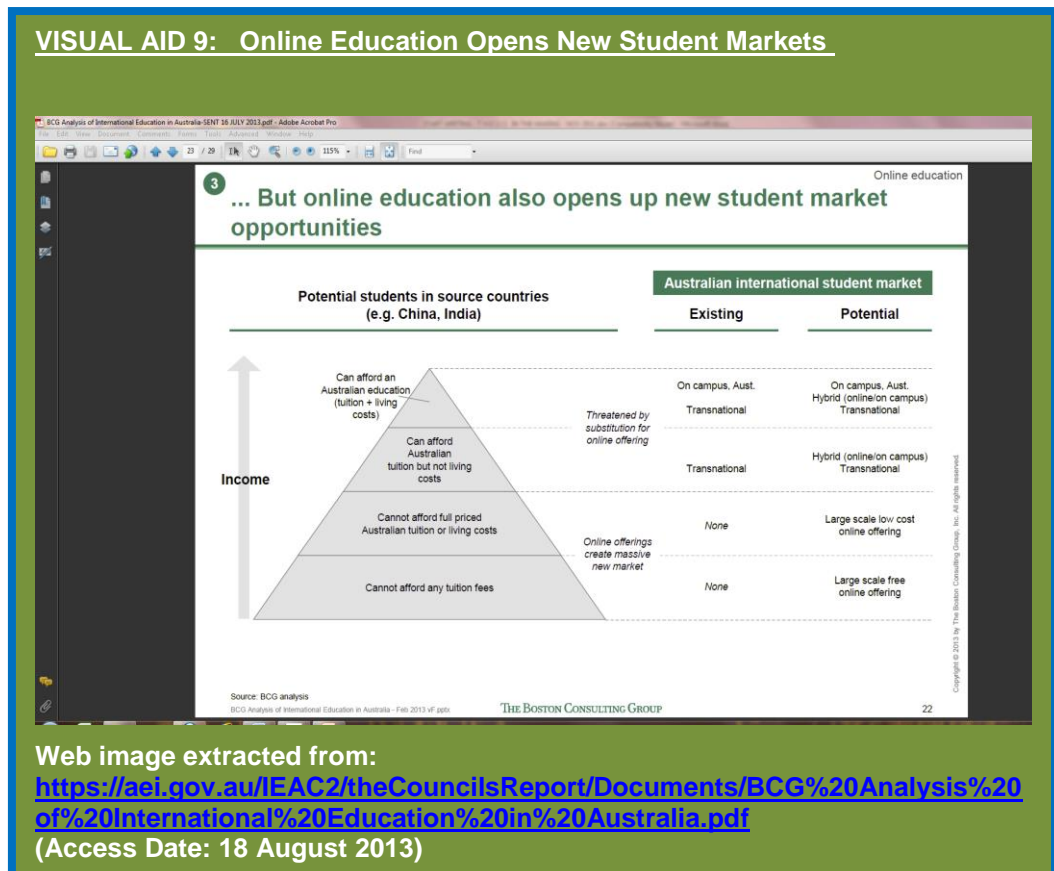
¹¹⁶ Jeffrey R. Young, 'American Council on Education May Recommend Some Coursera Offerings for College Credit', 13 November 2012. Also available at: http://chronicle.com/article/American-Council-on-Education/135750/?cid=pm&utm_source=pm&utm_medium=en (accessed 14 November 2013)

¹¹⁷ American Council on Education (ACE), 'ACE to Forge New Ground in MOOC Evaluation and Research Effort', 15 January 2013. Also at: <http://www.acenet.edu/news-room/Pages/ACE-to-Forge-New-Ground-in-MOOC-Evaluation-and-Research-Effort.aspx> (accessed 22 February 2018)

¹¹⁸ Alex Katsomitros, 'The impact of MOOCs on smaller universities: A blessing or a MOOClear disaster?', The Observatory on Borderless Higher Education, Borderless Report, June 2013. Also at: http://www.obhe.ac.uk/newsletters/borderless_report_june_2013/impact_moocs_on_smaller_universities (accessed 18 June 2013)

courses, universities may need to offer a combination of all three - free online courses for credit from 'premium' elite institutions; some transnational study locally/regionally and maybe a semester at the university's main campus (which offers the TNE program). The campus experience in fact may turn out to be one of the greatest advantages that universities would be able to bring to the table when promoting their programs.

There is an active movement in favour of MOOCs in order to educate the masses and to make online courses available across the world. There is also a move to ensure that courses can be evaluated. An example of this is American Council on Education (ACE) work with setting up a 'Presidential Innovation Lab that will bring together college leaders to discuss the potential of MOOC's and new business models for higher education'.¹¹⁹ In 2012 ACE secured funding for the lab through the Bill & Melinda Gates Foundation and substantial progress in this project is reported on the ACE website.¹²⁰



¹¹⁹ *Ibid.*

¹²⁰ <https://www.acenet.edu/news-room/Pages/Presidential-Innovation-Papers.aspx> (accessed 5 October 2018)

There is much work being undertaken by the OBHE, the British Council, DAAD and others to collate TNE data but issues remain as to whether the data for all countries is accurate or even possible. This work will take greater priority in order to more accurately gather data on onshore and offshore students around the globe and differentiate between the modes of study.

Despite some 'barriers' or negatives created by free MOOCs for TNE, it is important to understand that distance learning has existed for a very long time and certainly well before TNE or the MOOCs phenomenon. Online study was important in the delivery of education in some closed societies where women and girls are not permitted to attend school or where lifestyle and religion places restrictions on attendance in classrooms. While some societies are 'very "wired" for the next innovation in technology' other societies require that

VISUAL AID 10: University Readiness Questionnaire

Disruption readiness self-diagnostic

The exponential advancements we see in technology today are only going to accelerate. To seize the upside of disruption, universities must take risks and invest in a disruption agenda, even as they continue to focus initiatives that will keep them competitive in the near to medium term. Standing still, waiting and seeing, relying on past success to carry you forward into the future, is no longer an option.

Use this tool to diagnose the readiness of your university to contend with disruption by 2030.

- 1 Are you willing to challenge or change your core business model? Yes Maybe No
- 2 Have you cultivated a culture of "yes, we can" that enables agile decision-making? Yes Maybe No
- 3 How well does the leadership team and council understand the dynamics of disruption both inside and adjacent to higher education? Yes Maybe No
- 4 Is your university's strategy fit for a digital world? Yes Maybe No
- 5 Have you assessed your disruption readiness gaps? How do you compare to your competitors, locally and globally? How do you compare to leading corporates, locally and globally? Yes Maybe No
- 6 As incumbent business models shatter, can you build the capabilities you need to succeed or will you need to buy them? Yes Maybe No
- 7 Does your strategy address the need to both achieve near-term objectives and lay the groundwork for future disruption? Does it drive transformation? Yes Maybe No
- 8 How does university purpose inform your disruption readiness agenda? Yes Maybe No
- 9 How secure are your funding commitments against disruption initiatives over the medium to long term? Yes Maybe No
- 10 Have you assessed your funders' views on disruption in higher education? Is your funder base aligned to your ambitions? Yes Maybe No

If the answers to a number of these questions cause concern, it could be time to revisit your strategy to ensure you are ready for the Transformative Age.

Data Source: 2018 Ernst and Young Report 'Can the Universities of Today Lead Learning for Tomorrow? – The University of the Future'.

Web image extracted from:

<http://cdn.ey.com/channel/au/en/industries/government---public-sector/ey-university-of-the-future-2030/EY-university-of-the-future-2030.pdf>

(Access Date: 8 May 2018, p. 33.)

‘Online global classroom is adaptable: crosses gender, religious and cultural borders to create an open forum for learning.’¹²¹

In the case of Australia, in February 2013 the Boston Consulting Group (BCG) stated in a presentation that online course offered new education opportunities for Australian universities.¹²² Refer also to Visual Aid 9, p. 87.

Long after the BCG presentation in 2013, a 2018 Ernst & Young (EY) Report on Australian Universities ‘*Can the Universities of Today Lead Learning for Tomorrow? – The University of the Future*’ suggests that like shopping malls in the US which are failing at the rate of 1 in 5 as consumers go to online shopping, technology will have an impact on education as learning moves online and technology will ‘liberate content, creating the option to simply digitise existing options or, more interestingly, to transform them’.¹²³ The EY report discusses the role of universities as moving from being ‘repositories of knowledge to teaching learners to curate, challenge and extend knowledge, redefining research and teaching methodologies via technology’ so that ‘universities will need to reimagine their physical footprints and facilities, with opportunities to use them in new ways to help address broader social and societal needs.’¹²⁴

Bannier’s research (2016) indicates that open learning and internet based courses are more popular in the African region but at the same time that the popularity of these has ‘already peaked, as enrollment numbers have dropped slightly each of the past few years’.¹²⁵ This suggests that areas which don’t have other forms of TNE depend on open learning and the internet to support their plans for study. While the research did not consider in depth the literature on

¹²¹ http://www.obhe.ac.uk/conferences/the_2011_global_forum_canada/Cichello.pdf (accessed 14 February 2018)

¹²²

<https://aei.gov.au/IEAC2/theCouncilsReport/Documents/BCG%20Analysis%20of%20International%20Education%20in%20Australia.pdf> (accessed August 2013)

¹²³ Ernst and Young Australia, *op. cit.*, p. 30.

¹²⁴ *Ibid.*

¹²⁵ Bannier, *op. cit.*, p. 81.

online learning and distance education of the early 1970s and 1980s, it becomes clear that the term TNE was seldom if ever used when referring to online and distance education courses however, the arrival of twinning programs and IBCs made TNE more visible. The use of the term TNE became common to describe all programs taught beyond a country's borders, including online and distance education courses. It was not only learning that was facilitated by the internet but also how institutions conducted their day to day work. The IIE (2018) posits that 'virtual exchanges, online classrooms and cloud-based transcripts for refugees' were transforming international education while at the same time harnessing social media allowed institutions to communicate with students round the world in real time while also dealing with rapid response to emergencies.¹²⁶

More recently, the OECD *Education at a Glance 2017* report revealed a number of trends in higher education which included the 'rapid adoption of online teaching and learning'.¹²⁷

2.2.4 Diminishing Numbers of International Students go to the West

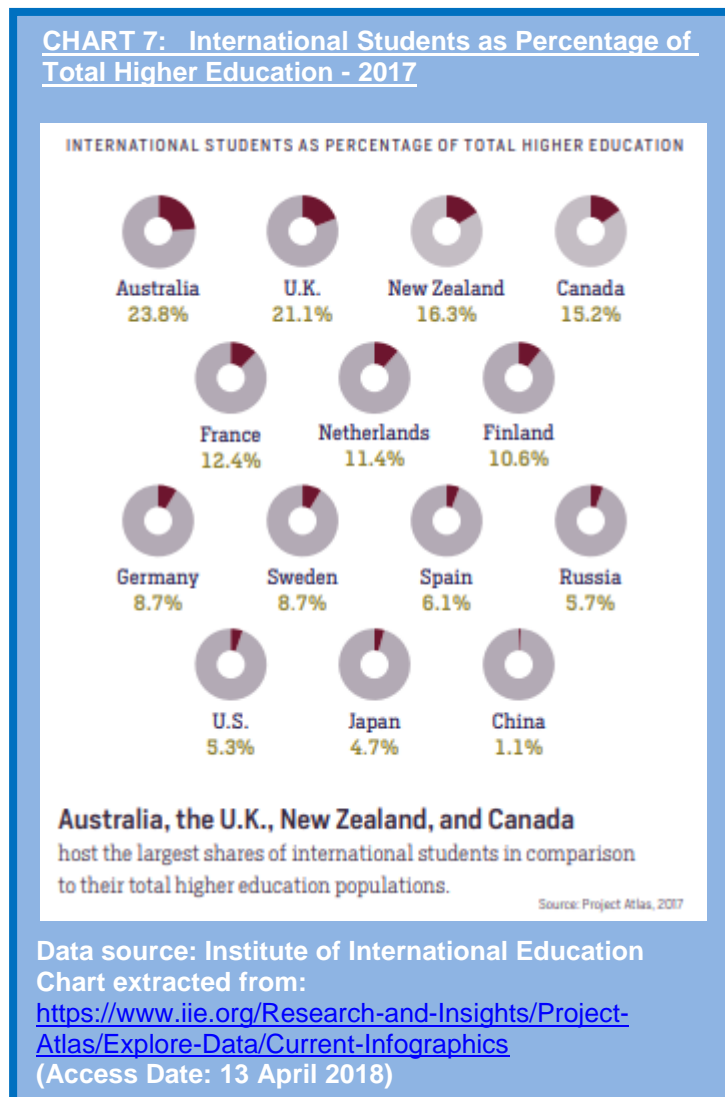
For many students the visa issue to go abroad as a foreign student has become far more problematic in the post-September 11 environment where many countries tightened their borders for security reasons. This has had a huge impact on students going abroad particularly from some Muslim countries. Labi (2012) states that as universities strive to increase their share of the growing number of internationally mobile students, immigration policy in parts of Europe has come into conflict with the ambitions of the higher education sector.¹²⁸ Marginson (2014) referred to UK's international student visa policy as

¹²⁶ Allan E. Goodman, '#IntEd in a Tech-driven World', IIE Networker, Institute of International Education, p. 7, Spring 2018. Also at: <http://www.nxtbook.com/naylor/IIEB/IIEB0118/index.php#6> (accessed 14 May 2018)

¹²⁷ <http://monitor.icef.com/2017/09/oecd-charts-slowing-international-mobility-growth/> (accessed 10 October 2018)

¹²⁸ Aisha Labi, 'In Europe, Anti-Immigration Measures Run Up Against Efforts to Attract Foreign Students', *The Chronicle of Higher Education Online*, 7 June 2012. Also available at: <http://chronicle.com/article/In-Europe-Anti-Immigration/132193/> (accessed 11 January 2018).

`unwelcoming, discriminatory, burdensome, and intrusive’¹²⁹ while Altbach and De Wit (2017) discussed the `minitsunami’ when there were restrictions placed on citizens of seven predominantly Muslim countries from entering the United States’ and the `Brexit, inward-looking nationalist governments in Poland and Hungary, and the rise of the populist right in Europe are all parts of what might be called the “new world order” of higher education internationalization’.¹³⁰



While student visas and immigration are two different things, in most cases these are connected as students from some countries travel abroad to study so that post-study they may be able to apply for immigration. Britain’s Conservative Party in 2010 pledged to curb immigration as a part of its election promises.¹³¹

Some countries including Britain

previously provided work rights for its international students but like France began to build in stricter legislation to curb such work rights. In the UK, according to recent statistics released by the Higher Education Statistics

¹²⁹ Simon Marginson, *International Students: The United Kingdom Drops the Ball*, International Higher Education, n. 76, Summer 2014, p. 9.

¹³⁰ Philip G. Altbach and Hans de Wit, *Trump and the Coming Revolution in Higher Education Internationalization*, International Higher Education, n. 89, Spring 2017, p. 3.

¹³¹ Labi, *op. cit.*

Agency (HESA), more than a third (38%) of last year's Welsh university graduates are unemployed or underemployed, working in roles for which a degree is not necessary.¹³² This suggests that the job market in countries which historically took in large numbers of international students and allowed more liberal work rights or post education migration opportunities are no longer in a position to provide such benefits and therefore, international students are more focused on remaining in their home countries where they can pursue the job market whilst also studying locally either through local institutions or TNE options and/or go to regional areas to study where there would be more work options and/or future migration possibilities.

Today's TNE students can stay closer to a job market and access the program and institution of their choice given the number of universities now offering TNE programs. The UK for example, now has triple the number of international students undertaking UK programs offshore than onshore.¹³³

Compared to only 10-15 years ago, the job market presents a huge challenge to international students who believe a job has higher priority than investing in education in a far-away destination. The lack of jobs has become a global issue and one which confronts students round the world. Most seek out an education which will get them a job at the end of it. Strol (2012) in a Commentary in the Chronicle of Higher Education stated that The Higher Education Research Institute at the University of California in Los Angeles had advised that 'it comes as no surprise that 86 percent of incoming freshmen said that their top reason to attend college was to get a better job.'¹³⁴ Therefore, in many countries TNE provides the option to undertake a foreign degree domestically or at least in regions where the job market may be better or the region may offer future work or migration possibilities. A job is therefore, considered one of the most important reasons why students pursue a university degree. OECD (2009)

¹³² <http://www.walesonline.co.uk/news/education-news/2012/08/09/getting-a-job-may-be-better-than-uni-and-with-no-debt-91466-31580471/> (accessed 11 January 2018)

¹³³ British Council. *The shape of things to come, The evolution of transnational education: data, definitions, opportunities and impacts analysis*, Going Global Conference, Dubai, 2013.

¹³⁴ Jeff Strohl, 'A Solid Base for Making Sound Decisions', *The Chronicle of Higher Education Online*, 22 October 2012. Also at: http://chronicle.com/article/A-Solid-Base-for-Making-Sound/135220/?cid=at&utm_source=at&utm_medium=en (accessed 11 January 2018)

research indicates that ‘large number of students are willing to explore new possibilities: following a higher education or post-secondary course provided by a foreign university without leaving their own country.’¹³⁵

A BC and DAAD study (2014) suggests that ‘TNE students are also firmly of the opinion that employers perceive TNE to be advantageous when selecting job candidates and that 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.’¹³⁶ Both studies which were 5 years apart refer to the large number of students interested in TNE offering them foreign qualifications.

Some countries that had historically seen large numbers of international students at their campuses began to see decreases. This suggested that international students were no longer flocking to the West to study. Saul (2017) in a New York Times article states that:

The number of newly arriving international students declined an average 7 percent in fall 2017, with 45 percent of campuses reporting drops in new international enrollment, according to a survey of nearly 500 campuses across the country by the Institute of International Education.¹³⁷

2.2.5 TNE - Strategic, Market Driven and Complex

Despite some countries experiencing a slow-down in the inbound international student market, overall international student numbers moving to the developed world continued to increase. The available data suggested that there were more students in the developing world that could not afford to come abroad to study. Some were also not prepared to leave families and jobs and move to the developed world for international studies.¹³⁸ Adams (2001) stated that ‘The

¹³⁵ Stephan Vincent-Lancrin. ‘*Cross-border Higher Education : Trends and Perspectives*’ in Higher Education to 2030, Volume 2, Globalisation. Series: Educational Research and Innovations, OECD. p. 69, 2009. Also at <http://www.oecd.org/edu/cei/highereducationto2030volume2globalisation.htm> (accessed 14 May 2018)

¹³⁶ The British Council and the German Academic and Exchange Service, *op. cit.*, Executive Summary.

¹³⁷ Stephanie Saul, ‘*Fewer Foreign Students Are Coming to U.S., Survey Shows*’, The New York Times Online, 13 November 2017. Also at: <https://www.nytimes.com/2017/11/13/us/fewer-foreign-students-coming-to-us.html> (accessed 19 May 2018)

¹³⁸ www.obhe.org (accessed 11 March 2018)

globalisation of higher education manifests itself in various forms, of which transnational education is perhaps the most visible.¹³⁹ A BC Report (2016) stated that in the last two decades, globalization has meant 'that industries, markets, cultures and policymaking around the world have become increasingly linked' and therefore higher education is now global.¹⁴⁰

It would not have been possible to set up in country on campus facilities for international students or consider various forms of TNE offshore, if it wasn't for the fact that there were large numbers of students wanting to study that could not study in their home countries. Education infrastructure in some countries and regions around the world was not sufficiently extensive or well established enough to cater to large numbers of domestic students. While international student numbers continued to grow exponentially at campuses in developed countries like the USA, UK, Canada and Australia particularly during the period 1995-2010, newer players such as Singapore, Malaysia and China began to host international students in their countries. UNESCO reported that the number of international students rose from 2.8 million to 4.1 million between 2005 and 2013.¹⁴¹

As mentioned in the earlier section, TNE seemed to be a natural fit for higher education given dwindling public funding for education and fewer international students traveling abroad for a university degree. Therefore, to survive universities had to take their education to where the students were. For universities TNE was a second stage of the internationalization process. The first was when universities brought in international students to their home campuses; TNE was the second stage. Adam (2001) stated that TNE 'is something that cannot be ignored'; it was different to onshore education and impacted 'globalisation, the 'marketisation' of education, lifelong learning, consumer protection, 'recognition' and 'transparency' and quality.'¹⁴² Skinner

¹³⁹ Stephen Adam. 'Transnational Education Project Report and Recommendations', presented to the Confederation of European Union Rectors' Conference, March 2001.

¹⁴⁰ HE Global, *op. cit.* p. 9.

¹⁴¹ UNESCO, 'Mobility in Higher Education', UNESCO Science Report Towards 2030. Also at: <https://en.unesco.org/node/252273> (accessed 10 February 2017).

¹⁴² Adam, *op. cit.*, p. 2.

(2008) stated that there is greater awareness of just how porous national boundaries are when it comes to education given `some technological, other political and economic developments.¹⁴³ Bannier (2016) had a similar view and stated that from humble beginnings of online and open education, TNE emerged and continues to grow at a rapid pace.¹⁴⁴ Clearly it was simply too late to reverse the trend and TNE is here to stay.

In making the case for mobility, Marginson and Van der Wende (2009) suggest that higher education is already implicated in globalization, that information and knowledge are highly mobile and readily slip across borders and that it is no longer possible for individual higher education institutions to completely seal themselves off from global effects.¹⁴⁵ They also held the view that globally active higher education institutions as well as governments had two objectives as part of their global strategy and these included: maximizing capacity and performance internationally and capitalizing on offshore operations and linkages for their home campuses. Ziguras and McBurnie (2015) were of the view that the `growing case of international mobility' provided receivers and providers of higher education the impetus to move readily across borders.¹⁴⁶

The discourse about why TNE came into being was not disputed although researchers approached their theories from different angles. Alam et al (2013) posited that TNE developed local skills and reduced capital outflow, brain drain and pressure on local education systems while at the same time offering choice for students while opening competition amongst foreign and local institutions which would lead to quality improvement.¹⁴⁷ There was clearly a real benefit for TNE receiving countries as seen from a receiving country perspective.

¹⁴³ Richard A. Skinner, 'The Challenges of Transnational Online Learning', *Journal of Asynchronous Learning Networks*, Volume 12: Issue 2, p. 83, 2008. Also at: https://secure.onlinelearningconsortium.org/sites/default/files/v12n2_skinner_0.pdf (accessed 15 January 2017)

¹⁴⁴ Bannier, *op. cit.*, p. 81.

¹⁴⁵ Simon Marginson and Marik van der Wende. 'The New Global Landscape of Nations and Institutions' in *Higher Education to 2030*, Volume 2, Globalisation. Series: Educational Research and Innovations, OECD. p. 19 and 20. 2009. Also at <http://www.oecd.org/edu/ceri/highereducationto2030volume2globalisation.htm> (accessed 14 May 2018)

¹⁴⁶ Christopher Ziguras and Grant McBurnie, 2015. *Governing Cross-Border Higher Education*, Routledge, New York, p. xv.

¹⁴⁷ Firoz, *op. cit.*, p. 873.

Caruana (2016) was of the view that ‘Attracting students with talent, expertise, and prestige while improving the global competence of university graduates to accelerate the process of building human capital emerges as a key priority’ of TNE.¹⁴⁸

Adams (2001) stated that ‘Transnational education should be viewed as a positive set of opportunities and not something to be feared.’¹⁴⁹ TNE was simply seen as a part of the whole process of internationalisation at universities.

Choudaha (2013) posited that engaging in international partnerships would amplify the brand and credibility of institutions and ‘in doing so, institutions hope to expand the pool of admissible prospective students.’¹⁵⁰

At the same time researchers placed emphasis on the common good. White (2005) stated that the ‘ultimate goal is to build a new political and socioeconomic order of transnational cooperation and to transform both social and personal consciousness to a higher realization of human solidarity.’¹⁵¹ Robb (2015) provides an Australian government perspective that knowledge and skills crossing borders reduces the transaction cost of delivering education, facilitates trade while also fostering cultural understanding and helping build people to people links of enduring value.¹⁵²

Governments and organizations promoted TNE knowing the value it held for governments and their national institutions. Ziguras and McBurnie (2015) confirm this view when they state that besides being the receivers and providers of education, governments are also engaged in advocating and lobbying.¹⁵³ Peak (2016) for the British Council encouraged UK universities to set up TNE

¹⁴⁸ Viv Caruana, ‘Researching the transnational higher education policy landscape: Exploring network power and dissensus in a globalizing system’, *London Review of Education*, v. 14, n. 1, p. 60, UCL IOE Press, London. Also at: <http://www.ingentaconnect.com/content/ieop/clre/2016/00000014/00000001/art00007#> (accessed 21 March 2018)

¹⁴⁹ Adam, *op. cit.*, p. 1.

¹⁵⁰ Rahul Choudaha, ‘*International Student Mobility Trends 2013: Towards Responsive Recruitment Strategies*’, World Education News and Reviews Online, 1 March 2013. Also at: <http://www.wes.org/ewenr/13mar/feature.htm> (accessed 14 April 2014)

¹⁵¹ Stephen R. White, *op. cit.* p. 20.

¹⁵² Richardson, *op. cit.*, p. 9.

¹⁵³ Ziguras and McBurnie, *op. cit.* p. xvii.

programs as this created a 'halo effect' and encourages student mobility, provides domestic students opportunities to study at IBCs abroad; helps build strong networks overseas and boosts collaborative research output while also bringing income to universities in the form of fee revenue.¹⁵⁴ Lane (2018) suggests that exerting influence on foreign nations through the sharing of knowledge and cultural assets is a way of fostering goodwill amongst nations and develops shared interests so that there is an appreciation and support for the systems of the other and it is in this context that higher education is involved in 'soft power' diplomacy.¹⁵⁵ There is more detailed discussion on Capacity Building and 'Soft Power' in Section 2.2.8, pp. 145-152.

Knight (2012) described TNE as one part of internationalization and states that 'there are two interdependent pillars of internationalization—at home or campus-based and abroad/cross border education.'¹⁵⁶ TNE provided all the same attributes as the international student program with the only exception being that universities and colleges delivered the programs offshore either directly or in partnership with local institutions. Caruana (2016) was of the view that within 'the economic model involving the commodification of knowledge, which blurs the lines between education as social capital and education as human capital, TNHE is both the product and the instrument of globalization.'¹⁵⁷

The International Association of Universities (IAU) recognizes the need for borderless engagement on the education front whilst acknowledging that checks and balances need to be put in place to ensure academic integrity. In a 2004 paper on '*Sharing Quality Higher Education Across Borders: A Statement on Behalf of Higher Education Institutions Worldwide*' the IAU, AUCC, ACE and CHEA jointly make the case for 'a borderless education community on the basis that transnational education can contribute to 'enhancing higher education if it is

¹⁵⁴ Michael Peak, 'Can transnational education buffer against political change?', Voices Magazine, British Council Online, 1 September 2016. Also at: <https://www.britishcouncil.org/voices-magazine/can-transnational-education-buffer-against-political-change> (access 17 March 2018)

¹⁵⁵ Jason E. Lane, 'International Relations and Signals of Change in International Education', World Education News and Reviews Online, 6 February 2018. Also at: <https://wenr.wes.org/2018/02/international-relations-signals-of-change-in-international-education> (accessed 10 May 2018)

¹⁵⁶ Knight, 2012. *Internationalization: Three Generations of Crossborder Higher Education*. Occasional Publication 38. India International Center.

¹⁵⁷ Caruana, *op. cit.*, p. 58.

developed and delivered responsibly and effectively.’¹⁵⁸ The paper also discusses how shared responsibility for managing TNE rests with higher education institutions, governments and intergovernmental organizations so that all parties remain involved in planning and monitoring of activities.

There is little doubt that TNE provides higher education with the opportunity to integrate intercultural and international perspectives in research and teaching and at the same time contributes to societies worldwide. This is the view generally held by researchers and particularly by international education organizations. For example, the 2004 statement by the IAU/AUCC/ACE/CHEA refers to actively working to ‘enhance higher education community’s role and actions in advancing societies worldwide.’¹⁵⁹ National non-governmental bodies, some government bodies and universities also hold the view that it is not about whether to participate in TNE, but rather about how could universities join this next wave of internationalisation?

Some research was focused on why institutions had to consider other modes of delivery to students. For example, a 2016 report released by Australia’s Austrade, indicated that the traditional demarcation of the higher education sector into onshore and offshore will be challenged as ‘students access the skills and knowledge they require at the time they chose, through the channel that optimises their learning experience, be it in Australia, online, or in-market as part of course delivery or on-the-job learning.’¹⁶⁰

Vincent-Lancrin (2009) in *‘Cross-Border Higher Education: Trends and Perspectives’* argued that not all countries have a policy in place for internationalization and that those that do include the traditional strategy which was based on mutual understanding followed by the strategies which came into being in the 1990s and were based on skilled migration, revenue generation and capacity building.¹⁶¹ Vincent-Lancrin further stated that these ‘strategies are not

¹⁵⁸ International Association of Universities (IAU), the Association of Universities and Colleges of Canada (AUCC), the American Council on Education (ACE) and the Council for Higher Education Accreditation (CHEA), *op. cit.*, p. 2.

¹⁵⁹ International Association of Universities (IAU), the Association of Universities and Colleges of Canada (AUCC), the American Council on Education (ACE) and the Council for Higher Education Accreditation (CHEA), *op. cit.*, p. 1.

¹⁶⁰ <http://www.austrade.gov.au/Australian/Education/Services/australian-international-education-2025/AIE2025-roadmap> p. 3 (accessed 11 April 2018)

always coordinated and even less so directly decided upon at government level, and their results vary considerably from one country to the next, even with similar political intentions or instruments.’ This suggests that TNE within a global strategy was also driven by what was deemed important in terms of the economic and political agendas of governments. There was support for this view given that Becker (2012) stated that ‘TNE is seen as a solution in countries with a shortage of – and a growing demand for – higher education capacity, and where governments are unable to invest in higher education at an adequate pace’.¹⁶² The BC (2012) had also commissioned a study titled ‘*Trust Pays*’ which discussed how cultural relationships build trust in the UK and underpin the success of the UK economy. The report stated that the UK has invested heavily in building trust through the work of the BC in promoting education and culture and this can be seen ‘by sharing the best of our nation with the world, and by continuing to be interested in and open to sharing and learning from cultures from all around the world.’¹⁶³

The importance of TNE and its impact on societies was reinforced by the BC’s TNE Summit titled ‘*Higher Education Summit in the UK’s G8 Presidency Year*’ in May 2013¹⁶⁴ which was held in the UK. There were several key factors which emerged about the future of TNE including TNE transforming societies through economic and individual growth as well as through capacity building of education systems; TNE supported region specific skill development and evolved to suit individual country/region requirements.

Professor Pankaj Chandra, Director, Indian Institute of Management, a delegate at the TNE Summit stated that ‘as technology mediated learning will continue to mature; the range of skill needs will change from basic and advanced to professional; regulations will become more stringent; users will demand more

¹⁶¹ Vincent-Lancrin, *op. cit.*, p. 73.

¹⁶² <https://www.nuffic.nl/en/publications/find-a-publication/international-higher-education-collaboration-in-the-south-worldwide-developments.pdf> p. 4 (accessed 21 April 2018)

¹⁶³ British Council, ‘*Trust Pays: How international cultural relationships build trust in the UK and underpin the success of the UK economy*’, research conducted by the British Council, p. 2, 2012. Also at: <https://www.britishcouncil.org/sites/default/files/trust-pays-report-v2.pdf> (accessed 18 March 2018)

¹⁶⁴ British Council, ‘*Higher Education Summit in the UK’s G8 Presidency Year*’, Summary prepared for the 14-15 May 2013 Summit at the British Academy, London, United Kingdom. Also at: https://ei.britishcouncil.org/sites/default/files/import-content/summary_summit.pdf (accessed 14 May 2018)

value from their investment in education and international collaborations will expand.¹⁶⁵

Details on the discussions and outcomes of the TNE Summit were released to another major gathering of University personnel at the Global University Summit (GUS) held at the University of Warwick in late May 2013 which attracted over 200 delegates from 30 countries. 'This event drew an audience of leaders from the world's foremost universities, senior policy-makers and international business executives to London in 2013'.¹⁶⁶ In the pre-summit report, there was an emphasis placed on the need for higher education across the globe to join forces to bring about change because the higher education 'system is now in trouble, and the cure is beyond the capacity of any single national government, institution or actor'.¹⁶⁷ The GUS discussed the major global challenges faced by higher education and society and produced a policy recommendation for submission to the G8 World Leaders' Summit. A clause in the GUS material on TNE (supplied by the British Council TNE Summit) stated that:

Transnational Education (TNE) has expanded. There is evidence that TNE is leading to a widening of access in host countries, is addressing skills gaps and is widely perceived to deliver enhanced employability for its graduates. However, there has been no commensurate evaluation of the impact of TNE and no policy response from Governments.¹⁶⁸

The GUS in its Declaration to the G8 world leader summit advised that universities were the engine room of innovation and 'have enabled academics and students to exchange ideas and spread innovations long before the current system of economic globalisation emerged' and that 'all the evidence shows that universities, from the great leading world research universities to the humblest polytechnics, technical colleges and other institutes, are now a key part of the

¹⁶⁵ *Ibid.*, p. 2

¹⁶⁶ <http://www.gus2013.org/> (accessed 11 January 2018)

¹⁶⁷ The University of Warwick, '*Universities and economic growth*', a pre-summit report for the Global University Summit, 28-30 May 2013, p. 3, Whitehall, London.

¹⁶⁸ British Council, '*Higher Education Summit in the UK's G8 Presidency Year*', *op cit.*, p. 3.

engine room of long-term, sustainable economic growth and prosperity.¹⁶⁹ In the context of TNE, the GUS Declaration stated that G8 countries should 'Continue to work with transnational institutions to simplify the international patent infrastructure that both protects international property across national borders yet simplifies the global flow of innovation that arises from research.'¹⁷⁰ Long standing and well established higher education institutions from the west were also considered to be more tuned in to 'recognizing historical inequalities and biases' and therefore could help build the higher education partnerships between developed and developing nations.¹⁷¹

What is clear from the literature is that TNE is a natural extension of the international student program. There are some universities which may be considered as the trailblazers in TNE, however, it was a movement which cannot be credited to one institution or even a small group. It developed from the knowledge that universities were increasingly under pressure to develop new income streams in light of diminished government funding, to be accessible to students around the globe as a result of a demand for university places by international students and the fact that many universities had already grasped modern technologies to deliver distance education to rural communities and businesses; therefore, TNE was an extension of this thinking. Alam et.al. (2013) predicted that while the number of international students would increase to the UK, USA and Australia, this will be 'outstripped by demand' for TNE.¹⁷²

Choudaha (2013) in a World Education Services (WES) Research Report states that 'from the supply side, the recent trend toward the purposeful recruitment of international students has been instigated by the global recession and the

¹⁶⁹ http://www2.warwick.ac.uk/knowledge/business/gus/global_university_summit_declaration_to_the_g8.pdf p. 1 (accessed 11 November 2017)

¹⁷⁰ http://www2.warwick.ac.uk/knowledge/business/gus/global_university_summit_declaration_to_the_g8.pdf p. 4 (accessed 11 November 2017)

¹⁷¹ Malette, *op. cit.*, p. 49.

¹⁷² Firoz Alam, Quamrul Alam, Harun Chowdhury and Tom Steiner, 'Transnational education: benefits, threats and challenges', *SciVerse Science Direct*, Elsevier Press, p. 871, 2013. Also at: https://ac.els-cdn.com/S1877705813005638/1-s2.0-S1877705813005638-main.pdf?_tid=2791db8e-6bea-4b18-bc1b-6a61c9cc7b89&acdnat=1525983966_34466b1145c66cf1451f1315fe09ab91 (accessed 10 May 2018)

consequent decrease in state support for higher education.¹⁷³ At the same time receiving countries of TNE were keen to enhance their education systems and draw foreign institutions to their shores so their students had access to wide range of programs.

What is less clear in the available literature is how to define the many forms of TNE given the range of variances within each known form of TNE. The evolution of TNE at such a fast pace suggests that fitting TNE activity within known forms (e.g. IBCs, twinning/joint) was grounded more in practice (on the job learning and reporting) and this was based on the perceptions of individual universities and whether the programs were more driven by the TNE provider countries or in fact the TNE receiving country had some degree of control based on the relationship being formed. For example, education hubs in Dubai and South Korea provide infrastructure support to incoming TNE providers and therefore would have more control over how the TNE activity evolves and what is provided. While there were many opinions and descriptions of the flurry of activity in TNE including some data analysis, there was very little literature that provided uniform descriptions of the many forms of TNE although some researchers like Knight and McNamara did undertake some research for the BC and DAAD which is discussed further in this Chapter.

A number of researchers have raised concerns about inadequate TNE data. Ziguras and McBurnie (2008) suggested that ‘governments currently keep little consolidated information about mobile programs (transnational education courses) or mobile institutions (international branch campuses)’¹⁷⁴ while Marginson and Van der Wende (2009) held the view that ‘National higher education systems and institutions across the world do not experience global flows and relationships in a uniform, even, consistent or entirely predictable manner’¹⁷⁵ which suggested that collecting data on TNE is not straight forward. Vincent-Lancrin (2009) provided a similar view in ‘Cross-border higher

¹⁷³ Choudaha, ‘*International Student Mobility Trends 2013: Towards Responsive Recruitment Strategies*’, *op. cit.*

¹⁷⁴ C. Ziguras and G. McBurnie. *The Impact of Trade Liberalization on Transnational Education*. In L. Dunn and M. Wallace (ed.) *Teaching in Transnational Education: Enhancing Learning for Offshore International Students*, Routledge, London, UK, p. 3-13, 2008.

¹⁷⁵ Marginson and van der Wende, *op. cit.*, p. 23.

education has evolved differently depending on the OECD country and region.’¹⁷⁶ Vincent-Lancrin also referred to the OECD’s statistical data on students which in 2006 for the first time included data on mobile international students as well as foreign students but then went on to state that the ““foreign” students are generally an overestimate of genuinely mobile international students’.¹⁷⁷

The OECD data, while useful, did not appear to be totally accurate as it included domestic students who hold the residence of another country or were previously educated in another country. Lawton and Jensen (2015) state that in terms of data for the UK, ‘There is little international comparative data on TNE, and what little there is, it is not directly comparable.’¹⁷⁸

Receiving countries also don’t always collect the data on their students enrolled in transnational programs and Ziguras (2011) confirmed that ‘these students are often overlooked in national data on higher education participation.’¹⁷⁹ This view was also supported by Clark (2012) who discussed the potential for confusion in ‘developing, understanding and monitoring transnational education programs, a commonly understood typology would be of benefit to all parties involved’ and that the growth and implications of transnational education also raised concerns that reliable data on the scale of the TNE market were not readily available.¹⁸⁰ An EU (2016) report also indicated a ‘lack of sufficient data for comparative analysis and decision-making’.¹⁸¹

¹⁷⁶ Vincent-Lancrin, *op. cit.*, p. 64

¹⁷⁷ *Ibid.*, p. 66.

¹⁷⁸ Lawton and Jensen, *op. cit.*, p. 4.

¹⁷⁹ Christopher Ziguras, ‘The Effect of Cross-Border Provision on Higher Education Access, Equity and Capacity in the Asia-Pacific Region’ in *Access, Equity, and Capacity in Asia-Pacific Higher Education*, Edited by Deane E. Neubauer and Yoshiro Tanaka, p. 171, Palgrave Macmillan, Jan 2011. Also at: https://www.researchgate.net/publication/230578162_The_Effect_of_Cross-Border_Provision_on_Higher_Education_Access_Equity_and_Capacity_in_the_Asia-Pacific_Region?enrichId=rgreq-f4610a037dc39fc026810a0940de485e-XXX&enrichSource=Y292ZXJQYWdlOzIzMDU3ODE2MjtBUzoyMjg4MzY1NzUwMTkwMDhAMTQzMTU3MDI5OTE3MQ%3D%3D&el=1_x_2&_esc=publicationCoverPdf (accessed 10 August 2017)

¹⁸⁰ Nick Clark. *Understanding Transnational Education, Its Growth and Implications*. World Education News and Reviews (WENR) Online, 1 Aug 2012. Also at: <https://wenr.wes.org/2012/08/wenr-august-2012-understanding-transnational-education-its-growth-and-implications> (accessed 12 April 2018)

¹⁸¹ De Wit, Hunter, Howard and Egron-Polak, *op. cit.*, p. 27

There was also confusion when describing IBCs as a mode of TNE. Lane and Kinser (2012) argued that ‘overseas activity on the ground is not limited to the parameters established by scholarly definitions.’¹⁸² Lawton and Jensen (2015) view TNE as being much broader than just IBCs stating that ‘branch campuses are a minority pursuit in comparison with the breadth of TNE.’¹⁸³ Knight and Liu (2017) state that there is ‘inconsistency in TNE terminology’ and that the research that is available is mainly from the TNE sending country perspective.¹⁸⁴

Despite the phenomenal growth of TNE, the lack of guidelines on the interpretation of the many forms of TNE and comprehensive TNE student data appeared to be an impediment to the progress that was being made in TNE collaboration. In 2013 the BC report on ‘*Exploring the Impact of Transnational Education on Host Countries: a pilot study*’ stated that the research that was then available on TNE was based on the perspectives of sending/awarding countries but that there was relatively little research conducted which provides information on the impact of TNE on the host country. The report also raised the dilemma about the lack of real data on TNE. An extract from the report is as follows:

The numbers and types of TNE programmes have increased substantially but there is little national data available in the host countries on economic impacts, whether labour market needs are being met by skilled TNE graduates, or if overall access or quality of higher education is enhanced. For the most part, only anecdotal impact evidence is available and that is primarily at the institutional level. A more systematic collection of data at institutional and national levels is necessary. Given that TNE appears to be changing in form and scale, further research is needed on types of impact, the integrity and recognition of qualifications, the modes of TNE, and the localisation of curriculum to meet host country needs and labour market conditions. The overall impression is one of growth and a relatively positive perception about TNE; but there is also an unsettling sense that host countries lack a TNE policy/regulatory framework, a TNE strategy, data on the extent of TNE provision and knowledge of how TNE contributes to or threatens national priorities and objectives.¹⁸⁵

¹⁸² Jason Lane and Kevin Kinser, ‘*International Branch Campuses: One Definition to Rule them All?*’, The Chronicle of Higher Education Online, 18 January 2012. Also at: <https://www.chronicle.com/blogs/worldwide/international-branch-campuses-one-definition-to-rule-them-all/29051> (accessed 17 November 2017)

¹⁸³ Lawton and Jensen, *op. cit.*, p. 25.

¹⁸⁴ Knight and Qin Liu, *op. cit.*, p. 15.

¹⁸⁵ British Council, ‘*Exploring the impacts of transnational education on host countries: a pilot study*’, Research conducted by the British Council, p. 3, 2014. Also at: https://www.britishcouncil.org/sites/default/files/tne_report_2014.pdf (accessed 15 July 2017)

The significance of explaining individual forms of TNE was important given that even within a specific form of TNE there were many variants. This was particularly the case with IBCs. Over the last decade, the growth of the IBC has been one of the most striking developments in the internationalization of higher education.¹⁸⁶ Yet there is limited information available about individual IBCs in the public domain. Merola (2016) states that IBCs in their ‘many forms are difficult to capture in description, and its constant evolution makes arriving at a concrete definition a daring endeavor’.¹⁸⁷

While IBCs can differ from one another, there are common elements. For example, an IBC requires a student market as without demand for an IBC it is not possible to commit to the high cost of infrastructure in setting up an IBC. Added to this is the need for specific curriculum to meet market expectations. In a 2015 article, Nigel Healey states that the reason there is limited literature on IBCs is because the phenomenon of IBC is new, there is commercial secrecy about IBCs and also because of the scattered nature of campuses where local faculty is hired, ‘so that there is not the usual interchange of information through informal networks’.¹⁸⁸ One of the notable characteristic of branch campuses is that they differ from one another and cover a number of ownership and governance models.¹⁸⁹ Literature from the BC (2018) states that the 5 UK universities with IBCs in Malaysia view their Malaysian campuses as ‘more or less seamless part of a global whole, with strong links to other campuses around the world’ and at the same time also ‘very much part of the Malaysia higher education system, and believe they have an important role to play in delivering Malaysia’s vision for the future.’¹⁹⁰

While McBurnie and Pollock (1998) described an IBC in the early days as ‘a fully-fledged campus of the provider institution that offers programs from

¹⁸⁶ Healey, *op. cit.*, p. 2.

¹⁸⁷ Rachael Merola, ‘How International Branch Campuses Stand Out From the Crowd’, *International Higher Education*, n. 87, p. 11, Fall 2016. Also at: <https://ejournals.bc.edu/ojs/index.php/ihe/article/view/9514/8479> (accessed 15 May 2017)

¹⁸⁸ Healey, *op. cit.*, p. 3.

¹⁸⁹ Merola, *op. cit.*, p. 11.

¹⁹⁰ <https://www.britishcouncil.org/going-global/programme/sessions/five-go-malaysia-uk-branch-campuses> (accessed 17 March 2018)

commencement through graduation'¹⁹¹ this was a somewhat simplistic definition of IBCs given that they have now evolved and that there are variations in the way IBCs are formed today. In 2009 there were 164 branch campuses as per the Observatory on Borderless Higher Education, a research and advocacy group and 80% of these had been opened in the previous decade.¹⁹² In 2010 Wilkins expanded on the definition of IBCs stating that they had two distinct features: 'first a branch campus operates under the same name as its parent institution, and second, the qualifications that the students gain bear the name of the parent institution.'¹⁹³

There is concern among some Australian universities in considering TNE operations given the closure of a number of Australian university branch campuses. Fischer (15 September 2010) discusses some of the reasons for such failures and mentions that often it is because there is not much oversight with some branch campuses whereas at other times they 'are overly restrictive, not allowing the branch enough autonomy.'¹⁹⁴ Becker (2012) also raised concerns about the commercialization of TNE and the evolving nature of TNE which creates potential risks. She refers to Ireland's Dublin Business School which had a branch campus in Malaysia and closed after 11 years due to meeting the quota that was set down in its licensing agreement with the Malaysian Government and also to the closure of Australia's Central Queensland University branch campus in Fiji after 7 years due to the political climate.¹⁹⁵ These are some of the reasons why universities may have a sense of 'wait and see' when it comes to IBC, believing that the bad publicity about these closures will become a distant memory.

¹⁹¹ Grant McBurnie and Anthony Pollock. *Transnational Education: An Australian Example*, Centre for International Higher Education, Boston College, International Higher Education, Winter 1998.

¹⁹² Karin Fischer. *Overseas Branch Campuses Should Start Small, Assess Demand, Proceed Carefully*. Chronicle of Higher Education, Academe Today, 15 September 2010.

¹⁹³ S. Wilkins, *Higher Education in the United Arab Emirates: An analysis of the outcomes of significant increases in supply and competition*. Journal of Higher Education Policy and Management, 32(4), 389-400. 2010.

¹⁹⁴ Fischer, *op.cit.*

¹⁹⁵ <https://www.nuffic.nl/en/publications/find-a-publication/international-higher-education-collaboration-in-the-south-worldwide-developments.pdf> p. 4 (accessed 23 April 2018)

As IBCs are a relatively new entrant on the TNE scene, their development is usually tied to the vice chancellor or someone in senior leadership in place at the time. Sometimes interest in an IBC can wane if key personnel at the home institution move to other positions. Closures of IBCs have been occurring for some time and the data has been recorded by C-Bert, the Cross-Border Education Research Team.¹⁹⁶ Kosmutzky and Krucken (2014) refer to shutdowns of branch campuses being part of a 'competitive selection process' and that not all IBCs will be able to survive.¹⁹⁷ In addition to the closures listed in the previous paragraph, the University of New South Wales shut its campus in Singapore in 2007. This was open only for one semester and cited low enrolments as the reason for leaving Singapore. The University of Nevada in Las Vegas left Singapore after several years of operations in 2014, De Montfort University closed its operations in South Africa in 2004 and the University of Southern Queensland moved out of Dubai in 2005. More recently in 2015, the University of Wolverhampton commenced its plan to shut down its campus operations in Mauritius after only 4 years of operations.¹⁹⁸ These were not universities which had issues related to quality but rather the competitive nature of the marketplace meant that not all were able to make the necessary income to maintain the IBCs and eventually had to make a decision to leave. Crist 2017 states that IBCs 'require the highest magnitude of investment and, not surprisingly, carry the greatest risks for the partners involved' and that 'IBC's are expensive to set up and maintain.'¹⁹⁹ It is not surprising therefore, that given the investment, IBCs need to deliver economic benefits to cover the cost of their investments.

The IBC story is not straight forward. There are many variations in how IBCs are structured. Some overseas universities have established IBCs with little or

¹⁹⁶ <http://cbert.org/resources-data/branch-campus/> (accessed 19 November 2018)

¹⁹⁷ A. Kosmutzky and G. Krucken, Macro-Environmental Mapping of International Branch Campus Activities of Universities Worldwide. Research & Occasional Paper Series: CSHE. 2.14, Center for Studies in Higher Education, p. 7.

¹⁹⁸ John Morgan. *Wolverhampton to shut down Mauritius campus*. Times Higher Education Online. 9 December 2015. Also at: <https://www.timeshighereducation.com/news/wolverhampton-shut-down-mauritius-campus> (accessed 19 December 2016)

¹⁹⁹ John T. Crist, 'U.S. Universities and International Branch Campuses', IEM Spotlight Newsletter Online, NAFSA, v.14, Issue 1, April 2017. Also at: https://www.nafsa.org/Professional_Resources/Browse_by_Interest/International_Students_and_Scholars/Network_Resources/International_Enrollment_Management/U_S_Universities_and_International_Branch_Campuses/ (accessed 7 July 2017)

no support from TNE receiving countries and many IBCs have undergone a very rigorous process of vetting to get through the various local regulatory processes. At the same time there are IBCs that commenced operations as a form of twinning partnership. An example of this was the initial foray into Singapore by Yale University which worked closely with the National University of Singapore (NUS) to develop a presence in Singapore. Testamurs for students were issued by NUS and not Yale. More recently however, the NUS and Yale partnership is listed as a separate College (and not an IBC or a twinning arrangement). NUS and Yale now jointly own the Yale NUS College with the College issuing its own Testamurs.²⁰⁰ Other universities such as GMU received infrastructure support from the local government in South Korea to establish their presence in Korea and issue GMU Testamurs. Wilkins (2010) states that the TNE student in an IBC would earn a qualification bearing the name of the parent institution but this is not always the case.²⁰¹

There were concerns expressed about the ever-changing description of IBCs. Lane and Kinser (2012) in an article for the Chronicle of Higher Education discussed the final report from the OBHE published in 2012 and only available to members (or for a fee), the 'evolving definition of IBCs' and stated that:

- There are so many different *versions* of the IBCs that it took the OBHE 5 pages to describe what constitutes an IBC.
- While IBCs are 'foreign degree-granting locations of a higher-education institution' they can in fact be a type of twinning or franchise arrangement such as Yale University in Singapore where the program is offered as a Yale University Singapore campus program which is administered by Yale and National University of Singapore (NUS); however, NUS and not Yale provide the qualification. There is a suggestion that the Yale brand name is the reason why the program is marketed as Yale University Singapore.

²⁰⁰ <https://www.yale-nus.edu.sg/> (accessed 11 June 2018)

²⁰¹ Wilkins, *op. cit.*

- The changes made to the definition of an IBC 'in the report make comparative and historical analyses tricky' and that the report should have highlighted the 'definitional problems associated' with IBCs.²⁰²

The evolving nature of IBCs now also includes corporations setting up training facilities in foreign countries. Infosys, an IT, consulting and outsourcing corporation based in India, is establishing a state-of-the-art training and residential center in Indianapolis, Indiana to serve as its Education Center in the United States.²⁰³ The Infosys training facility will have an initial investment of 35 million and will train Americans for digital careers with plans to create 3,000 jobs by the end of 2023.

Many researchers discussed the financial imperative that drove TNE. Ziguras and McBurnie (2008) in a discussion on the impact of trade liberalization on transnational education state that while many critics of trade liberalization argue about education not being a commodity, this 'flies in the face of facts.'²⁰⁴ Fisher (2010) stated that, despite financial concerns related to managing educational activities given decreased government funding 'there is reason to believe that even as many campuses are tightening their belts, a handful are making high-profile investments in international activities, arguing that it is something they need to do to distinguish their institutions and fully prepare their students for an ever-more-global workplace.'²⁰⁵

Knight (2012) was of the view that while in the past student mobility of 1960s and 1970s offered generous scholarship schemes, student mobility has 'now turned into the big business of international student recruitment.'²⁰⁶ The reality is that universities in the developed world began to rely on full fee paying

²⁰² Lane and Kinser 2012, *op. cit.*

²⁰³ <https://www.prnewswire.com/news-releases/infosys-to-establish-us-education-center-in-indianapolis-680968441.html> (accessed 10 May 2018)

²⁰⁴ Ziguras and McBurnie, *op. cit.*, p 3-13.

²⁰⁵ Karin Fischer. *In Economic Downturn, Colleges Eye International Education: Cut Back or Forge Ahead?*. The Chronicle of Higher Education online, Thursday, September 2, 2010.

²⁰⁶ Knight, 2012, *op. cit.*

students given the decrease in government funding and particularly after the global recession; there was no choice but to ‘embrace the idea of education as one of the commodities in global trade.’²⁰⁷ Ziguras (2012) states that ‘Transnational education has been attractive to many governments as a way to rapidly supplement and assist in building the capacity of the domestic higher education system’²⁰⁸ and Djerasimovic (2014) holds the view that the drive for growth in TNE now happens within a multitude of political, social, cultural and economic contexts.²⁰⁹ Governments are now heavily involved in TNE. For example, Austrade now provides market intelligence reports and supports Australian institutions linking with partners round the world to establish TNE relationships.²¹⁰

IBCs continued to grow in numbers and ‘at the end of 2015, the number of international branch campuses worldwide hit 249, up 26% since the end of 2010’²¹¹ and that for IBCs growth was steady as ‘from 2011-2015, 66 IBCs were founded, compared to 67 from 2006-2010’²¹² In 2016 there were 442,000 international students in China.²¹³ There appear to be varied forms of IBCs. Lane and Kinser (2012) state that:

The report also demonstrates that the growth of IBCs can no longer be viewed solely as an institutionally driven phenomenon. Governments throughout Asia and Middle East are actively recruiting IBCs and offering incentives as part of their competitiveness strategies. In fact, 61 of 149 institutions responded that they received some form of aid from the host government. One of the most common strategies seems to be the development of educational hubs, which have been popping up in Qatar, the United Arab Emirates, South Korea, Singapore, Hong Kong, and Malaysia, among other nations. Hubs seems to serve a variety of purposes; some have been used to attract students from other countries, others foster

²⁰⁷ Malette, *op. cit.*, p. 39.

²⁰⁸ Ziguras, 2011, *op. cit.*, p. 179.

²⁰⁹ S. Djerasimovic. *Examining the discourses of cross-cultural communication in transnational higher education: from imposition to transformation*, *Journal of Education for Teaching*, 40(3): 204-21. 2014.

²¹⁰ <https://www.austrade.gov.au/australian/education/news/news-and-opportunities> (accessed 10 March 2018)

²¹¹ Richard Garrett, Kevin Kinser and Rachael Merola, ‘*International Branch Campuses: Trends and Developments, 2016*’, Presentation to the OBHE Global Forum ‘Brain Gain: Charting the impact and future of TNE’, 9-11 November 2016, Kuala Lumpur, Malaysia. Also at: http://www.obhe.ac.uk/documents/view_details?id=1049 (accessed 19 November 2017)

²¹² *Ibid.*

²¹³ Zhuang Pinghui, ‘*China welcomes foreign students, but jobs hard to come by*’, *South China Morning Post*, 17 December 2017. Also at: <http://www.scmp.com/news/china/society/article/2124426/china-welcomes-foreign-students-jobs-hard-come> (accessed 15 April 2018)

innovation and research, while still others are meant to improve the overall quality of the education sector.²¹⁴

It is clear that international student numbers (not just as part of TNE) were also generally up with the OECD data reporting that there were 4.1 million international students in 2010 and this represented an increase of 99% within 10 years (2000-2010).²¹⁵ In terms of TNE alone, for the period 2012/2013, the British Council reported 600,000 students undertaking UK programs, without entering the UK and that there were 126 UK institutions that offered TNE during this period.²¹⁶ C-BERT data indicates that there were 249 IBCs operational with 41 closures in 2017.²¹⁷ When one considers the data cumulatively, this suggests that approximately one sixth of IBCs had closed, raising some concern that business considerations such as profit and sustainability as well as quality issues may have been factors behind the closures. At the same time Crist (2017) argues that this is a low failure rate when considered against the higher failure rates of new businesses and start-ups.²¹⁸ Poyago-Theotoky and Tampieri (2014) consider that the rapidly growing numbers of universities engaging in TNE has made IBCs competitive.²¹⁹ On the other hand, Marcus (2017) stated that TNE activities were on the rise and that 'Transnational education isn't dying, but it is changing.'²²⁰

In more recent years the trend is for developing countries to establish IBCs. These countries include the Philippines, Malaysia, South Korea, China, Turkey, Uganda and Iran which operate IBCs abroad.²²¹ IBCs are essentially universities

²¹⁴ Jason Lane and Kevin Kinser. *Economic Competitiveness, Internationalization, and Branch Campuses*, The Chronicle of Higher Education Online, 8 Feb 2012.

²¹⁵ http://www.oecd-ilibrary.org/education/education-at-a-glance-2012_eag-2012-en (accessed 1 March 2015)

²¹⁶ Peak, 2014, *op. cit.*

²¹⁷ http://cbert.org/?page_id=34# (accessed 26 December 2017)

²¹⁸ John Crist, 2017. *Root and Branch: The State of International Branch Campuses*. In *International Educator Magazine*, Sept-Oct 2017. NAFSA. Also available at: http://www.nafsa.org/File/ie_sepoct17_enrollment.pdf (accessed 21 December 2017)

²¹⁹ Joanna Poyago-Theotoky and C. Alessandro. *University Competition and Transnational Education: The Choice of Branch Campus*. CREA Discussion Paper 2014- 11. Center for Research in Economic Analysis University of Luxembourg. 2014 Also available at: http://www.fr.uni.lu/recherche/fdef/crea/publications2/discussion_papers (accessed 3 March 2016)

²²⁰ Jon Marcus, 'Cut the branches, try a safer route', *Times Higher Education Online*, 17 November 2011. Also available at: <http://www.timeshighereducation.co.uk/418125.article> (accessed 11 March 2015)

²²¹ http://cbert.org/?page_id=34 (accessed 10 May 2018)

who create 'embassies of knowledge in foreign countries' which provide local and regional students access to an educational experience of another country.²²² Developing countries view TNE as an opportunity to promote their education systems, culture and understanding. Lane (2018) confirms that Iran has a number of IBCs throughout the Arab region hoping that the country's influence may be greater in places like Iraq and Syria; Chinese institutions are setting up IBCs in several countries including Laos, Japan and Malaysia.²²³ Soft power and diplomacy are one of the rationales of governments supporting their institutions engaging with the outside world. An EU report (2016) states that there is increasing competition from emerging and developing countries such as China, India, Malaysia, Singapore, South Africa and South Korea wanting to increase international student numbers in their countries but there will also be opportunities for collaboration.²²⁴

Lane and Kinser (2012) stated that 'Despite the potential financial and reputational risk, the OBHE report found that institutions appear motivated to create IBCs for the pursuit of new revenue, enhanced global reputation, and internationalizing the learning and research opportunities for students and faculty.'²²⁵ This view was similar to Crist (2017) who when discussing the motivations of US universities in establishing IBCs stated that there were two motivations; firstly IBCs enhanced the global profile of a university and secondly IBCs provided staging grounds for partnerships and research collaboration in regions which were considered economically dynamic.²²⁶

It is important to also understand that the IBCs are not the only form of TNE although in the last two decades they have emerged as the 'most commonly understood delivery method is through the international branch campus, but these foreign outposts are responsible for just a tiny fraction of the degrees

²²² Jason E. Lane, 'International Relations and Signals of Change in International Education', *World Education News and Reviews Online*, 6 February 2018. Also available at: <https://wenr.wes.org/2018/02/international-relations-signals-of-change-in-international-education> (accessed 10 May 2018)

²²³ *Ibid.*

²²⁴ De Wit, Hunter, Howard and Egron-Polak, *op. cit.*, p. 29 and 49

²²⁵ Lane and Kinser, *op cit.*

²²⁶ Crist. 2017, *Root and Branch: The State of International Branch Campuses. op. cit.*

being delivered by institutions across borders.²²⁷ There are short courses delivered as series of seminars whereby faculty fly in and teach a short certificate course – this is another form of TNE yet there is very little published literature on this. At the same time there are many, many collaborative relationships between institutions which are part of TNE however, Richardson (2015) states that ‘data on collaborative programmes is more difficult to identify.’²²⁸

In a discussion on education hubs, Knight (2015) refers to three different types of hubs.²²⁹ The first is a student hub where the mission is to recruit students for building an international profile, generate revenue and also internationalize domestic higher education institutions; the second is referred to as an education and training hub where the rationales and expectations can be different however most invite overseas institutions to manage satellite campuses (IBCs) in the hub with a view to educate and train domestic and international students; the third type of hub is referred to as a knowledge and innovation hub where foreign research institutes and companies with major research and development activities can build a local base and collaborate with companies, universities and training organizations in order to build local talent. The main objective of the knowledge and innovation hub is to ‘build a knowledge and service based economy, to educate and train skilled labor, to attract foreign direct investment, and to increase regional economic competitiveness.’²³⁰ All hubs in operation (except for Qatar) have the recruitment of foreign students as central to their mission.

Funding for IBCs within hubs was almost a no-brainer for some overseas institutions. In discussing the motivations of US universities in establishing IBCs, Crist (2017) stated that the constraints with federal funding at a time when some countries were investing massive amounts into higher education and

²²⁷ Clark, 2017, *op. cit.*

²²⁸ Richardson, *op. cit.*, p. 18.

²²⁹ Jane Knight, Regional Education Hubs – Rhetoric or Reality, *International Higher Education*, p. 20-21, No. 10.6017/ihe.2010.59.8491, Boston, 2015. Also available at: <https://ejournals.bc.edu/ojs/index.php/ihe/article/download/8491/7625> (accessed 11 November 2017)

²³⁰ *Ibid.*

research in their countries made it possible to launch IBCs.²³¹ Clifford and Kinser (2016) are of the view that while overseas TNE provider institutions may have a helping hand in setting up IBCs within hubs, it is clear from a TNE receiving country perspective that the main attraction was the development of their human capital and economic development in order to have highly qualified workforce to meet local labor market needs and also to decrease brain drain.²³² Moreover, IBCs that receive TNE receiving country support are expected to meet the requirements set down by the TNE receiving country.²³³

Hawkins (2015) raises concerns that educational hubs are at an early stage, dynamic and also changeable and therefore they deserve scrutiny. He goes on to state that 'the boundaries of what constitutes a hub is unclear to the point that some scholars are questioning whether or not they are just a fad and will morph into something else in due time' but at the same time his view is that hubs are a business model which serves national interests while preserving local talent, drawing in regional talent and stopping brain drain.²³⁴ Governments in many developing countries have established hubs and offer incentives to overseas universities to establish IBCs their hubs. Opidee (2015) stated that Kean University from the US was provided roughly US\$500 million for operations and construction of the 900,000-square-foot Wenzhou-Kean campus in China, which was completed in 2012.²³⁵

Hubs and IBCs are not just set up in the developing world. The developed world has also seen TNE activities. It was in 1996 that South Australia first identified higher education as a potentially lucrative source of revenue with the view that it would attract elite foreign institutions to Adelaide and that niche programs

²³¹ Crist, 2017, *Root and Branch: The State of International Branch Campuses. op cit.*

²³² Carrie Amani Annabi and Marlene Muller, Learning from the Adoption of MOOCs in Two International Branch Campuses in the UAE, *Journal of Studies in International Education*, v. 20, Issue 3, p. 8, 2016. Also available at: <https://journals.sagepub.com/doi/10.1177/1028315315622023> (accessed 14 October 2017)

²³³ *Ibid.*

²³⁴ John N. Hawkins, *Globalization, Internationalization and Asian Educational Hubs: Do We Need Some New Metaphors?*, Research & Occasional Paper Series: CSHE.8.15, p.6, Oct 2015, Center for Studies in Higher Education, University of California, Berkeley. Also available at: https://cshe.berkeley.edu/sites/default/files/publications/rops.cshe_.8.15.hawkins.globalizationmetaphors.9.3.2015.pdf (accessed 18 December 2017)

²³⁵ Ionna Opidee, *Global Ambitions in Higher Education – The benefits and pitfalls of establishing an overseas campus*, University Business Online. Also available at: <https://www.universitybusiness.com/article/global-ambitions-higher-education> (accessed 9 May 2018)

would offer new opportunities for those students already there, particularly those working in the city's state service, entertainment and defence sectors.²³⁶ One example of a foreign university operating in Adelaide is Carnegie Mellon University from Pittsburg USA which forms part of Carnegie Mellon's global footprint which includes campuses in Silicon Valley, Rwanda and Qatar.²³⁷ Other examples of universities with foreign campuses in developed countries include the New York Institute of Technology which operates a branch campus in Vancouver Canada²³⁸ and the Bahçeşehir University – BAU International University from Turkey operating a branch campus in Berlin, Germany.²³⁹

The literature on TNE suggests that research conducted by individual researchers has a common theme. Researchers agreed that TNE was an extension of the onshore international student program and that some of the factors which led to the rapid pace of TNE development came as a result of diminished government funding for institutions; diminishing international student numbers traveling to overseas campuses given the cost of the overseas study and the prospect of unemployment on returning home and greater issues with international students from some countries having limited access to visas in the post 9/11 environment.

The data from researchers was still 'limited' in nature. Some cited the country specific data that is already available from national bodies such as the UK's BC and the Australian Government's Australian Education International (AEI). Additionally, there was also the data from international agencies such as the OBHE and the OECD. While the OBHE and the OECD data, as well as the data from receiving countries such as China, Malaysia and Singapore, about TNE students on their campuses was very useful, it was not always clear whether the data included all TNE students or if students could have been counted twice. For

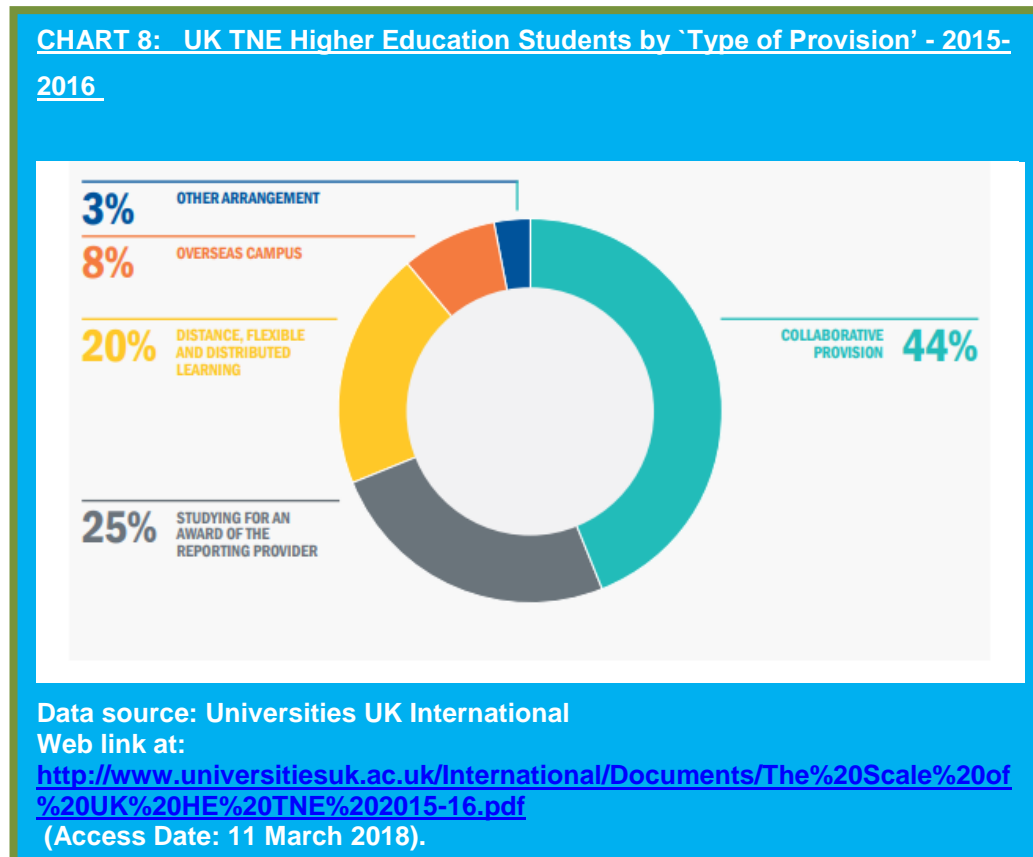
²³⁶ David Cohen, Coalition Courses, The Guardian Online, 7 August 2007. Also available at: <https://www.theguardian.com/education/2007/aug/07/highereducation.internationaleducationnews> (accessed 10 May 2018)

²³⁷ <https://www.topuniversities.com/universities/carnegie-mellon-university-australia> (accessed 14 May 2018)

²³⁸ <http://cbert.org/wp-content/uploads/2016/10/New-York-Institute-of-Technology-Vancouver.pdf> (accessed 14 May 2018)

²³⁹ <http://cbert.org/wp-content/uploads/2016/10/BAU-International-Berlin-%E2%80%93-University-of-Applied-Sciences.pdf> (accessed 14 May 2018).

example, if a student was enrolled in a twinning program which ensured enrolment at two universities, was the student counted twice? At the same time a short course delivered offshore may not be considered important enough to be included in the TNE statistical data - for example Australia's Macquarie University in 2016 'made inroads into the transnational education market in India by delivering programs for senior level executive bankers', yet it is not



clear whether the course would be considered 'core' enough to be included in Macquarie University statistics and/or Australian Government enrolment statistics.²⁴⁰

The research indicates there were no standard guidelines adopted across TNE provider countries in the way quantitative data on TNE students is collected, although some countries like the UK have been collecting data which provides a snapshot of the UK's performance. Refer Chart Aid 8 above. What is significant is that the Higher Education Statistics Agency (HESA) which collects the UK TNE data states that it accepts no responsibility in inferences or conclusions

²⁴⁰ <https://www.austrade.gov.au/local-sites/india/news/macquarie-university-australia-makes-inroads-into-the-transnational-education-market-in-india> (accessed 14 August 2017)

made by third parties; the report is a ‘snapshot’ of the scale of UK TNE activities and trends and does not seek to identify causal links.²⁴¹ Moreover, the consolidated data provided under ‘type of provision’ indicates that 44% of UK TNE is listed under ‘collaborative provision’ and 3% under ‘other arrangement’ making it difficult to understand what ‘modes’ of TNE are considered within the scope of the data collection for these categories. This is not a criticism of HESA’s work but rather this indicates that much more work will need to be undertaken to develop comprehensive definitions of the various modes of TNE as well as developing standard methodologies in collecting data.

Standardizing the meanings of the numerous forms of TNE appears to have some urgency as often there are caveats placed when writing about a specific form of TNE. For example Yang (2017) discusses dual degrees in the USA and states that while there have been relationships amongst universities across borders there is no ‘standard approach, neither in the United States nor across international borders, to the way dual degrees are delivered, assessed, and conferred’.²⁴² Yang further states that even within an agreement in place, institutions can follow different processes in how courses are selected, credits are determined and degrees are awarded. There is therefore much ambiguity about how the various forms of TNE are described.

The BC and DAAD with the support of a number of organizations have commissioned much of the research that has been undertaken in relation to how TNE data can be collected. In 2013 at the Higher Education Summit in the UK’s G8 Presidency Year, a number of representatives from global higher education institutions ‘adopted a declaration which recognized the contributions of transnational education (TNE) to the global community and stressed the challenge posed by the lack of available data.’²⁴³ Resulting from that

²⁴¹ Universities UK International, *The Scale of UK Higher Education Transnational Education 2015-16*, p. 5, January 2018, London. Also available at: <http://www.universitiesuk.ac.uk/International/Documents/The%20Scale%20of%20UK%20HE%20TNE%202015-16.pdf> (accessed 21 April 2018)

²⁴² Thy Yang, *Dual Degrees: A Comprehensive Set of Guidelines*, NAFSA, IEM Spotlight Newsletter, v. 14, Issue 1, April 2017. Also available at: https://www.nafsa.org/Professional_Resources/Browse_by_Interest/International_Students_and_Scholars/Network_Resources/International_Enrollment_Management/Dual_Degrees_A_Comprehensive_Set_of_Guidelines/ (accessed 21 April 2018)

²⁴³ https://www.britishcouncil.org/sites/default/files/1.1_tne_joint_declaration.pdf (accessed 21 May 2017)

declaration, at the Going Global conference in London, 01 June 2015, the BC and DAAD decided to take the next step to agree to 'a framework for TNE data collection' and invited international government and non-government education organizations as well as higher education institutions to work 'towards a better global understanding of TNE, its value and impact.'²⁴⁴ Subsequently, in 2015 a preliminary report was produced by the BC and DAAD titled '*Transnational education data collection systems: awareness, analysis, action*' and indicated that the analysis of existing host country data collection methods should be taken to the next level to develop common definitions and terminology for TNE in order to make it possible for host countries to develop and monitor TNE activities within and beyond their national systems and therefore provide a valuable tool to develop policy as well as to build capacity. The BC and DAAD (2015) study stated:

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.²⁴⁵

The 2015 report also encouraged organizations and governments internationally to work together to ensure that the proposed TNE framework is 'robust enough to differentiate between various modes of TNE and flexible enough to adapt to the individual contexts of each country.'²⁴⁶ There is also much support and a welcoming hand provided by many countries around the world to accept TNE arrangements. For example, in Japan 'foreign institutions' branch campuses' by satisfying 'certain conditions will be recognized in the same way as their programs in their countries of origin'.²⁴⁷

While Yang (2017)²⁴⁸ had been concerned about the numerous ways in which dual or joint degrees are managed, Knight (2017) raised concerns about the

²⁴⁴ https://www.britishcouncil.org/sites/default/files/1.1_tne_joint_declaration.pdf (accessed 21 May 2017)

²⁴⁵ John McNamara and Jane Knight, 'Transnational education data collection systems: awareness, analysis, action', a report commissioned by the British Council and DAAD, 2015, London, UK, p. 3. Also available at: https://www.britishcouncil.org/sites/default/files/1.1_report_tne_data_collection_system.pdf (accessed 21 May 2017)

²⁴⁶ *Ibid.*, p. 60

²⁴⁷ Fujio Ohmori. *Japan and Transnational Higher Education*, World Education News and Reviews, May/June 2005, Volume 28, Issue 3. Also available at: <http://www.wes.org/ewenr/05may/feature.htm> (accessed 15 June 2013)

²⁴⁸ Yang, *op. cit.*

varying interpretations across all the many forms of mobility. She stated that international program and provider mobility (IPPM), another term for TNE, has created unprecedented growth at a very rapid rate and while creating opportunities for the education sector has also led to ‘mass confusion and misunderstanding surrounding the different forms of mobility.’²⁴⁹ Knight cites the significant lack of consolidated data on a global scale and suggests that the TNE terminology chaos is significant and that ‘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.’²⁵⁰

In a discussion on the impact of TNE on receiving countries, Knight and McNamara (2015) state that an important challenge for TNE providers is to collect data on their operations so that they have ‘the aggregate enrollment of local students, expatriate students living in the country, and international students enrolled in all TNE operations.’²⁵¹

In 2017 the BC and DAAD finalized their study on data collected. The report titled ‘*Transnational Education: A Classification Framework and Data Collection Guidelines for International Programme and Provider Mobility (IPPM)*’ was authored by Knight and McNamara and provided the first ever set of guidelines that had the potential to support a common TNE Classification Framework for IPPM and TNE data collection.²⁵² The report is the first work of its kind in developing standard definitions by placing the current forms of TNE into six categories in order to simplify the data collection process. It was not clear how data would be collected for students who fall within two or more forms of TNE at the same time. It was also not clear whether the study has

²⁴⁹ Jane Knight, *International Program and Provider Mobility: Innovations and Challenges*, NAFSA, IEM Spotlight Newsletter, v. 14, Issue 1, April 2017. Also available at: http://www.nafsa.org/Professional_Resources/Browse_by_Interest/International_Students_and_Scholars/Network_Resources/International_Enrollment_Management/International_Program_and_Provider_Mobility__Innovations_and_Challenges/ (accessed 15 January 2018)

²⁵⁰ *Ibid.*


²⁵¹ Jane Knight and John McNamara. *The Impact of Transnational Education in Receiving Countries*. International Higher Education Journal, n. 82, Fall 2015, p. 5.

²⁵² Knight and McNamara. *Transnational Education: A Classification Framework and Data Collection Guidelines for International Programme and Provider Mobility (IPPM)*. op. cit. p. 59.


sufficiently addressed the assertion made by Healey (2014) who stated that 'by analyzing a large number of TNE partnerships around the world' he had concluded that the then current typology had declining value due to the multidimensional and blurring boundaries between the types of partnerships.²⁵³ While Knight and McNamara have advanced the cause by addressing the issue,

CHART 9: Barriers to TNE Data Collection


Lack of consistency in the way in which TNE student 'type' is interpreted and recorded . How TNE providers and host countries interpret and record data is significant for planning purposes.



Lack of Data Collection in some countries. Not all countries have agencies who are tasked to collect TNE student data



Some institutions/countries may provide data in a manner which better promotes their success in TNE. Total student count could be provided with no differentiation between part time or full time; whether enrolled in twinning, distance or at an IBC.



The fast evolving nature of TNE has made the recording of the many variations of TNE students a logistical challenge. For example, how does a university/sending/receiving country record one student, enrolled by one TNE provider but undertaking several modes of study such as 25% of study at the IBC, 25% online learning, 50% with the joint partner/twinning program? Does the data collection methodology have capacity to include all variables (mode of study)?

Source: Author


questions remain as to how the multitude of relationships that exist can be classified within just six forms of TNE.

²⁵³ <https://link.springer.com/article/10.1007/s10734-014-9757-6> (accessed 8 May 2018).

At the 45th Asia-Pacific Advanced Network Meeting in Singapore from 25-29 March 2018, John Chapman made a presentation on TNE data collection by Jisc (formerly, the Joint Information Systems Committee (JISC)), a membership body that provides digital solutions for UK education and research. The presentation raised concerns that ‘data reported by governments and TNE data we are searching for, not necessarily defined the same’.²⁵⁴ Refer Visual Aid 11 below.

The issue of TNE data collection appeared in the literature to be of major concern. Some country specific data is also flawed as is noted by Phillips and

VISUAL AID 11: TNE Data Reported by Governments and Challenges in Interpretation



Challenges

Data reported by governments and TNE data we are searching for not necessarily defined the same

- » How do we validate?
 - › Direct search by institution
 - › Survey by institution
- Not practical given numbers institutions involved
- » Estimation
 - › Educated guessing?
 - › Collect sample and statistical analysis
 - › Margins of error??

Data Protection Regulation

- » What is protected data?
 - › Varies by country
 - US FERPA – Nationality protected data element
 - UK Data Protection Bill 2018
 - EU General Data Protection Regulation (GDPR)
- » University interpretation of regulations
 - › Some US universities report national / international numbers, others do not
- » Our responsibilities

Data source: Jisc
Web image extracted from a power point presentation by Jisc Internet 2 at a Conference in Singapore, March 2018.
<https://apan.net/meetings/apan45/files/36/36-01-04-01.pdf>
(Access Date: 8 May 2018). Slide 8.

Burgess (2016) where in the Australian context they state that ‘given the data collection only identifies students studying at a campus of an Australian higher education provider, the risk of missing critical data from both public and private Australian higher education providers where students study in a non-campus TNE environment is high.’²⁵⁵ A EU 2016 report suggested that there was a lack of sufficient data for comparative analysis and decision making.²⁵⁶ Ziguras

²⁵⁴ <https://apan.net/meetings/apan45/files/36/36-01-04-01.pdf> (accessed 8 May 2018) p. 8.

²⁵⁵ R Phillips and P. Burgess. *Australian Transnational Higher Education and Onshore Student Flows*, IEAA and IERN. Research Digest 9, p. 4, August 2016. Also available at <https://www.ieaa.org.au/documents/item/797> (accessed 21 April 2018)

²⁵⁶ De Wit, Hunter, Howard and Egron-Polak, *op. cit.*, p. 27

(2016) in a presentation at the Observatory on Borderless Higher Education Global Forum in Kuala Lumpur indicated that Australian TNE data does not include students enrolled in customized workplace training and foundation programs which do not lead to formal Australian qualifications, Australian programs offered through local subsidiaries and offshore English language colleges.²⁵⁷ Therefore there is reason to believe that there is far greater TNE activity taking place than is apparent in the current available data on TNE.

In a University World News article Macgregor (2017) highlights the work done by the BC and DAAD (as described above) but states that ‘there is also a serious lack of reliable information regarding the nature and extent of transnational education provision in terms of enrolments and characteristics of delivery.’²⁵⁸

The pace at which TNE grew can hardly be overstated. It was indeed phenomenal growth. The OBHE reported that in 2011, of the 333,000 international students for Australia, 108,000 were TNE and therefore studying outside of Australia, enrolled in Australian programs; seven Australian universities had more international students enrolled offshore than onshore and there were four universities which had a 50/50 mix of onshore and offshore international students; the UK increased TNE numbers to the point that in 2008 or 2009 there were more TNE students than international students onshore.²⁵⁹ The growth in TNE has to be understood within the context of increased student interaction with technology and globalization.

The OECD reports that the ‘talent pool of students’ is increasing and presents data on these numbers. Refer Visual Aid 12, p. 123.

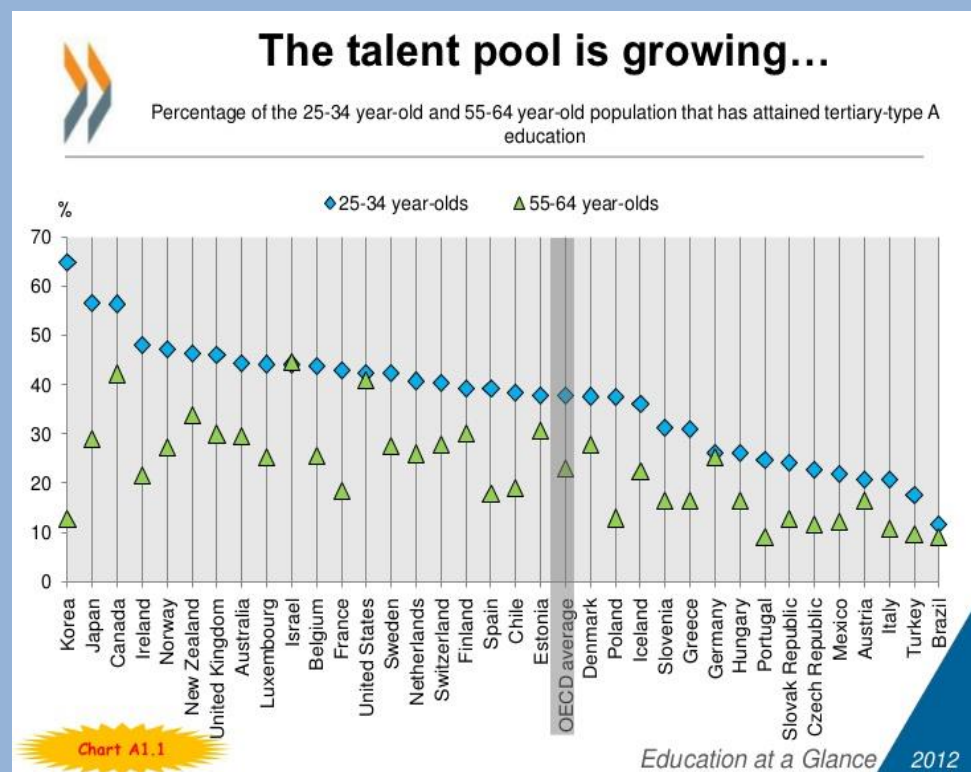
²⁵⁷ Christopher Ziguas. *The Changing Face of Australian Transnational Education*, Presentation at the Observatory on Borderless Higher Education Global Forum, Kuala Lumpur, 9-11 November 2016, slide 10.

²⁵⁸ Karen Macgregor, ‘*Transnational education – A classification framework*’, University World News Online, 4 June 2017. Also available at: <http://www.universityworldnews.com/article.php?story=20170602140718267> (accessed 14 February 2018)

²⁵⁹ William Lawton, ‘*Canada’s Internationalisation Strategy: Forging ahead, in part*’, OBHE Borderless Report October 2012. Also available at: http://www.obhe.ac.uk/newsletters/borderless_report_october_2012/canadas_internationalisation_strategy (accessed 4 January 2014.)

The push to develop TNE programs was led by institutions in Australia, the UK and the USA. There were however, a handful of very long-standing twinning/shared/support arrangements that had been offered by France and the UK in Asia and Africa but these were not considered TNE in the fullest sense as they involved more 'capacity building' of local institutions and supporting them as part of an 'aid' type of an agenda than TNE as we know it now. Bertelsen (2016) stated at a seminar at the United Nations University in Tokyo that higher education had historically and currently played a central role in economic

VISUAL AID 12: The Talent Pool is Growing – More and More People are Demanding an Education



Data source: OECD.

Web image extracted from a slideshow produced by the OECD.

<http://www.slideshare.net/OECD/education-at-a-glance-2012-key-findings>

(Access Date: 24 February 2014).

development and state building. He suggested that 'Universities are quintessential transnational knowledge actors, historically and currently moving information, ideas, people and money between societies.'²⁶⁰

²⁶⁰ <https://unu.edu/events/archive/conference/building-transnational-higher-education-capacity.html> (accessed 29 February 2017)

TABLE 7: Some of the Many Variations of Transnational Education Delivery

<i>This is not an exhaustive list!</i>	
1	Students study locally in- home country at a foreign university campus taught by locally appointed faculty and earn the foreign university qualification
2	Students study locally in their home country at a foreign university campus taught by the foreign university (main campus) faculty and earn the foreign university qualification
3	Students study in a foreign country at a third country university taught by locally appointed faculty which has a local campus and earn the foreign university qualification
4	Students study in a foreign country at a third country university taught by the university's main campus faculty and earn the foreign university qualification
5	Students study in their home country at a local university which has a partnership with a foreign university, taught by local faculty and receive the qualification from the foreign university
6	Student study in their home country at a local university which has a partnership with a foreign university, taught by the foreign university faculty and receive the qualification from the foreign university
7	Students study in a foreign country at a university which offers a program of a foreign university (different country to the foreign country the student studies in), taught by local faculty and receive the qualification from the foreign university
8	Students study in a foreign country at a university which offers a program of a foreign university (different country to the foreign country the student studies in), taught by the foreign university's main campus faculty and receive the qualification from the foreign university
9	Students undertake any of the above options but have a small component of their study at the foreign university main campus which provides the qualification
10	Students study locally or wherever they are residing through online courses offered by a foreign university, taught by the university's main campus faculty and receive the qualification of the foreign university
11	Students study locally or wherever they are residing through online courses offered by a foreign university, taught by the university's main campus faculty but also undertake a small component (e.g. residential school) at the foreign university's main campus; student receives the qualification of the foreign university.
12	Students study locally or wherever they are residing through online courses offered by a foreign university, taught by the university's main campus faculty but also undertake a small component classroom residential school arranged locally by the foreign university; student receives the qualification of the foreign university.

Source: Author

Following on from the initial work in developing TNE programs by institutions in Australia, the UK and the USA, countries such as China, India, Malaysia, Singapore and others that were previously the receivers of TNE also began to recruit international students to their countries. Not all overseas students were coming to universities in these countries; some international students were arriving to undertake a foreign qualification of a foreign university operating an

IBC in these countries. Knight and McNamara (2015) state that ‘There is no question that more and more students across the world are choosing to study international higher education programs, without moving to the country that awards the qualification.’²⁶¹ This is substantiated in the OBHE report on ‘International Branch Campuses: Trends and Developments 2016’ which indicates that there was an increase of 26% in IBCs for the period 2010-2015 after taking into account closures and that the trends show that IBCs will continue to grow.²⁶² There was no information about the impact of the ‘micro-campus’ model that was introduced by the UA in 2014, which is considered to be the next new frontier of TNE.²⁶³

The micro-campus was introduced as an alternate to the IBC by the UA. There is discussion on micro-campuses in Chapter 1, pp. 19-24. There appear to be many benefits of micro-campuses compared to the IBC but two of the key benefits to students appear to be affordability and the ability to move within the ‘network’ of micro-campuses. White (2016) in ‘Are micro-campuses a new model for international HE?’ states that micro-campuses provide greater ‘access and affordability by eliminating the substantial costs of living abroad and because the cost-savings of the model enables the UA and the partner to set tuition at local market rates.’²⁶⁴ The UA website states that ‘As this network grows, the UA envisions an expansive global network of at least 25 micro-campuses, capable of educating more than 25,000 students abroad every year, while serving as an incubator for multi-country faculty collaboration and global research.’²⁶⁵ This suggests that the micro-campuses have the ability to reach an even greater number of students than IBCs given that students can still obtain a foreign qualification but have access to lower tuition fees which are set at local market rates. *While there is much recognition of IBCs as a mode of TNE there is very little recognition given by researchers to the more recent micro-campuses.*

²⁶¹ Knight and McNamara, *The Impact of Transnational Education in Receiving Countries*. *op. cit.*, p. 3.

²⁶² Garrett, Kinser and Merola, *op. cit.*

²⁶³ <https://microcampus.arizona.edu/> (accessed 11 February 2018)

²⁶⁴ White, *op. cit.*

²⁶⁵ https://evolution.com/revenue-streams/global_learning/a-new-global-model-the-micro-campus/ (accessed 14 April 2018)

Annie Bartlett (2018) makes the case that in light of falling enrolments at US universities 'A micro-campus is an extension of a college or university, designed to offer higher quality education to individuals in developing countries' as it 'doesn't involve building infrastructure like branch campuses, but instead includes a partnership with existing international institutions of higher education.'²⁶⁶ However, while Deere refers to individuals from developing countries accessing micro-campuses, most of the literature available on micro-campuses suggests that the micro-campus exists to support all students, faculty and researchers across a network i.e. students, faculty and researchers would be able to access all institutions and programs within the network. The focus of micro campuses does not suggest that they would only be targeted to students from developing countries. Indeed, the UA model of a micro-campus has been working on expanding its micro campus network to some developed countries. Therefore, the TNE activities that we currently see in the developing world are likely to be seen also in the developed world because there is little reason to believe that students in the developed world in the future will not demand access to overseas universities whilst they remain at home for similar reasons to students from the developing world – lower cost courses, exposure to foreign campuses, possible opportunities to travel overseas for only part of the program and importantly an opportunity to remain closer to local employment and family.

Well established researchers in TNE such as Knight and McNamara who undertook the 2017 '*Transnational Education: A Classification Framework and Data Collection Guidelines for International Programme and Provider Mobility IPPM*)' study commissioned by the BC and DAAD did not refer to the 'micro-campus' model.²⁶⁷ While in the initial report they had made the case that 'terminology will continue to be a major limitation in TNE research until a common framework of terms is developed' the non-inclusion of the UA model of the micro-campus in the final report is of some concern. There may be an assumption that the micro-campus falls within Knight's and McNamara's

²⁶⁶ <https://www.kuali.co/resource/micro-campus-answer-enrollment-problem/> (accessed 7 March 2019)

²⁶⁷ Knight and McNamara. *Transnational Education: A Classification Framework and Data Collection Guidelines for International Programme and Provider Mobility (IPPM)*. Op. cit.

definition of 'twinning', however, the available evidence on micro-campuses suggests that the micro-campus is part of a network of micro-campuses across a number of countries and allows students, faculty and researchers to move almost freely within the network which is different to twinning.

While the 2017 BC and DAAD study is a major step in the right direction to define and explain all modes of TNE it does not appear to have considered (i) all modes of study including those in networks such as micro-campuses; and (ii) made suggestions on how duplication will be avoided in terms of counting the same student more than once when gathering data. For example, a student at a micro-campus who is enrolled at their home university, while also enrolled at the micro-campus and/or participating in a semester abroad program at another micro-campus could be counted thrice. There could also be TNE students who are not included in the data due to their 'status' – for example, a TNE 'paid' student arriving for a semester may be considered as 'non-award' and not counted in TNE data collection. Richardson (2015) states that without 'efforts to determine the pattern and scale of collaborative programmes, much provider mobility will continue to take place under the radar.'²⁶⁸

While raising the issue of the lack of 'micro-campus' information in the BC and DAAD report listed above, it is possible that the pace in which TNE has expanded, suggests that many IBCs may be adapting to another phase, in that the micro-campus may in fact be a different version of the IBC and therefore not considered a new mode of TNE delivery by researchers. In his article, Tse (2017) in much the same way as Knight and McNamara had done earlier, refers to the many forms of TNE but not micro-campuses.²⁶⁹ Also, Kinser (2016) released a report on *International Branch Campuses, Trends and Developments, 2016* where he stated that 'Quality assurance is adapting as the IBC phenomenon expands into more countries' and that 'we are seeing the

²⁶⁸ Richardson, *op. cit.*, p. 66.

²⁶⁹ Emily Tse, 'Transnational Education: A Primer for Evaluators and Admissions Officers', NAFSA, IEM Spotlight Newsletter, v. 14, Issue 1, April 2017. Also available at: https://www.nafsa.org/Professional_Resources/Browse_by_Interest/International_Students_and_Scholars/Network_Resources/International_Enrollment_Management/Transnational_Education_A_Primer_for_Evaluators_and_Admissions_Officers/ (accessed 19 August 2017)

emergence of new systems for managing and regulating truly multinational universities.²⁷⁰ This also suggests that forms of TNE will continue to evolve. In an article in the Summer Forum 2016 magazine of the EAIE, the issue of collecting alumni data for transnational students was brought into focus. The article states two viewpoints. One that higher education is now defined by student mobility and more multinational employers are aspiring towards graduates with cross cultural competencies, multi-lingual skills and who want to advance their professions abroad and the second is that higher education needs to be prepared to capture alumni data for transnational students wherever they might be because by tracking them `institutions gain a valuable international diaspora at their doorstep.²⁷¹

As TNE evolves, questions arise about the robust way in which some universities simply went and set up overseas campuses; current developments are not taking place in quite the same way - universities are being challenged to think outside the box. This does not mean the end of so-called 'transnational education' but universities are increasingly taking the more affordable step of teaming up with host partners.²⁷² At the same time there is discussion on the impact of TNE on domestic markets in TNE producer countries. Vincent Lancrin (2009) argues that TNE programs do not compete with onshore programs and in fact `stimulate' the movement of students between the main and branch campuses.²⁷³ Malete (2016) argues that TNE has the potential for host countries to become reliant on overseas institutions in offering programs to their domestic markets and this could lead to underdevelopment of the local higher education system.²⁷⁴ Earlier Knight (2004) had raised the 'possibility of the government slowly withdrawing from its commitments to higher education, seeing that the alternate mechanism of funding is gaining support from international sources.'²⁷⁵

²⁷⁰ <http://news.psu.edu/story/436801/2016/11/10/research/report-breaks-down-increase-international-branch-campuses> (accessed 5 January 2017)

²⁷¹ <https://www.eaie.org/our-resources.html> (accessed 11 March 2018)

²⁷² Marcus, *op. cit.*

²⁷³ Vincent-Lancrin, *op. cit.*, p. 80

²⁷⁴ Malete, *op. cit.*, p. 47.

²⁷⁵ Knight, *Trade in Higher Education Services: The implications of GATS, op cit.*, p. 67.

There has been some work done on TNE qualifications recognition as part of a project undertaken by the BC titled: *The Shape of Global Higher Education: National Policies Framework for International Engagement*. While there is mention that there is concern about the recognition of TNE degrees especially those offered in a third country²⁷⁶ it is unlikely to be a major factor because in the case of IBCs Testamurs are generally the same as those offered to students that go to the main campus abroad. For example, most Australian university campuses having IBCs issue the main campus Testamur even though the TNE student has never set foot on the main campus or indeed visited Australia. Similarly, students at GMU at IGC in Korea receive the same degree as students who attended GMU's main campus in the USA.²⁷⁷ (It is important to note however, that GMU at IGC does have the requirement that students in their South Korea campus must attend a year of study at GMU's campus in the USA.) Vincent Lancrin (2009) states that 'In Australia, most of the providers have adopted a three-year study model, starting abroad and finishing in Australia (as per a 2 + 1 or 1 + 2 model).²⁷⁸ Crist (2017) states that a number of US universities operating IBCs within education hubs 'agree to require (or strongly encourage) attendance on the home campus for one or two semesters as part of the requirement for graduation.²⁷⁹ This does not suggest that attendance at the overseas home campus was mandatory. The research indicates that there are many variants within the same form of TNE and IBCs even in one country can operate quite differently.

According to the 2017 BC and DAAD study undertaken by Knight and McNamara employers don't really know the existence of TNE or understand it.²⁸⁰ This suggests that employers may have been accepting qualifications of

²⁷⁶ Janet Ilieva and Michael Peak, 'The Shape of Global Higher Education: National Policies Framework for International Engagement', Research commissioned for the British Council by McNamara Economic Research and Education Insight, London, p. 4, 2016. Also available at: https://www.britishcouncil.org/sites/default/files/f310_tne_international_higher_education_report_final_v2_web.pdf (access 9 August 2017)

²⁷⁷ <https://www.studyinternational.com/news/gmu-korea-virginias-largest-public-research-university-in-neasias-education-hub%E2%BB%BF/> (accessed 16 May 2017)

²⁷⁸ Vincent-Lancrin, *op. cit.*, p. 80.

²⁷⁹ Crist, 'U.S. Universities and International Branch Campuses' *op. cit.*

²⁸⁰ Knight and McNamara. *Transnational Education: A Classification Framework and Data Collection Guidelines for International Programme and Provider Mobility (IPPM)*, *op. cit.* p. 58.

overseas universities from their prospective employees and assuming that they had studied overseas. At the same time it is important to note that as per the BC and DAAD study, ‘about half (49 per cent) of the TNE students have a study-abroad experience during their TNE programme, which contributes to the high rankings that international outlook and intercultural awareness/competencies receive as both skills and overall benefits gained by TNE students.’²⁸¹ Online programs offered through TNE also provide similar challenges when it comes to who issues the Testamur, as some online TNE programs are offered completely online and do not require campus attendance or the need to travel to the foreign campus for a component of study. Examples include the Penn State University and Swinburne University programs referred to in Visual Aids 5 and 6, on pages 25 and 26.

There is discussion on how IBCs will develop in the future. Healey (2015) suggests that it is hard to predict whether IBCs will continue at their current pace or indeed they will evolve into local institutions in their own right as the higher education systems in the TNE receiving countries mature. Healey (2015) refers to the experience of the British Commonwealth when in the early days the University of London set up outposts in the West Indies, Colombo and Zimbabwe which eventually ‘developed their own identities and academic cultures, cutting the ties with London as they grew up to become proud, autonomous institutions of higher learning’.²⁸² This view is further confirmed by Garrett (2017) when he states that ‘as has happened in the past, some IBCs may gradually become independent of the parent institution and transform into a domestic university’.²⁸³

There is increasing focus on the quality of TNE programs and ‘the growing importance of private and cross-border higher education, institutional rankings

²⁸¹ *Ibid.*

²⁸² Nigel Healey, ‘Universities that set up branch campuses in other countries are not colonisers’, The Conversation Online, 19 October 2015. Also available at: <http://theconversation.com/universities-that-set-up-branch-campuses-in-other-countries-are-not-colonisers-46289> (accessed 11 March 2016)

²⁸³ Richard Garrett, ‘International Branch Campuses – Curiosity or Important Trend?’, International Higher Education, n. 90, Summer 2017, p. 8.

and the quest for accountability'.²⁸⁴ Issues related to quality and oversight for internationalization will receive greater attention. There will be increasing sophistication from national quality assurance agencies about how to evaluate transnational education.²⁸⁵ Now 'international trade of education services is not the only factor driving the urgency of addressing international quality recognition and assurance.'²⁸⁶ Governments can do only so much to enact legislation which holds their universities accountable, however, once a university moves into another region whose legislative framework may not be as stringent, issues arise about whether governments can 'control' their institutions in managing branch offices in much the same way as they do so in the home country with the main campus. Lane and Kinser (2012) state:

This highlights another problem with the oversight of internationalization—international activities are often justified in terms of the potential revenue streams they provide. A nod to the creation of global citizens, of course, but the cynical selling point is that they bring more resources to the home campus.²⁸⁷

With the relationship between traditional education, the state and non-official higher education changing, a growing tension between national education systems and TNE is emerging.²⁸⁸ The concern is whether the qualification is more aligned to the country of origin or the country of delivery. While on the one hand, there are strict guidelines for overseas universities operating IBCs and quality is usually managed by the host countries (for example Malaysia where a foreign university would need to seek accreditation to operate an IBC), still the 'proliferation of these programs has also raised concerns about the wide-ranging levels of quality assurance that can be found.'²⁸⁹

²⁸⁴ OECD, 'Higher Education to 2030', Volume 2 Globalisation, Centre for Educational Research and Innovation (CERI), Executive Summary, p. 15, 2009. Also available at: https://cyber.harvard.edu/communia2010/sites/communia2010/images/OECD_2009_Higher_Education_to_2030_Volume_2_Globalisation.pdf p. 15 (accessed 11 January 2018.)

²⁸⁵ Kevin Kinser and Jason E. Lane, 'International Branch Campuses: Evolution of a Phenomenon', *International Higher Education*, n. 85, p. 4, Spring 2016. Also available at: <https://ejournals.bc.edu/ojs/index.php/ihe/article/download/9232/8288> p. 4 (accessed 10 May 2018)

²⁸⁶ Knight, *Trade in Higher Education Services: The implications of GATS*, *op cit.*, p. 63.

²⁸⁷ Jason Lane and Kevin Kinser. *Oversight of Internationalization—Who's Responsible?* Chronicle online, February 14, 2012.

²⁸⁸ Tang and Nollent, *op. cit.*, p. 4.

²⁸⁹ Tse, *op. cit.*

To understand the phenomenal growth in TNE one needs to examine the publications and online web content of international education organizations where the emphasis on bringing foreign students to one's shores has changed to also delivering courses offshore through expanded versions of the distance education mode (which is now almost exclusively serviced online) to offshore campuses and/or shared facilities. Kinser and Lane (2016) state that TNE is no longer unusual and should be a part of higher education systems for all countries; regulatory frameworks are adapting to new forms just as new forms are adapting to systems; strategies surrounding IBCs should be taken seriously because they are exhibitions of national sovereignty in the education space and therefore political risks need to be considered alongside academic risks.²⁹⁰

IIE research indicates that there is an emergence of new patterns of student mobility and that these cannot be based solely on historical trajectories from south to north or from East to West but rather that 'emerging host countries are creating incentives for students to study in non-traditional destinations, redrawing the map of global student mobility'.²⁹¹ The IIE research also indicates that China will continue to be a major TNE receiving country as well as a major recruiter of international students.

What is clear from the range of TNE activities currently taking place is that institutions are adapting their TNE delivery based on market needs. A *2018 Report on Transnational education: Global location, local innovation* prepared for Universities UK International indicates that it is 'unsurprising that the TNE landscape, i.e. what it provides, how, where and who participates, is constantly evolving'.²⁹²

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²⁹⁰ Kinser and Lane, 'International Branch Campuses: Evolution of a Phenomenon', *op. cit.* p. 5.

²⁹¹ <https://www.iie.org/Research-and-Insights/Publications/US-Students-In-Overseas-Degree-Programs> (accessed 11 April 2018)

²⁹² Universities UK International. Report on *Transnational education: Global location, local innovation*. September 2018. Available at: <https://www.universitiesuk.ac.uk/policy-and-analysis/reports/Pages/Transnational-education-.aspx>

2.2.6 Negative Perceptions of TNE and Impact on Student Mobility

The concerns related to absorbing Western curriculum and transferring this 'doctrine' to the developing world keeps coming up as a credible fear in absorbing TNE programs. Bannier (2016) while acknowledging that there are potential benefits in TNE, considers that the concern about educational imperialism 'cannot be overstated given the prevalence of transnational education providers in English-speaking nations.'²⁹³ Bannier goes on to state that the 'cultural capital of receiving nations, particularly developing nations, must be protected by well-planned and collaboratively administered quality control measures.'²⁹⁴ Bosier and Amimo (2017) were of the view that TNE makes it possible for resource rich countries to further their ideologies and cultures in poorer countries.²⁹⁵

While countries with limited education infrastructure are pleased to have overseas universities support education infrastructure such as IBCs, they have some concerns about commercialization of the education sector. Some countries have created a regulatory framework to ensure checks and balances to ensure quality of TNE programs.

Singh (et al) 2005 refer to a moral perspective and 'the inciting of ethno-nationalism and the exploitation of its divisiveness and fragmentation are being reinforced by neoliberal globalism in response to the growing inequalities it is causing.'²⁹⁶ This was similar to one of the findings in a 2013 BC pilot study titled '*Exploring the Impact of Transnational Education on Host Countries*'²⁹⁷ which stated that there were concerns about Western-centric programs. The BC pilot study, however, found that overall TNE was well accepted and liked by receiving countries.

²⁹³ Bannier, *op. cit.* p. 83.

²⁹⁴ Bannier, *op. cit.*, p. 83.

²⁹⁵ Joseph Bosier and Catherine Amimo, '*Emerging Issues and Future Prospects in the Management of Transnational Education*', *International Journal of Higher Education*, v. 6, n. 5, 2017, p. 147.

²⁹⁶ Apple, Kenway and Singh, *op. cit.*, p. 8.

²⁹⁷ British Council, '*Exploring the impacts of transnational education on host countries: a pilot study*', *op. cit.*

While Purves (2007) made the argument that 'TNE should not be seen as an extension of traditional dependency theory, with the developed countries exporting courses to the developing countries to their long-term detriment' and instead for countries with long term capacity issues it should be seen as an opportunity to access the resources of developed countries²⁹⁸, Francois (2016) held the view that TNE provider countries pushed cultural imperialism because 'English is the dominant language in transnational education programs' and therefore, supports 'further western educational diplomacy as a force for western-style democracy in developing countries.'²⁹⁹ On the other hand, Ziguras and McBurnie (2015) state that one of the 'chief criticisms' of TNE is that students are part of an enclave with 'fellow-nationals, speaking the home language, rather than the host language' and sometimes taught by local teachers.³⁰⁰

The European Students' Union (2004) also raised concerns that TNE would endanger 'the building up and development of national systems or even replace those systems' in developing countries and that the 'for profit' nature of TNE programs will in fact exclude those needing education as well as create dependency patterns whereby the TNE receiving countries would retreat from their responsibility of providing tuition free education for their citizens.³⁰¹

There are also some concerns expressed about operating foreign educational programs and Wilkins (2015) has stated that some of the arguments put forward from TNE receiving countries include whether 'it is unethical for Western institutions to profit from selling standardised education in developing countries, or those with insufficient higher education capacity, as it does not help the host country's economic and social development and can actually hinder innovation

²⁹⁸ Joanne Purves, 'Can transnational education assist development aims?', in Commonwealth Education Partnerships 2007 commissioned by the Commonwealth Secretariat, Nexus Strategic Partnerships (publishers), p. 121. Also available at: <http://www.cedol.org/wp-content/uploads/2012/02/119-122-2007.pdf> (accessed 1 August 2017)

²⁹⁹ Emmanuel Jean Francois, 2016. 'What is Transnational Education', in *Perspectives in Transnational Higher Education*, Eds. Emmanuel Jean Francois, Mejai B.M. Avoseh and Wendy Griswold, p. 15, Sense Publishers.

³⁰⁰ Christopher Ziguras and Grant McBurnie, *op. cit.*, p. xxiii.

³⁰¹ European Students' Union, '2004 Policy Paper "Transnational Education"', 2004. Also available at: <https://www.esu-online.org/?policy=2004-policy-paper-transnational-education> (accessed 11 January 2018)

and knowledge creation'³⁰² There are also concerns raised about how it was possible for Western campuses to be ethically working in countries which may not uphold Western values and civil liberties. Saul (2015) raises the issue of academic freedom and cites the case of a New York University faculty member who was denied entry to the United Arab Emirates because he had criticized labour practices in the UAE.³⁰³ The concerns with academic freedom appear 'real' in countries which do not support the same academic freedoms and values as the TNE provider countries.

Knight (2004) discusses how education as a trade commodity 'evokes strong positions and sentiments' and goes on to argue that whilst some see trade in education services as offering enormous opportunities, others view this as 'eroding national cultural identities and instead of forming new forms of cultures through hybridization, cultures are being homogenized (in most cases interpreted to mean westernized)'.³⁰⁴ Knight also raised concerns on whether the commercialization of education versus education that crossed borders due to aid based initiatives, could be more or less in tune with promoting local traditions and cultural norms or whether private providers (essentially profit making institutions) would have a vested interest in adjusting curriculum to meet local viewpoints or 'given that private providers are market driven there may be a demand from the students and employers for what is perceived to be modern (read western) education.'³⁰⁵ Bannier (2016) raised concerns about how TNE may (a) undermine the existence of local institutions which support local cultural norms; and (b) bring in foreign curriculum which is in some cases counterproductive to local norms and values.³⁰⁶

³⁰² Stephen Wilkins, 'Branch campuses – The ethical questions', University World News Online, 27 November 2015. Also available at: <http://www.universityworldnews.com/article.php?story=20151124015023366> (accessed 17 May 2018)

³⁰³ Stephanie Saul, 'N.Y.U. Professor is Barred by United Arab Emirates', The New York Times, 16 March 2015. Also available at: <https://www.nytimes.com/2015/03/17/nyregion/nyu-professor-is-barred-from-the-united-arab-emirates.html> (accessed 2 Oct 2018)

³⁰⁴ Knight. *Trade in Higher Education Services: The implications of GATS*, *op cit.*, p. 63.

³⁰⁵ *Ibid*, p. 68.

³⁰⁶ Bannier, *op. cit.*, p. 82-83.

The 2017 BC and DAAD report also highlighted the impact of competition in TNE and ‘that the number-one negative attribute of TNE from a national level perspective is the competition for students and staff between TNE programmes/providers and local institutions.’³⁰⁷

While TNE has been well accepted round the world, there are some concerns that are expressed by local students who oppose their universities setting up offshore TNE programs as they believe this takes away much needed resources from the home campus. There are also those that suggest that in order to make a profit, universities use scant resources in their TNE facilities and this does not give the TNE student the same experience as the onshore student at the main campus. There are also some questions about whether academic freedom is compromised with TNE. For example, Wilkins (2015) states that in Laos foreign institutions offering courses are required to deliver political classes that are approved by the authoritarian government and in China and Malaysia, staff of TNE programs are not allowed to criticize the government.³⁰⁸

There is a greater understanding that education leads to longer term sustainability of the region and indeed the world. Barnett (2011) refers to universities within the framework of the environment and refers to the ‘ecological university’ which he says ‘takes seriously its relationship with its total environment and it does what it can to further the wellbeing of that total environment.’³⁰⁹ This suggests that for universities to protect the world from environmental degradation (which would affect all humans on earth), they have to do whatever they can to educate the world's peoples and clearly it is not possible to bring all the ‘peoples’ to a university's home campuses. Margee Ensign, the President of the American University in Nigeria, in a 2012 blog stated that even in Nigeria ‘creating more jobs in conflict-threatened states increases the chances of a sustainable peace.’³¹⁰ There are many regions of the

³⁰⁷ Knight and McNamara. *Transnational Education: A Classification Framework and Data Collection Guidelines for International Programme and Provider Mobility (IPPM)*, op. cit. p. 23.

³⁰⁸ Wilkins, ‘Branch campuses – The ethical questions’, op. cit.

³⁰⁹ Ronald Barnett. *Being a University*, Routledge UK 2011, pg 5.

³¹⁰ Margee Ensign, ‘An Educational Success Story Amid Nigeria's Violence’, The Chronicle of Higher Education Online, 29 October 2012. Also available at: http://chronicle.com/blogs/worldwise/an-educational-success-story-amid-nigerias-violence/30866?cid=pm&utm_source=pm&utm_medium=en (accessed 29 December 2013)

world where TNE provides universities with the opportunity to connect and education students and communities beyond their own national borders.

Many consider that education contributes to world peace and educating students through whatever means necessary ensures far more peaceful societies. In 2009, Hilmer in the Presidential Perspective speech at the Association of International Education Administrators (AIEA) Conference in the US stated that universities needed to globalize their students and provided the following description:

A “global citizen” needs to be able to live and work effectively in different cultures. Hence, a basic knowledge and appreciation of the range of ideas, ideologies, religions, values and customs is required. How do people in different countries approach risk and money issues? Is communication direct or indirect—does “maybe” mean “maybe” or “no”? When is it okay to be informal and when is formality expected?³¹¹

Against these many perspectives, there is more debate about nationalism and local issues having greater priority. An example is the Trump Administration’s ‘America First’ policies. Altbach and De Wit (2018) state that ‘Trumpism, Brexit, and the rise of nationalist and antiimmigrant politics in Europe are changing the landscape of global higher education’ and that there is a shift in thinking about internationalization which will require rethinking how universities work internationally.³¹² Van Damme (2018) was of the view that international students no longer being welcome in some western countries and the improvements in domestic education systems has had an impact on student mobility citing that since 2012 the OECD data indicates that there has been minimal growth in the movement of students across borders.³¹³ Yet only a few years earlier, Kemp (2016) stated that ‘international student mobility is likely to continue to grow over the next decade, and at rates of 5 percent per year or more’ – this view was however, before Brexit and Trump.³¹⁴

³¹¹ Frederick Hilmer. *An Australian Perspective*. Presented by the President and Vice Chancellor, University of New South Wales in Presidential Perspectives at <http://aieaworld.org/publications/PresidentialPerspectives> (accessed 15 July 2013)

³¹² Philip G. Altbach and Hans De Wit, ‘Are we Facing a Fundamental Challenge to Higher Education Internationalization?’, *International Higher Education*, n. 93, Spring 2018, p. 2.

³¹³ Dirk van Damme, ‘The Growth of International Student Mobility is Faltering’, *International Higher Education*, n. 93, Spring 2018, p. 10.

³¹⁴ Neil Kemp, ‘The International Education Market: Some Emerging Trends’, *International Higher Education*, n. 85, Spring 2016, Boston, p. 15.

There is discussion about barriers to TNE in Chapter 1, pp. 43-51.

2.2.7 The TNE Student – A Different Consumer

It is important to understand TNE in the context of today's student. Like their 19th century counterparts, today's students eagerly embrace an international experience that places less emphasis on the traditional classroom environment and more on a vigorous intellectual and emotional engagement with people and customs.³¹⁵ With the advent of technology, students are engaged through social media with their counterparts around the world and join forces to respond to matters of significance in the world. These include responses to humanitarian issues, natural disasters, technological systems, disease and famine, terrorism, territorial disputes and war, health and education. Most university websites now offer a platform for prospective students, current students and alumni to connect via social media such as Twitter, Facebook and LinkedIn. Students are no longer interested only in local/regional issues; many who have access to the internet are quickly becoming 'globalized' with an interest in world affairs.

The changes in technology ensure that fewer and fewer people will live in isolation from the rest of the world. Today's student therefore, is far more aware of the outside world than their earlier counterparts. Lehman (2012) stated that:

Communications media and cheap transportation mean that all of us will interact more and more with people raised in circumstances different from ours. More and more, we will find ourselves working as members of multinational teams. One cannot underestimate the value in such situations of people who know how people from different cultures are similar and how they are different, people who can both appreciate contributions from a wide range of perspectives and also resolve possible misunderstandings that can easily occur in such situations.³¹⁶

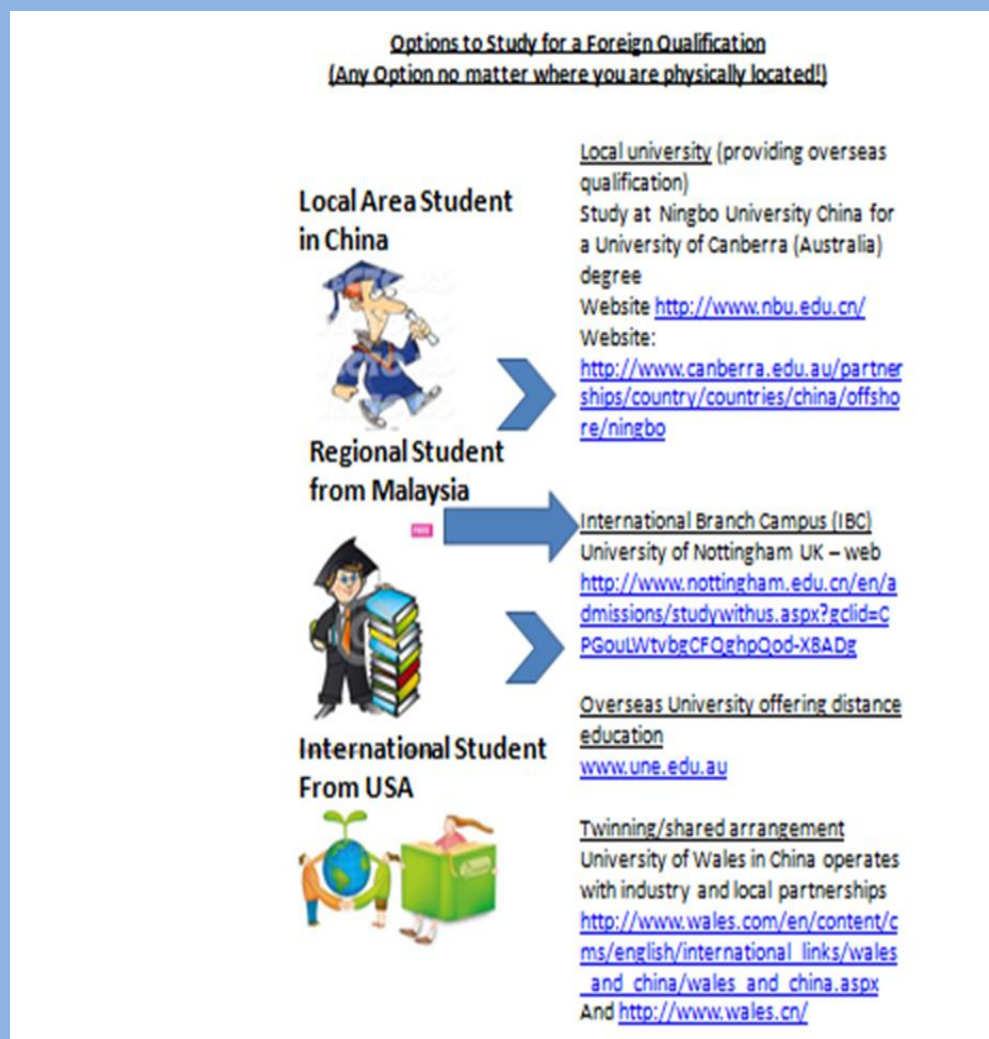
Choudaha (2012) in an article for University World News Online refers to reports produced by the Boston Consulting Group which stated that by 2015 'the

³¹⁵ Stephen J. Friedman. *Rendezvous with the World*. Presented by the President, Pace University in Presidential Perspectives at <http://aieaworld.org/publications/PresidentialPerspectives> (accessed 15 July 2013)

³¹⁶ Jeffrey S. Lehman. *The Goals of Transnational Education: Reflections of a True Believer*. Research & Occasional Paper Series CSHE 17.12, Center for Studies in Higher Education, University of California, Berkeley, p. 6, December 2012.

consumer class will include 100 million people with an annual income of more than \$5000, in six South East Asian countries - Indonesia, Malaysia, the Philippines, Singapore, Thailand and Vietnam' and the McKinsey Global Institute asserting 'that between 2005 and 2025, China and India alone will see their aggregate urban consumption increase seven-fold and six-fold, respectively.'³¹⁷ These are impressive statistics which support the case for TNE

CHART 10: Technology Provides the 24/7 'Student to University' Direct Interface for Enquiries, Enrolments and Study Programs



The chart provides examples of options available when students search for information via the internet.

Source: Author

³¹⁷ Rahul Choudaha. *Are you prepared for the arrival of 'glocal' students?* University World News Online. 29 April 2012. Also available at: <http://www.universityworldnews.com/article.php?story=20120424141501882> (accessed 15 May 2013)

and demonstrate that this rising group of the consumer class will pay to have their international education whilst staying in their region or country. There is reference made to these students as glocals - 'people who have global aspirations, but need to stay local.'³¹⁸ At the same time it is worth noting that a 2014 BC and DAAD study titled "*Impacts of transnational education on host countries: academic, cultural, economic and skills impacts and implications of programme and provider mobility*" indicates that 'while there is certainly no typical TNE student, the data suggest that TNE students are generally older than the traditional secondary school leaver entering higher education.'³¹⁹ Another 2017 BC and DAAD study indicates that although TNE students participate locally in TNE 'it is interesting to note that the option for a short term experience of studying overseas is still an important priority'.³²⁰

Today's students more than ever before, need to be challenged to operate across borders to deal with a world whose expectation is that countries will unite to help one another in time of crises. This thinking is in line with the tenets of internationalization and providing students with educational opportunities never seen before. Bannier (2016) states that 'Transnational education programs offer great promise for expanding access to higher education for individuals throughout the world, with far fewer geographical and geopolitical barriers than traditional, face-to-face college and university programs.'³²¹

There is also reason to believe that today's students view their social responsibility for their world in a far more holistic manner than their predecessors. They are more engaged in the concept of a peaceful, sustainable environment for the world's people and not just within their own borders; this is part of the reason why they believe they should be able to access education from anywhere wherever they might be. They view themselves as global citizens. This is also the generation where many believe that market liberalization

³¹⁸ *Ibid.*

³¹⁹ The British Council and the German Academic and Exchange Service (DAAD), *op. cit.*, Executive Summary.

³²⁰ Knight and McNamara. *Transnational Education: A Classification Framework and Data Collection Guidelines for International Programme and Provider Mobility (IPPM)*. *Op. cit.* p. 17.

³²¹ Bannier, *op. cit.*, p. 83.

policies should not be forced on society but rather marketed to society in a civilized world. This generation of students in the 21st Century are different - they see the world as a global place and their demand for education is near insatiable. An EU (2016) report states that the focus on 'global citizenship and global competence has two dimensions: competence as global professionals is strongly related to the need for employability in a globally connected world, while citizenship is more aligned with raising awareness and commitment to global issues such as health, poverty and climate, as indicated in the UN Sustainable Development Goals.'³²²

Many students view the sophisticated platforms for online course delivery as a means of overcoming the necessity to go abroad during periods of financial crises or the lack of opportunities to obtain visas when some countries have tightened visa arrangements due to terrorism and other security issues. This group of students are tech savvy and look for value for money educational opportunities. Knight and McNamara (2015) state that 'The affordability of TNE relative to study abroad represents the most positive attribute of TNE for students.'³²³ This view is also supported by Choudaha (2018) who refers to international students generally as 'bargain-hunters' who 'are driven by how to minimise costs (tuition and living expenses) and maximise financial returns in terms of work opportunities during and after the programme.'³²⁴

Students today are also more heavily reliant on technology to interface with the rest of the world. This includes even engagement at the local level. Universities are catering to this group of students who want information on demand no matter where they are. *There is commonality in thinking among researchers about the influence of technology on today's student.* For example Mangan (2005) states that 'While e-mail remains the official method of communication on most campuses, colleges are expanding their presence in the virtual world,

³²² De Wit, Hunter, Howard and Egron-Polak, *op. cit.*, p. 52.

³²³ Knight and McNamara, *The Impact of Transnational Education in Receiving Countries. op. cit.*, p. 4.

³²⁴ Rahul Choudaha. *Recalibrating value for money for international students.* University World News Online. 27 July 2018. Also available at: <https://www.universityworldnews.com/post.php?story=20180724145334625> (accessed 9 February 2019)

trying to reach students where they hang out³²⁵ and Friedman (2007) states that 'Today, technology is providing virtual pathways to foster international engagement'.³²⁶ This change in the way students absorb information almost anywhere means universities are now catering for a clientele which could be resident in any part of the world. It is clear from the literature that TNE has taken up the challenge to provide the interface for students by using technology whenever possible. Shepherd (2012) in an article for The Guardian states that TNE has 'led to a new type of higher education consumer who seeks an unconventional, flexible format that allows them to continue their own pursuits (be that career, family or other) outside regular residential bricks and mortar study'.³²⁷ While a EY Report (2018) did not specifically deal with TNE students, the report advised that:

Technology disruption is affecting the nature of employment and employability. As workplaces change, so does what it takes for a graduate to be 'work ready'. The future of work will be radically different, driven largely by the machine economy, where robotics and machine learning take over repetitive and programmable human tasks and artificial intelligence augments human roles.³²⁸

To understand the student of the 21st Century, there needs to be some discussion on how humans learn. Ryan, Scott, Freeman and Patel (2000) state:

When considering what learning is and how it occurs, it is useful to recall that humans, like all other biological organisms, are dynamic, self-organizing systems, surviving and evolving in a hostile world. Such systems survive by adapting to their worlds and by actively becoming 'informed' of how their worlds work. 'Learning' as biological adaptation happens incidentally in the context of the pursuit of current 'need-satisfying' goals.³²⁹

Today's student is different - today's student demands certain services which universities had never had to cater to before. For example, students today look

³²⁵ Katherine Mangan, As Students Scatter Online, Colleges Try to Keep Up, The Chronicle of Higher Education Online, 10 September 2012. Also available at: http://chronicle.com/article/Digitally-Savvy-Students-Play/134224/?cid=cc&utm_source=cc&utm_medium=en (accessed 15 November 2015)

³²⁶ Friedman, *op. cit.*

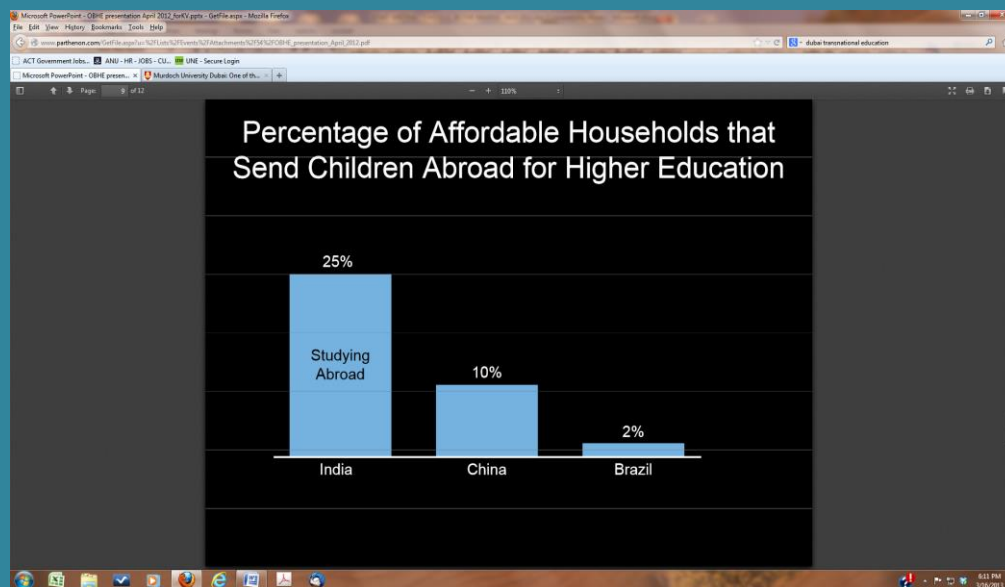
³²⁷ Elizabeth Shepherd. *Who is today's transnational student?* The Guardian Online. 10 September 2012. Also at: <http://www.guardian.co.uk/higher-education-network/blog/2012/sep/10/transnational-student-profile-careers-networks> (accessed 15 September 2014)

³²⁸ Ernst and Young Australia, *op. cit.*, p. 7.

³²⁹ Ryan, Scott and Freeman, *op. cit.*, p. 35.

for up to date and well-connected rooms and accommodation with internet access including access to remote libraries in the far corners of the world, 24/7 access to faculty members or advisers, online systems for admissions and enrolment and indeed for maintaining the ongoing student-teacher relationship. There are now whole classrooms which connect via Facebook, Twitter and other social media. Therefore, access to a program in the student's region, is not an unusual requirement for today's student and TNE meets that need. Bleak (2005)

VISUAL AID 13: Percentage of Affordable Households that Send Children Abroad for Higher Education



Web image extracted from a slideshow prepared by The Parthenon Group to the Observatory of Higher Education (OBHE) 2012 Forum.
www.parthenon.com/GetFile.aspx?u=%2FLists%2FAttachments%2F54%2F0BHE_presentation_April_2012.pdf
 (Access Date: 19 September 2015)

states that 'in an effort to keep students' disposable income on campus and create an additional source of revenue, many universities have purchased nearby hotels.'³³⁰ Today universities are compelled to provide students with a level of service that has never been seen before - a demand for education almost round the clock along with a range of services. 'It is important to remember that, regardless of economic, political, cultural, or social rationales for international education, it is the individual student who ultimately lives the impact of the experience, and each student will take from it what he/she wants.'³³¹ Marginson

³³⁰ Jared L. Bleak. 2005. *When For-Profit Meets Nonprofit - Educating Through the Market*. Routledge. NY and London. pg. 2

(2013) states that 'cross border students change their circumstances and their own pathways and potentials' in a manner where they adapt to their changing selves.³³² This suggests that as student needs change, institutions need to adapt to those changing needs. TNE education is therefore one such service where the evolving needs and demands from students can be met.

While the evidence indicates that universities are adapting to change, Tsiligiris (2014) argues that universities have been more focused on replicating their home programs in offshore locations and suggests the need for a student-centered strategy to include: '1) increasing employability; 2) enhancing value for money; and 3) multicultural exposure and understanding'.³³³

While the snapshot of the percentage of households that send children abroad for higher education (Visual Aid 13, p. 143) does not necessarily refer to TNE (as some students going abroad could be 'regional'), it highlights the high percentage of people in these fast-growing economies that send their children abroad. Not all these children would need to necessarily go abroad to pursue degrees from their universities of choice if the universities from abroad offered programs within the students' home countries which offered the benefit of: lower tuition fees and staying closer to home whilst pursuing the overseas qualification. There are other reasons for this group of potential students to take up TNE study options, such as cultural (feeling at home amongst students from their own countries and regions), access to more jobs (given that where there is such demand for education, there usually is a robust economy and/or a developing region which has a great need for a skilled workforce), easily accessibility and usually none of the barriers related to applying for student visas to go to a western country to study.

³³¹ Kristen Sheppard. 'Global Citizenship: The Human Face of International Education'. *IIE Networker*, v. 34, n. 1, p. 39, Fall 2004.

³³² Simon Marginson, 'Student Self-Formation in International Education', *Journal of Studies in International Education*, 18(1):6-22, p. 14, January 2013. Also available at: https://www.researchgate.net/publication/274989575_Student_Self-Formation_in_International_Education (accessed 24 June 2015).

³³³ Vangelis Tsiligiris, 'Internationalisation - A student-centred approach is key', *University World News*, 18 April 2014. Also available at: <https://www.universityworldnews.com/post.php?story=20140416075647276&query=tsiligiris> (accessed 8 April 2019).

Due to the various modes of delivery, TNE study options offer almost a 24/7 delivery culture which ensures that students who would otherwise not be able to go abroad to attend classes at a foreign university's main campus now have a way of gaining a foreign qualification through different pathways.

2.2.8 Capacity Building and 'Soft Power'

It is important to understand the current period within the context of the last 100+ years. At no other time have countries developed at such a rapid pace due to the advent of technology which made the whole world far more accessible. This 'access' has fueled the need for knowledge. In some countries not everyone who is qualified has access to higher education because of the scarcity of places at local institutions. The Institute of International Education (IIE) discusses 'higher education capacity, access and equity, personal and professional goals and human capital needs' as critical reasons why students are studying abroad.³³⁴ TNE's role in developing education infrastructure in developing countries needs to also be understood within the context of capacity building. Vincent-Lancrin (2004) was of the view that 'the ultimate goal of national capacity development strategy is to achieve progress and development, by becoming a developed high-income economy.'³³⁵ The IAU (2005) state in their policy statement that 'governments should play a constructive role in developing national and international policy frameworks that promote cross-border higher education's positive contributions to society.'³³⁶

Marginson and Van der Wende (2009) asserted that 'In global knowledge economies, higher education institutions are more important than ever as mediums for a wide range of cross-border relationships and continuous flows of people, information, knowledge, technologies, products and financial capital'.³³⁷ This view is supported by Ziguras (2011) with: 'The international mobility of

³³⁴ <https://www.iie.org/Research-and-Insights/Publications/A-World-on-the-Move> p. 4, Issue 1 (accessed 16 April 2017)

³³⁵ Stephen Vincent-Lancrin, 'Building Capacity through Cross-border Tertiary Education', Paper prepared for the UNESCO/OECD Australia Forum on Trade in Educational Services, 11-12 October 2004 Sydney, Australia, p. 9. Also available at: <http://www.oecd.org/education/skills-beyond-school/33784331.pdf> (accessed 15 February 2018)

³³⁶ International Association of Universities (IAU), the Association of Universities and Colleges of Canada (AUCC), the American Council on Education (ACE) and the Council for Higher Education Accreditation (CHEA), *op. cit.*, p. 5.

³³⁷ Marginson and Van der Wende, *op. cit.*, p. 17.

educational programs and campuses has the potential to build and supplement domestic institutions in a much more far-reaching manner than overseas movement of students.³³⁸

Helping to develop a country's human capital is thought to be a rewarding endeavour. Expanding TNE into countries that are stretched for places for their

CHART 11: Students as Cultural Diplomats (Soft Power)

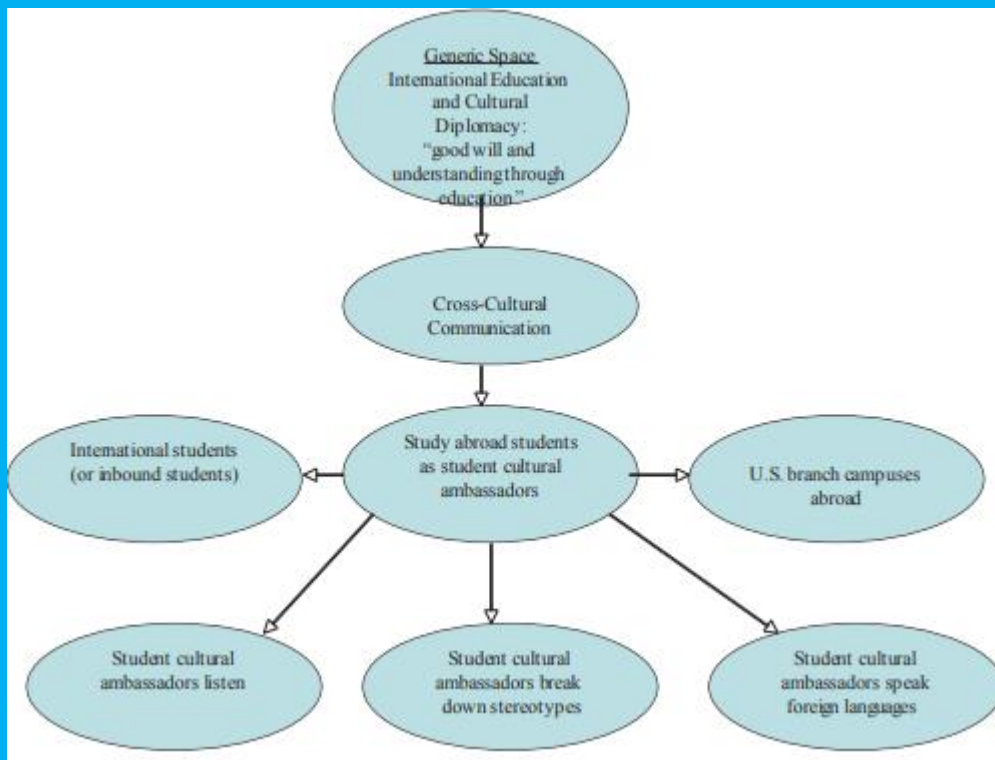


Chart extracted from 'The Role of Study-Abroad Students in Cultural Diplomacy: Toward an International Education as Soft Action' by Madalina Akli, PhD, Rice University.
<https://files.eric.ed.gov/fulltext/EJ1150064.pdf>
 (Access Date: 10 May 2018). Pg. 39

own students means an increase in access to education. Besides addressing the issue of offering places to students who would otherwise need to go abroad, TNE also provides other benefits. Quddus and Rashad (2000) state that

³³⁸ Christopher Ziguras. 2011. The Effect of Cross-Border Provision on Higher Education Access, Equity and Capacity in the Asia-Pacific Region. In 'Access, Equity and Capacity in Asia-Pacific Higher Education', editors Deane E. Neubauer and Yoshiro Tanaka, p. 179, Palgrave Macmillan. Also available at: https://www.researchgate.net/publication/230578162_The_Effect_of_Cross-Border_Provision_on_Higher_Education_Access_Equity_and_Capacity_in_the_Asia-Pacific_Region?enrichId=rgreq-f4610a037dc39fc026810a0940de485e-XXX&enrichSource=Y292ZXJQYWdlOzIzMDU3ODE2MjtBUzoyMjg4MzY1NzUwMTkwMDhAMTQzMTU3MDE5OTE3MQ%3D%3D&el=1_x_2&_esc=publicationCoverPdf (accessed 10 August 2017)

‘Already, many of these newly established private universities have been able to provide salaries and working conditions that have attracted a large number of expatriate scholars and even foreign academicians.’³³⁹ This creates a benefit and goodwill as expatriate scholars and foreign academics re-establish or establish themselves in the country. ‘The landscape of higher education in these countries, and in the world as a whole, is richer as a result of this development.’³⁴⁰ Larson, Momii and Vincent-Lancrin (2004) confirm the view that capacity building through foreign post-secondary education is ‘a faster way to build an emerging country’s capacity in higher education.’³⁴¹

In a discussion on TNE in Africa, the case has been made that ‘transnational educational arrangements must, therefore, help to reshape local institutions so that they serve the human, social and economic development imperatives of the continent.’³⁴²

Quddus and Rashid (2000) also argue that without human ‘capital formation there cannot be economic prosperity’ and state that:

More important than physical capital, such as roads, bridges, and buildings, is human capital—the skill and education of the people of a nation. This is what a good university does best. In addition, for a country to develop, a critical mass of citizens must be trained to think. A university, with its liberal arts curriculum and atmosphere of free inquiry, helps enhance this essential body of thoughtful citizens through its young graduates who will become the future leaders of the country.’³⁴³

Quddus and Rashid are not alone in their thinking that human capital must be at the forefront of development. Many scholars refer to developing human capital as a means of reaching out to the developing world. This is viewed as capacity building. This provides an enormous opportunity for universities to become engaged in TNE education which accelerates the development of human capital within developing countries. In the Opening Plenary Session for the 2016 Go

³³⁹ Quddus and Rashid, *op. cit.*

³⁴⁰ *Ibid*

³⁴¹ Kurt Larsen, Keiko Momii and Stéphan Vincent-Lancrin, ‘Cross-border Higher Education: An Analysis of Current Trends, Policy Strategies and Future Scenarios’, OECD Report, p. 12, 2004. Also available at: http://www.obhe.ac.uk/documents/view_details?id=49 (accessed 11 March 2018)

³⁴² <http://www.aau.org/sites/default/files/proceedings.pdf> p.18 (accessed 19 May 2016)

³⁴³ Quddus and Rashid, *op cit.*

Global Conference in Cape Town, Dr Adam Habib, Chairperson, Universities South Africa and current Vice-Chancellor and Principal of the University of the Witwatersrand, Johannesburg stated the following:

We need to be able to do two distinct things. First, we need to provide sufficient numbers of students from poor and disadvantaged communities, to access the best universities and institutions around the world.

Second, we need to produce sufficient numbers of high quality graduates in the professions required by society and economies. Our internationalisation efforts must be facilitative of both these outcomes. The way they do that is by not retarding and weakening local institutions around the world. What internationalisation should be about is to create what some of us have called a global academy of commons.

....In the 21st century, we will not survive as a human species if we do not come together as a global academy and a global society. All of our challenges, terrorism, public health....are transnational in character and require multi-national and multi-institutional teams of researchers if they are going to be addressed and tackled. This is why we need to go global.³⁴⁴

The initiatives related to nation or capacity building when driven by governments and national organizations are viewed in the context of 'soft power'. Aidarbek and Kanat (2014) explain the advantages of culture and education as soft power compared to military force, coercion and economic sanctions (hard power).³⁴⁵ Trilokekar (2015) is of the view that government involvement in international education is also related to cultural diplomacy, a form of soft power³⁴⁶ and Knight (2015) states that academics 'hail soft power as a fundamental premise of today's international education engagement'.³⁴⁷ An example is the Fulbright Program sponsored by the US Department of State.³⁴⁸ Through interaction in the international education space, countries can promote

³⁴⁴ <https://www.britishcouncil.org/organisation/press/going-global-2016-opens-call-greater-equality-he> (accessed 17 March 2017)

³⁴⁵ Amirbeka Aidarbek and Ydyrys Kanat. 'Education and Soft Power: Analysis As An Instrument of Foreign Policy'. *Procedia - Social and Behavioral Sciences* 143 (2014) 514 – 516, p. 515. Elsevier Limited. Also available at: https://ac.els-cdn.com/S1877042814043560/1-s2.0-S1877042814043560-main.pdf?_tid=2ffbf84b-fd12-449c-8f69-7cf87f1d2ec4&acdnat=1546122065_fe5e7c8653fd5cf3d440e94fdb7ca47c

³⁴⁶ Roopa Desai Trilokekar. 'From Soft Power to Economic Diplomacy? A Comparison of The Changing Rationales and Roles Of The U. S. And Canadian Federal Governments' in *International Education. Research & Occasional Paper Series*. CSHE 2.15. Center for Studies in Higher Education, University of California, Berkeley, p. 2. February 2015. Also at: https://cshe.berkeley.edu/sites/default/files/publications/rops.cshe_2.15.desaitrilokekar.softpowereconedplomacy.2.9.2015.pdf

³⁴⁷ Jane Knight, 'Moving from Soft Power to Knowledge Diplomacy', *International Higher Education*, n. 80, Spring 2015, Boston, p. 8.

³⁴⁸ Patti McGill Peterson, 'Diplomacy and Education: A Changing Global Landscape', *International Higher Education*, n. 75, Spring 2014, Boston, p. 3.

their social, cultural, educational and political image abroad and this not only `enhances their global visibility and influence but also their ultimate goal to reach and win the hearts and minds of people world-wide'.³⁴⁹ The UK Government views the global education market as developing rapidly and providing an opportunity to UK institutions to become involved in soft power diplomacy through tackling issues such as poverty which in turn would keep UK secure.³⁵⁰

There are researchers who continue to discuss support for education for all and/or infrastructure building at institutions that require support to reach out to students. Adrian Perry (2005) when discussing the role of universities in helping vocational colleges (albeit in the domestic market in the UK) suggests that partnerships amongst institutions are important particularly if they can enhance infrastructure and provide access to a wider group of students. He states that there is `joint management of shared facilities, and franchise arrangements whose financial provisions directed resources to the poorer partner'.³⁵¹ Boeren (2014) discusses higher education in the context of social and economic development of developing countries and states that there is now growing acknowledgement that a strong human capital base requires higher education to participate in innovation, research and economic development.³⁵² `The challenge, then, is to stem current and forestall future educational inequalities and hierarchies by fostering systems of international academic mobility, exchange, collaboration, connectivity, and regulation that generate and sustain empowering knowledge networks that are guided less by the polarizing and profiteering pressures of the market and more by the developmentalist and democratizing demands of global "public good."³⁵³

³⁴⁹ Simge Erdogan. `International Education as Soft Power'. North American Cultural Diplomacy Initiative. Blog Online. 2 October 2018. Also at <http://culturaldiplomacyinitiative.com/international-education-as-soft-power/>

³⁵⁰ <https://www.gov.uk/government/publications/international-education-strategy-global-potential-global-growth/international-education-strategy-global-potential-global-growth> (accessed 8 April 2019).

³⁵¹ Adrian Perry. `Further and higher education: A cautionary note', Editor Chris Duke, `The Tertiary Moment - What road to inclusive higher education?', Chapter Four, p. 33, Niace, UK, 2005.

³⁵² Ad Boeren. *HE in pursuit of development goals*. IAU Horizons Magazine. Vol. 20, N°3, November 2014, p. 31. Also available at: www.iau-aiu.net (accessed 11 January 2017)

³⁵³ <http://www.aau.org/gc11/adocs/pdf/eng/zeleza.pdf> (accessed 29 March 2013)

UNESCO data suggests that there were 21.3 million refugees in 2015 of which over half under the age of 18 `who most likely have yet to enter tertiary education or have experienced a disruption of their higher education studies.³⁵⁴ The United Nations High Commissioner for Refugees (UNHCR) and the University of Geneva have formed a consortium in 2016 to coordinate the provision of quality education to regions involved in conflict, crisis and displacement by using information technology to provide face to face online learning.³⁵⁵ (It is not clear how this data on TNE is reported within the statistics.) Some of the work undertaken for teaching refugees through TNE (although this is not listed as TNE) is by the University of Oslo, the Scholars at Risk Network, The Network of Universities from the Capitals of Europe (UNICA Network) and the University of Ljubljana who are participating in an Erasmus Strategic Partnership project to increase the competency and capacity of European universities to support and welcome refugees and threatened scholars.³⁵⁶

There is also much discussion on the role higher education institutions can play in the information age to deliver programs in a manner where there is equity of access to people around the world. While the traditional TNE programs operated out of classrooms, universities can harness the power of the internet to further deliver programs to those that cannot afford traditional programs by providing TNE via the distance education mode. One academic rationale for TNE is the potential to contribute to capacity building in developing countries.³⁵⁷ At the transnational level the great debates about the future of higher education inevitably overlap with other great debates, such as how to address world poverty and the need for sustainable development.³⁵⁸ These are priority issues for modern times.

³⁵⁴ <http://www.unhcr.org/en-us/statistics/country/5a8ee0387/unhcr-statistical-yearbook-2016-16th-edition.html> p. 92 (accessed 19 November 2017)

³⁵⁵ <http://www.unhcr.org/en-us/connected-learning.html?query=students> (accessed 21 February 2018)

³⁵⁶ Marit Egner and Lauren Crain. *Academic Refuge: a strategic partnership to promote greater respect for academic freedom and welcoming refugees in higher education*. IAU Horizons magazine, Vol. 22 N°2, p. 30. January 2018. Also at www.iau-aiu.net

³⁵⁷ http://www.auqa.edu.au/files/otherpublications/quality_assurance_of_transnational_higher_education_the_experiences_of_australia_and_india.pdf p. 19 (accessed 15 July 2016)

³⁵⁸ Ryan, Scott, Freeman and Patel *op cit.*, p. 175.

Gough and Scott (2007) discuss the worldwide debate that is taking place about the 'nature and purpose' of higher education. These authors view sustainable development as being the most urgent issue to be dealt with as leaving this issue unresolved would threaten human life itself. 'For some, indeed, the pursuit of sustainable development is the most pressing global issue of the coming 50 years, since it may very well be argued that long-term issues of social injustice, environmental degradation and resource scarcity provide the underpinnings of faster-moving events such as wars, famines and natural disasters that are more likely to capture the daily headlines.'³⁵⁹ There is discussion on 'collective learning' and how issues related to sustainable development are disseminated through vital networks although reference is also made to the claim that 'research suggests that, to help virtual teams succeed, organizations need to invest in opportunities for face-to-face interaction.'³⁶⁰ As university graduates are expected to contribute to society, Gough and Scott (2007) argue that universities have a great impact on society as a whole. 'Both teaching and research are (increasingly) international in nature and therefore bear upon issues of global citizenship, policy, structure and lifelong learning.'³⁶¹

There is recognition amongst higher education institutions (and governments) that to continue to improve their education systems they need to evolve. An Academic Cooperation Association (ACA) Conference paper in Vienna in 2005 referred to a wealthy Europe which could become poorer due to 'unfavourable demographic development, the high price of labour, and relentless competition from old and new competitors {which} threaten Europe's comfortable position'.³⁶² The ACA papers suggests that the '*Lisbon Strategy*' was put in place in order to ensure that Europe continues to innovate and become a leader in 'knowledge creation' so their society advances rather than risks stagnation in a globalized world. Marginson (2006) recognizes that higher education and research are integral to national building but argues that decreasing aid budgets have made some developing countries less aid-dependent and more market-

³⁵⁹ S. Gough and W. Scott. 2007. '*Higher Education and Sustainable Development - paradox and possibility*'. p. xi. Routledge, UK.

³⁶⁰ *Ibid.*, p. 129.

³⁶¹ *Ibid.*, p. 168.

³⁶² <http://www.aca-secretariat.be/index.php?id=386> (accessed 21 January 2018)

dependent and this will impact upon poorer developing nations. Marginson makes the case that there needs to be investment in higher education as a public good because the outcome of global competition in higher education has held back the capacity of education in poorer developing nations.³⁶³

While TNE may be accessible, it still costs money to participate in it and therefore, even if access is provided to the far corners of the world, not all students could afford to participate. The issue of access and lower costs even for those that can afford TNE domestically or in their local regions, means the overall cost of study is cheaper than going abroad and this ensures that much needed foreign currency is not leaving the shores of developing countries; these funds can then contribute to the economic development of their own countries. Furthermore, TNE is continuously evolving, bringing new opportunities. For example, the micro-campus form of TNE (refer discussion on pp, 19-24) appears to meet the need of students to access education at locally set prices for tuition and at the same time students have the option of travelling within the network of countries which form part of the micro-campus network.

2.2.9 Commercial Aspects of TNE

It was not possible for universities to launch into internationalizing their campuses without extra access to funding, particularly in light of diminishing governmental funding. Funding therefore, became crucial in internationalization and with this phenomenon came increased commercialization of the higher education sector.

Researchers raise the issue of commercialization of higher education from very different perspectives. For example, Bok (2003) provided a comprehensive comparison of the corporate business sector and the move by research universities in the USA to become commercialized. He discussed the differences in thinking between academia and tenured professors who insist that research

³⁶³ Simon Marginson. 'Dynamics of National and Global Competition in Higher Education'. *Higher Education*, Springer, 52, 2006, p. 36. Also available at: https://melbourne-cshe.unimelb.edu.au/_data/assets/pdf_file/0008/1664315/HEd_2006_national_and_global_competition.pdf (accessed 14 June 2017)

and teaching are compromised through commercialization of a university to the view by Presidents and administrators of universities who believe that 'an important lesson universities can learn from business is the value of striving continuously to improve the quality of what they do.'³⁶⁴ Bok's view was that commercialization compromised quality. On the other hand, Sidhu (2006) referred to 'the desire for overseas credentials in the postcolonial world, a desire that continues to sustain the largely First World education export industry'³⁶⁵ which sheds a light on universities as entrepreneurs and exporters. Øgård (2018) discussed the impact of revenue generation within universities on the independence of research and academic freedom and stated that 'to compensate for the loss of public funds under neoliberal regimes and to respond to a large increase in number of students, higher education institutions have prioritized revenue generation and have increasingly become reliant on private sources of funding'.³⁶⁶

TNE in the main involves public institutions, however it has also given rise to private entrepreneurship in education. Such ventures are not always connected to public institutions but could leverage their possibilities of market entry by collaborating with local institutions. An example includes Laureate International Universities, which in 2009 owned approximately 40 campus universities in 18 countries, in South and North America (Brazil, Chile, Costa Rica, Ecuador, Honduras, Mexico, Panama, Peru, United States), in Asia and the Pacific (Australia, China, Malaysia) and Europe (Germany, Cyprus, Spain, France, Switzerland, Turkey).³⁶⁷

Bok (2000) stated that 'commercialization can undermine collegiality and trust within academic communities by creating divisions and tensions that did not previously exist.'³⁶⁸ As universities have evolved to becoming commercial in many of their operations including transnational activities they have become

³⁶⁴ Bok, *op cit.*, p. 25.

³⁶⁵ Sidhu, *op. cit.*, p. 26.

³⁶⁶ Beathe Øgård. *Commercialization of higher education – shrinking the space for critical thinking or meeting the demands of society?* IAU Horizons magazine, Vol. 22 N°2 January 2018. Also at www.iau-aiu.net

³⁶⁷ Vincent-Lancrin, *op. cit.*, p. 72.

³⁶⁸ Bok, *op cit.*, p. 113.

susceptible to criticism from within as well as from outside. At the BC's Go Global Conference in Dubai, Fernandez-Chung, Vice-president of HELP University in Malaysia warned that 'branch campuses could exacerbate economic and social differences rather than closing divides, as some charge tuition fees that are beyond the reach of many'.³⁶⁹ In some cases those universities that are involved in opening IBC are seen to be too entrepreneurial and involved in the external student markets only because there is money to be made rather than the reality that students need courses in their home countries. Raduntz (2005) states that 'the marketization of education has all the hallmarks of an entrepreneurial takeover executed with blitzkrieg precision backed by the trappings of legality and plausibly justified on the grounds of economic survival in the face of global competition.'³⁷⁰

In a broad discussion on commercialization of the higher education sector in the US, Bok (2003) states that universities will need to come up with a better way of establishing rules in order that commercial activities are evaluated so that academic values can be safeguarded. In his opinion, to do otherwise will lead to the undermining of the basic principles which had for so long underpinned the value of higher education. 'Without such rules, officials will find it all too easy to succumb to the lure of money, not because it is the proper path to take, but rather because it is the path of least resistance.'³⁷¹ Knight (2004) argues that the emphasis on the commercial aspects of TNE will place a greater stress on economic imperatives rather than 'on the academic, social, scientific and cultural contributions of higher education to society.'³⁷²

In the literature there is no question about why universities became entrepreneurial and sought revenue generation strategies including TNE, however, there were different views on the impact of commercialization of the education sector. One other view that needs to be considered is that

³⁶⁹ Katherine Forestier and Yojana Sharma. *Higher Education Hubs – Why do we want them?* University World News Online. 8 March 2013. Also at: <http://www.universityworldnews.com/article.php?story=20130307173256655> (accessed 23 April 2015)

³⁷⁰ Helen Raduntz. *The Marketization of Education within the Global Capitalist Economy*. Editors Michael Apple, Jane Kenway and Michael Singh in *Globalizing Education - Policies, Pedagogies, & Politics*. Peter Lang NY. p. 244. 2005.

³⁷¹ Bok, *op cit.*, p. 121.

³⁷² Knight. *Trade in Higher Education Services: The implications of GATS*, *op cit.*, p. 77.

governments in some TNE provider countries did focus on the revenue generation aspects of TNE which may have played a role in the general perception that there is 'money to be made' in international education. For example, Austrade's research states quite openly that 'International education is currently one of Australia's top service exports, valued at \$19.65 billion in 2015 (including fees and associated expenditure) and supports over 130,000 jobs in cities and regions throughout Australia.'³⁷³ At the same time, the BC (2016) refers to the 'economic value of the global education market'.³⁷⁴

The value, including the economic value, of the global education market has been recognized by many countries including the UK. The higher education sector is regarded as one of the UK's most important export earners for the UK economy - and internationalization has become a major priority for all UK universities and the UK Government alike.

While concerns about commercialization of international higher education exist and there are critics of TNE, it is clear that dwindling government funding for higher education, in some cases lower domestic student numbers and diminishing numbers of international students going to the west will force universities to go to where the student markets are. Shepherd (2012), in an article for the Guardian newspaper, stated that UK institutions have had to deal with an increase in UK domestic student fees and cuts to government funding for institutions which has resulted in institutions having to become creative, innovative and capitalize on TNE opportunities.³⁷⁵ At the same time it is important to note that research undertaken by BC and DAAD in consultation with a number of national agencies (from Australia, France and the UK) indicates that students, faculty and government agencies in receiving countries were overall pleased with TNE and students believed that TNE did offer them a more affordable option to undertake an international qualification locally.³⁷⁶

³⁷³ <https://www.austrade.gov.au/australian/education/services/australian-international-education-2025/aie2025-roadmap/aie2025-roadmap> p. 3 (accessed 19 April 2018)

³⁷⁴ HE Global, *op. cit.* p. 9.

³⁷⁵ Shepherd, *op. cit.*

³⁷⁶ The British Council and the German Academic and Exchange Service (DAAD), 'Impacts of transnational education on host countries: academic, cultural, economic and skills impacts and implications of programme and provider mobility' *op. cit.* p. 65

2.2.9.1 General Agreement on Trade in Services (GATS)

Universities now can contribute significantly to a country's trade in education services. Robinson (2005) posits that despite the higher education sector long having been international, one of the most dramatic developments has been the rapid expansion of international trade in the sector.³⁷⁷ Universities have also established specific corporate structures to finance and market research, and manage commercial teaching, often in partnership with other universities and corporations.³⁷⁸

Governments now place a great deal of effort in cultivating relationships between their universities and offshore countries in order to establish TNE facilities. For example, in 2018 there were some 82% of UK universities which offered transnational education and 'this is seen as integral to the UK government's strategy to promote education as an export commodity.'³⁷⁹

Many countries are part of GATS, and cross-border mobility in higher education is facilitated under the GATS framework, although transnational mobility extends beyond those countries that are signatories of GATS.³⁸⁰ Bannier (2016) states that online and distance education which crosses borders falls 'under the scrutiny of GATS rules and the World Trade Organization itself'.³⁸¹ GATS has coverage over IBC, twinning and also franchising of institutional services, depending on the makeup of the program. Rules and regulations specified in the World Trade Organization's (WTO) General Agreement on Trade in Services (GATS) recognize transnational education as an internationally traded service.³⁸² Depending on which country discusses GATS there can be different

³⁷⁷ David Robinson, 'GATS and the OECD/UNESCO Guidelines and the Academic Profession', *International Higher Education*, The Boston College Center for International Education, No. 39, Spring 2005, p. 6. Also available at: <https://ejournals.bc.edu/ojs/index.php/ihe/article/viewFile/7469/6664> (accessed 21 January 2017)

³⁷⁸ Simon Marginson. *Australian Higher Education: National and Global Markets*, op. cit., p. 220-221

³⁷⁹ Universities UK International. *The Scale of UK Higher Education Transnational Education 2015-16 – Trend analysis of HESA data*, op. cit., p. 59-61.

³⁸⁰ <http://gshe.international.wisc.edu/wp-content/uploads/2011/02/varghese.pdf> - p. 1 (accessed 21 July 2013).

³⁸¹ Bannier, op cit., p. 80.

³⁸² *Ibid.*

viewpoints. One could say that the viewpoint of developing countries in relation to GATS is quite different to the viewpoint of the developed world. In the case of Africa, there is concern that GATS does not adequately represent its interests and that 'it is a non unique, necessary, but not sufficient condition for trade in transnational education' and that 'it is only a legally enforceable set of rules and corollary not a priori or axiomatic to the philosophy, history and practice of trade in transnational education.'³⁸³ GATS while attempting to undertake a regulatory framework that would protect all trade partners and ensure conformity with a standard set of criteria; there 'is always a risk in trade between unequal partners that the trade arrangement will benefit the strong at the expense of the weak'.³⁸⁴

As education should be there to serve the public interest and be offered for the good of humanity, there are questions raised about whether GATS places an unnecessary burden on developing countries in pushing them to accept a trade dominated agenda which undermines their ability to be an equal partner in GATS negotiations. Although GATS proponents are correct in saying that GATS itself does not force individual governments to privatize public services, GATS exerts a constant pressure through continuous rounds of negotiations mandated in the treaty to open up public services to foreign commercial providers to privatize or commercialize them.³⁸⁵ The greatest concern with GATS for universities in the developing world remains the issue of equity and the possibility of losing the ability to enhance their own education systems without foreign intervention, particularly the intervention of private or commercial interests from the developed countries within GATS membership. For universities in the west the concerns with GATS are mostly that 'trade frameworks are not designed to deal with the academic, researcher or broader social and cultural purposes of cross border higher education' and that the trade and national policy may be in conflict with the capacity of higher education to meet its overall social and cultural mission.³⁸⁶

³⁸³ <http://www.aau.org/sites/default/files/proceedings.pdf> p.20 (accessed 15 May 2016)

³⁸⁴ <http://www.aau.org/sites/default/files/proceedings.pdf> p.22 (accessed 15 May 2016)

³⁸⁵ <http://www.aau.org/sites/default/files/proceedings.pdf> p.27 (accessed 15 May 2016)

³⁸⁶ https://www.iau-aiu.net/IMG/pdf/statement_sharing_quality-2.pdf p. 5 (accessed 21 January 2018)

Whilst trade in education services was once almost exclusively the domain of developed countries, there is now also growing interest amongst developing countries to offer educational opportunities to international students. India and Malaysia are examples of this trend. On the one hand it seems that some countries (example: China, Indonesia and Malaysia are worth a mention) do not have the infrastructure to provide sufficient university places for their own nationals who have been applying to go abroad, on the other hand these countries have active private entrepreneurs including private universities which have become active in promoting their education systems abroad. In some cases, even the public university systems in these countries have been able to invest in expanding their infrastructure to attract international students on the basis of a fee for service income return that can underpin their investment. In its 2016 snapshot of trends in TNE, the OBHE reported that developing countries continue to become both home and host of IBCs.³⁸⁷

In 2013 the International Finance Corporation (IFC) of the World Bank (WB) provided Laureate Education (LE) an injection of \$150 million in investment funds to expand its network of locations around the world. Laureate already has more than 750,000 students attending its institutions that make up the network of Laureate International Universities (LIU) including their online programs through Walden University. A LIU spokesman stated that 'the company, with about \$3-billion in annual revenues, will use the money to continue its expansion, possibly to locations in Africa (Laureate has a campus in Morocco) and Latin America, where the company has an extensive presence.'³⁸⁸ These are considered export earnings by governments and are reflected in GATS.

Trade in education services continues to remain high on the agenda with the GATS. GATS impacts TNE particularly in countries where regulation makes it impossible to set up TNE infrastructure and GATS creates some equity in the global market place for education. Despite all the positive attributes of GATS some countries are cautious about transnational education in light of issues of

³⁸⁷ Garrett, Kinser and Merola, *op. cit.*

³⁸⁸ Goldie Blumenstyk, 'Arm of World Bank Buys \$150-million Stake in Laureate Education', *The Chronicle of Higher Education Online*, 23 January 2013. Also available at: http://chronicle.com/blogs/bottomline/arm-of-world-bank-buys-150-million-stake-in-laureate-education/?cid=pm&utm_source=pm&utm_medium=en (accessed 14 February 2014)

quality assurance and the need to protect intellectual property. Since its inception in 1995 GATS now covers 145 member countries of the WTO.³⁸⁹ While there are continued negotiations within GATS it is important to understand the work done by governments to maintain some coordination with trade in education services. Knight (2003) states:

While it is true that both the benefits and risks of increased international trade in education will be felt most keenly at the national level, it also important that the wider international higher education community continues to work together on these issues so that 1) educators' views and expertise come to bear on developments in trade in education services; 2) the higher education sector continues to work towards national/regional and international education frameworks that addresses the quality assurance, accreditation and recognition of qualifications for cross-border education; 3) further work is done on investigating the implications of trade agreements on scholarly pursuits, research and intellectual property; 4) trade is seen as one subset of the larger phenomenon of cross-border education; and 5) that the impact of trade on the larger more philosophical questions related to the purpose, values and role of higher education continue to be explored.³⁹⁰

2.2.10 Reputation and Quality Control in TNE

Reputation as a TNE provider in an overseas market is of paramount importance and when jeopardized affects the entire sector and reflects poorly on a country. While from the very beginning there were measures being taken to address the issue of quality, the `main difficulty was how to gain an accurate picture of what was forever changing on the ground.³⁹¹

Edwards (2007) raised concerns about how a number of `Australian providers of offshore courses (which) entered their markets in haste, seeking to capitalize on a newly international fee-paying environment and trading on the emerging good name of Australian higher education.³⁹² At the time there were several

³⁸⁹ Knight. *Trade in Higher Education Services: The implications of GATS*, *op cit.*, p. 45.

³⁹⁰ Jane Knight, `GATS, Trade and Higher Education Perspective 2003 – Where are we?', an OBHE Report, p. 23, May 2003. Also available at: http://www.uws.edu.au/_data/assets/pdf_file/0014/7070/GATS2May2003OBHE.pdf.pdf (accessed 11 February 2013)

³⁹¹ Stephen Adam. March 2001. Transnational Education Project - Report and Recommendations. Confederation of European Union Rectors' Conferences, p. 12.

³⁹² Neil Edwards. *Dropping the Ball Offshore: Foreign Campus Fiascos were Inevitable*. The Australian Online, 4 July 07. Also available at: <http://www.theaustralian.news.com.au/story/0,25197,22012133-25192,00.html> (accessed 14 May 2013)

universities that had dived into offshore opportunities to link with partners locally and then pulled out when things had not worked out. Armitage (2007) stated that the relationships being formed with local partners reflected ‘the mad phase of the late 1990s, when universities would get into bed with just about any foreign partner who came knocking’³⁹³ and that the advent of the Australian Universities Quality Agency (AUQA) would provide regulation and oversight for the sector. (AUQA functions were later absorbed by the Tertiary Education Quality and Standards Agency (TEQSA).)

Despite the downside of more scrutiny of TNE activities, the OECD reported that international rankings and pressure on financing are likely to continue to boost student mobility and global competition for international students – increasingly of Chinese or Indian origin and attracted by English-speaking destinations.³⁹⁴

Fischer (2012) ‘highlighted the stumbles, and sometimes outright spills, by American colleges seeking to set up degree programs with foreign partners.’³⁹⁵ While referring to the impropriety of two US universities, both of which raised significant quality issues, Lane and Kinser (2012) discussed the issue of who is responsible for cross border oversight and mentions internal mechanisms to ensure quality control because ‘external mechanisms don’t do a good job of crossing borders.’³⁹⁶ At the same time Lane and Kinser state that they believe that the issue of quality is taken seriously by many institutions which ensure that processes are put in place which ‘allow faculty members on the home campus oversight of the hiring and curricular practices at the branch campus and making sure that programs offered to international students meet the same standards expected of all students’.³⁹⁷

³⁹³ Catherine Armitage. *Overseas Flops a Good Lesson*. The Australian Online , 31 July 07. Also available at: <http://www.theaustralian.news.com.au/story/0,25197,22088964-25192,00.html> , (accessed 14 May 2013)

³⁹⁴ The Organisation for Economic Co-operation and Development (OECD), ‘Higher Education to 2030’, *op cit.*, p. 13.

³⁹⁵ Karin Fischer. *American Colleges’ Missteps Raise Questions About Overseas Partnerships*. The Chronicle of Higher Education Online. February 19, 2012.

³⁹⁶ Lane and Kinser. *Oversight of Internationalization—Who’s Responsible?**op. cit.*

³⁹⁷ *Ibid.*

In a later article, Kinser and Lane (2013) highlight the difficulties of managing cross border operations and maintaining oversight of quality. Procedures that work well when applied across the campus quad, however, may not have the same success when their target is half a world away.³⁹⁸ Coelene (2014) also raised concerns about the level of influence a home campus can have on its TNE programs given financial considerations and various structural issues.³⁹⁹

While quality issues were being raised, governments and organizations believed that appropriate measures were being put in place through regulation and codes of conduct to overcome any barriers that might hinder the establishment of good practice in TNE. At the same time Fallon (2014) stated that providers of TNE depend on the quality of their partnerships to ensure standards at their IBCs in order to protect branding, image and marketing and receivers of TNE seek guarantees about credibility and accreditation from providers of TNE and these efforts ensure quality of the TNE programs on offer.⁴⁰⁰

Bannier (2016) confirmed that there are many agencies including UNESCO, the Asia-Pacific Quality Network and the International Network for Quality Assurance Agencies in Higher Education that have been gathering data on the quality of TNE for well over a decade.⁴⁰¹ The difficulty for governments and organizations in implementing policies and best practice is constrained by the fast pace of developments in the TNE sector.

In research undertaken by the BC (2013) the issue of quality assurance in TNE was noted:

An exhaustive analysis of available global data suggests that TNE is continuing to expand at a brisk pace; both in terms of scale – programme and student enrolment – and scope – diversity of delivery modes and location of delivery. 25 of the most significant countries for TNE were selected for the study. However, the report finds

³⁹⁸ Kevin Kinser and Jason Lane, 'The Problems with Cross-Border Quality Assurance', *International Higher Education*, n. 73, Fall 2013, Boston, p. 4.

³⁹⁹ Robert Coelene, 'International Branch Campuses and Institutional Control', *International Higher Education*, n. 78, Special Issue 2014, Boston, p. 24.

⁴⁰⁰ F. Fallon. 'Collaborating for knowledge exchange in multi-campus universities in Australia and China'. In A. Kwan, E. Wong, T. Kwong, P. Lau & A. Goody (Eds.), *Research and Development in Higher Education: Higher Education in a Globalized World*, n. 37, p. 105 - 114. 7-10 July 2014, Hong Kong.

⁴⁰¹ Bannier, op. cit., p. 82.

that a third of these have little or no quality assurance systems in place, and that for many countries in the study, TNE is simply not a policy priority.

The research also finds that the level of TNE activity is not always indicative of quality assurance systems being in place. The evidence 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 registration, licensing, accreditation, quality assurance and recognition of qualifications and for ensuring the sustainability of TNE going forward.⁴⁰²

In an online article in the Chronicle (online), Hallak and Poisson (2017) refer to TNE programs as also being a breeding ground for corruption and refer to favouritism, bribery in scholarship administration as well as admissions based on false qualifications, and the need for quality standards. They also state that as 'some higher education providers circumvent accreditation by creating franchising schemes or introducing courses in segments of the education system where accreditation is not compulsory' it is important that steps are taken to protect students and they list the work done by UNESCO and the Council of Europe in creating 'a multi system approach including punitive measures, institutional arrangements of transparency, and protection of whistle blowers'.⁴⁰³

Quality is already an issue that comes up in many countries due to their own internal systems. In Britain and Australia for example, issues are often raised about quality in education and how institutions of higher learning have to do more for less with public money. Coaldrake (2011) stated that 'Fifteen years later we are still here and still wrestling with the same dilemma: that of matching expansion with the resources needed for quality.'⁴⁰⁴ These concerns are used as an argument by some Australian universities that are very cautious in approaching offshore campuses, and even in addressing the whole notion of TNE through an alternate mode such as a franchising agreement with a local provider.

⁴⁰² <https://www.britishcouncil.org/organisation/press/transnational-education> (accessed 17 March 2018)

⁴⁰³ Hallak and Poisson, *op. cit.*, p. 24.

⁴⁰⁴ Peter Coaldrake. *A Tricky Balancing Act*. The Australian newspaper, 18 May 2011. Also, at <http://www.theaustralian.com.au/higher-education/opinion-analysis/a-tricky-balancing-act/story-e6frgcko-1226057730387> (accessed 13 February 2013)

If not structured properly, TNE can lead to major difficulties for a university as it exposes its weaknesses in an overseas market which could have consequences for its other activities. TNE can also lead to strained relationships with local partners and/or other international partners who compete in the same market for the same students. Castagnera (2015) stated that 'Higher education exporters tend to establish programs in popular and lucrative fields such as business, which are cheap to deliver, but leave the host nation's public universities to shoulder the more expensive programs, such as the sciences.'⁴⁰⁵ Offering programs onshore at a university's home campus is therefore quite different to TNE. When full-fee paying students arrive at a University's home campus, any concerns are addressed and usually remain contained within the country with less offshore publicity; in the case of TNE a wrong move by a university can mean effects are felt in other areas and quickly lead to bad publicity not just for the relevant institution but also the education system of the country as a whole. For example, if an institution from the USA was to close in Hong Kong, it would reflect badly on US education; whereas if the institution was to shut down in the USA itself it would have less impact.

Today, resulting from more face to face teaching and overseas universities crossing borders to open campuses compared to the early days of distance education, TNE is 'more highly visible in some countries and more controversial in others, so too there has been an increased focus on quality.'⁴⁰⁶ Many researchers hold the view that while countries importing TNE programs have been busy trying to 'regulate' the industry in order to maintain standards of quality, the pace at which TNE has been moving and the varied operational modes (e.g. branch campus, twinning arrangement, distance education coupled with residential school locally, etc.) have made regulation a complex undertaking. The epistemic community of professionals and stakeholders with an interest and expertise in international quality assurance has been developing rapidly, as is evidenced by a proliferation of models, guidelines, resources,

⁴⁰⁵ Jim Castagnera. 'GATS is good.' Campus Review Weekly, v. 15, n. 24, p. 15, June 22, 2005.

⁴⁰⁶

http://www.auqa.edu.au/files/otherpublications/quality_assurance_of_transnational_higher_education_the_experiences_of_australia_and_india.pdf p. 33 (accessed 12 March 2013)

approaches and discussions, addressing cross-border education in general, and program mobility in particular.⁴⁰⁷

What is interesting also is that some of the very countries that were importing TNE in the early days are now creating education hubs and therefore, are considered exporters as well as importers which makes for a dual edged sword when it comes to developing a regulatory framework for TNE.

Despite the pace at which TNE continues to develop round the world, particularly in Asia and the Middle East, `rather than flying under the radar, TNE is increasingly in the purview of both sending and receiving governments, professional bodies, of both sending and receiving countries, and subject to the internal quality assurance procedures of both the foreign provider and its local partner.⁴⁰⁸ Note that for institutions to establish TNE facilities in foreign countries – usually IBCs, they are required to meet location registration and often there are very strict guidelines for such registration that ensures quality standards. For example, in Malaysia, overseas universities would need to register with the ‘Malaysian Qualifications Agency, which specifies the curriculum requirements, and the Ministry of Education, which controls enrolment numbers and tuition fees.’⁴⁰⁹ Malaysia has been concerned about allowing an expansion of its educational institutions including allowing foreign universities to set up branch campuses without appropriate regulations. Originally, `the Education Act 1996, Private Higher Educational Act 1996, National Council on Higher Education Act 1996, and the National Accreditation Board Act 1996 were passed by Malaysian Parliament, paving the way for different institutional structure and delivery of TNHE in Malaysia.⁴¹⁰ A further reinforcement of this Act through an amendment in 2003 ensured far more scrutiny of the changes that the original Acts put in place to safeguard the

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http://www.auqa.edu.au/files/otherpublications/quality_assurance_of_transnational_higher_education_the_experiences_of_australia_and_india.pdf p. 33 (accessed 12 March 2013)

⁴⁰⁸

http://www.auqa.edu.au/files/otherpublications/quality_assurance_of_transnational_higher_education_the_experiences_of_australia_and_india.pdf p. 35 (accessed 12 March 2013)

⁴⁰⁹ Healey, *op. cit.*, p. 4.

⁴¹⁰ Sirat Morshidi. 2005. *Transnational Higher Education in Malaysia: Balancing Benefits and Concerns through Regulations*. Working Paper. National Higher Education Research Institute (NAHERI), p. 8.

integrity of the Malaysian education system. These changes ensured qualitative measures were in place to support an expansion of the private sector including participation from overseas universities. Another plus point being the Malaysian government has historically welcomed international input and transnational provision in the national higher education system in particular.⁴¹¹

The ICEF Monitor in their February 2015 Newsletter raised concerns about quality assurance in relation to TNE programs and stated that ‘Approaches to quality control can vary across countries, and core concepts such as accreditation, recognition, and the authority to grant degrees may carry different meanings’.⁴¹² The Newsletter also referred to research carried out by the European Commission on branch campuses which found that there were loopholes in the system which could allow rogue operators to take advantage of the situation.

Coelen 2014 discusses the challenges faced by TNE providers to adapt curriculum but at the same time makes the point that ‘the degree awarded to graduates from TNE programmes must reflect the same learning outcomes as the degree on the home campus’.⁴¹³ This is where Coelen suggests TNE delivery requires a great deal of attention. The Quality Assurance of Cross-border Higher Education Project Report (2016) discusses the quality assurance systems of different countries and the constraints they face in managing cross border education. In the case of Australia, the report mentions the ‘difficulties in determining whether student learning outcomes for courses delivered outside Australia are equivalent to those for the same course of study when delivered by the higher education provider, as required by the national Threshold Standards’.⁴¹⁴ As many Australian TNE programs, particularly those offered through IBCs issue the same Testamur as is offered to an international student who

⁴¹¹ *Ibid.*, p. 9.

⁴¹² <http://monitor.icef.com/2015/02/managing-growth-maintaining-standards-international-branch-campuses/> (accessed 13 April 2018)

⁴¹³ Robert Coelen, ‘*Adapting curricula for success*’, EAIE Forum Magazine, Summer Edition, July 2014, p. 26. Also available at: <https://www.eaie.org/our-resources/library/publication/Forum-Magazine/2014-summer-forum.html> p. 26 (accessed 22 March 2018)

⁴¹⁴ <http://web.archive.org/web/20160820143404/http://www.enqa.eu/indirme/QACHE%20final%20report.pdf> p. 17 (accessed 18 November 2017)

participates in Australian programs in Australia, the question is whether the student from the Australian IBC receives the same quality education as the education offered at the main campus. At the same time a 2016 BC study concluded that international higher education is becoming a policy preoccupation and that there are ‘strong signals of countries’ readiness to engage internationally and to support their higher education systems’ global positioning.’⁴¹⁵

There is extensive research already undertaken on the ‘quality’ issue in TNE notably by Lane and Kinser (2013) and the British Council (2013). Indeed, there are ‘a wide variety of international agencies’ that have been collecting data on quality in TNE for a long period of time.⁴¹⁶

2.2.11 The TNE Student Experience

There is evidence from the Literature Review that there are differences in the TNE study experience compared to students going abroad to a university’s home campus. An example includes the criticism of TNE because students usually learn with their fellow nationals and converse in the local language (Ziguras and McBurnie, 2015).⁴¹⁷ Garrett (2018) stated that IBC leaders believe that the student experience may be different in line with local customs and norms although their TNE students are ‘internationally minded’ and TNE programs follow ‘consistent academic standards and practices’ as at the home campus.⁴¹⁸

The quality and reputational issues that have been raised in relation to TNE, also suggest that program management at a main campus would be subject to more qualitative processes than are undertaken at outposts of institutions (Edwards, (2007); Armitage, (2007); Fisher (2012); Coaldrake (2011); Kane and Kinser,

⁴¹⁵ Janet Ilieva and Michael Peak, *op. cit.*, p. 17.

⁴¹⁶ Bannier, *op. cit.*, p. 82.

⁴¹⁷ Ziguras and McBurnie, *op. cit.*

⁴¹⁸ Richard Garrett, ‘International Branch Campuses: Success Factors’, *International Higher Education*, n. 93, Spring 2018, Boston, p. 16.

(2012); Kane and Kinser, (2013); Coelene, (2014); Castagnera, (2015); and Hallak and Poisson (2017)). Refer discussion in Section 2.2.10, pp. 159-166. Given the quality issues raised, it can be assumed that the TNE student experience must be different to the main campus program. Despite this, there has been little research on the *differences* in the student experience of TNE students compared to students studying on the main campus and the impact, if any, of issuing TNE students with the same Testamur as is provided to the home campus students.

2.3 The Future of TNE

Based on the literature review what we have learnt about the future of TNE is that:

1. *TNE is fast evolving and here to stay.* There is no turning back despite the barriers faced (which include concerns with foreign doctrine, nationalist and anti-immigrant policies).
2. Students will select their university based on convenience (local, regional options) and the relevance of 'job readiness' programs that connect to local industries and businesses (for jobs).
3. *Technology will continue to provide higher education with the necessary platforms to launch programs in just about any part of the world.*
4. Due to technology (see No. 3 above) and the interface with students in work places and their homes, university brick and mortar infrastructure will likely reduce in size as there will be fewer students coming to university campuses; universities will go to where the students are; indeed some universities will operate out of workplaces (corporations) as facilitators of learning to create 'work ready' human capital.
5. *The many forms of TNE will continue to evolve and hence, the classifications of the multiple forms of TNE will also need to be revised on an ongoing basis.*
6. Universities will service students globally – there will be less emphasis on the 'domestic' student market.

7. Resulting from the many changes that affect the higher education sector, national and sub-national governments will increasingly decrease funding for higher education and allow the sector to operate as 'corporations'
8. Governments will support TNE in the trade context because bringing in revenue will become crucial to maintaining status internationally while improving the gross national income (GNI).
9. Universities will be increasingly run like corporations.
10. *Universities will increasingly work in collaboration with the corporate sector to provide a holistic (and joint) approach to the development of human capital* – therefore, from the time a student enters higher education, they will work with university and industry to develop their skills through mentoring, training, education and work placement. Education and training will be a lifelong endeavour as people adapt to changing conditions in the workplace.
11. Traditional degrees will be less valued; instead an emphasis on 'work readiness' training and certification along with regular updating of skills (lifelong training) will be considered more valuable.
12. Data collection will continue to be an issue for some time due to several factors:
 - a. competition in the higher education space will increase as universities jockey for global positioning and this will lead to some countries not being prepared to provide the level of detail necessary to provide a global view of TNE movements;
 - b. There will be even more commercial secrecy to protect revenues making data collection an issue; and
 - c. Differentiating the many different forms of TNE and the constant evolution of 'types' of TNE relationship will make the gathering of accurate data almost impossible.
13. Governments will rely on delivering aid funded education in developing countries using modern technologies (online education and fully electronically connected classrooms). This may be associated with reduced 'aid' budgets in developed countries where shifting demographics (fewer local students, and businesses going to

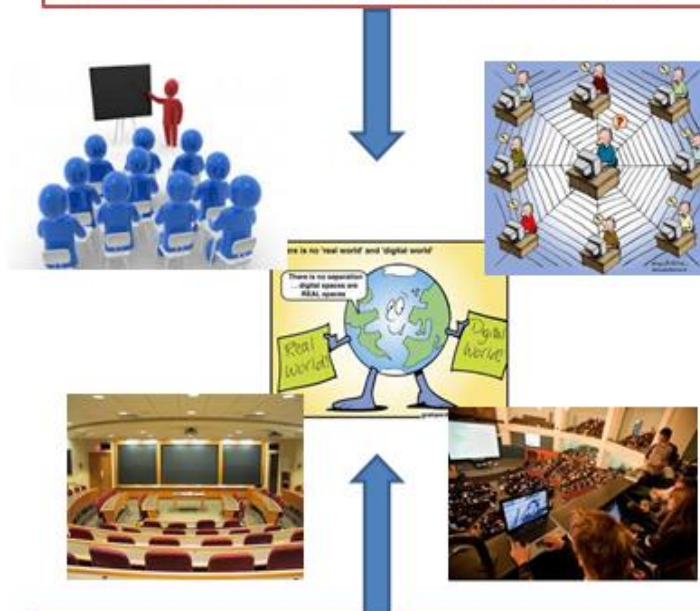
where economies are booming or expecting to boom) are resulting in less wage tax revenue and less willingness to fund development assistance to potential competitors.

CHART 12: TNE – Developing Different Products for Different Markets

TNE - DEVELOPING DIFFERENT PRODUCTS FOR DIFFERENT MARKETS –

Delivering what the market requires

HOME CAMPUS COURSE/PROGRAM can be delivered in offshore markets through twinning, franchise arrangements, distance and or international branch campuses (IBC)



HOME CAMPUS COURSE/PROGRAM can be modified to include local content which may be delivered by local faculty

HOME CAMPUS CAN DEVELOP COURSES/PROGRAMS to suit specific markets based on skills gaps identified in country/region, cultural norms and/or industry partnerships including on the job training arrangements.

Source: Author

14. There will be even more movement of human capital across international borders to go to where the jobs are and where economies are booming. This will have an impact on immigration flows into developed countries. Consequently, there will be a

potential impact on these developed economies (with housing, standards of living and benefits such as national health, welfare schemes etc coming under scrutiny), as a reverse form of brain drain can occur with domestic students pursuing opportunities in formerly developing countries. An example would be the adult Australian born and educated children of Chinese migrants to Australia moving back to work in China.

15. Recruiting international students (and attracting the best human capital possible) will not be the sole domain of institutions and corporations in the developed world as more and more countries in the developing world participate in this phenomenon.
16. There will be more relationships formed between universities in the developed world and universities and corporations in the developing world.
17. It is likely that over time some of the IBCs and other TNE facilities established by the developed world in the developing world will become part of local institutions and sever ties to the parent institution and/or develop in their own right as independent institutions.
18. Cultural barriers and some of the issues of 'closed' societies will be addressed as there will no longer be just the shift from developing countries to developed countries; developing human capital for global needs will help bridge the gap in understanding and appreciating shared values.

There is a more discussion in Section 4.9 on Conclusions - Emerging Trends, pp. 295-299.

2.4 Summary: Literature Review

The emergence of TNE has been a 'rite of passage' for many universities which have viewed it as the next frontier for educating the world's students who are perceived as being thirsty for a world-class education. Access and exposure to

the international world is no longer reserved for the elite.⁴¹⁹ This discussion of TNE also highlights the reasons why organizations such as the OBHE came into being to better understand the phenomenon and provide leadership in gathering strategic intelligence for Commonwealth institutions of higher learning as well as UK universities.

On the one hand, this literature review embraces the concept of TNE as the natural extension to the full-fee paying international student programs on offer at universities' home base campuses, whilst on the other hand raising concerns about the potential loss of quality when offering programs in locations away from the main campus. These concerns are not just limited to the individual institution offering the TNE program but the overall impact this may have on a country's reputation when issues related to quality are raised. At the same time `properly designed and carefully implemented, transnational education programs hold the potential to greatly assist developing nations in expanding their intellectual infrastructure.'⁴²⁰

The literature review indicated that researchers were generally agreed on the following:

- TNE is moving at a very fast pace and continues to evolve.
- Higher education institutions have participated in TNE because:
 - Government funding for the higher education sector was diminishing.
 - Domestic student numbers were trending downwards.
 - International student numbers to main campuses were trending downwards.
 - It would be possible to access more international students by setting up local TNE programs and taking programs to where the students were.
 - TNE would support local education systems particularly those that could not cope with the large numbers of local students.

⁴¹⁹<http://www.aau.org/sites/default/files/proceedings.pdf> p. 19-20 (accessed 14 May 2013)

⁴²⁰Banner, *op. cit.*, p. 83.

- Some governments and local institutions were prepared to provide infrastructural support to attract overseas institutions to their shores (e.g. education hubs).
- The advent of the internet age supported TNE.
- It was simply a good thing to do and would lead to widespread collaboration on research and exchange of students; providing domestic main campus student and faculty with greater options for exchange.
- Students were willing consumers of TNE because going abroad to study was no longer the preferred option because of:
 - The post 9/11 environment of raised security concerns and visa issues; and
 - Family and local employment (as available jobs had diminished in the west).
- TNE receiving countries were attracting key foreign universities to their shores (mainly through the establishment of education hubs) as a means of (a) providing high quality programs to their students; (b) keeping students in-country which saves money and leads to less brain-drain; (c) having 'control' of the quality of foreign programs through regulatory processes; (d) growing or enhancing their own education systems; and (d) opening up markets to bring in international students to their own shores.
- TNE receiving countries were also competing with TNE provider countries for international students.
- TNE provider governments supported TNE because it provided significant export earnings and underpinned the domestic higher education sector; there were political gains - promoting democracy, 'soft power' and capacity building, development aid, academic collaboration.
- Other benefits of TNE included: assistance to/support for refugees.
- There were not many negatives in participating in TNE other than some concern about quality of TNE programs, solely 'profit driven' programs and disadvantage to local institutions.

- There was insufficient data on TNE. The BC and DAAD have provided a set of guidelines but state that ‘A more systematic collection of data at institutional and national levels is necessary.’⁴²¹
- The definition of all forms of TNE was somewhat blurred because the description of each form of TNE was based on the differing perceptions of TNE providing and receiving countries and institutions.

The literature also suggests that universities that do not move forward with an active TNE agenda may be left behind in terms of research and teaching. The challenge for universities is not whether they engage in TNE but rather to weigh each of their transnational activities from the viewpoint of the disadvantage to their institutions should they decide not to participate in this growing phenomenon. Do the barriers to TNE outweigh the many tangible benefits gained by universities? Spring (2006) sums up in a discussion on ‘Pedagogies of Globalization’ that there are several educational models in place that might ‘educate people capable of solving some of the inherent problems of the industrial-consumer model’⁴²² He further elaborates that universities could educate people to find answers to questions such as how technology and industry can be organized in order to ensure happiness for all people rather than believing that technology and industry are there only for profit; how people can serve in economies to provide better opportunities for medical care, housing and nutrition that will allow them to lead satisfactory lives and how people could organize economies without ‘depleting the world's resources and while protecting the biosphere?’⁴²³

The literature suggests that if universities are able to attract students into their TNE facilities then clearly there is reason to be offering programs and services to this group of students some of whom may not have the ability to pursue study abroad opportunities due to their socio-economic situation and lack of finances.

⁴²¹ Knight and McNamara. *Transnational Education: A Classification Framework and Data Collection Guidelines for International Programme and Provider Mobility (IPPM)*. Op. cit. p. 3.

⁴²² Joel Spring, 2006. *Pedagogies of Globalization: The Rise of the Educational Security State*. Lawrence Erlbaum Assoc Publishers NJ and London. p.254.

⁴²³ *Ibid.*, p. 254.

‘Differences in socio-economic status are more important but still are only part of the story.’⁴²⁴

There is not much literature which deals with student experience of TNE programs compared to students onshore at the main campus. It is clear that higher education institutions with TNE arrangements will from time to time survey their students to determine outcomes but such data is not readily available and is held ‘commercial in confidence’ by the TNE providers. Most TNE program providers, particularly IBCs promote their programs on the basis that they provide the same high-quality programs to TNE students as they do to their on-shore main campus students but there is no real evidence to back those claims through research data. Refer also to the section on Limitations of the Research in Chapter 1, pp. 66-69.

2.5 Future Research

This research project focused on gaining a better understanding of global trends in TNE as well as answering the question of whether the TNE qualification at an offshore campus or other location provide the same student experience as the onshore, main campus students gain. Available literature recognizes TNE’s role in bringing education with a range of options to the world’s people, while also providing institutions and governments with political and economic benefits, however, there is insufficient research undertaken to determine whether *all* TNE students gain the *same* benefits in terms of the cross-cultural experiences received by students that travel abroad to the host institution. To undertake such research, there will need to be a better understanding of the modes of TNE delivery because some modes (of delivery) may in fact provide similar student experiences to those gained by the students who travel abroad to the institution’s main campuses. For example, students in the ‘micro-campus’ have the option of going abroad for part of their study. While more and more IBCs, particularly those operating within education hubs have a requirement for students to undertake part of the degree at the home university’s main campus abroad, there

⁴²⁴ Dept of Education, Training and Youth Affairs. *Access-Effect of campus proximity and socio-economic status on university participation rates in regions*. Occasional Paper Series. November 2000.

is no consistent policy across all IBCs about a mandatory component of the study being undertaken at the overseas university's main campus. It is important to recognize that TNE is evolving rapidly and therefore research will need to keep up with this pace to determine how the TNE student experience evolves.

There will also be the need for researchers to do more work on whether some forms of TNE will in some way diminish or dilute the cultural attributes of in-country programs and universities. For instance, Dr Ting Wang, who is a bilingual and bicultural academic in China, says she encourages exchanges which provide diverse perspectives. She holds the view that students should not simply accept imported wisdom and her 'approach challenges students to critically examine Western leadership ideas in the Chinese context and to develop their intercultural competency.'⁴²⁵ Are some modes of TNE better at addressing the issues raised by Dr Wang and other researchers? Is there a form of TNE which can provide the student with the foreign campus student experience (by undertaking some study abroad) while at the same time having the home study experience which supports local norms, customs and culture? Are there different TNE requirements depending upon the field of study, such that, for example, physical science students would have very different needs to social science students?

In 2009 the OECD discussed the trajectory of some countries who will shift from being the receivers of TNE provision to themselves being providers of TNE so that TNE will mature in the form of a limited number of dense "branch campus clusters" of high prestige institutions located in leading cities acting as regional hubs in Asia, the Middle East, Africa and Latin America.⁴²⁶ This has already started to happen given the numbers of students enrolled in IBCs in countries such as China, Malaysia, Singapore and Dubai.

While most researchers agree that TNE is fast evolving and growing, there was a minority view that eventually TNE will phase out when the education systems of TNE receiving countries mature, at which time the IBCs, twinning and other

⁴²⁵ <http://www.altc.edu.au/september2009-transnational-education-for-chinese-educators> (accessed 21 May 2013)

⁴²⁶ OECD, *op. cit.*, p. 99.

TNE arrangements would simply evolve into local institutions in their own right.

Chapter 3 discusses global trends in TNE. The chapter looks to the major countries and organizations that have been involved in moving TNE forward and how they differ from one another.

Chapter 3 - Country Specific Data and Education Hubs – Who is Doing What?

To present a global perspective on trends in TNE, summaries are presented below of major countries exporting and importing TNE. Similarly, information on major education hubs has also been included in this Chapter.

There are many different reasons why TNE arrangements are in place within different countries and education hubs. The needs of importing and exporting countries and institutions can be quite varied thus institutions could develop a model of a TNE operation in one country and a completely different model in another. As a result, in most locations we see a wide range of motives and contradictory behaviours emerging from a melange of actors.⁴²⁷ Because of the rapid growth of TNE across the globe, it is difficult to examine every activity by every importing and exporting country. Therefore, information on TNE activities of only the major TNE provider and/or receiver countries has been described. Given the evolving nature of TNE, the information is also not comprehensive and will have changed by the time this research goes to print. Emphasis is therefore, placed only on the 'major' countries involved in this phenomenon.

3.1 Australia

In 1986 after several reviews, the Australian Government introduced full fees for international students in Australia. No Australian university was left untouched by this change.⁴²⁸ This fundamental change led to the Australian Government reducing overall funding for universities in 1996. Universities therefore, had to quickly become entrepreneurial. Australia's universities

⁴²⁷ Jason Lane and Kevin Kinser. *Cross-border Higher Education: A Complicated Mix of Players*. The Chronicle of Higher Education Online. 6 March 2012. Also available at: <http://chronicle.com/blogs/worldwise/cross-border-higher-education-a-complicated-mix-of-players/29206> (accessed 11 January 2017)

⁴²⁸ Dennis Murray and Betty Leask. 'Australia' in *Internationalisation of Higher Education*, study for the Director General for Internal Policies, European Union, July 2015. p 191. Also at: [http://www.europarl.europa.eu/RegData/etudes/STUD/2015/540370/IPOL_STU\(2015\)540370_EN.pdf](http://www.europarl.europa.eu/RegData/etudes/STUD/2015/540370/IPOL_STU(2015)540370_EN.pdf) (accessed 14 May 2018)

transformation to internationalize their campuses with foreign students, providing revenue to cross-subsidize research and domestic teaching.⁴²⁹ Australia places a much lower percentage of its GDP into education than the OECD average, and student-staff ratios in universities have increased steeply.⁴³⁰ The OECD reports that in 2011, Australia (with 6%) was 'the third most popular destination after the United States (16% of international student worldwide) and the United Kingdom (13%)' for international students.⁴³¹ Clark (2012) in a WENR article stated that, based on data from the AEI 'In Australia almost one third (104,678) of international students studying for an Australian higher education qualification were doing so 'offshore' in 2010' and of this number '75,377 were studying on campus and 25,115 via distance education.'⁴³²

Australian universities play important capacity-building and demand absorption roles, chiefly in partnership with local private providers and public institutions.⁴³³ There is more elaborate analysis of the data on the AEI website.⁴³⁴

In the Australian case, besides bringing full-fee international students to their campuses, Australian universities have already progressed to the point of setting up IBCs, entered into local partnerships that 'suggest' a branch campus infrastructure, or used a combination of both models (branch campus and/or a relationship with a local partnership). In 2005 the Australian Government developed the Transnational Quality Strategy (TQS) in consultation with state and territory governments, representatives of each sector and international

⁴²⁹ William B. Lacy, Gwilym Croucher, Andre Brett and Romina Mueller. *Australian Universities at a Crossroads: Insights from their Leaders and Implications for the Future*. Report by the University of Melbourne Centre for the Study of Higher Education and Berkeley Center for Studies in Higher Education. May 2017, p. 12. Also at: https://melbourne-cshe.unimelb.edu.au/data/assets/pdf_file/0005/2368895/Australian-Universities-at-a-Crossroads.pdf (accessed 10 February 2018)

⁴³⁰ http://www.auqa.edu.au/files/otherpublications/quality_assurance_of_transnational_higher_education_the_experiences_of_australia_and_india.pdf p. 43 (accessed 12 March 2013)

⁴³¹ http://www.oecd.org/edu/Australia_EAG2013%20Country%20Note.pdf (accessed 15 May 2017)

⁴³² Clark, 2012, *op. cit.*

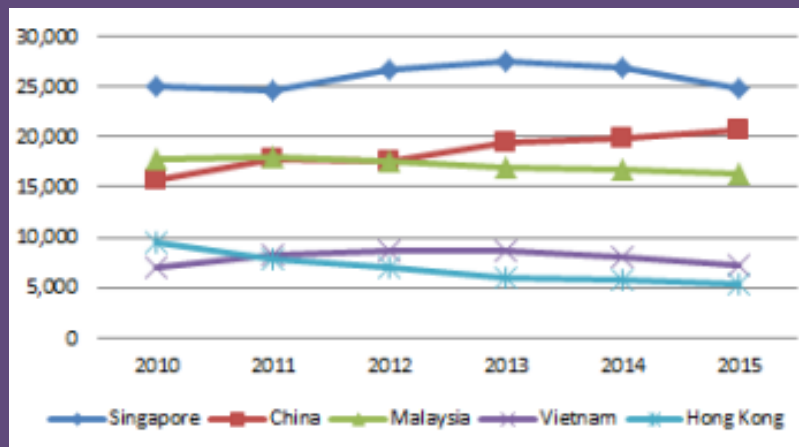
⁴³³ Tony Adams, Melissa Banks and Alan Olsen. 'Benefits of International Education: Enriching Students, Enriching Communities' in *Making a Difference - Australian Education International*, Edited by Dorothy Davis and Bruce Mackintosh, 2011, p.28. UNSW Press.

⁴³⁴ https://aei.gov.au/research/Research-Snapshots/Documents/Transnational%20education_HE_2011.pdf (accessed 18 May 2015)

students.⁴³⁵ One in four of Australia's international students is a transnational student.⁴³⁶ It was reported that in 2013 there were 84,785 international students enrolled in Australian programs outside of Australia and there were a further 25,331 students undertaking distance education. Combined, this group of students represented 33.5% of all international students in the Australian higher education sector.⁴³⁷

Australia has also invested substantially in ensuring the quality of its education. In 2012, Australia established the Tertiary Education Quality and Standards Agency (TEQSA) and absorbed the functions of the former AUQA. TEQSA protects the reputation of Australia's higher education sector both at home and abroad and actively works with other international agencies to support the quality and reputation of Australian education.

TABLE 8: Transnational Students in Australia by Country – 2010-2015



Data source: Australian Department of Education and Training
 Web image extracted from:
https://internationaleducation.gov.au/research/Research-Snapshots/Documents/Transnational%20education_HE_2015.pdf
 (Access Date 7 July 2018)

⁴³⁵ Murray and Leask. *Op. cit.*, p. 196.

⁴³⁶ www.auqa.edu.au/files/otherpublications/quality_assurance_of_transnational_higher_education_the_experiences_of_australia_and_india.pdf p. 84 (accessed 12 March 2013)

⁴³⁷ Murray and Leask. *Op. cit.*, p. 201.

While Australia has been a leader in developing IBCs and as of 2017 had 14 IBCs operating abroad, given the closures of three Australian IBCs in recent years (University of New South Wales in Singapore, University of Southern Queensland in the United Arab Emirates and Charles Sturt University in Canada), it is not clear whether further expansion in IBCs is a wise strategy.⁴³⁸

VISUAL AID 14: Australia's Positioning in TNE Activities - Year 2015-2016

Jisc INTERNET

Case study: Australia TNE data

- » 109,541 students were studying Australian TNE programs in 2015-16
- » Over 1,000 TNE programs delivered through partnerships or IBCs
- » 14 International Branch Campuses (IBCs)

Top Host Countries

- » Singapore (28,692)
- » China (19,341)
- » Malaysia (18,761)
- » Hong Kong (5,361)
- » Vietnam (6,934)

Data sources: Australian Government, Department of Education and Training
OBHE and C-BERT IBC report

Data source: Jisc with data/material from Australian Government, Department of Education and Training, OBHE and C-Bert IBC Report
Web image extracted from a power point presentation by Jisc:
<https://apan.net/meetings/apan45/files/36/36-01-04-01.pdf>
(Access Date: 8 May 2018).

Australia's growth in TNE programs over a 5-year period (2010-2015) from major source countries is summarized in Table 8, p. 178. The level of interest in TNE can be seen in the way in which Jisc gathers country specific data. Refer Visual Aid 14 above which shows more recent data on student numbers in Australian TNE programs. In 2013, Boston Consulting Group presented data on Australia's IBCs abroad – refer Chart 13, p.180. Table 9, p. 182 shows the large

⁴³⁸ Lacy, Croucher, Brett and Mueller, *op. cit.*, p. 10.

volume of programs (821) offered by Australian institutions in overseas markets.



From viewing data on the AEI and Austrade websites it appears that at least 1/4 of Australian universities are active in TNE programs. Australia has been highly successful in delivering programs offshore – in 2011 there were more than 80,000 students enrolled offshore in higher education programs and more than 65,000 enrolled in vocational education and training (VET) programs.⁴³⁹ This is not surprising given Australia's preference for neoliberal policies which have come with reduced

public funding for higher education while promoting privatization.⁴⁴⁰

Among a range of developments in Australian higher education over the last 15-20 years, the following three have direct relevance to this research project: continued growth in international students (Australia's international student numbers went from a few thousand in the 1980s to 292,352 in 2015), emerging digital and information technology such as MOOCs and the opening up of

⁴³⁹ <http://www.austrade.gov.au/Education/Services/Transnational-education> (accessed 15 July 2017)

⁴⁴⁰ Lacy, Croucher, Brett and Mueller, *op. cit.*, p. 14.

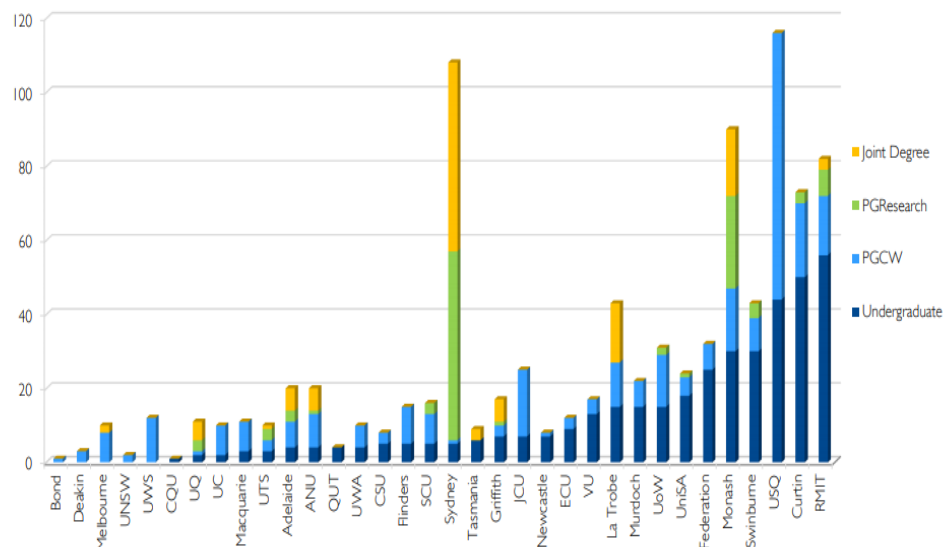
overseas IBCs by Australian universities which now enroll tens of thousands of students each year.⁴⁴¹

Australian universities also undertake substantial work in developing partnerships which support TNE activities. For example, at Visual Aid 15, p.183 is information about the partnerships developed by Victoria University in Melbourne to promote its TNE programs.

TABLE 9: Number of Offshore Programs of Australian Universities as of April 2014

Offshore Campuses

There are 821 programs offered by Australian universities offshore, delivered almost exclusively offshore for duration of between six months to five years. Ten universities provide offshore programs by distance education and fourteen deliver some complement of the offshore course in Australia. Most universities provide undergraduate courses are part of their offshore program, while five universities are exclusively dedicated to offshore delivery of postgraduate coursework (*Figure 1*). The vast majority are delivered in partnership with an international institution, however, there are currently 31 offshore Australian university campuses (listed in Table 1).



Data source: Universities Australia

Web Image extracted from:

<https://www.universitiesaustralia.edu.au/ArticleDocuments/188/LINKS%202014%20Offshore%20Programs%20FINAL.pdf.aspx>

(Access Date 11 November 2017)

One of the overall objectives within the multilateral engagement of AEI, the Australian Government's agency set up to support the activities of Australian

⁴⁴¹ *Ibid.*, p. 25.

universities in their internationalization activities `is to work cooperatively to build sustainable, globally connected and internationally influential education and training systems in the Asia Pacific region.⁴⁴²

VISUAL AID 15: Victoria University of Technology's International Partnerships

The screenshot displays the Victoria University of Technology (VU) website's 'International delivery partnerships' page. The page features a navigation menu with options like 'VU Home', 'Current students', 'Staff', 'Researchers', 'Alumni', 'Library', 'Campuses', 'Contact us', 'Login', and a search icon. Below the navigation, there are dropdown menus for 'Study at VU', 'Industry', 'Research', and 'About VU'. The main content area is titled 'About VU' and includes a sub-section for 'International delivery partnerships'. This section provides an overview of VU's role as a provider of Australian qualifications outside Australia, mentioning its history of transnational education partnerships in Asia since 1997. It also lists the types of courses offered (English language, diplomas, bachelors, and masters) and notes that VU is ranked in the top 2% of universities worldwide according to THE World University Rankings 2018. A map of Asia highlights various partner institutions with callouts for their names and the year of partnership. A list of partner institutions is provided, including Liaoning University (Shenyang, China), Central University of Finance & Economics (Beijing, China), Henan University (Kai Feng, China), City College Muizhou (China), Hanoi University (Hanoi, Vietnam), National School of Business Management (Sri Lanka), Sunway College (Malaysia), and Lithan Academy (Singapore). The page also includes a sidebar with navigation links for 'In this section' such as 'Vision, mission & strategy', 'University profile', 'University of the West', 'Community partnerships & engagement', 'International engagement', and 'International delivery partnerships'. The 'International delivery partnerships' section lists several partner institutions: Central University of Finance and Economics, Hanoi University, Henan University, Liaoning University, Lithan Academy, Sunway College, and National School of Business.

Web Image extracted from:
<https://www.vu.edu.au/about-vu/international-engagement/international-delivery-partnerships>
 (Access Date 19 August 2017).

In 2012, Andrew Robb, an Opposition Spokesperson in Australia, stated that `Australia's international student industry has the potential to grow to a mind-boggling 10 million students within 10 years, from fewer than 700,000 today, with much of the growth in students being taught offshore through online platforms.⁴⁴³ Robb stated that students would likely spend 6-12 months of a 3

⁴⁴² Department of Education, Employment and Workplace Relations. *New AEI – A Discussion Starter*. An Australian Government Report produced by the International Group, Department of Education, Employment and Workplace Relations, Canberra, March 2010.

⁴⁴³ Andrew Trounsan. *Andrew Robb Predicts 10 Million International Students within 10 Years*. The Australian Online, May 19, 2012.

year degree program in Australia, thereby, placing an emphasis on TNE. However, data available does not indicate that Australian IBCs operating abroad are consistent in this approach of requiring TNE students to study in Australia for part of their study. The evidence suggests that most Australian IBCs do not require study in Australia.

Education is the third largest export industry in Australia. In 2015 international education contributed 19 billion Australian dollars to the economy.⁴⁴⁴ Table 10, p. 185, provides the distribution of onshore and offshore students across Australia in 2016. Table 11, p. 186 has been compiled from the Australian Government's original dataset and shows the onshore and offshore student numbers over a 5 year period. The data indicates that TNE student numbers to universities decreased for the first time in 2015 and 2016 whereas onshore international students had a drop in 2012 but increased again from 2013. Official TNE data for subsequent years was not available but advice from the Department of Employment and Training is that TNE student numbers (i) did decrease for two years and one reason for this was the entry of a number of competitors into the TNE market; (ii) the TNE data on non-university higher education is not readily available and in some cases goes unreported; and (iii) regulations in relation to TNE programs increased in a number of countries particularly China.

In a presentation to the OBHE Global Forum in Malaysia in 2016, Ziguras stated that the reason for the drop in Australian TNE student numbers was the increased competition from local providers as well as UK universities who are able to provide more credit for study with partners, protectionist policies/regulatory issues especially in China, India and Indonesia as well as difficulty in obtaining accreditation in some cases.⁴⁴⁵ It is worth noting also that Australia received negative publicity in the Asian region for the closure of some

⁴⁴⁴ <https://nsie.education.gov.au/node/26> (accessed 18 March 2018)

⁴⁴⁵ C. Ziguras. *The Changing Face of Australian Transnational Education*. Presentation to the Observatory on Borderless Higher Education Global Forum Kuala Lumpur, 9-11 November 2016. Slide 2. Also available at: http://www.obhe.ac.uk/documents/view_details?id=1039 (accessed 19 January 2018)

**TABLE 10: 2016 ONSHORE AND OFFSHORE ENROLMENTS
AT AUSTRALIAN HIGHER EDUCATION INSTITUTIONS**

State/Institution	All Students		
	Onshore	Offshore	TOTAL
New South Wales			
Universities	83,394	12,151	95,545
Non-University Higher Education Institutions	13,405	2,290	15,695
Victoria			
Universities	83,511	37,385	120,896
Non-University Higher Education Institutions	20,326	321	20,647
Queensland			
Universities	46,065	3,948	50,013
Non-University Higher Education Institutions	2,126	0	2,126
Western Australia			
Universities	18,519	15,727	34,246
Non-University Higher Education Institutions	2,371	0	2,371
South Australia			
Universities (does not include private unis)	17,323	3,139	20,462
Private Universities (Table C) and Non-Universities	3,449	2,766	6,215
Tasmania			
University (only one uni in Tasmania)	4,084	1,396	5,480
Non-University Higher Education Institutions	0	0	0
Northern Territory			
University (only one uni in Northern Territory)	2,632	0	2,632
Australian Capital Territory			
Universities	10,548	731	11,279
Non-University Higher Education Institutions	< 5	0	< 5
Multi-State			
Universities	3,303	101	3,404
Non-University Higher Education Institutions	np	0	np
TOTAL	311,181	79,955	391,136

Data extracted from:

Australian Government Student Statistics compiled by the Department of Education and Training

<https://www.education.gov.au/student-data> (accessed 11 August 2017)

(Access Date 11 August 2017).

IBCs and this would have had some impact on TNE student numbers. At the same time Visual Aid 16, p. 186 indicates that Australia's school sector's TNE

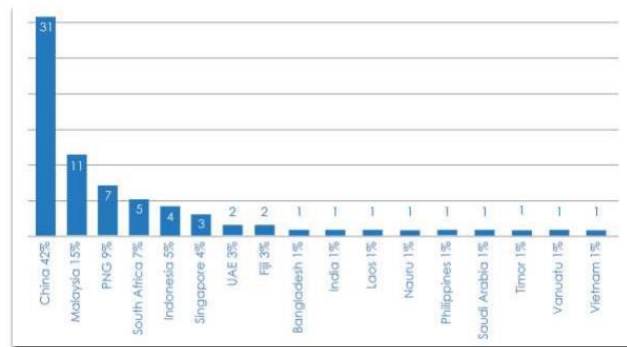
TABLE 11: Onshore and Offshore Enrolments in Australia 2011-2016

YEAR	Onshore	Offshore	TOTAL
2016	311,181	79,955	391,136
2015	280,102	83,196	363,298
2014	261,687	85,873	347,560
2013	243,617	84,785	328,402
2012	241,144	82,468	323,612
2011	252,119	80,458	332,577

Data compiled from Australian Government student data statistics compiled by the Department of Department of Employment and Training
<https://www.education.gov.au/student-data>
 (accessed 11 August 2017)

VISUAL AID 16: Australia's TNE Secondary School Sector

Australian transnational secondary education



In 2015, there were 74 offshore schools formally licensed/franchised or approved to teach Australian school curricula, and growing fast

Mainly at upper secondary level, in State-based matriculation programs, both public and private schools

Source: Peter Burgess, Transnational Education and the Australian Schools Sector, International Education Association of Australia, 2016



Web image extracted from 'The Changing Face of Australia's Transnational Education' presented by Ziguras to the OBHE Global Forum 'Brain Gain: Charting the Impact and Future of TNE' from 9-11 November 2015, Kuala Lumpur, Malaysia.

http://www.obhe.ac.uk/documents/view_details?id=1039

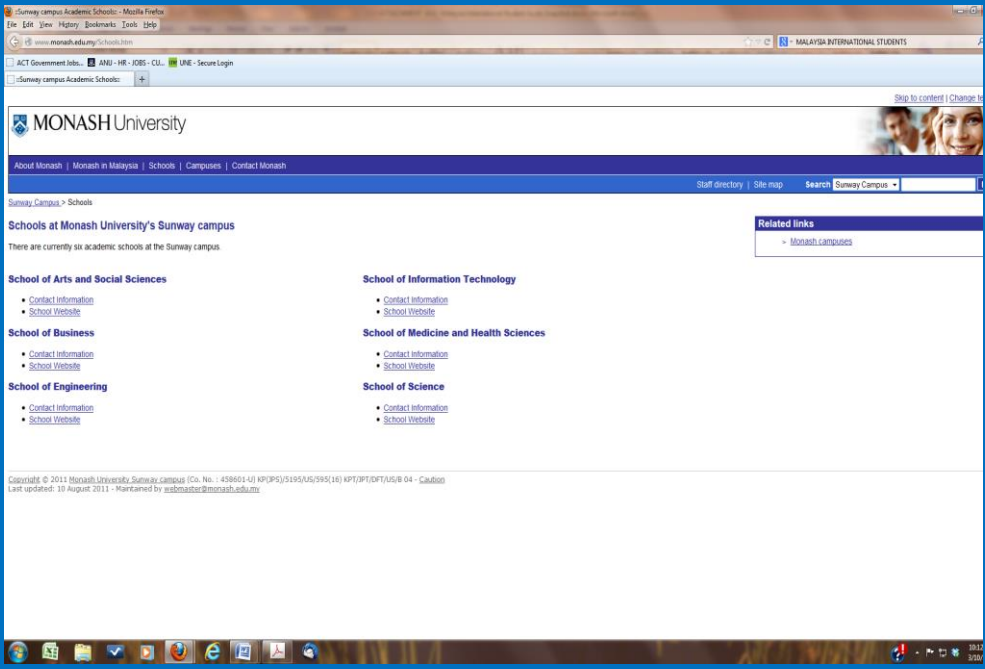
(Access Date 14 December 2017).

activities have been growing rapidly. It is important to note that the TNE data that is currently available through the Australian Department of Education and Training does not provide a comprehensive snapshot of Australia's TNE activity in the secondary education sector. However, Ziguras's 2016 presentation in Malaysia, stated that in 2015 there were 74 offshore schools which were

approved, licensed or franchised to teach Australian school curricula and that this sector was growing fast.⁴⁴⁶

Robb also stated that the `scale of the opportunity in education and TNE was "hard to conceive" but said the Organisation for Economic Co-operation and Development had forecast that by 2030, an extra two billion people would have become middle-class in the Asia-Pacific, from India to China, and they would be demanding improved education.⁴⁴⁷

VISUAL AID 17: Monash University Malaysian Branch Campus Website Promoting TNE Programs



The screenshot displays the website for Monash University's Sunway campus in Malaysia. The page features a navigation menu with links for 'About Monash', 'Monash in Malaysia', 'Schools', 'Campuses', and 'Contact Monash'. A search bar is located in the top right corner. The main content area is titled 'Schools at Monash University's Sunway campus' and lists six academic schools, each with links for 'Contact Information' and 'School Website':

- School of Arts and Social Sciences
- School of Business
- School of Engineering
- School of Information Technology
- School of Medicine and Health Sciences
- School of Science

A 'Related links' section on the right side of the page includes a link to 'Monash campuses'. The footer contains copyright information for 2011 and the date of the last update: 10 August 2011.

Web image extracted from www.monash.edu.my/Schools.htm (Access Date 14 July 2017)

Some examples of differences in Australian university TNE operations internationally are shown in Visual Aid 17 above and Visual Aid 18 on p. 188. Visual Aid 17 shows Monash University with a full scale branch campus in Malaysia and Visual Aid 18 shows Murdoch University which offers TNE

⁴⁴⁶ *Ibid.*

⁴⁴⁷ Trounsan, *op. cit.*

programs through partnerships in Dubai.

Australia has some history in developing IBC operations over nearly two decades. For example, the University of Wollongong has been in Dubai with an IBC for over 19 years.⁴⁴⁸ In Australia there is an active agenda related to government regulation and/or oversight of TNE. Even when there were over 70,000 students enrolled in Australian university offshore programs, the Australian Government wanted more scrutiny of their overseas operations, with vice-chancellors resisting.⁴⁴⁹

VISUAL AID 18: Murdoch University Promoting TNE Programs

The screenshot shows the Murdoch University website page for Transnational Education (TNE) programs. The page is titled "Transnational education" and is part of the "Future students" section. The main content area is divided into several sections:

- Transnational education:** A section with a heading and a paragraph stating: "With three campuses in Western Australia and transnational partners in Dubai, Singapore and Malaysia, a degree from Murdoch University is more accessible than ever. We are fully committed to being a truly international university engaging with students and communities in both Australia and abroad to offer our degrees in a number of global locations."
- Murdoch University International Study Centre, Dubai:** A section with a heading and a paragraph stating: "Opened in 2008 in partnership with the Global Institute Middle East, Murdoch University International Study Centre, Dubai offers a range of programs in Business, Media, Communication, IT, Environmental Science and Education."
- SMF Institute of Higher Learning:** A section with a heading and a paragraph stating: "SMF Institute of Higher Learning (formerly Sifa Institute of Higher Learning) was established in 2004, with the aim to enhance the human capital development of Singapore's workforce. As one of the leading and larger educational providers in Singapore, SMF Institute strongly advocates education and continuous capacity building of human capital in the region."
- Kaplan Higher Education:** A section with a heading and a paragraph stating: "Kaplan Higher Education is a regional provider in Singapore which provides a range of high-quality, internationally recognised qualifications with a rigorous set of standard operating procedures to ensure quality service."
- KDU University College:** A section with a heading and a paragraph stating: "KDU University College is a pioneer in Malaysian private education which is committed to provide quality education, be it in academics or life in general. KDU believes that people should learn more from people and be inspired by their life's experiences."

The page also includes a navigation menu with links to Home, Research, Courses, Future students, News, Services, Business and Industry, Alumni, and New students. A search bar is located in the top right corner. The footer contains copyright information and contact details.

Web image extracted from
www.murdoch.edu.au/Future-students/International-students/Choosing-Murdoch/Transnational-education/
 (Access Date 14 July 2017)

⁴⁴⁸Julie Hare. *Wollongong eyes off India for campus*. The Australian Online. 19 November 2011.

⁴⁴⁹Campus Review Weekly. *No Pot of Gold at the end of the Offshore Rainbow*. p. 15, vol. 15, n. 24, June 22, 2005.

While Australian universities do offer a number of branch campuses in Asia and Dubai, transnational operations in the main `still are partnerships between an Australian university or other higher education institution and an organisation in the other country.⁴⁵⁰ There are a multitude of reasons for Australia's involvement in TNE including the desire for commercial return.⁴⁵¹ Australian universities' involvement in TNE include cultural understanding; institutional capacity building offshore; providing greater access to education at a better price in countries whose educational systems are constrained as well as research collaboration.

Australia has also attracted overseas universities to its shores including Carnegie Mellon University from Pittsburgh which opened a campus in Adelaide in 2006 with considerable funding received from the South Australian Government. New York University has also visited Sydney to conduct a feasibility study for opening a study center in Australia. More than 40 per cent of NYU students go abroad for a semester or more.⁴⁵² *Not all such ventures to establish TNE facilities in Australia have been successful.* While University College London has successfully established itself, growth at US-based Carnegie Mellon has been modest compared with the \$20 million in state subsidies it received, and British-based Cranfield University has gone home.⁴⁵³ In 2013 the OBHE reported that the US Laureate International Universities Network had commenced recruitment efforts for international students 'with a special focus on Spanish and Latin American international students.'⁴⁵⁴ Laureate has been recruiting students to its 'Torrens University' campus in South Australia since 2013. Visual Aid 19, p. 190 shows how Torrens University promotes its campus

⁴⁵⁰

www.auqa.edu.au/files/otherpublications/quality_assurance_of_transnational_higher_education_the_experiences_of_australia_and_india.pdf p.46 (accessed 19 March 2013).

⁴⁵¹

www.auqa.edu.au/files/otherpublications/quality_assurance_of_transnational_higher_education_the_experiences_of_australia_and_india.pdf p. 85 (accessed 21 March 2013).

⁴⁵² Bernard Lane. *New York University Eyes Sydney for Study Site*, The Australian Online, 4 May 2011. Also at: <http://www.theaustralian.com.au/higher-education/new-york-university-eyes-sydney-for-study-site/story-e6frcjx-1226049369328> (accessed 19 March 2013)

⁴⁵³ Andrew Trounson. *Red tape cuts US plan for Adelaide university city*. The Australian Online. 26 August 2011.

⁴⁵⁴ http://www.obhe.ac.uk/newsletters/borderless_report_january_2013/he_news_around_world (accessed 19 January 2015)


in South Australia as well as the network of Laureate universities around the globe.

In addition to the Australian Government (mainly through the AEI, Austrade and TESQA), the International Education Association of Australia (IEAA) and Universities Australia (UA) provide a forum for Australian universities to discuss TNE. The IEAA also runs short courses and seminars on TNE. In October 2012 the IEAA conducted a high-level dialogue titled '*Beyond Competition: Cooperation between Australia and the United Kingdom in International Higher Education*' which included discussion on TNE. While the IEAA initiated and managed the activity, it was considered a joint program by the IEAA, the UK Higher Education Unit in Universities UK, the BC and also

Visual Aid 19: Torrens University (Laureate Network) Promoting its International Campus in South Australia
<https://www.torrens.edu.au/about/why-study-with-us>

HOME » ABOUT TORRENS » WHY STUDY WITH US

WHY STUDY AT TORRENS UNIVERSITY?




OUR GLOBAL NETWORK

BE PART OF AN INTERNATIONAL NETWORK

Torrens University Australia is part of [Laureate International Universities](#), a leading international network of quality, innovative institutions of higher education comprised of nearly 70 universities across 23 countries. Torrens' association with Laureate International Universities gives you the opportunity to leverage the network of over 1,000,000 students around the world – including more than 100,000 online students.

[Find out more about Torrens global partnerships](#)



ACCESS OUR NATIONAL CAMPUS NETWORK

Whether you study on campus or online, you can access state-of-the-art Torrens campuses in Adelaide, Sydney, Melbourne and Brisbane. There are no more boring classrooms, instead, we have designed our learning spaces to promote collaboration and engagement, and they're located in convenient and vibrant inner city neighbourhoods.

[See Torrens campuses](#)

Web image extracted from
<https://www.torrens.edu.au/about/why-study-with-us>
 (Access Date 5 October 2018)

the AEI. One could say that these were 'ground breaking' discussions on cooperation in areas of research, data compilation on the internationalization of higher education, student mobility and TNE. The joint program confirmed the interest of universities and their peak organizations in both countries to jointly

pursue a number of priority initiatives, including (where appropriate) with third countries and regions.⁴⁵⁵

3.2 Canada

Canada has had an established network of distance and online education providers offering programs to international students, long before TNE became popular. Most of Canada's work in the TNE space can be considered distance education although more recently Canadians have commenced IBC type arrangements as joint partnerships with local providers. There are six academic institutions in Canada with a strategic focus on distance education and online learning – in Alberta, Newfoundland, and two each in British Columbia and Quebec.⁴⁵⁶ Athabasca, a Canadian university does not have on campus programs and was recognized as offering the world first online MBA program back in 1993.

The Canadian Bureau of International Education (CBIE) has an active interest in TNE and usually has representatives attending most major conferences on TNE. There is plenty of awareness in Canada about TNE. The opportunities for Canadian higher education include transnational education such as branch campuses and ‘virtual mobility’ programs and the market for students in countries that are not capable of meeting the college-aged cohort’s higher education needs.⁴⁵⁷ Opportunities for TNE are well recognized in Canada but so also is the issue of quality. For example, in an online article it stated that ‘In an increasingly globalized world, a transnational education is often seen as valuable capital, but the students don't necessarily need to travel outside their own borders to access a Canadian education’ and at the same time the article suggested caution because of Australia’s experience and refers to ‘the risk to Canadian postsecondary institutions of setting up shop abroad is diluting the reputation of the programs – something Australia learned the hard way’.⁴⁵⁸

⁴⁵⁵ IEAA. *Op cit.* p. 14.

⁴⁵⁶ Lawton, *op. cit.*

⁴⁵⁷ Meggan Madden, *Going Global? A Guide to the Twists and Turns of Global Mobility in Higher Education*. Academic Matters Online. 3 October 2010. Also available at: <https://academicmatters.ca/going-global-a-guide-to-the-twists-and-turns-of-global-mobility-in-higher-education/> (accessed 15 March 2014)

⁴⁵⁸ Daina Lawrence. *Canadian schools are taking the classroom to where the students live*. The Globe and Mail Online. 16 June 2015. Also available at:

Despite the 'caution', as per a survey conducted by the Association of Universities and Colleges of Canada, 15% of Canadian universities are offering courses to international students via partnerships offshore and 44% of these arrangements are based in China⁴⁵⁹ and in 2018, Ryerson University from Toronto announced it would work with a private provider, Canadian University Dubai (accredited locally in Dubai) to offer a Ryerson University degree program.⁴⁶⁰ These arrangements are currently being set up.

The difficulty for Canada in commencing TNE is the lack of a 'whole of government' approach given that the role of education is passed on to individual Provinces making it difficult for the Federal Government to become involved in internationalization. While most provinces have developed some form of international education policy or invested in specific initiatives, these initiatives have emerged independently of one another without an overall national framework or policy context or a "Canadian" brand.⁴⁶¹ While provinces and territories in Canada make many of the decisions on education, 'institutions hold a high degree of autonomy within higher education'.⁴⁶² Despite this, in 2014 for the very first time, Canada launched its International Education Strategy for the education sector in which the 'federal government, which spearheaded the strategy, holds jurisdiction and responsibilities in international relations, development cooperation, scientific research, workforce development and a host of other realms that intersect the world of international education'.⁴⁶³ Canada's strengths lie in cooperative agreements with many developing countries but to date there is very little data available centrally on what these agreements consist

<https://www.theglobeandmail.com/report-on-business/international-business/canadian-schools-are-taking-the-classroom-to-where-the-students-live/article24966427/> (accessed 11 May 2017)

⁴⁵⁹ AUCC. *Canada's Universities in the World – AUCC Internationalization Survey*. A Report produced by the AUCC, Ottawa, p. 17, 2014. Also available at: <https://www.univcan.ca/wp-content/uploads/2015/07/internationalization-survey-2014.pdf> (accessed 18 Apr 2018)

⁴⁶⁰ <http://qswownews.com/canadian-university-dubai-ryerson-develop-unique-new-program/> (accessed 17 May 2018)

⁴⁶¹ Roopa Desai Trilokekar and Glen A. Jones. Internationalizing Canada's Universities. *International Higher Education eJournal*, p. 13. Also at: <https://ejournals.bc.edu/ojs/index.php/ihe/article/viewFile/7942/7093> (accessed 17 May 2018)

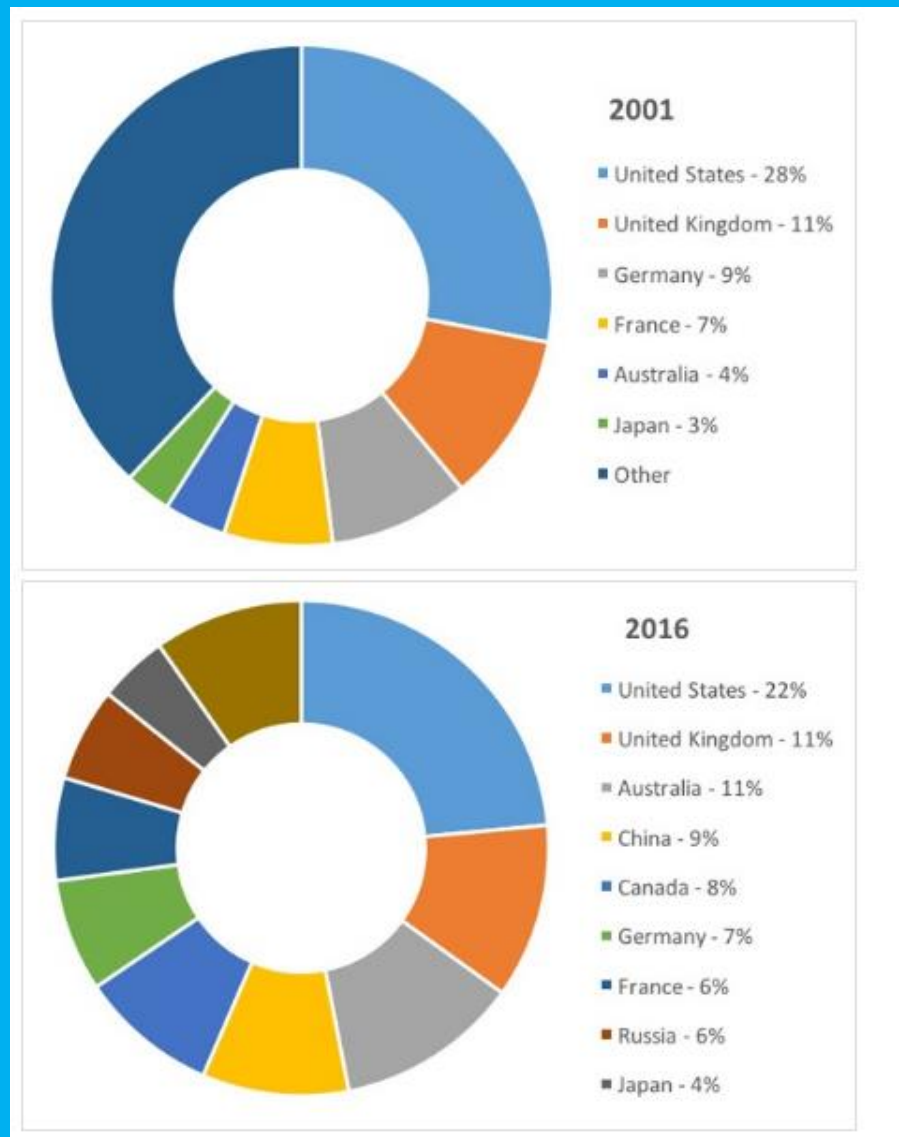
⁴⁶² Karen McBride, Jennifer Humphries and Janine Knight-Grofe. 'Canada', in *Internationalisation of Higher Education*, a Study for the Director General for Internal Policies, European Union, July 2015. P. 205. Also at: [http://www.europarl.europa.eu/RegData/etudes/STUD/2015/540370/IPOL_STU\(2015\)540370_EN.pdf](http://www.europarl.europa.eu/RegData/etudes/STUD/2015/540370/IPOL_STU(2015)540370_EN.pdf) (accessed 14 May 2018)

⁴⁶³ *Ibid.*, p. 208.

of in terms of any TNE activity. An example is Brazil where Canadian universities collectively have 110 agreements.⁴⁶⁴

Despite the lack of comprehensive data on TNE activity carried out by Canadian institutions, Canada has overtaken Germany and France in attracting

Visual Aid 20: Canada Overtakes France and Germany in Capturing a Larger Share of the Global Market for International Students



Data presented by ICEF Monitor with material from Project Atlas, Institute of International Education

Web image extracted from:

<http://monitor.icef.com/2017/04/measuring-global-market-share-national-targets-international-education/>

(Access Date 5 October 2018)

international students to its shores. Data from the IIE suggests that Canada is

⁴⁶⁴ <http://www.aucc.ca/policy-issues/global-connections/brazil/> (accessed 11 June 2018)

now in the top five countries attracting international students. Refer Visual Aid 20 above.

3.3 China

There are several elements to the Chinese internationalization policy:

- China has foreign institutions operating in China either as IBCs such as the University of Nottingham's Ningbo Campus, or it has twinning types of arrangements whereby foreign degrees are offered through local institutions;
- China has been looking at setting up campuses abroad and already opened its first campus with Soochow University in Laos in 2012;
- China actively encourages and sends students abroad for further study; and
- China also brings in overseas students to its own campuses in China. The country hopes to become a major destination for international students, with some 293,000 currently enrolled in its universities - more than 20,000 of them from Africa.⁴⁶⁵


China's strategy of offering scholarships to international students from some developing regions of the world such as Africa and its low tuition fees and living costs make it an attractive proposition for international students from poorer nations. A 2017 IIE Report indicates that the Chinese Government through a scholarship program for students to come and study, has greatly helped its international strategy of drawing overseas students to Chinese campuses. The IIE report states that: 'To implement this policy in China, universities have been entrusted to recruit students and grant government scholarships to international students.'⁴⁶⁶ What is unclear however, is whether the Chinese Government is permitting these scholarships to be used by incoming full degree students participating in TNE programs in China.

⁴⁶⁵ Ryan Brown. 'African Students see China as a Path to a Prosperous Future'. The Chronicle of Higher Education Online. 10 September 2012. Also at: http://chronicle.com/article/Many-Africans-Look-to-China/134246/?cid=gn&utm_source=gn&utm_medium=en (accessed 11 May 2013)

⁴⁶⁶ <http://www.iie.org/Research-and-Publications/Publications-and-Reports/IIE-Bookstore/US-Students-In-Overseas-Degree-Programs> - report available on US Students in Overseas Degree Programs – (accessed 10 December 2017)

For a foreign university to set up in China, it is required to undergo all the checks and balances of the country's education system. China supported the development of one of the most state-of-the-art sustainability labs for the University of Nottingham's Ningbo campus.⁴⁶⁷ Refer Visual Aid 21 below.

VISUAL AID 21: The University of Nottingham's International Branch Campus in China.



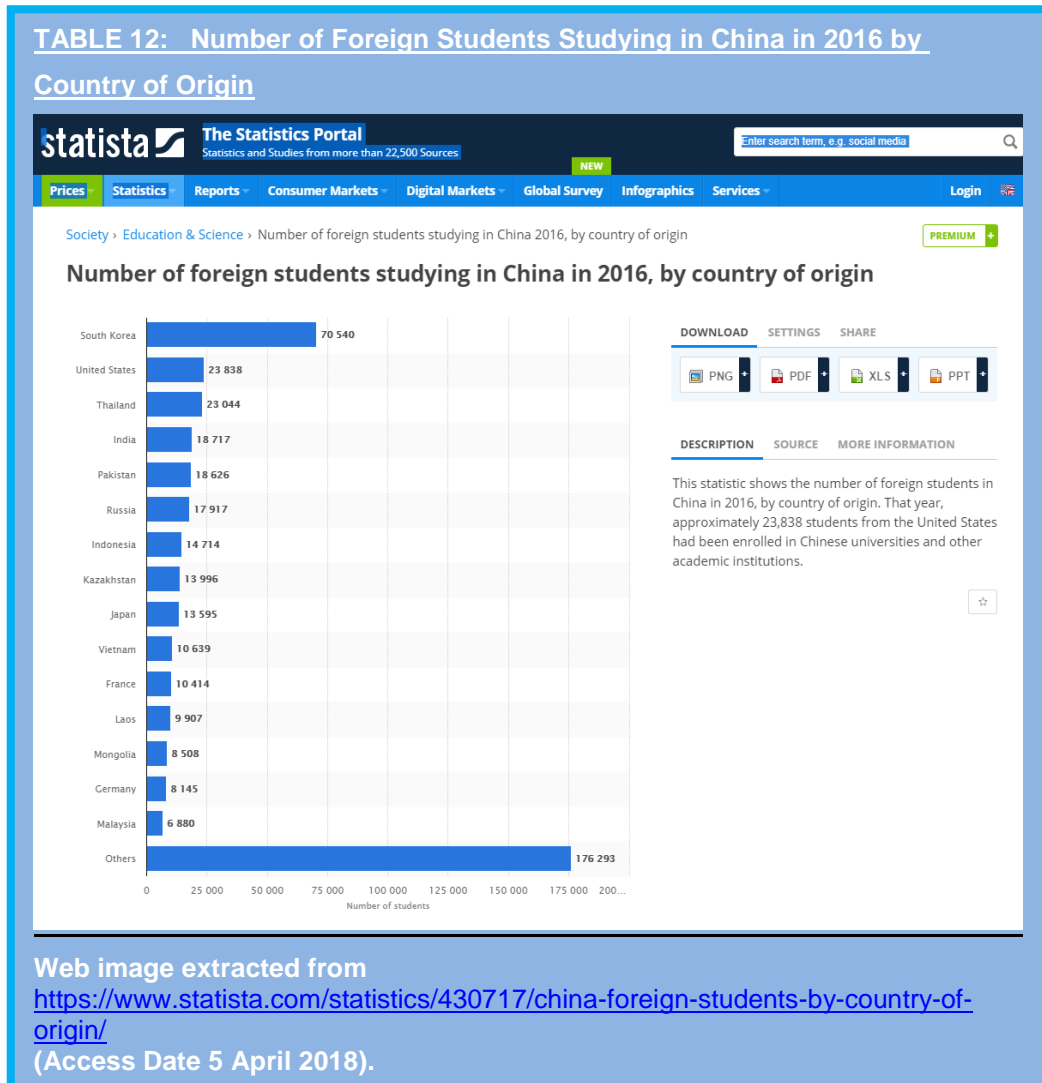
Web image extracted from:
www.nottingham.edu.cn/en/admissions/studywithus.aspx
 (Access Date 11 December 2016)

China is not just an importer of TNE. China's first IBC with Soochow University opened in Laos in 2012 in a temporary campus facility whilst waiting for the building of a large-scale campus. Little has been made of the undertaking, but as well as being Laos' first foreign campus, it marks the first time a Chinese university (as opposed to the government-linked Confucius Institute) has opened a branch abroad.⁴⁶⁸ As of 2018, China had IBCs operating abroad in Laos, Malaysia and Thailand.

⁴⁶⁷ Jason Lane and Kevin Kinser. *Looking Ahead: 5 International Trends for 2013*. The Chronicle of Higher Education Online. 2 January 2013. Also at: http://chronicle.com/blogs/worldwise/looking-ahead-5-international-trends-for-2013/31279?cid=pm&utm_source=pm&utm_medium=en (accessed 15 September 2016)

⁴⁶⁸ Patrick Boehler. 'First overseas branch campus set to open in Laos'. University World News Online. 07 October 2012. Also at: <http://www.universityworldnews.com/article.php?story=20121004161503207> (accessed 19 June 2015)

In 2016 China attracted 440,000 international students to its campuses (including IBCs). This is a growth of 35% over 2012.⁴⁶⁹ It is important to also note that China is investing in its trading partners. For example, within a period of 8 years (2003-2011), China had increased its investment in Africa to \$12 billion and over the past decade, China has risen to become Africa's single largest trading partner, and its stake in the continent is mushrooming.⁴⁷⁰



⁴⁶⁹ <https://chinapower.csis.org/china-international-students/> (extracted 27 December 2017.)

⁴⁷⁰ Brown, *op. cit.*

3.4 Dubai

The United Arab Emirates (UAE) is home to 37 IBCs, which serve its large expatriate population.⁴⁷¹ It is also one of the most liberal and modern countries in the Persian Gulf.⁴⁷² Students from countries such as China, India, Pakistan, Bangladesh and other Middle Eastern and Asian countries study in Dubai. The attraction of Dubai as a hub for studying foreign degrees through the transnational mode is great for many expatriate communities who work in the region and feel that rather than send their children to distant shores they would keep their children close by. This avoids any difficulties with visas, the concerns related to settling into another way of life plus the cost of travel, tuition and housing. An example, of a foreign university offering programs in Dubai is at Visual Aid 22, p. 199.

In 2011, Dr Abdullah Al Karam, Director General of Dubai's Knowledge and Human Development Authority (KHDA) when speaking to the QS Middle East and Africa Professional Leaders in Education (QS-MAPLE) Conference stressed the differences between the traditional overseas study program where students who go abroad to study are vulnerable to global factors such as the political, legislative and financial issues of another country, compared to the TNE model of education delivery where students remain within their country or region and have far greater access to stable systems. Dr Al Karam also referred to the 11 September 2001 terrorist attacks in New York and the vulnerability of international students particularly those originating from the Middle East in the US.⁴⁷³

In March 2013 the British Council's annual 'Go Global' Conference was held in Dubai. Mr Nigel Banister, Chief Global Officer of Manchester Business School, part of the University of Manchester, which has a Middle East centre in Dubai, stated that while TNE in many parts of the world provided local access

⁴⁷¹ Ursula Lindsey. 'Despite Limits on Freedom, Foreign Campuses Retain Value, Speakers Say'. The Chronicle of Higher Education Online. 5 March 2013. Also at: http://chronicle.com/article/Despite-Limits-on-Freedom/137703/?cid=pm&utm_source=pm&utm_medium=en (accessed 14 May 2014)

⁴⁷² <https://www.chronicle.com/academicDestination/United-Arab-Emirates/60/> (access 9 October 2018).

⁴⁷³ Rania Moussly. 'Dubai's tertiary education model praised'. Gulf News Education Online. 1 May 2011. Also at: <http://gulfnnews.com/news/gulf/uae/education/dubai-s-tertiary-education-model-praised-1.801818> (accessed 26 August 2013)

to the world's best programs 'multicultural environments such as Dubai, which is a regional education hub' provide opportunities that 'also enriches the learning experience for students and the international faculty who teach the programmes'.⁴⁷⁴

More recently, Dubai's progress is summed up by its announcement in 2018 that international students 'who are performing "exceptionally well" will be eligible for a 10-year residency visa and other students can receive a five-year visa'.⁴⁷⁵
Dubai is doing all it can to recruit and retain international students.

Dubai International Academic City (DIAC) with BMI Media invests in market research on TNE. In 2017, the research indicated that quality of education and employment prospects were the main drivers of overseas study. Specific to the UAE, the study revealed that the UAE is more popular than Switzerland, Brazil, Mexico, South Korea, Singapore and China as a study destination and that it ranked as a preferred destination to Singapore and South Korea.⁴⁷⁶

The UAE government is active internationally and 'actively seeking international partnerships in higher education' to increase international MBA students from 85 countries. Only 50% of the university's students were residents of Dubai. A further matter of interest is that the University of Manchester's MBA program was being offered through an 'international network' (of TNE arrangements) in Hong Kong, Singapore, Shanghai, Brazil, Miami and the UAE. 'During the 2016-2017 academic year, 27 international branch campuses from 12 countries were operating in Dubai—including UK, Australia, India, US, Russia, Austria, Lebanon, Pakistan, Iran, France, Canada, and Ireland.'⁴⁷⁷

Dubai's growth in international student numbers has been phenomenal. Recruitment agencies are also very actively promoting Dubai as a study

⁴⁷⁴ <http://www.diacedu.ae/media-center/latest-news/1-2011/437-dubai-well-placed-to-support-transnational-education> (accessed 14 April 2018)

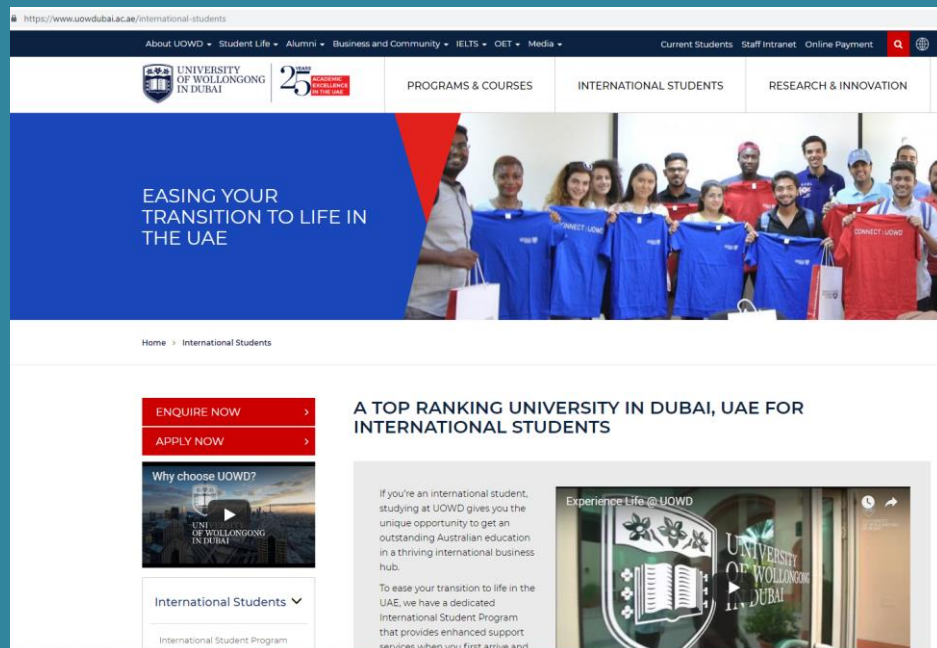
⁴⁷⁵ Sarwat Nasir. 'More Foreign Students Come from India: Dubai Study'. Khaleej Times Online. 9 October 2018. Also at: <https://www.khaleejtimes.com/news/general/more-foreign-students-come-from-india-dubai-study> (accessed 10 October 2018)

⁴⁷⁶ <http://www.diacedu.ae/news/transnational-students-cite-employment-prospects-quality-of-education-as-key-drivers-for-overseas-study/> (accessed 10 October 2018)

⁴⁷⁷ <http://digitalllearning.eletsonline.com/2017/11/dubai-worlds-education-hub/> (accessed 11 February 2018)

destination. Refer Visual Aid 23, p. 200. UNESCO reports that the number of foreign students in the Emirates grew from about 48,600 in 2011 to nearly 74,000 in 2015 – a total increase of 51% in just five years.⁴⁷⁸ Given the number

VISUAL AID 22: The University of Wollongong's International Branch Campus in Dubai



Web image extracted from:
<https://www.uowdubai.ac.ae/international-students>
 (Access Date 9 September 2017).

of private schools in Dubai and the number of foreign nationals enrolled in those schools, compared to native Emiratis, it is not surprising that foreign universities in Dubai have instant access to international students who 'feed' into the university sector after completing their private school study in Dubai. Refer Visual Aid 24, p. 201.

Dubai has invested heavily in ensuring quality of its education system as well as introduced a framework of quality assurance of foreign programs. The KHDA was established in 2007 and the University Quality Assurance International Board (UQAID) established in 2008 'to provide greater oversight and quality assurance for higher education in the Emirates'.⁴⁷⁹

⁴⁷⁸ <http://monitor.icef.com/2017/10/dubai-strengthens-position-regional-education-hub/> (accessed 10 October 2018)

⁴⁷⁹ *Ibid.*

VISUAL AID 23: A Recruitment Agency Promotes Dubai as a Study Destination for International Students

Home >> Study Abroad >> Dubai

Study Abroad in Dubai

Like 53

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Mix It!



There is much more to the vibrant and pulsating city of Dubai than its Gold Souk, dazzling deserts and breathtaking architectural beauty. And the one avenue that is fast emerging as Dubai's most important specialty is its prominence as an **education hub**.

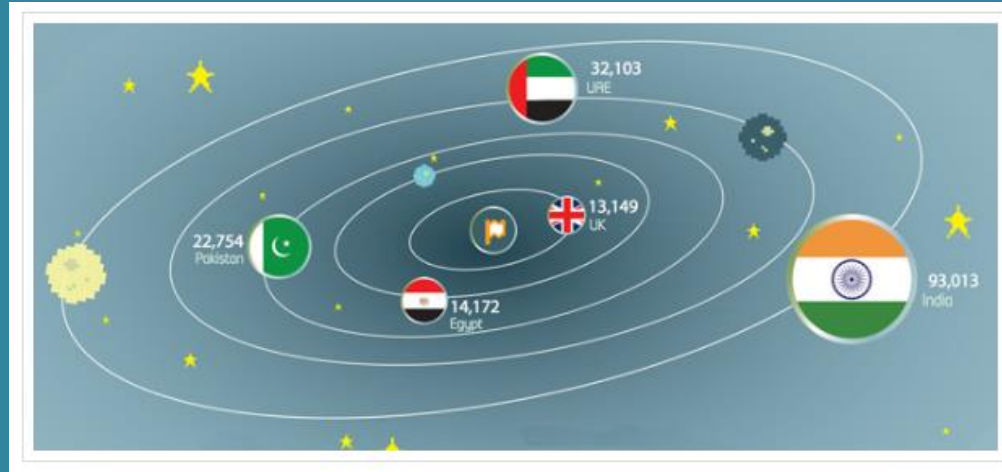
Web image extracted from:

<http://www.indiaeducation.net/studyabroad/dubai/>

(Access Date 9 September 2017).

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VISUAL AID 24: Leading Nationalities Enrolled in Private K-12 Schools in Dubai Creating an Instant Market for Foreign Universities Operating Branch Campuses in Dubai



Data and Web image extracted from ICEF Monitor.

Data compiled for 2016/2017

Original data source: UAE's Knowledge and Human Development Authority (KHDA)

<http://monitor.icef.com/2017/10/dubai-strengthens-position-regional-education-hub/>

(Access Date 19 July 2013).

3.5 France

France has historically had educational ties with the rest of the world through its Alliance Francais where the study of the French language was viewed as a priority for France. The strategy that had been adopted by France 'for the internationalisation of higher education has been built on the principles of cooperation and influence, and recently on attracting highly qualified talent, rather than on purely commercial motives'.⁴⁸⁰ France has also had an interest in development aid including training 'specialists whose skills would then

⁴⁸⁰ Patricia Pol and Andree Surssock, 'France'. In *Internationalisation of Higher Education*, study for the Director General for Internal Policies, European Union, July 2015. P.106. Also at: [http://www.europarl.europa.eu/RegData/etudes/STUD/2015/540370/IPOL_STU\(2015\)540370_EN.pdf](http://www.europarl.europa.eu/RegData/etudes/STUD/2015/540370/IPOL_STU(2015)540370_EN.pdf) (accessed 14 May 2018)

contribute to the swift development of emerging countries, mainly in Eastern Europe and Asia.⁴⁸¹

In 1998 France committed to engaging more aggressively to promote its higher education sector internationally. As a result of the creation of the Edu France agency `there has been a steady increase in the number of overseas students in France and a growth of projects exporting French higher education overseas.⁴⁸² Additionally France through The Francophone University Agency (AUF) and also the Ministry of Foreign and European Affairs (MAEE) undertakes many collaborative programs within francophone countries and in 2007 internationally France supported `56 francophone programs which represented 6400 students'.⁴⁸³ France already has a developed distance learning platform through its digital campuses and it is important to note that learning through distance provides the same status for the qualification as traditional face to face classroom study. The model of digital campus learning means that students can learn in their local regions `but have access to AUF's resource centers as well as locally arranged tutor services.⁴⁸⁴

Despite its distance learning platforms and its historical ties through the Alliance Francais, France has been seen as lagging in TNE and in 2016 announced a new national strategy to gain market share in the TNE space. Visual Aid 20, p. 193 indicates that in 2001, France was in the top five countries hosting international students but by 2016, Australia, China and Canada had surpassed it.

A 2016 report titled *L 'enseignement superieur francais par-dela les frontieres: L 'urgenced' unestrategie* (*French Higher Education Across Borders: The Urgent Need for a Strategy*), confirmed that over 600 French programs were offered abroad with 50 branch campuses and these were usually in countries

⁴⁸¹ Academic Cooperation Association. '*Transnational Education in the European Context – Provision, Approaches and Policies*'. Report produced by the Academic Cooperation Association (ACA) as part of the EU Global Promotion Project funded by the European Commission. P. 10. Also at <http://www.aca-secretariat.be/index.php?id=188> (accessed 11 September 2018)

⁴⁸² *Ibid.*

⁴⁸³ *Ibid.*

⁴⁸⁴ *Ibid.*

where France had ‘former colonial interest or other strong historical ties’.⁴⁸⁵ (It was not clear whether the reference to branch campuses was in fact twinning and/or other joint arrangements given that France seldom gets a mention amongst researchers when it comes to IBCs in operation worldwide.) The report refers to the UK and Australia’s efforts in TNE and states that while there were financial reasons for the UK and Australia pursuing TNE and that it was important for France to develop a TNE framework given that in recent times France has been provided with fewer resources for its education sector. The Report also argued that France was lagging behind other countries in distance learning.⁴⁸⁶

As of 2015 France had 37,000 TNE students.⁴⁸⁷

3.6 Hong Kong

TNE in Hong Kong has grown out of market demand.⁴⁸⁸ In Hong Kong there is now an emphasis on growing its educational sector and it plans to invest \$HK54 billion to make education the biggest priority and to become an education hub for the region. As 20 per cent of higher education students are non-locals, the education sector is seen as booming.⁴⁸⁹ Visual Aid 25, p. 204 lists Hong Kong’s attractiveness as a TNE player and Visual Aid 26, p. 205 lists the history of IBCs and other TNE arrangements in HK.

TNE is now attracting students not just from developing countries but also from developed countries to Hong Kong. Hong Kong has always attracted numbers of international students due to its role as a tourist destination; most people

⁴⁸⁵ <http://monitor.icef.com/2016/10/french-government-calls-new-strategy-transnational-education/> (accessed 12 January 2018)

⁴⁸⁶ <https://thepienews.com/?s=france+TNE> (accessed 4 February 2018)

⁴⁸⁷ <http://www.strategie.gouv.fr/sites/strategie.gouv.fr/files/atoms/files/dp-anglais-enseignement-superieur-ok.pdf> - pg 3 (accessed 18 April 2017).

⁴⁸⁸ http://www.britishcouncil.org/1215-1245_ts_chan.pdf (accessed 11 October 2015)

⁴⁸⁹ Christina Slade. ‘Asia struts its stuff at global conference’. The Australian Online. 16 March 2011. Also at: <http://www.theaustralian.com.au/higher-education/asia-struts-its-stuff-at-global-conference/story-e6frcjx-1226022045678> (accessed 15 May 2014)

Visual Aid 25: Why Hong Kong as a TNE Market?

HKU SPACE *HKU School of Professional and Continuing Education* <http://hkuspace.hku.hk/>

Benefits of enhancing transnational higher education

- ✓ Offer more pathways for accessing to higher education
- ✓ Uplift the capabilities of human resource to cope with the knowledge-based society
- ✓ Facilitate talents exchange
- ✓ Meet the demand for continuing higher education especially after the accession of mainland China to the World Trade Organization

12

Data extracted from

https://www.hkqf.gov.hk/filemanager/common/events/main/20120927/20120927_02_enoch_young.pdf

(Access Date 4 March 2017)

internationally have heard of Hong Kong; therefore, TNE is simply a new phenomenon which is growing in Hong Kong. Overseas institutions from different countries, including Australia, UK, USA, Canada, New Zealand and the Philippines; Mainland China and Macau have been actively collaborating with local tertiary institutions, or through local partners and representative offices, to provide transnational education courses in Hong Kong to meet the strong and growing demand from Hong Kong students.⁴⁹⁰

Chan of the Federation of Continuing Education in Tertiary Institutions (FCE) states that there have been noticeable changes in the Government's views on transnational programs which can now receive local accreditation in Hong Kong.⁴⁹¹

⁴⁹⁰ <http://www.austrade.gov.au/Export/Export-Markets/Countries/Hong-Kong/Industries/Education> (accessed 13 March 2017)

⁴⁹¹ http://www.britishcouncil.org/1215-1245_ts_chan.pdf (accessed 15 July 2017)

What is unique about the Hong Kong market for TNE programs is that unlike markets in places like Malaysia and the Middle East (Dubai in particular), perceptions of TNE education are somewhat mixed. *Students in Hong Kong consider TNE programs as being inferior in some instances.* Chan of the FCE states that some of the feedback received from TNE students indicates that `if

VISUAL AID 26: International Branch Campuses (IBCs) in Hong Kong

Some universities have established offices/campus in HK

- United Kingdom
 - University of Middlesex (1996)
 - University of Ulster (2000)
 - University of Warwick (2003)
 - University of Oxford (2007)
- Canada
 - University of British Columbia (2005)
 - University of Waterloo (2011)
- Australia
 - University of New South Wales (2009)
- United States
 - Savannah College of Arts and Design (薩凡納藝術設計學院)
- China
 - Jinan University (暨南大學)

Web image extracted from https://www.hkqf.gov.hk/filemanager/common/events/main/20120927/20120927_02_enoch_young.pdf
(Access Date 4 March 2017)

we have no other choice then we will go for an overseas top-up offered here' and `the admission requirements of locally offered overseas top-up programmes are the lowest among all programmes'.⁴⁹² Given that TNE in terms of IBCs is a recent phenomenon on the Hong Kong scene it may be that these concerns may be limited in nature. Despite the reservations from some students, the FCE is promoting Hong Kong's location and position as a hub for TNE. The BC also invests substantial funding into exploring TNE options in the region. In 2011 the BC conducted `The Transnational Education Forum - The Road Ahead' in Hong Kong with participants drawn from Australia, Britain, Hong Kong, Malaysia,

⁴⁹² http://www.britishcouncil.org/1215-1245_ts_chan.pdf (accessed 15 July 2017)

USA and Singapore.⁴⁹³ Unfortunately, the BC does not release its research/conference papers on such programs to those outside of their membership which makes it difficult for researchers to fully understand more recent trends beyond what is reported in the press and/or in abstracts of conference papers or announcements.

To understand the developments with TNE in Hong Kong, it is important to note that 'as at 30 November 2011, there were 419 registered courses and 723 exempted courses offered by higher and professional institutions outside Hong Kong'.⁴⁹⁴ Yet in March 2013 the data from the Hong Kong Education Bureau showed that the number of registered courses had increased from 419 to 458 within a period of 16 months.⁴⁹⁵ The data also showed that the number of exempted courses dropped from 723 to 673 suggesting that some courses may have shifted from the exempted list to the registered courses list. Among its policy objectives the Hong Kong Education Bureau states that it works to 'ensure that no qualified students are denied access to higher and post-secondary education due to a lack of financial means' and it ensures 'that courses leading to non-local higher academic and professional qualifications are conducted by recognised institutions and professional bodies and have attained comparable standards and recognition as similar courses in the home countries concerned'.⁴⁹⁶

3.7 Korea

Korea has been attracting international students since the late 1990s. More recent data available from the Korean Ministry of Education for the period 2001 to 2012 is provided in Table 13, p. 207.

In 2007, the Songdo University Foundation (since 2015 known as the Incheon Global Campus (IGC)) received the go ahead from the Korean Government and

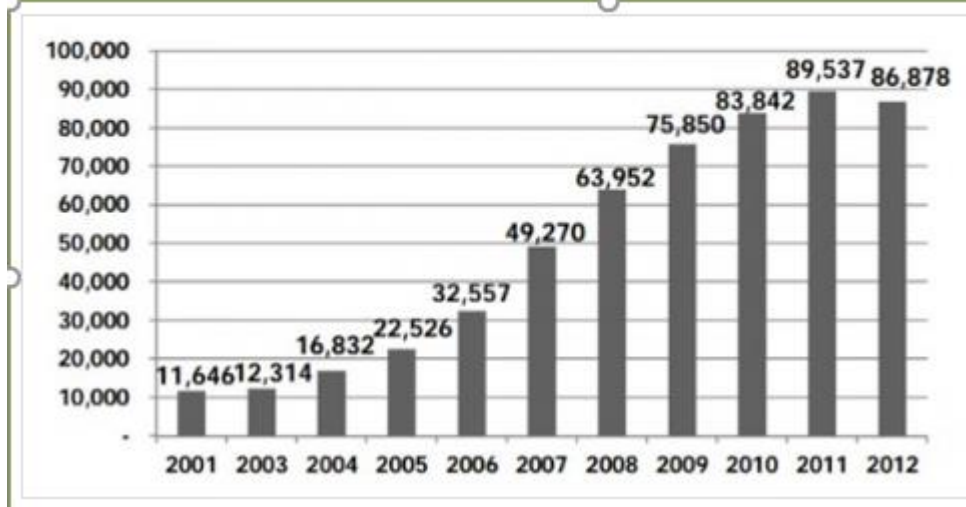
⁴⁹³ <http://www.britishcouncil.org/hongkong-education-transnational-education-forum.htm> (accessed 14 February 2014)

⁴⁹⁴ <http://www.austrade.gov.au/Export/Export-Markets/Countries/Hong-Kong/Industries/Education> (accessed 13 March 2017)

⁴⁹⁵ <http://www.edb.gov.hk/en/edu-system/postsecondary/non-local-higher-professional-edu/course/registered-course.html> (accessed 11 January 2018)

⁴⁹⁶ <http://www.edb.gov.hk/en/edu-system/postsecondary/policy-objectives/index.html> (accessed 19 September 2017)

TABLE 13: 2001-2012 Foreign Student Enrollments in South Korea



Data and image extracted from Korean Ministry of Education (Data sourced by ICEF) <http://monitor.icef.com/2015/10/korea-aims-for-200000-foreign-students-by-2023/> (Access Date 11 December 2017).

Incheon Metropolitan City to establish a world class education hub. In 2008 Stony Brook University in New York (SUNY) signed the first agreement to participate in IGC and in 2012 it opened its campus. In 2014, SUNY was joined by George Mason University (GMU), Ghent University from Belgium and the University of Utah.⁴⁹⁷ The IGC promotes Korea and the IGC as a less expensive option to study than going abroad. Refer Visual Aid 27, p. 208.

Despite IGC's success in attracting 4 international universities to its hub, the cost of setting up infrastructure within IGC has meant that Alfred University which signed a memorandum of understanding stated that due to capital costs it was not able to proceed with its plans. The statement from Alfred University advised that it 'would cost tens of millions of dollars that Alfred would have to raise itself for the equipment it would need to present a full range of programs in material science, glass science, and ceramic engineering—programs that are what we feel they want from us and in which we are among the best in the world.'⁴⁹⁸

⁴⁹⁷ <http://www.igc.or.kr/en/igc01.do> (accessed 18 November 2017)

⁴⁹⁸ Alan Dessoif. *Asia's Burgeoning Higher Education Hubs*. NAFSA International Educator, p. 22, July-August 2012. Also at: https://www.nafsa.org/_/File/_/ie_julaug12_asia.pdf - (accessed 19 November 2017)

VISUAL AID 27: Promoting TNE in Korea as Cost Effective in Comparison to Study in the USA

Why IGC?

Cost-effective education & living expenses

Category	Incheon Global Campus	Top-100 public universities in USA
Average Tuition & Fee	\$20,000	\$32,000
Cost of Dormitory	\$2,000~3,000	Housing Costs \$13,000
Total	\$22,000 (48%)	\$45,000

Shared Campus of World's Prestigious Universities

- Featured as Big University Campus
- Global Human Network
- Cost-effective Education
- Enjoy Hallyu
- Pleasant Residential Conditions
- Foster Global Citizenship

Web image extracted from:
 Incheon Global Campus (IGC) Korea
<http://www.igc.or.kr/en/igc02.do>
 (Access Date 13 December 2017)

In addition to the IGC, the Jeju Global Education City is also ‘emerging as another educational hub in the Jeju Free International City Development Center on Jeju Island off South Korea’s southern coast, with a principal objective, like Songdo’s, to curb the number of Korean students studying abroad, especially for language education.’⁴⁹⁹ *While Jeju appears to have been established some years ago but there seems to be very little interest from western universities in participating in the education hub.* Originally, it was stated that Jeju would accommodate around 9000 students with 12 elementary, middle and high schools operating as well as 10 colleges and universities.⁵⁰⁰ Despite this, to date there have been only a few overseas schools that have shown interest in Jeju.⁵⁰¹

⁴⁹⁹ *Ibid.*, p. 24.

⁵⁰⁰ <http://thewriterpreneur.com/jeju-global-education-city-an-international-education-haven/> (accessed 11 January 2018)

⁵⁰¹ <https://english.jdcenter.com/business/edu/jejuen.cs> (accessed 3 June 2018)

The most recent addition to Jeju has been the ACS International School from Singapore.⁵⁰²

3.8 Malaysia

The internationalization of higher education is an important strategy for the Malaysian government and ‘crafted in view of the transformative developments and shift in the global higher education landscape that require traditional academia to undergo a process of regeneration in order to meet the new challenges and opportunities offered by an increasingly competitive global environment.’⁵⁰³

In Malaysia student access to public higher education is limited. The country could only absorb a small proportion of its potential students within its higher education sector with many students opting to go abroad. *This departure of Malaysian students abroad was costing the Malaysian Government much in outbound currency. This was an unacceptable position for Malaysia and in 1995, the then Prime Minister of Malaysia (Tun Dr Mahathir Mohamed) announced the ‘2020 Vision’ aimed at transforming Malaysian economy and society into a fully developed economy and society by 2020.*⁵⁰⁴ Within the framework of this plan the Government sought to expand access to education and elevate the socio-economic status of Malaysians, control expenditure and make its educational institutions competitive. Furthermore, the plan was to make Malaysia a hub for education in the region. Branch campuses were helping to meet national aspirations, so that fewer Malaysian students had to study abroad, stemming the outflow of currency.⁵⁰⁵ Malaysia was also attracting international students to its shores which meant there was more foreign exchange flowing into Malaysia. Tengku Azian Shahrman, Director of the Education and SRI

⁵⁰² <http://www.jejuweekly.com/news/articleView.html?idxno=5397> (accessed 8 June 2018)

⁵⁰³ Abdul Razak Ahmad, ‘Malaysia’. In ‘*Internationalisation of Higher Education*’, study for the Director General for Internal Policies, European Union, July 2015, p. 241. Also at: [http://www.europarl.europa.eu/RegData/etudes/STUD/2015/540370/IPOL_STU\(2015\)540370_EN.pdf](http://www.europarl.europa.eu/RegData/etudes/STUD/2015/540370/IPOL_STU(2015)540370_EN.pdf) (accessed 27 May 2018)

⁵⁰⁴ Sirat, *op. cit.*, p. 9.

⁵⁰⁵ Forestier and Sharma, *op. cit.*

Human Capital Development, Performance Management and Delivery Unit within the Prime Minister's Department in Malaysia, said that country's policy of becoming a hub was part of a national development plan to propel it to high-income status by 2020.⁵⁰⁶ Malaysia's interest is in economic development and it provides 'grants to branch campuses to support locally relevant research'.⁵⁰⁷

Since the announcement in 1995 of the '2020 Vision', Malaysia has been at the forefront in Asia of exploring educational options including TNE. Given the ever-increasing demand for higher education places among Malaysians, coupled with the Malaysian government's objectives of internationalizing higher education and turning Malaysia into a regional education hub, several regulations have been introduced to facilitate the operation and relocation of TNHE providers in Malaysia.⁵⁰⁸ Malaysia has been drawing in foreign IBCs while also promoting its own education systems abroad and attracting foreign students to its shores. Refer Visual Aids 28, p. 211 and 29, p. 212. Malaysia recently announced that it received applications from 25 foreign universities to set up branch campuses.⁵⁰⁹

Malaysia actively engages in international education forums abroad such as the Malaysian Ministry of Education representatives attending the NAFSA Conference in the USA, CBIE Conference in Canada, the European Association of International Education (EAIE) Conference in Europe and many other international events to promote Malaysia as a study destination. Malaysia is host to seven international branch campuses, with another 15 investors seeking to establish at Iskandar and elsewhere in the country.⁵¹⁰

The Government of Malaysia now actively promotes its domestic universities as well as overseas universities with branch campuses in Malaysia. Malaysia has

⁵⁰⁶ *Ibid.*

⁵⁰⁷ Jason Lane and Kevin Kinser. *Looking Ahead: 5 International Trends for 2013*. *Op. cit.*

⁵⁰⁸ Sirat, *op. cit.*, p. 2.

⁵⁰⁹ Choudaha. *Are you prepared for the arrival of 'glocal' students?* *op. cit.*

⁵¹⁰ Forestier and Sharma, *op. cit.*

Visual Aid 28: Malaysian Government's Website Inviting International Students to Study at Foreign Universities in Malaysia

The screenshot displays the Malaysia University Portal website. At the top, there is a navigation bar with links: Home, Study English in Malaysia, Work and Study, About Us, Contact Us, and For Colleges. Below this is the main header with the text 'Malaysia University Portal' and 'Listing of Universities and Colleges in Malaysia'. A row of icons and text boxes includes: 'Student Guide to Education in Malaysia' (with a Malaysian flag), 'College & Course Search' (with a magnifying glass), 'Course & Fee Comparison' (with fruit icons), and 'Study In Malaysia Support Services' (with a globe). A photo of a group of students is also present.

The main content area is titled 'FOREIGN UNIVERSITIES IN MALAYSIA'. It contains a paragraph explaining that one can earn a foreign bachelor or postgraduate degree without leaving Malaysia through branch campuses. It lists four reputable foreign universities with campuses in Malaysia: Monash University, Curtin University of Technology Sarawak Campus, University of Nottingham Malaysia Campus, and Swinburne University of Technology Sarawak Campus. A note states that unlike twinning programs, these campuses offer a wide range of courses and allow students to study at the host university for one or two semesters while paying branch campus tuition fees.

On the right side, there is a 'MAIN MENU' with links to Home, Faculties and Schools, and About Us. Below it is a 'STUDENT HELPDESK' section with links to Student Services and Contact Our Counselor. Further down is a 'STUDY IN MALAYSIA' section with links to Why Study in Malaysia, Accreditation, Scholarships and financial aid, Students clubs and societies, Library, Student accommodation, Student visa, and Student counseling. At the bottom right, there is a 'UNIVERSITY & COLLEGE LIST' section.

A prominent banner on the right side reads 'We'll Help You To Study In Malaysia' and states: 'We are directly appointed by Universities and Colleges to provide support services to students interested to study in Malaysia. We do not charge students for any of our services. Please do not send money to us. Registration and course fees are made directly to the University or College that you are applying for.' An image of a lifebuoy is shown below this text.

Web image extracted from: <http://www.malaysiauniversity.net/branch-campus/> (Access Date 11 March 2016).

promotion centres in China, Dubai, Indonesia, United Arab Emirates, and Vietnam.⁵¹¹ While UK institutions dominate the Malaysian market with the University of Nottingham in Kuala Lumpur, there is also Edu City in Johor which is next to Singapore and is an education hub shared by eight leading international universities including Newcastle University Medicine Malaysia, University of Southampton Malaysia and University of Reading Malaysia.⁵¹² Malaysia's transnational education hub status is reaffirmed because it is the second most popular destination for Indonesian students.⁵¹³ The aim of the

⁵¹¹ Abdul Razak Ahmad, *op. cit.*, p. 245.

⁵¹² <https://www.gov.uk/government/world-location-news/asean-knowledge-partnership-showcasing-uk-transnational-education-in-malaysia> (accessed 15 October 2014.)

⁵¹³ Choudaha, *op. cit.*

VISUAL AID 29: Malaysian Government Promoting its Universities to International Students

Web image extracted from: www.universitymalaysia.net (Access Date 23 July 2017).

Malaysian Government is to expand its own higher education system and create a hub within South Asia for international students. Visual Aids 59 and 60, p. 262 in Chapter 4 provide information on Malaysia as a TNE receiving country which promotes its own local universities in preference to the IBCs established by overseas universities.

TNE data for Malaysia is presented in Visual 30, p. 213.

Malaysia's vision in internationalization has 'created mutual benefits for both Malaysia and the majority of the participating international universities, as it has promoted the commercialization of education and stimulated strong competition between universities'.⁵¹⁴

Due to the growth in Malaysia of TNE programs the British Council held a symposium which 'brought together the vice-chancellors of over 30 local and foreign universities to look at the direction TNE should take'.⁵¹⁵ The

⁵¹⁴ Guo Jie, 'Xiamen University Malaysia: A Chinese Branch Campus', International Higher Education, Number 95, Fall 2018, Boston, p. 10.

⁵¹⁵ Faridah Begum and Sarah Chew. 'New Directions in Education'. The Star Malaysia Online. 20 May 2007. Also at: <http://thestar.com.my/education/story.asp?file=/2007/5/20/education/17327068> (accessed 11 June 2014)

symposium in Kuala Lumpur entitled *Strategic Dialogue on Transnational* sought further collaboration between the United Kingdom and East Asian countries.

VISUAL AID 30: Malaysia TNE Data – Year 2016

Jisc **INTERNET** **MYREN** **Case study: Malaysia TNE data**

- » **130,277 international students** studying in Malaysia in 2016
- » **98,379 Malaysia students** studying overseas
- » **9 Foreign University Branch Campuses**
 - › 3 Australia
 - › 5 United Kingdom
 - › 1 China
- » **16,259 students** enrolled in foreign university branch campuses (2013-2014)
Transnational education data collection systems: awareness, analysis, action. British Council, 2015

Data source: Malaysia Ministry of Higher Education portal
<http://www.mohe.gov.my/kuat-turun/awam/statistik/2016-statistik>

- » Multitude of foreign/local joint degrees and degree transfer offered
 - › 34 Australia
 - › 49 United Kingdom
 - › 67 United States
 - › 17 Canada
 - › 5 New Zealand
 - › Netherlands, Sweden, France, India, etc
- » **69,960 students** enrolled including foreign university branch campuses (2016)

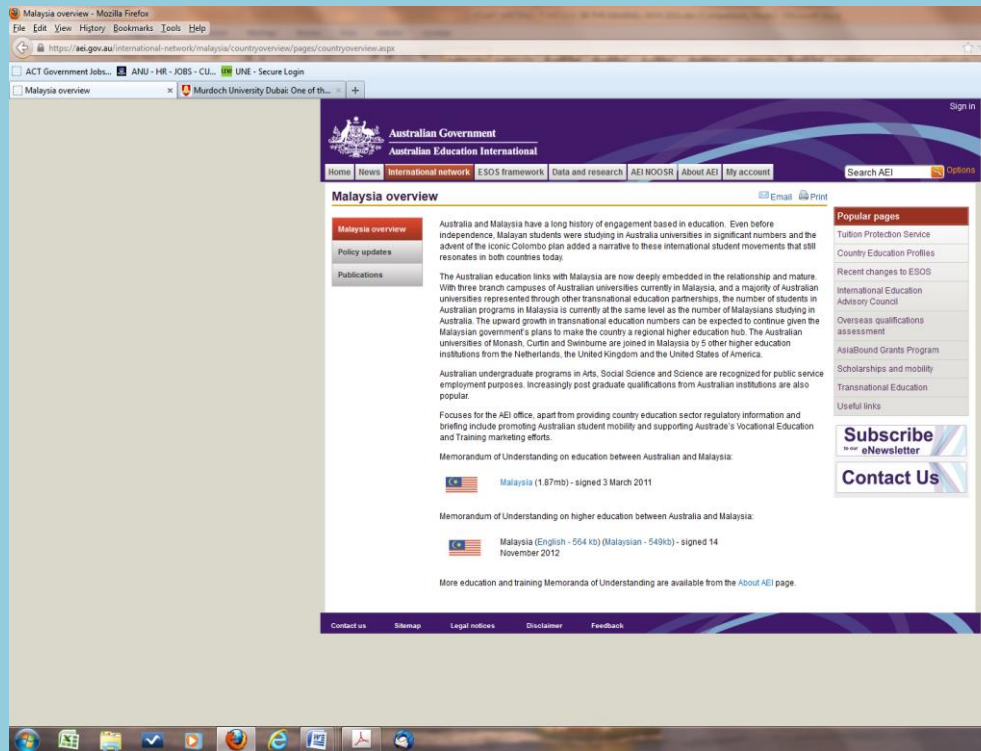
Data source: Malaysia University portal
<http://www.malaysiauniversity.net/foreign-degree/>

Data source: Jisc with data/material from Malaysia Ministry of Higher Education
Web image:
<https://apan.net/meetings/apan45/files/36/36-01-04-01.pdf>
(Access Date 8 June 2018, slide 6.)

There are currently three Australian universities managing branch campuses in Malaysia - Monash, Curtin and Swinburne. The Australian Government also promotes the relationship with Malaysia (under a Memorandum of Understanding) on its AEI website and provides a listing of the Australian universities that offer branch campuses in Malaysia. Refer Visual Aid 31, p.214.

Universities from Australia and the UK are the main providers of TNE programs in Malaysia. In Australia's case, Malaysia is within close proximity to Australia and therefore, accessible for the purpose of setting up TNE facilities. In the case of UK universities, it is considered that Malaysia has had long standing and stable relationships with UK education and this has influenced UK universities to establish transnational facilities in Malaysia.

VISUAL AID 31: Australian Government Website Providing Country Information on Malaysia and Australian (TNE) Campuses in Malaysia



Data and web image from
 Australian Government's Australian Education International (AEI)
<https://aei.gov.au/international-network/malaysia/countryoverview/pages/countryoverview.aspx>
 (Access Date 15 March 2017)

There is more information in Chapter 4, pp. 256-264 about how Malaysia now actively promotes to international students its own universities in preference to foreign universities operating branch campuses in Malaysia.

3.9 Singapore

In 2005, Tharman Shanmugaratnam, the Singapore Education Minister announced that by 2010 the participation rate in the 3 domestic universities would increase by 20%, a national open university would be created and there would be consideration given to private institutions securing university status.⁵¹⁶

⁵¹⁶ Richard Garrett. 'The Rise and Fall of Transnational Higher Education in Singapore'. International Higher Education Journal. Also at: <https://ejournals.bc.edu/ojs/index.php/ihe/article/download/7471/6666> (accessed 21 September 2017)

These policy changes led to the formation of several partnerships between Singaporean public and private higher education institutions and universities abroad.

The National University of Singapore (NUS) now operates a Yale University branch on its campus. The move was highlighted in a speech in Britain in 2010 when long-term Yale provost Richard C. Levin said that, "like the phenomenon of globalisation itself", the rising power of higher education in the East was a

VISUAL AID 32: The Linkage between the National University of Singapore and Yale University in the USA

NUS Registrar's Office
National University of Singapore

News Email Library Student Staff Alumni

Home About Us Current Students Graduated Students Prospective Students Academic Calendar NUS Bulletin

Yale-NUS College

1 Yale-NUS College and Liberal Arts Education

Home / NUS Bulletin AY2017/18 / Yale-NUS College / Yale-NUS College and Liberal Arts Education

Yale-NUS College is a landmark partnership between Yale University and the National University of Singapore. Drawing on the resources and traditions of two great universities, Yale-NUS aims to redefine liberal arts and science education for a complex, interconnected world.

A Yale-NUS College education emphasises broad-based, multi-disciplinary learning across the natural and social sciences, humanities and the arts. The curriculum and pedagogy are built from scratch by the inaugural faculty to harness the strengths of established liberal arts traditions, while introducing Yale-NUS College students to the diverse intellectual traditions and cultures of Asia and the world. Yale-NUS College aims to nurture young minds and equip them with the means to appreciate and understand the breadth and complexity of issues, the capacity to think critically and solve problems, and the skills to effectively communicate and lead.

Experiential learning is an integral pillar of the educational experience at Yale-NUS College. With Asia as the jumping off point, the world will be the students' campus and they will have access to a wide range of experiences and a global portfolio of opportunities. The rich cocurricular and international experiences offered at Yale-NUS College are designed to enhance the students' academic learning, broaden their perspectives and hone the skills and character they need to succeed as students today and leaders tomorrow.

Yale-NUS College was launched in April 2011 and enrolled its inaugural class of 150 students in August 2013. The College continues to expand the diversity and global nature of its student body, which comprises more than 700 students from 50 countries across 6 continents in 2016. The total expected student population at full capacity will be 1,000 students. In 2015, Yale-NUS College moved to its dedicated campus, located next to the NUS University Town to the north of the NUS main campus at Kent Ridge.

The campus hub of Yale-NUS comprises a learning commons with state-of-the-art technology, a library, a black box theatre and performance hall, art and dance studios, science laboratories, student facilities, and three residential colleges, each with a unique identity. Formal learning in the classrooms will be amplified and discussions will flow beyond the classroom walls to the dining hall, common lounges, or courtyard, truly fostering a community of learning, with learning and living intertwined.

For the most updated information on Yale-NUS College, please visit <http://www.yale-nus.edu.sg>.

College Vision
A community of learning.

NUS Bulletin AY2017/18

Provost's Welcome Message

Part I: General

- About NUS
- Academic Calendar
- Education at NUS
- Policies and Procedures

Part II: Programmes

- Faculty of Arts & Social Sciences
- School of Business
- School of Computing
- School of Continuing and Lifelong Education
- Faculty of Dentistry
- School of Design & Environment
- Faculty of Engineering
- NUS Graduate School for Integrative Sciences and Engineering
- Faculty of Law

Data and web image from:
National University of Singapore
<http://www.nus.edu.sg/nusbuletin/yale-nus-college/the-yale-nus-college-and-liberal-arts-education/>
(Access Date 11 January 2018).

"positive sum game" for universities in the West.'⁵¹⁷ Note however, that while this NUS and Yale partnership commenced as a type of quasi-IBC, it has

⁵¹⁷ Julie Hare. 'West meets East with new Asian campuses'. The Australian Online, 13 April 2011. Also at: www.theaustralian.com.au/higher-education/opinion-analysis/west-meets-east-with-new-asian-campuses/story-e6frgcko-1226038054857 (accessed 29 June 2013)

evolved to a separate entity called the Yale-NUS College which issues its own Testamur and is owned jointly by both Yale as well as NUS. Refer Visual Aid 32, p. 215.

Singapore also attracts Australian universities including Curtin University which has been represented in Singapore through various partnerships since 1996 and currently offers all programs, except one, offered at the main Curtin University in Perth to students studying in Singapore via Curtin's partnership with Navitas. The Australian Government promotes Australian TNE providers in Singapore on its website. An example is the promotion of Curtin University - refer Visual Aid 33, p. 217. Of the 27,000+ enrolments of Singaporean students in Australian programs in 2010, there were 67% enrolled offshore in Australian TNE programs.⁵¹⁸ Australian universities have many TNE arrangements in Singapore which remains 'one of the largest markets for transnational higher education in the world and is a particularly important market for Australian and U.K. universities'.⁵¹⁹

Singapore has many international partners working with its institutions. There is however, no 'one size fits all' arrangement. For example, Murdoch University in Australia administers some of its programs through Kaplan which is a TNE provider from the USA in Singapore. Refer Visual Aid 34, p. 218 which provides information on how Murdoch promotes its programs through Kaplan in Singapore.

A number of countries such as Australia and the UK promote Singapore as one of the countries where their qualifications are offered. For example, the BC continues to market to international students across a network of BC offices that UK qualifications can be sought by studying at home. Refer Visual Aid 35, p. 219. In this way students can undertake their studies at UK universities with the support of a BC Office in Singapore.

⁵¹⁸ IEAA, *Op cit.* p. 38.

⁵¹⁹ Garrett, *op. cit.*

VISUAL AID 33: The Australian Government Web Listing of Curtin University's TNE Facility in Singapore



Web image extracted from Australian Education International:
<https://aei.gov.au/International-network/singapore/PolicyUpdates-Singapore/Pages/NavitasandCurtinSingaporeTeoYu-Gin.aspx>
 (Access Date 14 November 2015)

James Cook University (JCU) in Singapore offers a full campus with the opportunity for students to study JCU's home-campus courses – in other words, JCU's main campus courses are available to students at the JCU Singapore campus. *Students undertaking JCU courses in Singapore receive a JCU Testamur.* JCU promotes its programs in Singapore on the basis that students can transfer between campuses. Australia also has an IDP Australia (IDP) office in Singapore which will process students for TNE courses offered by Australian universities in Singapore as well as in other countries where IDP has a presence. For example, it is possible for Singaporean students to go to a local Australian IDP office in Singapore and be processed for admission to a TNE course offered by Monash University in Malaysia. The UK runs a similar operation through its British Council network.

VISUAL AID 34: Murdoch University and Kaplan (joint TNE) in Singapore

Staff and Students Home | MyMurdoch | Library | Campus Map | Main Murdoch Website | More sites ▾

Murdoch UNIVERSITY

Home > TNE > Overview of Transnational Education at Murdoch University > Partners

Transnational Education

Transnational Education Partners

Kaplan Higher Education

Kaplan Higher Education Singapore is part of one of the world's largest education companies, Kaplan, Inc. Established in 1989 as the Asia Pacific Management Institute (APMI), Kaplan Singapore is one of the oldest private education providers in Singapore. It is a regional provider of management education and quality lifelong learning programs and services, and was among the first private education organisations to be awarded the prestigious Singapore Quality Class (SQC) for Private Education Organisations. Kaplan Singapore was also one of the first management institutions to achieve ISO 9000 quality certification in Singapore in 1996.

In 2017, Kaplan was recognised as:

- Best Private Education Institution for Accountancy
- Best Private Education Institution for Business Management
- Best Private Education Institution for Law
- Best Private Education Institution for Marketing
- Best Private Education Institution for Psychology
- Gold Standard Service Provider (Private Education Institutions) for Computer Science & IT

Source: JobsCentral Learning Training & Education Development (T.E.D) Awards 2017

Murdoch University has offered courses in partnership with Kaplan Singapore since 2007.

Initially partnering with the Asia Pacific Management Institute (APMI), the original courses were limited to the Bachelor of Commerce with majors in Hospitality and Tourism Management and Marketing Management. APMI was purchased by Kaplan Inc. in 2005 and after registering with the CPE, Kaplan Singapore was awarded the EduTrust certification in July 2011. Kaplan Higher Education is one of the largest private education institutions in Singapore, spanning more than 140,000 sqft, over 3 campuses - Kaplan City Campus @ PoMo, Wilkie Edge and Bugis (at the National Library Building). The campuses are located in the heart of the city.

Over the last decade Murdoch and Kaplan have offered a range of courses including Undergraduate Business, Media, IT, Psychology (new majors in Web Communications and Business Law were added in 2014/15); and Postgraduate Business, Human Resources, and Accounting. Our partnership continues to grow - making Kaplan Murdoch's largest TNE student cohort.

For more information on Kaplan Singapore, please visit the [Kaplan Singapore](#).

Web image extracted from:
<https://www.murdoch.edu.au/TNE/Overview-of-Transnational-Education-at-Murdoch-University/Partners/>
 (Access Date 8 June 2018).

*In 2016, the Singapore Government announced new measures which would 'tighten up on the quality, financial viability and information provided by private higher education institutions in Singapore, including foreign branch campuses, that offer external degrees from foreign institutions – also known as transnational education or TNE.'*⁵²⁰ These measures were implemented at a time when graduates from the New York University's Tisch School of the Arts in Singapore (which closed) complained that they did not receive the same quality of education as received by New York University's main campus students.

⁵²⁰ Yogana Sharma. 'Stricter controls on private institutions offering TNE'. University World News Online. 21 October 2016. Also available at: <http://www.universityworldnews.com/article.php?story=20161021130753781> (accessed 8 June 2018)

3.10 The United Kingdom (UK)

Since the early 1980s, the prime focus of internationalization in the UK `has been international student recruitment either directly to the UK or via transnational education (TNE) or offshore delivery of UK programmes, of various types.⁵²¹ *The UK Government has continued its strategy to assist its universities to develop the TNE market and the evidence is that more and more students are undertaking a UK qualification without entering the UK.*⁵²² Policies

VISUAL AID 35: British Council's Web Promotion of a UK Qualification in Singapore

Web image extracted from:
www.educationuk.org/Singapore/A-UK-education/ways-to-study-in-the-uk/Study-a-UK-qualification-in-Singapore
 (Access Date 22 February 2016)

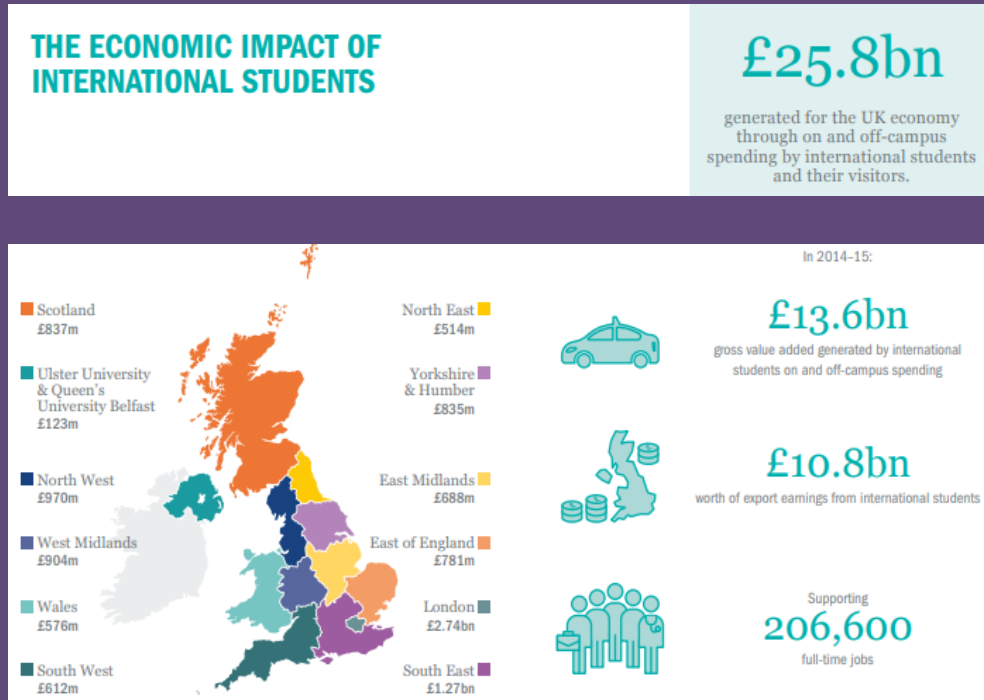
within the UK in relation to internationalization within the higher education sector are directed by the sector itself `rather than directed by government policy

⁵²¹ Steve Woodfield and Elspeth Jones. 'United Kingdom'. In *Internationalisation of Higher Education*, study for the Director General for Internal Policies, European Union, July 2015. P. 182. Also at: [http://www.europarl.europa.eu/RegData/etudes/STUD/2015/540370/IPOL_STU\(2015\)540370_EN.pdf](http://www.europarl.europa.eu/RegData/etudes/STUD/2015/540370/IPOL_STU(2015)540370_EN.pdf) (accessed 14 May 2018)

⁵²² Michael Peak. 'How does transnational education affect host countries?' British Council Voices Magazine Online. 20 March 2014. Also at: <https://www.britishcouncil.org/voices-magazine/how-does-transnational-education-affect-host-countries> (accessed 17 November 2017)

and, as government funding schemes reduce in number, international activities are largely financed from income generated by institutions themselves.⁵²³

CHART 14: The Economic Impact of International Students (Onshore and Offshore) to the UK Economy – 2014-2015



Web image extracted from Universities UK:

https://www.universitiesuk.ac.uk/policy-and-analysis/reports/Documents/International/International_Facts_and_Figures_2017.pdf

(Access Date 9 October 2018, p. 11)

What is significant about the UK in the context of TNE is that there is a great deal of collaboration between UK institutions, organizations and Government to support research on TNE. Examples include: UK Universities International, British Council, HESA and Jisc. Jisc, a membership organization is undertaking a substantial amount of work to ensure that the UK is at the forefront of technological developments which facilitate the delivery of TNE.⁵²⁴

⁵²³ Woodfield and Jones. Op cit., p. 177.

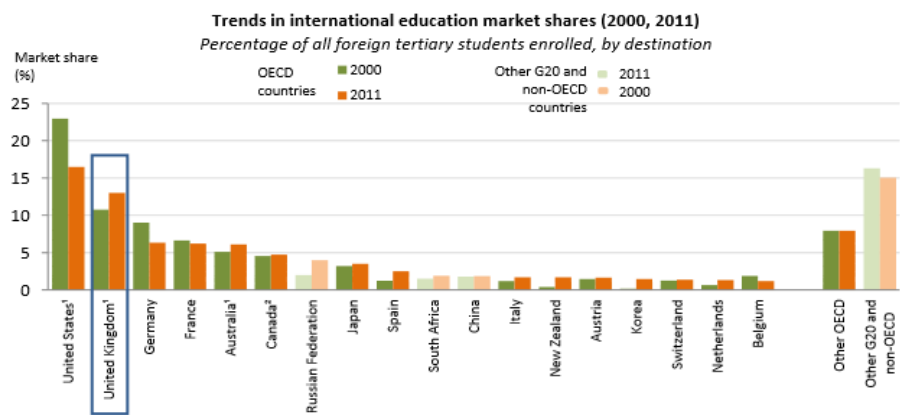
⁵²⁴ <https://www.jisc.ac.uk/about/corporate/strategy>

The annual value of TNE to the UK economy is estimated at 330 million British Pounds.⁵²⁵ In 2014-2015, the economic impact of both onshore and offshore international students to the UK economy was £25.8 billion.⁵²⁶ Refer also to

TABLE 14: The UK – Second Preferred Destination after the United States for International Students 2000-2011

An attractive place in which to study and stay

The UK's share in the international student market grew from 10.8% in 2000 to 13.0% in 2011. The UK is the second preferred destination among international students after the United States (Table C4.4). These students contributed a total of EUR 2.6 billion in tuition fees and EUR 2.7 billion in living expenses in 2008-09 (European Commission, 2012) and in 2010, 21% of international students remained in the UK after they graduated (European Commission, 2012)



Note: Year of reference of data for countries other than OECD and G20 is 2010 (instead of 2011).

1. Data relate to international students defined on the basis of their country of residence. For the UK, data for 2011 is based on citizenship.

2. Year of reference 2010.

Countries are ranked in descending order of 2011 market shares.

Source: OECD and UNESCO Institute for Statistics for most data on non-OECD countries. Table C4.7, available on line. See Annex 3 for notes (www.oecd.org/edu/eag.htm).

Data compiled from OECD

Web image from

http://www.oecd.org/edu/United%20Kingdom_EAG2013%20Country%20Note.pdf

(Access Date 24 April 2014)

Chart 14 at page 220. OECD data indicates that the UK is the second preferred destination for international students – refer Table 14 above.

In 2010 the number of students (undergraduate and postgraduate) studying for a UK degree overseas was over 408,000 - a greater number than the number of

⁵²⁵ *Ibid.*

⁵²⁶ Universities UK International, 'International Facts and Figures', data published in May 2017, p. 11. Also available at: https://www.universitiesuk.ac.uk/policy-and-analysis/reports/Documents/International/International_Facts_and_Figures_2017.pdf (accessed 8 October 2017)

international students studying in the UK (405,000).⁵²⁷ HESA reported that `for the first time more international students were studying UK courses outside the UK than within it.⁵²⁸ At the same time, the UK made considerable efforts in moving its own students abroad – for example, a campaign in the UK called for sending at least 15,000 UK students to either study or gain experience in China by 2016;⁵²⁹ another campaign encouraged 25,000 UK students to visit India.⁵³⁰ More recent data for UK TNE is listed at Visual Aid 36, p. 223.

With the launch of the very first UK university in 2000 in Malaysia, Nottingham paved the way for other UK universities to go global. Additionally, Nottingham also moved into China some four years later with a fully-fledged campus, thereby making Nottingham a brand name in the region. ‘UK universities have become global brands, offering degrees to students around the world who never need to get on a plane.’⁵³¹

The OECD reports in Table 14, p.221 indicates that the UK's share in the international student market grew from 10.8% in 2000 to 13.0% in 2011. This data was based on total student count and not specific to TNE and is useful in determining the rate of increase over a 10 year period in international student numbers for the UK, soon after the turn of this century. The Table also shows the UK’s position in the international student market, after the USA. Subsequent data presented in Table 15, p. 223 indicates that the rate of growth in TNE student numbers accelerated at a much faster pace and that there was an 81% increase in TNE students between the period 2008/2009 and 2015/2016. Together the two tables indicate the rate of acceleration of UK TNE between 2000 and 2016.

SPACE LEFT BLANK

⁵²⁷ <http://heglobal.international.ac.uk/tne.aspx> (accessed 24 July 2014)

⁵²⁸ Shepherd, *op. cit.*

⁵²⁹ <https://www.britishcouncil.org/organisation/press/generation-uk> (accessed 15 January 2017)

⁵³⁰ <https://www.britishcouncil.org/organisation/press/call-25000-uk-students-go-india> (accessed 15 January 2017)

⁵³¹ https://www.vice.com/en_uk/article/qb5nmp/the-university-of-nottingham-malaysia (accessed 7 June 2018)

Table 16, p. 226 provides data on the UK's top TNE student markets and total number of TNE students for the period 2015-16 and Table 17, p. 227 provides a snapshot of the large number of TNE students studying a full degree abroad and enrolled in UK universities.

VISUAL AID 36: UK TNE Data – Year 2015-2016



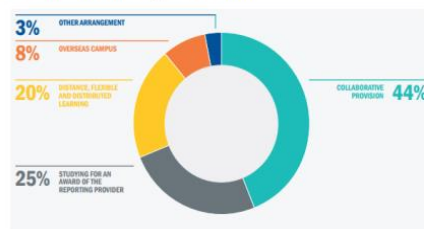
Case study: UK TNE data

- » 701,010 students were studying UK HE TNE programmes in 2015-16
- » 44 International Branch Campuses (IBCs)

Top Host Countries

- » Malaysia (74,178)
- » Singapore (48,292)
- » China (70,238)
- » Hong Kong (27,390)
- » Egypt (21,697)

Breakdown of provision:



Data sources: HESA Aggregate Offshore Record 15/16
OBHE and C-BERT IBC report

Data presented by Jisc with data/material from HESA, C-Bert and OBHE
<https://apan.net/meetings/apan45/files/36/36-01-04-01.pdf>
(Access Date 7 June 2018, slide 3)

TABLE 15: Growth in UK TNE from 2008/09 to 2015/16



Data source Universities UK
Data and web image from:
[https://www.universitiesuk.ac.uk/policy-and-analysis/reports/Documents/International/International Facts and Figures 2017.pdf](https://www.universitiesuk.ac.uk/policy-and-analysis/reports/Documents/International/International_Facts_and_Figures_2017.pdf)
(Access Date 8 October 2018, p. 22)

While TNE numbers for UK universities increased, the numbers coming to the UK showed signs of decrease. A British Council report concludes that while TNE student numbers to UK institutions have increased, this news has been overshadowed by a continued decline in UK's market share of new international students.⁵³²

More recently, however, in early 2018 it was reported that while the UK has had phenomenal growth in TNE students, there are some concerns that the market is slowing down. In 2013-2014 the TNE market for the UK grew by 6% however,

VISUAL AID 37: University of Nottingham UK Logo Promotes its Three Distinct Campuses in UK, China and Malaysia

The screenshot shows the University of Nottingham website page for 'China & Malaysia Campuses'. The page layout includes a header with the university logo and name, a navigation menu (Study, Research, Business, Global, About, A-Z), and a search bar. The main heading is 'China & Malaysia Campuses'. Below this, there is a sidebar with a 'Study abroad' menu, a main text area with an image of students, and a 'Related links' section.

Current Students

- News
- Postgraduates
- International students
- Final year and beyond
- Student opportunities
- Library and IT essentials
- Exam Period
- Study abroad**
 - China & Malaysia Campuses**
 - Exchanges Overseas
 - Peer Advisers
 - Factsheets
 - Events
 - Study abroad finance

Students who are studying at The University of Nottingham UK can apply to study at one of our international campuses in China and Malaysia for a period of one semester or one academic year through the **Inter-Campus Exchange programme**.

To be eligible to apply to the programme, you must be studying for an undergraduate or postgraduate degree in Nottingham which is also offered at either the China Campus or the Malaysia Campus. For information on whether this is possible for your school or department, see [study abroad opportunities by school](#).

Where can I study abroad?

With the opening of our Malaysia Campus in 2000, The University of Nottingham was the first UK university to open a branch campus overseas. This was followed in 2004 by the opening of our China Campus in Ningbo.

Malaysia

The [Malaysia Campus](#) is situated near the town of Semenyih, 45 minutes to an hour's drive from the capital Kuala Lumpur. The purpose-built campus opened in 2005 and provides on-campus accommodation, free sports facilities (including an outdoor swimming pool), and a multi-level library, as well as state-of-the-art teaching and learning facilities. The campus has

Study in Asia

Related links

- Summer schools in Asia
- How to apply
- Application process

Web image extracted from:
<https://www.nottingham.ac.uk/currentstudents/study-abroad/study-in-asia.aspx>
 (Access Date 18 April 2018).

⁵³² <https://www.britishcouncil.org/organisation/press/uk-risks-losing-competitive-edge-new-international-stude> (accessed 17 March 2018)

over 2016-2017 the growth was under 1%.⁵³³ Universities UK International reported that:

“Growth rates in institutions delivering TNE across types of provision and in host regions show an evolving picture. Although there have been year-on-year increases in UK HE TNE students since at least 2007-08, the year-on-year growth rate remained between 4%-7% between 2012- 13 and 2015-16. Recent figures released by HESA in January 2018⁹ show that this rate dropped to 1% from 2015-16 to 2016-17.”⁵³⁴

UK institutions which have experienced budget cuts have adapted very quickly to bolster their international student programs. To understand the dependence of UK universities on international students (both onshore and offshore) one would need to view the data presented in Chart 14 on page 220 which shows the impact of international students on the UK economy.

TNE partnerships that would have been considered beyond the realm of possibility only a few years ago now appear to be the norm based on market conditions. For example, Nottingham University in the UK has entered into a partnership with another UK University, Birmingham which now provides students with an extensive network of TNE study opportunities given Birmingham's branch campuses in North America and Nottingham's in Asia. When discussing IBCs with The Australian newspaper's Higher Education Supplement, the Vice Chancellor of Nottingham University stated that:

"Indirectly the campuses help, because they offer valuable pathways for graduate recruitment and excellent opportunities for business engagement. Both help in diversifying income streams. They have also helped us build a strong reputation globally for both education and research and that will be invaluable in underpinning other strategies to allow us to progress despite a challenging funding climate."⁵³⁵

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⁵³³ Nic Mitchell. 'Divide between onshore and offshore campuses blurring'. University World News Online. 18 January 2018. Also at: <http://www.universityworldnews.com/article.php?story=20180118125323500> (accessed 10 August 2018)

⁵³⁴ Universities UK International. *The Scale of UK Higher Education Transnational Education 2015-16 – Trend analysis of HESA data, op. cit.*, p. 59.

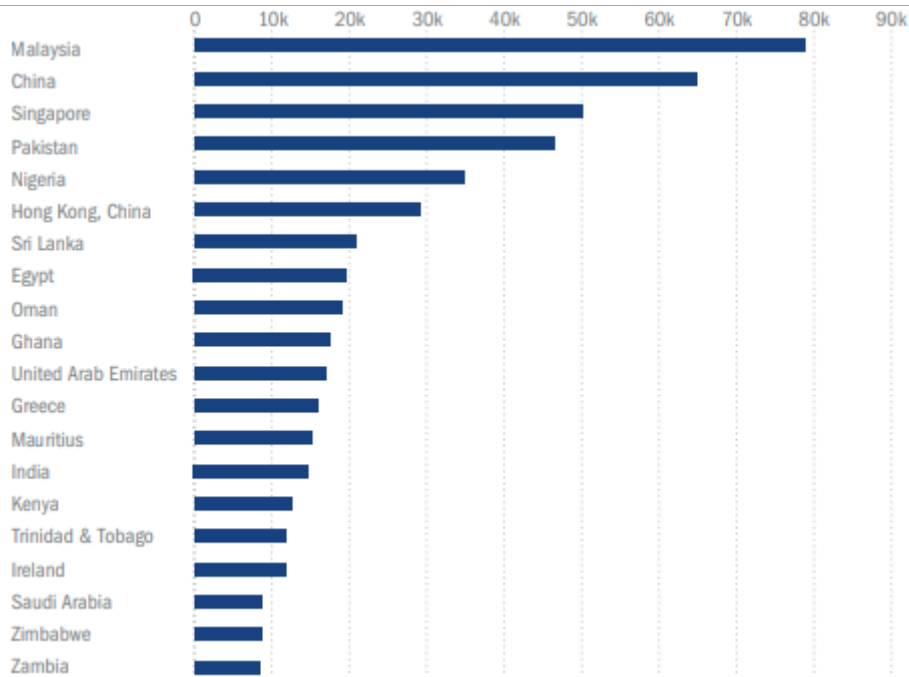
⁵³⁵ Hare, *op. cit.*

TABLE 16: UK's Top TNE Student Markets and Total Number of TNE Students - 2015-2016

TRANSNATIONAL EDUCATION

701,010

students study for UK higher education qualifications outside of the UK.



Data source: Universities UK (HESA statistics)

https://www.universitiesuk.ac.uk/policy-and-analysis/reports/Documents/International/International_Facts_and_Figures_2017.pdf

(Access Date 8 October 2018, p. 20)

The UK invests heavily in research and produces comprehensive data on its international student program as compared to some other countries. *Despite having some failures with a small number of branch campuses shutting operations, the UK remains very committed to identifying student markets and taking its programs to where the students are.* Already post-Brexit, the first UK-EU branch campus is being proposed between King's College London and TU Dresden 'Transcampus' in Germany.⁵³⁶

⁵³⁶ Ellie Bothwell. 'First UK-EU branch campus post-Brexit under consideration'. Times Higher Education Online. 6 July 2017. Also available at: <https://www.timeshighereducation.com/news/first-uk-eu-branch-campus-post-brexit-under-consideration> (accessed 18 January 2018).

TABLE 17: Which UK Universities have the Most Students Enrolled Overseas?

Table shows the number of students studying wholly overseas by institution for the academic year 2011-12.

Institution	Students enrolled
1 Oxford Brookes University	251990
2 University of London	45680
3 The Open University	42685
4 The University of Wales	16250
5 Heriot-Watt University	14380
6 The University of Liverpool	13220
7 Staffordshire University	12555
8 The University of Greenwich	12100
9 Coventry University	10715
10 Middlesex University	9820
11 The University of Nottingham	9430
12 The University of Bradford	9255
13 The University of Sunderland	7800
14 The University of Leicester	7700
15 The University of East London	5965
16 The University of Northumbria at Newcastle	5915
17 University of Hertfordshire	5685
18 Edinburgh Napier University	3845
19 The University of Lancaster	3785
20 The University of Manchester	3660

Web link:

<http://www.guardian.co.uk/education/2013/feb/15/surge-in-students-studying-for-uk-degrees-abroad>

(Access Date 19 May 2015)

Malaysia is a huge market for TNE for the UK with estimates of 58,000 students studying at UK institutions within Malaysia alone. The University of Nottingham Malaysia Campus has over 4,000 students from Malaysia and 70 other countries at a purpose-built campus outside of Kuala Lumpur.⁵³⁷ In China Nottingham operates a campus with 6000 students. Its IBC strategy is based on

⁵³⁷ <https://www.gov.uk/government/world-location-news/asean-knowledge-partnership-showcasing-uk-transnational-education-in-malaysia> (accessed 19 June 2014)

working with a local partner while overseeing quality and the issue of transcripts to all students enrolled in Nottingham's TNE programs.

The UK primarily uses the British Council to pursue TNE opportunities for UK universities. For example, recently (2018) the Joint Development of Niche Programs (JDNP) in the Philippines via its Philippine-UK Linkages project confirmed that it would fund local higher education institutions to 'develop and implement niche programs that are not currently available in the country'.⁵³⁸ Subsequently an agreement was entered into with the BC to bring together 'the academic excellence of Philippine and UK universities to co-create postgraduate niche degrees not currently available in the country' and to ensure that Filipinos that are not able to pay for a full degree abroad will now be able to study and pay locally.⁵³⁹ In addition to the BC, Visual Aid 38 below shows that

VISUAL AID 38: Universities UK Supporting its Members with Promoting TNE

The screenshot shows the following content on the Universities UK website:

- Page Title:** Transnational education (TNE)
- Navigation:** Home, About us, Facts and stats, Policy and analysis, Our work in parliament, News and blog, Events, International
- Search:** Search...
- Text:** We champion the UK's leading position in delivering degrees around the world, supporting universities' strategic TNE ambitions and activities.
- Image 1:** A young woman reading a book outdoors.
- Section: About our TNE work**
 - Text:** Our TNE work is designed to give universities the best chance of success when developing and delivering programmes overseas.
- Image 2:** A group of people sitting at a table in a classroom or meeting room, looking out at a building.
- Section: What is UK HE TNE?**
 - Text:** UK HE TNE is UK higher education programmes delivered outside of the UK.
- Image 3:** A person sitting on a bench reading a newspaper.
- Section: TNE news and blogs**
 - Text:** The latest news and opinion about transnational education.
- Contact us:** tne@international.ac.uk
- About UUK International:** More information about UUK International. UUKI is the international arm of Universities UK, representing UK universities and acting in their collective interests globally.
- Social Media:** Twitter, Facebook, LinkedIn, Google+, YouTube, RSS, Instagram icons.

Web image from Universities UK:
<http://www.universitiesuk.ac.uk/International/heglobal>
 (Access Date 19 November 2017).

⁵³⁸ Aerol John Patina. 'PH, UK forge deals for transnational education'. Philippine Canadian Inquirer Online. 16 February 2018. Also available at: <http://www.canadianinquirer.net/2018/02/16/ph-uk-forge-deals-for-transnational-education/> (accessed 7 June 2018)

⁵³⁹ *Ibid.*

Universities UK also supports the promotion of TNE programs but this is conditional on membership.

The available data indicates that the UK hosts 9 branch campuses including 3 from France, 1 from Malaysia, 1 from Switzerland and 4 from the USA.⁵⁴⁰

3.11 United States of America (USA)

In recent years, there has been some concern about the drop in international student numbers into the US from some markets. A large and diverse system

TABLE 18: New International Student Enrolments in the USA – 2011/12 to 2016/17		
opendoors®		
INTERNATIONAL STUDENTS IN THE U.S.		
NEW INTERNATIONAL STUDENT ENROLLMENT		
2011/12	228,467	New international student enrollment—students enrolling for the first time at a U.S. institution in fall 2016—decreased by 3.3% over the previous year.
2012/13	250,920	
2013/14	270,128	
2014/15	293,766	
2015/16	300,743	
2016/17	290,836	

Data from National Center of Education Statistics compiled by IIE.
Open Doors 2016 'Fast Facts'
<https://www.iie.org/Research-and-Insights/Open-Doors/Fact-Sheets-and-Infographics/Fast-Facts>
(Access Date 14 October 2017).

with 4,409 degree granting institutions, the USA is currently facing fiscal challenges that many are saying will require systemic reform, or a 'new normal' in the provision of U.S. higher education.⁵⁴¹ New international student enrolments

decreased for the first time in the Fall of 2016. Refer Table 18 above. The President of the Council of Graduate Schools (CGS), Suzanne Ortega referred to

⁵⁴⁰ Carol Carey. 'Branch Campuses, UK Universities and Transnational Education'. Search Higher. 19 February 2018. Also available at: <https://www.searchhigher.com/news-events/branch-campuses-uk-universities-and-transnational-education> (accessed 7 June 2018)

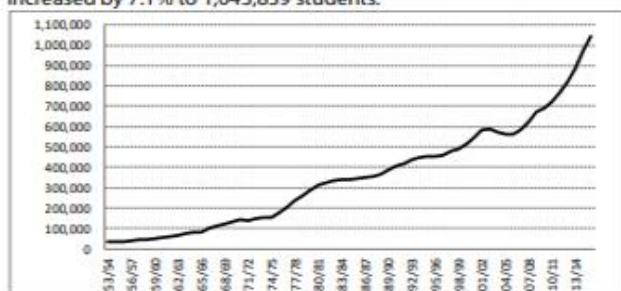
⁵⁴¹ Madeleine Green and Adelaide Ferguson. 'Internationalisation of U.S. Higher Education in a Time of Declining Resources'. Report commissioned by Australian Education International. June 2011. p. 3. Also available at: <https://internationaleducation.gov.au/International-network/northamerica/PolicyUpdates-USA/Documents/Internationalisation%20of%20US%20Higher%20Education%20in%20a%20Time%20of%20Declining%20Resources.pdf> (accessed 11 July 2015)

the decline as worrisome.⁵⁴² The 'Trump effect' was considered as 'one of the major contributors to the decline in international enrollment as it is creating perceptions of America becoming unattractive and unsafe for international students.'⁵⁴³ However, Table 19 below indicates shows that overall international student numbers (which included continuing students) to the USA continued to

TABLE 19: 2004/05 – 2015/16 Total International Student Numbers in the USA

INTERNATIONAL STUDENT TRENDS

In 2015/16, the number of international students in the U.S. increased by 7.1% to 1,043,839 students.



Data from National Center of Education Statistics compiled by IIE. Open Doors 2016 'Fast Facts'. <https://www.iie.org/Research-and-Insights/Open-Doors/Fact-Sheets-and-Infographics/Fast-Facts> (Access Date 14 October 2017).

increase. *The challenges of lower international students coming to the US has led to US institutions looking beyond national borders to service international students.* The US already has some strong relationships established in the TNE space by US institutions. For example, Yale Campus in Singapore as well as GMU and State University of New York (SUNY) campuses in Korea receive much media

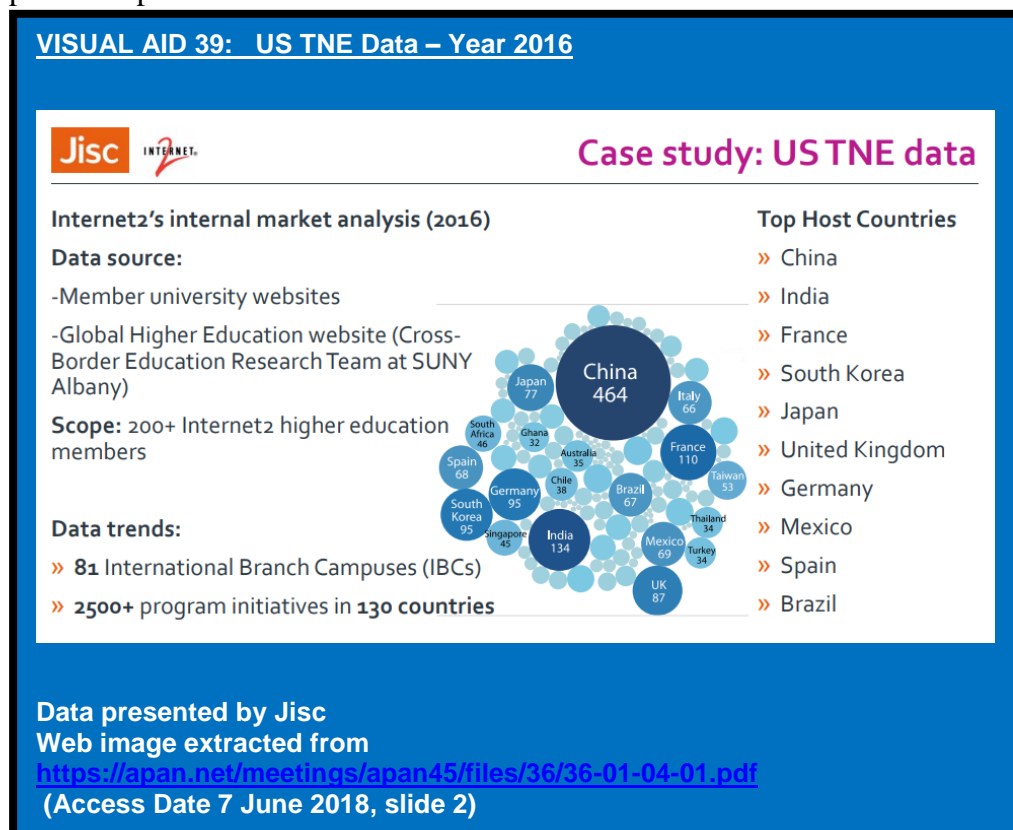
coverage. These are discussed in the section on Singapore, p. 214 and Korea, p. 206.

⁵⁴² Brendan O'Malley, 'Decline of international graduate enrolment quadruples', University World News Online. 5 October 2018. Also available at: <https://www.universityworldnews.com/post.php?story=20181005200448286> (accessed 11 October 2018)

⁵⁴³ Rahul Choudaha. 'A Third Wave of International Student Mobility: Global Competitiveness and American Higher Education'. Research and Occasional Paper Series, CSHE 8.18, Centre for Studies in Higher Education, University of California, Berkeley, p. 6. April 2018. Also at: https://cshe.berkeley.edu/sites/default/files/publications/rops.cshe.8.18.choudaha.thirdwaveinternationalstudents.4.24.2018_0.pdf

With the broad range of universities operating in the US, both private and public, there is no single standard on how institutions are generally progressing in internationalization efforts including TNE. Some universities have focused on bringing international students to their US campuses whilst other have been active in sending students on study abroad programs while also developing TNE arrangements. *Some institutions are most concerned about their 'global footprint' and presence abroad through branch campuses or programs offered abroad.*⁵⁴⁴ Visual Aid 39 below provides the US footprint on TNE activities in 2016.

The Washington Post's education arm Kaplan is increasing its TNE partnerships through the recent acquisition of an Australian private education provider, Carrick Education. Kaplan sees this as part of a 'much broader regional strategy which will see it push into Asia, leveraging partnerships with Australian universities to develop its market.'⁵⁴⁵ Kaplan already has several other partnerships in Australia and is also active in Asia.



⁵⁴⁴ *Ibid.*, p. 22.

⁵⁴⁵ Andrew Trounson. 'Kaplan's Asian push uses alliances with local unis'. The Australian Online. 9 June 2011. Also available at: <https://www.theaustralian.com.au/higher-education/kaplans-asian-push-uses-alliances-with-local-unis/news-story/f088d3feb2b8dc840eeb5b890319dc7d> (accessed 18 November 2014)

Compared to the UK and Australia, given the number of US institutions of higher education, it appears that US universities have been somewhat slow in taking up the challenge of TNE. In an opinion piece in the Chronicle of Higher Education in 2010 Ben Wildavsky a Senior Fellow in Research and Policy at the Kauffman Foundation states that:

One final lesson for educational prognosticators, particularly in the United States: The "us versus them" prism through which American universities and policy makers sometimes view stepped-up global competition is becoming less and less relevant. Cross-border research collaborations have more than doubled in 20 years and will surely grow. Partnerships between leading Western universities and rapidly improving institutions in Asia, Europe, and beyond are expanding quickly. Universities may take on entirely new forms.⁵⁴⁶

Public institutions in the US have not viewed TNE as important to their agenda as they see their funding as coming from taxpayer money and therefore their commitment is to their local and regional constituents. Despite this there is reason to believe this view is gradually changing. What is clear is that there is a 'cautious' approach being applied to TNE by the most universities that do show an interest in TNE. An example of this is Troy University which supports a Sino-American 1-2-1 dual degree model. The 1-2-1 programs enables Chinese students at partner institutions to start their degree programs, transfer to Troy for two years and then return to their home universities to complete their degree requirements.⁵⁴⁷

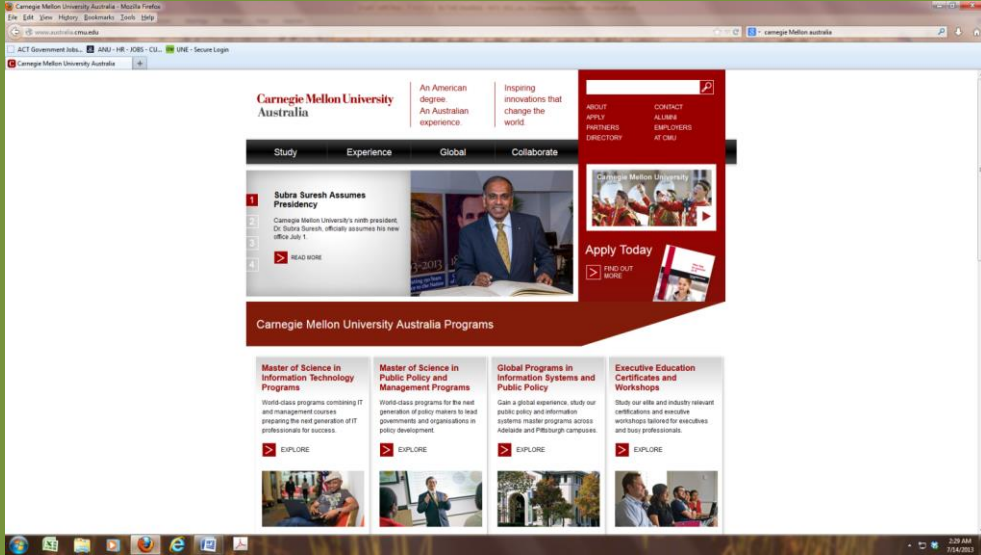
Private universities have been more ambitious including Carnegie Mellon University which has a campus in Adelaide Australia and other arrangements in place for TNE activities throughout Southeast Asia as well as in Latin America. Carnegie Mellon was the first international university to set up a campus in Australia. Refer Visual Aid 40, p. 233. Almost all students at Carnegie Mellon's campus in Adelaide are international students as fees are very high for Australian students. Annual fees are approximately \$75,000 per year which makes it unaffordable for Australian students who through subsidized government education can pay an average of \$12,000 per year in subsidized

⁵⁴⁶ Ben Wildavsky. 'University Globalization is here to Stay'. The Chronicle of Higher Education Online. 26 August 2010. Also available at: <http://chronicle.com/article/University-Globalization-Is/124148/> (accessed 19 December 2014)

⁵⁴⁷ Jack Hawkins Jr. 'Partnerships Fuel Internationalization'. In Presidential Perspectives at AIEA online. Also at: <http://aieaworld.org/publications/PresidentialPerspectiveshttps://www.aieaworld.org/presidential-perspectives> (accessed 18 May 2017)

tuition fees and defer payment through the tax system. Carnegie Mellon also encourages partnerships which award dual degrees. An example of this is in Latin America where Carnegie actively supports domestic Latin American universities as well as several organizations with scholarships and dual degrees which help Latin American students.⁵⁴⁸ What is interesting about Carnegie

VISUAL AID 40: Web Link to Australian Campus of Carnegie Mellon University USA



Web image extracted from:
<http://www.australia.cmu.edu/>
 (Access Date 17 November 2017)

Mellon is that it can take students out of certain countries to its programs in other countries - an example of this is when it promotes its Australian campus to students in Latin America.

The IIE in New York has a network of offices around the globe. It sees itself as one of the major US international education organizations that supports internationalization of US education abroad. To understand the contribution IIE makes to internationalization including researching and facilitating US institutional activities around the world, refer to Visual Aid 41, p. 234.

⁵⁴⁸<http://www.heinz.cmu.edu/global-heinz/partnerships-in-latin-america/index.aspx> (accessed 18 March 2017)

VISUAL AID 41: Institute of International Education New York Promotes its Global Reach and Internationalization Activities

The screenshot displays the IIE website's 'Our Global Reach' page. The main content area includes a green header with the title 'Our Global Reach' and a paragraph describing the organization's network of 19 offices and affiliates. Below this is a world map with various regions highlighted in different colors, corresponding to the 'IIE International Regional office' and 'REAC office' legend. To the right of the map is a 'Browse Programs' section with a dropdown menu listing regions: The Americas, Europe, Middle East and North Africa, Sub-Saharan Africa, South and Central Asia, and East Asia and the Pacific. Below the map, there are sections for 'IIE Offices' (listing Chicago) and 'Regional Educational Advising Coordinators (REACs)*' (listing The Americas). A sidebar on the right contains 'IIE Around the World' and 'Events and Conferences' with a list of upcoming events like TTNGO and Indonesia: Investing in International Education.

Data source: Institute of International Education
 Web image extracted from:
<http://www.iie.org/en/Our-Global-Reach>
 (Access Date 19 January 2017).

3.12 Education Hubs

In the last 10-15 years there has been much discussion about education hubs. *Resulting from demographic and economic challenges, a number of countries across Asia have been competing over the last decade to attract the best students and, in some cases, the best universities from around world to develop as regional higher education hubs in a bid to drive innovation and economic growth.*⁵⁴⁹ While Malaysia and Singapore have some history in developing education hubs, more recently Korea, Taiwan and Hong Kong have set their goals in the implementation of education hubs.⁵⁵⁰ Hubs have some common features ‘but the most significant may be that these new constructs seem to be

⁵⁴⁹ Nick Clark. ‘*Developing International Education Hubs in Asia*’. World Education News and Reviews (WENR) Online. 8 July 2015. Also available at: <https://wenr.wes.org/2015/07/developing-international-education-hubs-asia> (accessed 7 June 2018)

⁵⁵⁰ *Ibid.*

focused on serving the national political and economic interests of the site in which they are located'.⁵⁵¹

There are financial benefits to countries who opt to develop education hubs.

'Student-centric economic growth is initiated by the influx of young people and creates jobs; investment in the area, both domestic and international, often follows closely behind successful higher education establishments, as do collaborations with industry; additionally, education hubs which host branch campuses from abroad can form useful international links' and 'These economic benefits are especially valuable for those countries which have long suffered from brain drains to universities in the West, such as China.'⁵⁵²

At the British Council 'Go Global' Conference in Dubai in March 2013, Jane Knight, Adjunct Professor at the Ontario Institute for Studies in Education at the University of Toronto stated that for countries that are establishing TNE hubs 'the key motivations are to internationalise and modernise the higher education sector in the host country, develop a skilled workforce and retain students, attract foreign direct investment and increase the country's economic competitiveness, and enhance geopolitical status using soft power'.⁵⁵³ Knight went on to state that there are different reasons for pursuing the TNE 'hub' concept. Some countries are looking to bring in international students to their shores, whilst other want to develop their local talent and reinforce their knowledge and innovation base. For Singapore and Malaysia, with their significant outflows of students undertaking degrees abroad, the development of transnational programs acted as a form of import substitution, and has subsequently led to the development of an export-oriented private education sector that is able to recruit students from many countries to study in British and Australian programs closer to home.⁵⁵⁴ The common theme, however, is that all

⁵⁵¹ Hawkins. 'Globalization, Internationalization and Asian Educational Hubs: Do We See New Metaphors?' *op. cit.*, p. 5.

⁵⁵² <http://www.qs.com/education-hubs-good-news-or-bad-news/> (accessed 7 June 2018)

⁵⁵³ Forestier and Sharma, *op. cit.*

⁵⁵⁴ Debbie Clayton and Christopher Ziguras. 'Transnational Education: Delivering Quality Australian Programs Offshore' in *Making a Difference - Australian International Education*, Edited by Dorothy Davis and Bruce Mackintosh, 2011, p. 309. UNSW Press.

countries wanting to become hubs want to shift towards become knowledge economies. In Gulf countries in particular ‘there is a definite shift towards a knowledge economy from their dependence on oil’.⁵⁵⁵ There are 10 IBC's in Qatar, 3 in Bahrain and also 37 exist in the UAE – ‘making it the largest concentration of foreign branch campuses in the world’.⁵⁵⁶

The attractiveness of creating higher education hubs stems from the knowledge that ‘free trade zones such as in Malaysia, Qatar, South Korea and the UAE can attract significant foreign direct investment for industry and infrastructure development as well as higher education institutions, helping to develop outlying regions.’⁵⁵⁷

Visual Aid 42, p 237 provides information on education hubs in Africa and the Middle East and Visual Aid 43, p. 238 provides information on hubs in Asia.

There are a number of countries including Botswana, Sri Lanka and Mauritius that have expressed interest in becoming education hubs, however, ‘an important requirement for a country to successfully promote transnational (TNE) and seek to become a knowledge hub is to have a strong, local higher education sector.’⁵⁵⁸ *There has also been concerns expressed about governments not fully supporting their education systems and instead depending on TNE to manage their education infrastructure.*⁵⁵⁹ There are also concerns about some countries which appear to be rushing into the setting up of education hubs. For example, in 2015, there were claims made by an Egyptian body that they had ten overseas universities committed to their education hub however, a close examination of the documents suggested that no agreements had been entered into.⁵⁶⁰ Clearly Egypt does want to set up an education hub and this is backed by

⁵⁵⁵ Forestier and Sharma, *op. cit.*

⁵⁵⁶ Forestier and Sharma, *ibid.*

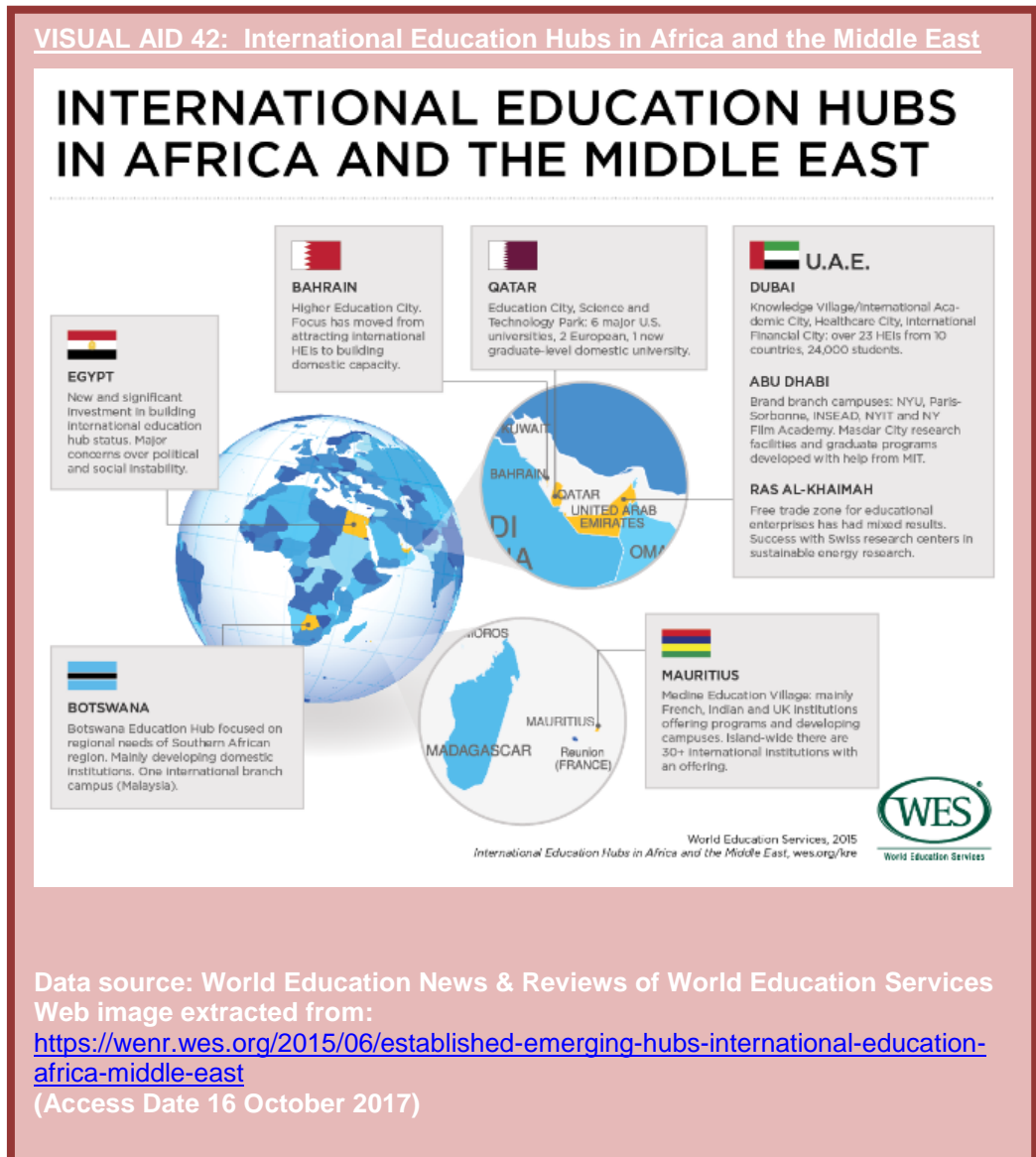
⁵⁵⁷ Forestier and Sharma, *ibid.*

⁵⁵⁸ Goolom Mohamed bhai. ‘*Transnational education: What impact on local institutions?*’ Inside Higher Ed Online. 24 March 2013. Also available at: <https://www.insidehighered.com/blogs/world-view/transnational-education-what-impact-local-institutions> (accessed 2 January 2018)

⁵⁵⁹ *Ibid.*

⁵⁶⁰ Arwa Ibrahim and Areeb Ullah. ‘*Egypt makes bogus claims to lure UK universities to new multi-billion city*’. Middle East Eye Online. 6 March 2018. Also available at: <http://www.middleeasteye.net/news/egypt-claims-UK-universities-new-cairo-city-education-minister-vision-2030-1835917836> (accessed 6 March 2018)

substantial government funding, however, the evidence indicates that more work has to be done before announcements are made about an education hub in



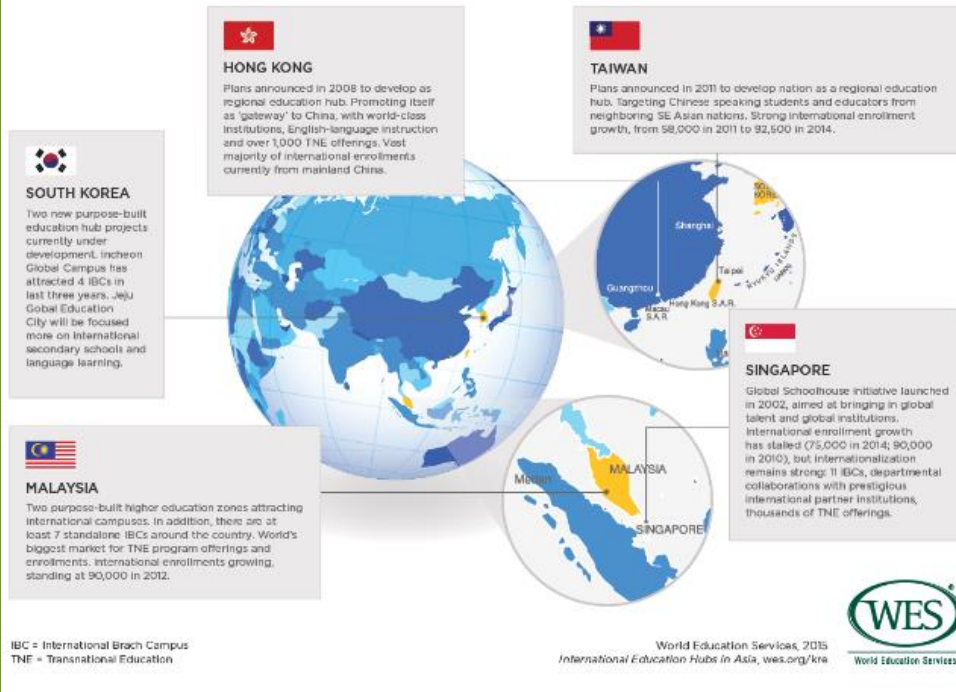
Egypt. Sri Lanka's Ministry of Education has also suggested that it will establish a cost-effective hub.⁵⁶¹ *Concerns remain about efforts to expand hub operations in some countries without appropriate lead up time and discussion.* At the same time 'some higher education authorities involved in or otherwise

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⁵⁶¹ Dessoff. *op. cit.*, p. 18.

VISUAL AID 43: International Education Hubs in Asia

INTERNATIONAL EDUCATION HUBS IN ASIA



Data source: World Education News & Reviews of World Education Services
Web image extracted from:
<https://wenr.wes.org/2015/07/developing-international-education-hubs-asia>
(Access Date 16 October 2017)

familiar with the development of the hubs question whether they all will be successful, and some hint that they might constitute more of a fad likely to fade than a trend likely to continue.⁵⁶²

In Chapter 4 there is discussion on how universities and countries are adapting to global trends and emerging issues in TNE. Given that there was a gap of about 4 years between the time of undertaking the initial research and finalizing the research, there is a '4 Year Update (2013-2017) on Trends in Transnational Education' which has been added to the Chapter.

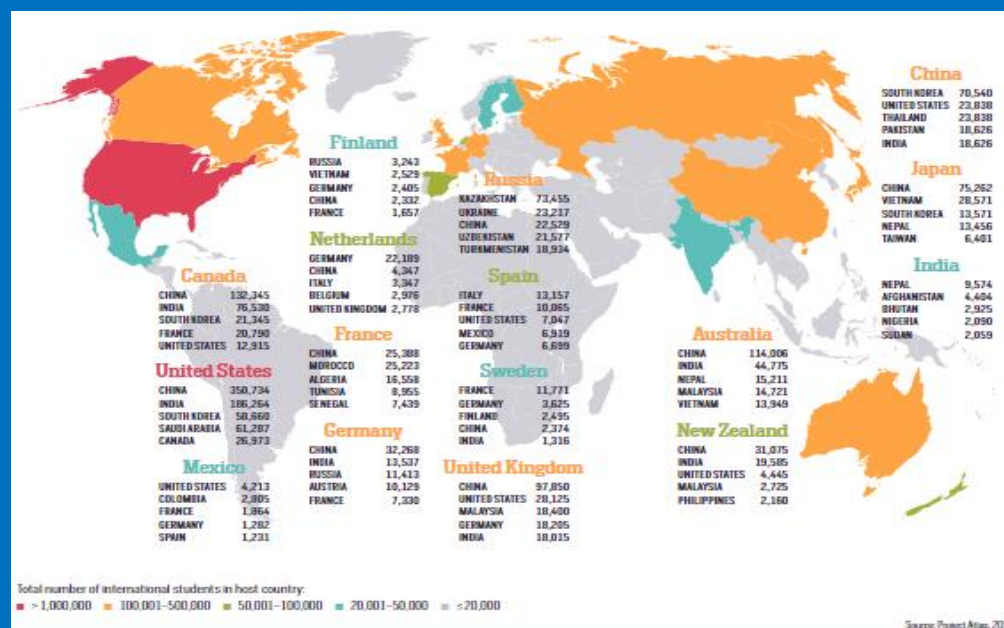
⁵⁶² *Ibid.*

Chapter 4 - Global Trends and Emerging Issues in Transnational Education

Following from Chapter 2 (Literature Review), pp.71-176 and Chapter 3 (Country Specific Data and Education Hubs – Who is Doing What?), pp. 177-238, it becomes clear that TNE is not exclusive to a specific group of countries. *Therefore, for this study, TNE is discussed in a global context.* It is not a study based on regional perspectives of TNE; instead this study focuses on TNE as a global phenomenon which has no boundaries.

This Chapter discusses the global trends and emerging issues in TNE.

TABLE 20: Leading Places of Origin of International Students by Host Country – Year 2017



Data source: Project Atlas, Institute of International Education.

Web page extracted from:

<https://www.iie.org/en/Research-and-Insights/Project-Atlas/Explore-Data/Current-Infographics>

(Access Date 10 May 2018).

4.1 Universities Adapting to Student Mobility without Borders

While Table 20, p. 239 does not refer specifically to TNE students, it provides a snapshot of the movement of international students across the globe.

Specifically, the table indicates that while major host countries continue to attract international students, countries such as China who are the more recent entrants in the full-fee student market are also attracting large numbers of international students.

This section focuses on providing a summary of *how* universities have been forced to change course to cater to students beyond their own borders. A recent British Council report (2018) indicates that the future will see student markets change and concludes that:

We have found that local education provision has been potentially the weightiest driver in shaping the current global higher education landscape. In a tumultuous global context, visas and student safety are often cited as factors that influence the sector but the impact of domestic investment on global student mobility has been profound. China, as an example, has improved its domestic system and we will start to see this across a number of different markets. Currently many students go abroad because there is neither capacity nor high-quality education at home but as this changes outbound mobility will suffer.⁵⁶³

Therefore, who the university serves, has changed. Gone are the days where universities could focus only on delivering the type of education that was in demand within their local regions. Peak (2014) for the BC, reported that ‘The number of students crossing an international border to study has increased by over 150 per cent in the last 18 years...’⁵⁶⁴

The pace at which TNE has developed suggests that it is unlikely to regress, rather it is expected to accelerate. ‘Contemporary economic, social and political trends mean that individuals, communities, nation states and supranational institutions are increasingly bound together in an interdependent globalised web

⁵⁶³ <https://ei.britishcouncil.org/educationintelligence/ei-feature-international-student-mobility-2027-local-investment-global-outcome> (accessed 18 April 2018)

⁵⁶⁴ Michael Peak. ‘Student mobility into and out of the UK: The trends’. British Council. 10 July 2014. Also available at: <https://www.britishcouncil.org/voices-magazine/student-mobility-into-and-out-of-the-uk-the-trends> (accessed 17 March 2018)

of complex connections and interactions, and that many local communities and nation states are more diverse.⁵⁶⁵

Today's university, no matter where the geographic location, has been affected by global factors such as: technological advances, reduced government funding for universities and a more well-connected student community which demands borderless education 24/7. Universities are grappling with these issues while trying to define their role within a global world stage for delivering programs. To understand the role of today's university it is worth noting what Ronald Barnett (2011) states:

Despite the exigencies of markets, entrepreneurialism, bureaucracy and globalisation and shifting knowledge structures and identity structures that characterise universities, they still have options before them. There are spaces into which they can move. So there is an ethical space in which universities have their being, whether they acknowledge this or not. Each university is responsible in part for its own form and character. Universities have, therefore, responsibilities. Those responsibilities derive partly from a sense as to what it means to be a university in the modern era.⁵⁶⁶

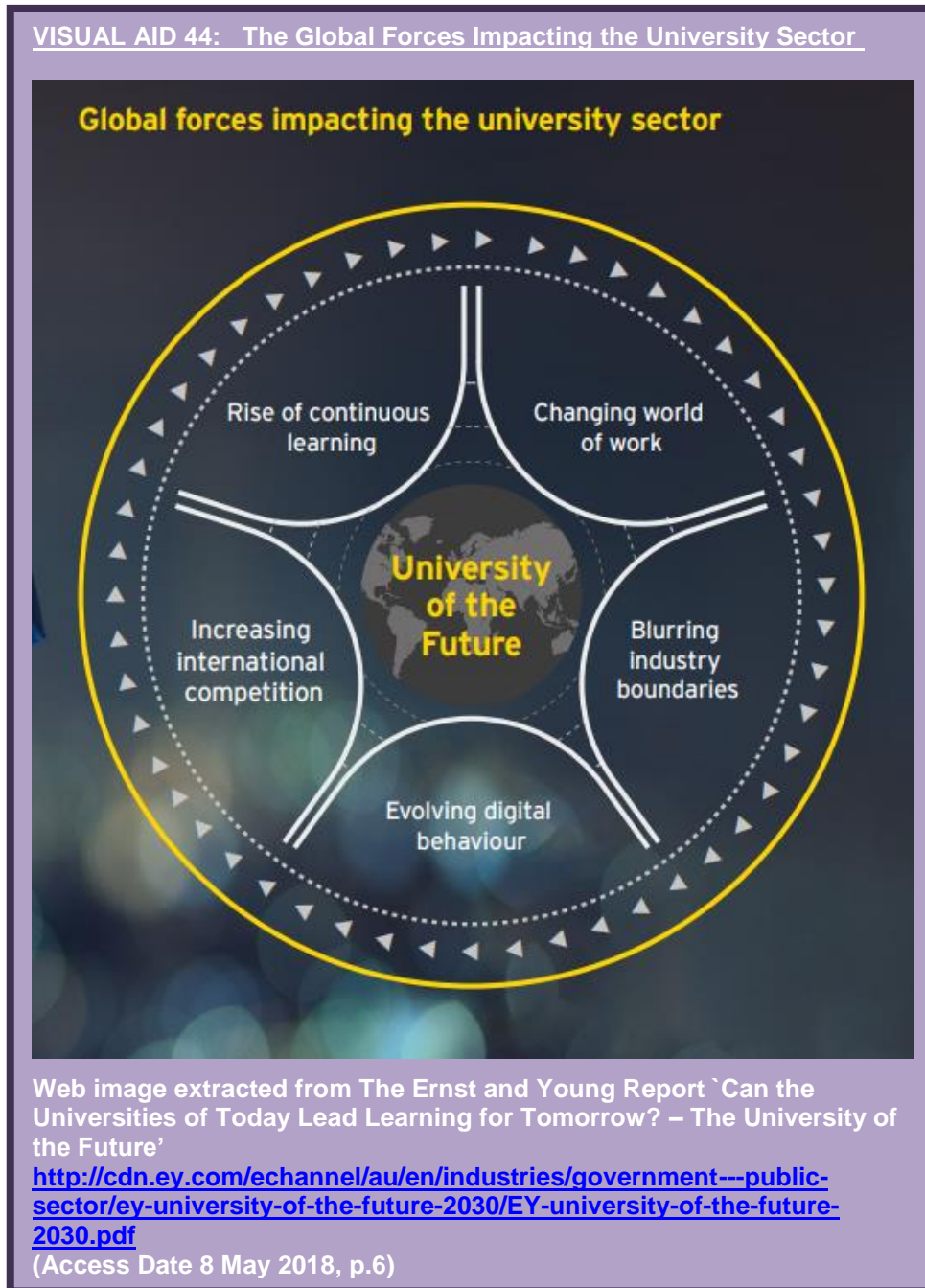
Global trends suggest that traditional universities can no longer be complacent in the belief that they were set up to serve their local or regional communities because often these very communities can access universities from distant shores through TNE. *TNE is a phenomenon which crosses all political, social and cultural divides and is an emerging trend.*

A 2013 statement by Universities Australia (UA) stated that 'Australian universities are no longer just providers of quality education to overseas students, but part of a larger globalised higher education system that encourages the reciprocity of ideas, research, curriculum, and mobility.'⁵⁶⁷ This view is supported in a 2018 EY Report for Australian universities which states that universities are monolithic and control all aspects of teaching and research

⁵⁶⁵ Julia Tanner. 'Global Citizenship'. In David Hicks and Cathie Holden (Eds) *Teaching the Global Dimension – Key principles and effective practice.* Routledge UK. p. 152.

⁵⁶⁶ Barnett, *op. cit.*, p. 4.

⁵⁶⁷ <https://www.universitiesaustralia.edu.au/global-engagement/Global-Education#.WuZpT4gbOUk> (accessed 26 April 2018)



which is anchored by physical spaces and time-bound schedules but digital transformation is challenging this dominant model and universities will need to adapt to changed market conditions because they have now entered the Transformative Age and much like the Industrial Revolution, how we live, work and play has changed.⁵⁶⁸ Refer also to Visual Aid 44 above. Van der Wende (2016) also stated that the change to internationalize the university had already accelerated post the war last century and was ` shaped by major political and

⁵⁶⁸ Ernst and Young Australia, *op. cit.*, p. 2.

economic developments such as the post-war reconstruction, decolonization, the fall of the Berlin Wall, and regional integration in Europe, the Asia-Pacific region, and in Latin America'.⁵⁶⁹

Visual Aid 45 below provides an example of how one university prioritizes its internationalization strategies.



4.1.1 University Partnerships and Relationship Building on the Rise

Historically higher education has been at the forefront of developing linkages to facilitate scholarly dialogue and research. *Given the pace at which the world has*

⁵⁶⁹ Marijk van der Wende and Jiabin Zhu. 'China: A Follower or Leader in Global Higher Education?' Research & Occasional Paper Series. CSHE 1.16. Center for Studies in Higher Education, University of California, Berkeley, p. 2. February 2016. Also available at: https://cshe.berkeley.edu/sites/default/files/publications/rops.cshe_1.16.wendezhu_chinafollowerleaderhe_2.22.2016.pdf

globalized, now more than ever universities are collaborating internationally, simply to be the best they can be. Today university research is not focused only on academia within a country or a region. Indeed, the best research is that which encompasses the best scholars who would deliver the best results. It is not about being insular but rather using the best pool of talent for the greater good of research outcomes. Only some 25 years ago, researchers would generally cooperate to work on projects and research within their own countries or regions; today the internet has made it possible for researchers around the world to readily connect and exchange ideas and research interests. This same 'international' thinking in research is also being harnessed across traditional business and social divides. Teaching students internationally therefore, is a natural extension of all the activities that a university engages in under the banner of 'internationalization'.

While the research available suggests that the growth of TNE is continuing at a rapid pace, not all higher education institutions follow similar paths in terms of their development strategies for TNE. *The pace at which TNE develops is based on the specific needs of individual institutions and the commitment of their leadership.* While one institution may prioritize online delivery of TNE another may choose an IBC or a twinning program. Mavroudis (2017) in an article for NAFSA states that 'The challenges and complexities associated with leading the operations of TNE efforts are real and evolving, and they vary by institutional resources, priorities, and levels of campus internationalization orientation.'⁵⁷⁰

Chapters 1 and 2 have provided much information about the evolution of TNE and how many universities, particularly from the west have expanded their international student programs to now also incorporate TNE activities. The research indicates that TNE receiving countries are now also promoting their own country programs and this has the potential to 'minimize' the investment of

⁵⁷⁰ Vasiliki Goudanas Mavroudis, 'Transnational Education: Northeastern University's Offshore Graduate', NAFSA International Education Magazine, v. 14, Issue 1, April 2017. Also available at: https://www.nafsa.org/Professional_Resources/Browse_by_Interest/International_Students_and_Scholars/Network_Resources/International_Enrollment_Management/Transnational_Education_Northeastern_University%E2%80%99s_Offshore_Graduate/ (accessed 24 February 2018)

those TNE providers (mostly from the west) who have invested heavily in developing TNE. Importantly, it is worth noting that competition for international students is not just by TNE provider countries but also TNE receiving countries that see the opportunity to build on their own education infrastructure while also generating revenue for the country. *This is an emerging trend.*

Hans de Wit (2015) focuses on the importance and appropriateness of partnerships in the higher education sector and their long standing history in internationalization and states that partnerships are the foundation on which international cooperation in education, research and service to societies is built.⁵⁷¹ Yet when it comes to partnerships there are also concerns related to a lack of appropriate discussion at the institutional level before the move towards forming transnational relationships of any sort. In a discussion amongst leaders of universities in Australia there was emphasis on the importance of partnerships, particularly international partnerships.⁵⁷² Wheeler (2012) states that while there has been robust discussion on branch campuses at some US universities, most notably Duke and New York, but at many other institutions there is silence.⁵⁷³ For example, some universities have chosen not to participate in TNE because there is some concern that 'quality' could not be assured. Wheeler makes the case that the reasons for universities not being involved in internationalization (which includes TNE) are:

- **internationalization costs money and takes up valuable resources;**
- **internationalization is dependent on a long term view and that is hard to come in academia given the reliance on government funding;**
- **internationalization requires full commitment from the relevant institution and not just a handful of staff; and**
- **universities should use their resources for the good of their own countries⁵⁷⁴**

⁵⁷¹ Hans de Wit. 'Partnerships for the Future: Trends, Challenges and Opportunities'. In *Higher Education Partnerships for the Future* published by Unit for Higher Education Internationalisation in the Developing World at Nelson Mandela Metropolitan University, Port Elizabeth, South Africa, p. 95. 2015. Also available at: <https://www.highered-research.com/2015/06/01/book-higher-education-partnerships-for-the-future/> (accessed 14 June 2017).

⁵⁷² Lacy, Croucher, Brett and Mueller, *op. cit.*, p. 3.

⁵⁷³ David Wheeler. *The Case Against Internationalization*. The Chronicle of Higher Education Online. 2 February 2012. Also available at: <https://www.chronicle.com/blogs/planet/2012/02/02/the-case-against-internationalization/> (accessed 19 May 2014)

⁵⁷⁴ *Ibid.*

There is now more discussion taking place within the higher education sector on collaboration in relation to capacity building and support of local education infrastructure, exchanges of students and faculty, linkages using technology, sharing of curriculum, twinning and partnership arrangements, the creation of education hubs and IBCs, exploring different approaches to funding TNE activities and real engagement across borders. Some of this engagement has also moved to the provision of internships and volunteer opportunities for students across international networks to enhance employment opportunities in their home countries. There are many examples of the work being done by organizations to collaborate and build on partnerships. For example, from 2013 to 2014 the European Commission in partnership with the European University Association (EUA) undertook capacity building workshops which explored possibilities for ‘enhancing quality of mobility through institutional partnerships, incentivising outward mobility, attracting inward mobility, embedding mobility into quality assurance practices, enhancing staff mobility and generating better data on mobility at institutional and national level to improve decision-making’⁵⁷⁵ A EU Report from 2016 indicated that ‘whether for internationalisation abroad or at home, for cooperation or competition, it is evident that academic partnerships have become a defining feature of higher education and an essential part of internationalisation.’⁵⁷⁶

There is also a greater awareness of what needs to be done to internationalize the university. Not only has there been a significant increase in the quantity of TNE programs available, new forms of partnerships and delivery modes are emerging in the international higher education sphere.⁵⁷⁷

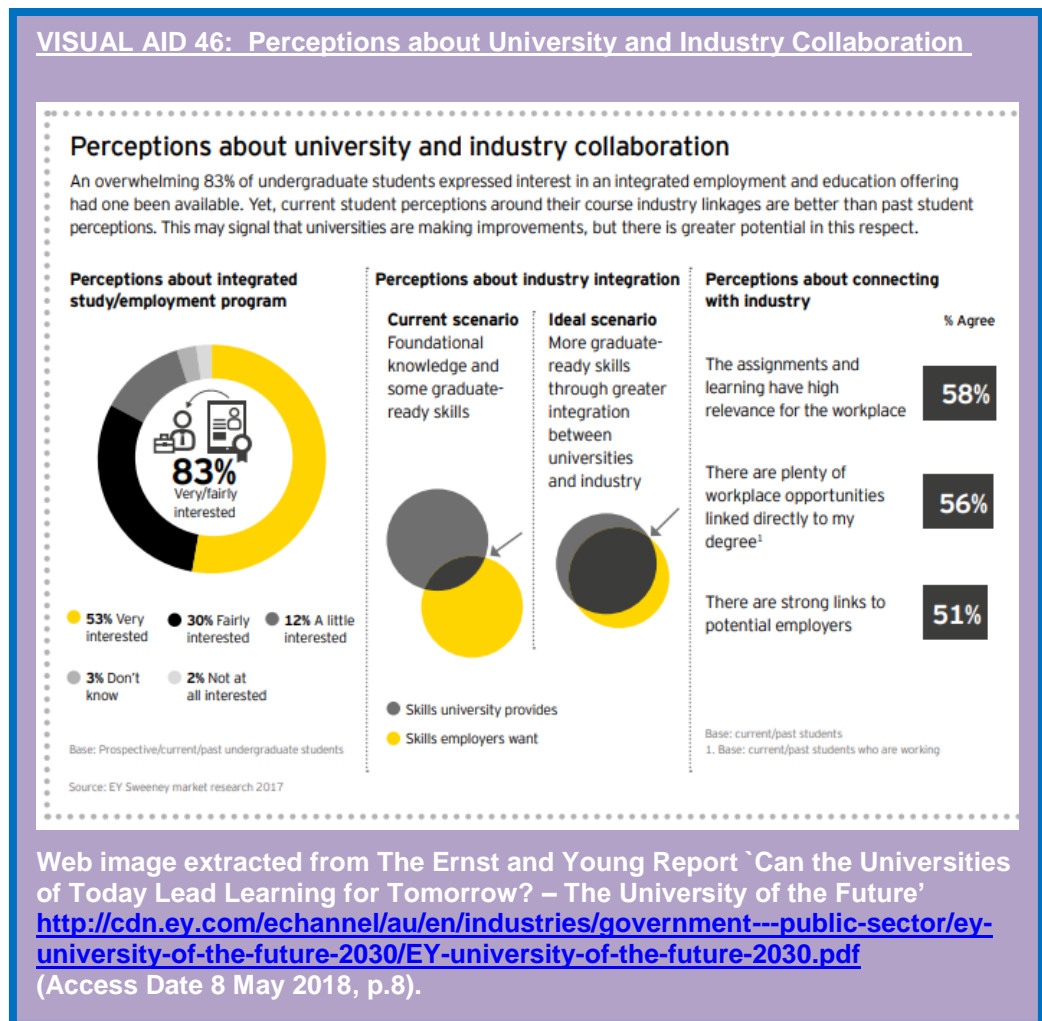
This awareness is leading to more commitments being made by organizations to monitor development and keep pace with change.

⁵⁷⁵ <http://www.aca-secretariat.be/index.php?id=776> (accessed 11 January 2018)

⁵⁷⁶ Hans de Wit and Fiona Hunter. ‘Understanding Internationalisation of Higher Education in the European Context’. In *Internationalisation of Higher Education*, study for the Director General for Internal Policies, European Union, July 2015. p. 53. Also at: [http://www.europarl.europa.eu/RegData/etudes/STUD/2015/540370/IPOL_STU\(2015\)540370_EN.pdf](http://www.europarl.europa.eu/RegData/etudes/STUD/2015/540370/IPOL_STU(2015)540370_EN.pdf) (accessed 14 May 2018)

⁵⁷⁷ Jane Knight, 2017. *International Program and Provider Mobility: Innovations and Challenges*. In *International Educator Magazine*, v. 14, Issue 1, April 2017. Also available at: https://www.nafsa.org/Professional_Resources/Browse_by_Interest/International_Students_and_Scholars/Network_Resources/International_Enrollment_Management/International_Program_and_Provider_Mobility_Innovations_and_Challenges/ (accessed 19 December 2017)

Universities today are also partnering with businesses groups to ensure (a) economic viability for certain programs or research; and (b) ensuring that the course content can create qualified students that are 'employment ready'. *In the case of Australia, the 2018 report by EY⁵⁷⁸ referred to five external drivers over which university stakeholders had limited control, which together will shape the future of higher education in Australia and that these would lead eventually to*



universities better understanding emerging patterns, detecting opportunities and threats, and testing how resilient they are to transform themselves to serve a changing society and a profoundly changed world. The Report refers also to collaboration with businesses on innovation and creating a university operational model which will come 'closer to learner and industry needs, providing an injection into our economy, while developing evolved offerings for the future market.' The perceptions of students concerning university and

⁵⁷⁸ Ernst and Young Australia. *Op. cit.*, p. 30.

industry collaboration are in the 2018 EY Report and included in Visual Aid 46, p. 247.

The 'openness' and ease with which universities now speak about international collaboration and entering into 'revenue based' ventures has historically never before been seen in the higher education sector. *This is an emerging trend.* What is noteworthy is that most institutions that manage TNE as a commercial operation seldom provide open access to information about investment versus return on TNE operations and/or provide student numbers by mode of TNE delivery. Therefore, from a research perspective, it is difficult to conclude what component of TNE students reported in an institution's overall numbers studying in foreign destinations were enrolled at an IBC, online course or a twinning program. The way in which data on TNE is reported by institutions suggests that there is some level of commercial secrecy and often universities prefer to simply list TNE student numbers as a whole and not specific to a particular category of TNE student (e.g. online, IBC, twinning etc.).

4.1.1.1 Individual Universities from TNE Provider Countries Inviting and/or Promoting Partnerships

There are multiple ways in which universities now promote TNE partnerships. Some examples of how individual universities from Australia, the USA and the UK invite partnerships or promote their current partnerships are shown in Visual Aids 47, p. 249, 48, p. 250 and 49, p. 251.

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VISUAL AID 47: RMIT University Inviting Partnerships to Expand TNE

Web image extracted from:
<https://www.rmit.edu.au/about/our-locations-and-facilities/locations/overseas/international-partners/partner-with-rmit>
 (Access Date 14 April 2018)

4.1.1.2. National Organizations Inviting and/or Supporting Partnerships


Some of the ways in which national organizations are driving the collaboration on higher education partnerships are shown in Visual Aids 50, p. 252, 51, p. 253, 52, p. 254 and 53, p. 255.

Visual Aid 52, p. 254 also provides some of the detail on why the UK Government is keen to support international partnerships and TNE is mentioned as one of the ways in which partnerships are formed. (The user connecting to the link would need to scroll down the page to capture all information.)

Visual Aid 53, p. 255 provides a snapshot of Canadian perspectives on international collaboration on various educational projects including TNE. (Please scroll down on the specific web link to access relevant information.)

The underpinning of international collaborative activities by international education organizations (and governments) will intensify as countries continue to jockey for positioning in the highly competitive international student market. *This is an emerging trend.*

VISUAL AID 48: University of Georgia Promoting its International Partnerships



The screenshot shows the University of Georgia Office of International Education website. At the top, there is a navigation menu with links for ABOUT, GOABROAD PORTAL, IMMIGRATION SERVICES, PARTNERSHIPS, FUNDING RESOURCES FOR FACULTY AND STAFF, and GLOBAL GATEWAY. A search bar is also present. The main heading is "International Partnerships". Below this is a world map with numerous colored dots representing international partnerships across various countries, including Canada, United States, Mexico, Peru, Brazil, Argentina, Norway, Spain, Italy, France, Germany, Poland, Czech Republic, Slovakia, Austria, Hungary, Switzerland, Netherlands, Belgium, Luxembourg, United Kingdom, Ireland, Denmark, Sweden, Finland, Norway, Ukraine, Kazakhstan, Mongolia, China, India, Pakistan, Saudi Arabia, Iraq, Iran, Yemen, Sudan, Algeria, Libya, Egypt, South Africa, Congo (Kinshasa), and Australia. Below the map, there is a text box stating: "UGA has built a network of international partnerships in more than 50 countries around the world, engaging with academic peers, governments, and nongovernmental organizations in areas critical to the UGA mission. Click on the map above to explore UGA's global partnership network." Below this text is a section titled "Academic Partnerships" with a sub-heading "The University of Georgia collaborates with international partner institutions in ways that reinforce and complement each other." and a small image of a person in a classroom setting.

Web image extracted from:
<https://international.uga.edu/partnerships>
 (Access Date 14 April 2018)

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VISUAL AID 49: University of Birmingham Promoting its International Partnerships



The screenshot shows the University of Birmingham website page for 'International partnerships'. The header includes the university logo, the name 'UNIVERSITY OF BIRMINGHAM', and navigation links for 'Teaching excellence', 'Alumni', 'Work here', 'Study', 'Research', 'International', and 'Business'. A breadcrumb trail reads 'Home > International > International partnerships'. The main heading is 'International partnerships'. The introductory text states: 'The University of Birmingham is proud of its extensive links with universities and other institutions throughout the world.' Below this is a photograph of a person in a lab coat looking at a piece of equipment. The text continues: 'Our collaborations take an array of different forms, ranging from student exchange and teaching partnerships to joint research on global issues. Through our extensive network of international partnerships we offer opportunities for collaboration on many levels including supporting universities, governments and companies in the development of their staff and providing international experiences for students and staff. Our academic staff research together with colleagues from every continent to address wide-ranging issues such as ensuring future energy demands can be met or to address global poverty. We are committed to international collaboration and are a founder member of [Universitas 21](#), the prestigious consortium of global research-led universities, which promotes international collaboration among its 27 member institutions across 13 countries. We participate actively in the European [Erasmus](#) scheme to promote mobility and cooperation between students and staff of different European countries and our extensive network of international exchange partners provides opportunities for students and staff to gain international experience in the wider global community.'

Web image extracted from:
<https://www.birmingham.ac.uk/International/collaborate/index.aspx>
 (Access Date 14 April 2018)

4.2 TNE Programs and Student Numbers Continue to Rise

Student numbers in TNE programs have continued to rise although there is no comprehensive data as some countries do not collect data and/or there is a lack of consistency in the way data is collected. 'Despite hundreds of institutions from scores of countries actively involved in TNE, the number of countries with systems in place to capture and report TNE enrolments is minimal.'⁵⁷⁹ There is a

⁵⁷⁹ Michael Peak. 'Where could the next transnational education hubs be?' British Council Online. 8 October 2015. Also available at: <https://www.britishcouncil.org/voices-magazine/where-could-next-transnational-education-hubs-be> (accessed 7 June 2018)

lack of reliable data on TNE `but official figures from two of the biggest innovators in the field – the United Kingdom and Australia – suggest that the market is significant and growing'.⁵⁸⁰ The available data is based on who has provided the data and their perception of what constitutes a TNE student. Concerns about data collection have been already been addressed in the Literature Review (Chapter 2).

VISUAL AID 50: The British Council Inviting International Partnerships

The screenshot shows the British Council website page for 'International partnerships'. The page layout includes a top navigation bar with 'Voices Magazine', 'Contact us', and 'Search'. Below this is a secondary navigation bar with 'BRITISH COUNCIL' logo and menu items like 'Learn English', 'Take an exam', 'UK, study and work abroad', 'School and teacher resources', and 'Arts, Education and Society'. A breadcrumb trail reads 'Home > Arts, Education and Society > Our work in education > Higher education > What we do'. The main heading is 'International partnerships', followed by a paragraph: 'We focus on developing education partnerships with institutions between the UK and their counterparts in other countries.' Below this is another paragraph: 'We help UK institutions to go international by providing market analysis and intelligence, developing research partnerships, and providing on the ground support for higher education partnerships.' The 'Our programmes:' section features two items: 'Erasmus+' with an image of hands holding a globe and text 'Erasmus+ is the European Union programme for education, training, youth and sport.', and 'SPHEIR' with an image of two people looking at a laptop and text 'SPHEIR partnerships aim to find innovative solutions to transform the quality, relevance, scale and affordability of higher education in low-income countries.' A sidebar on the right titled 'What we do' lists categories: 'Policy and strategy', 'International partnerships' (with sub-items 'Erasmus+', 'SPHEIR - Strategic Partnerships for Higher Education Innovation and Reform'), 'International mobility', 'Services for UK education providers', 'Services for students', and 'Higher education partnerships'. At the bottom, there is a cookie notice and a footer with the text 'Professional development training for higher education institutions'. The source information at the bottom of the image reads: 'Source: The British Council Web image extracted from: <https://www.britishcouncil.org/education/ihe/what-we-do/international-partnerships> (Access Date 14 April 2018)'. The entire image is framed with a green border.

Source: The British Council
 Web image extracted from:
<https://www.britishcouncil.org/education/ihe/what-we-do/international-partnerships>
 (Access Date 14 April 2018)

Universities are continuing to expand TNE operations. The Literature Review (Chapter 2) and some of the statistical data provided in Introduction (Chapter 1) will indicate that there is no slow down on TNE operations. The fact that

⁵⁸⁰ Clark, 2017, *op. cit.*

universities continue to expand into TNE operations and governments and international education organizations are investing resources to support their institutions is a suggestion that TNE is on the increase. *This is an emerging trend.*

VISUAL AID 51: The Institute of International Education Promoting its International Partnerships

Source: Institute of International Education
 Web image extracted from:
<https://www.iie.org/en/Why-IIE/Centers-of-Excellence/Center-for-International-Partnerships>
 (Access Date 14 April 2018)

TNE student numbers in the top 15 IBCs are presented in Table 21, p. 256.

Most higher education institutions and universities in the West now report their TNE activities as part of their overall internationalization activities. Visual Aid 54, p. 257 shows the website of UK's Heriot-Watt University Malaysia campus. This is how universities in the west are offering alternate options of study to international students who are unable to come to their main campuses.

VISUAL AID 52: The British Council Promotes the Benefits of TNE

Partnerships

<https://www.britishcouncil.org/education/ihe/what-we-do/higher-education-partnerships>

About

Higher education partnerships focus on Transnational Education (TNE) partnerships which build local capacity and support local and UK policy priorities.

Our aim is to support these partnerships in a growing number of countries by building system to system collaboration and working with policy makers to support and encourage internationalisation and create opportunities for UK sector engagement.

The British Council supports partnerships that deliver:

- capacity building in-country
- collaborations which allow UK universities to contribute to global goals, enhance their international engagement and support the national priorities in the regions they operate in
- academic, cultural, economic and social benefits to both partners
- sustainability

Benefit to UK institutions

Higher education partnerships open up wider opportunities for students to gain international qualifications and acquire new skills and perspectives, while distance and time constraints are no longer barriers. They will also open up opportunities for two way mobility of staff and students, and the potential for joint research.

Get involved

Be the first to hear about the latest opportunities from our higher education partnerships by signing up to the [newsletter](#).

Be the first to hear about the latest opportunities in higher education partnerships

Subscribe

Source: The British Council

Web image extracted from:

<https://www.britishcouncil.org/education/ihe/what-we-do/higher-education-partnerships>

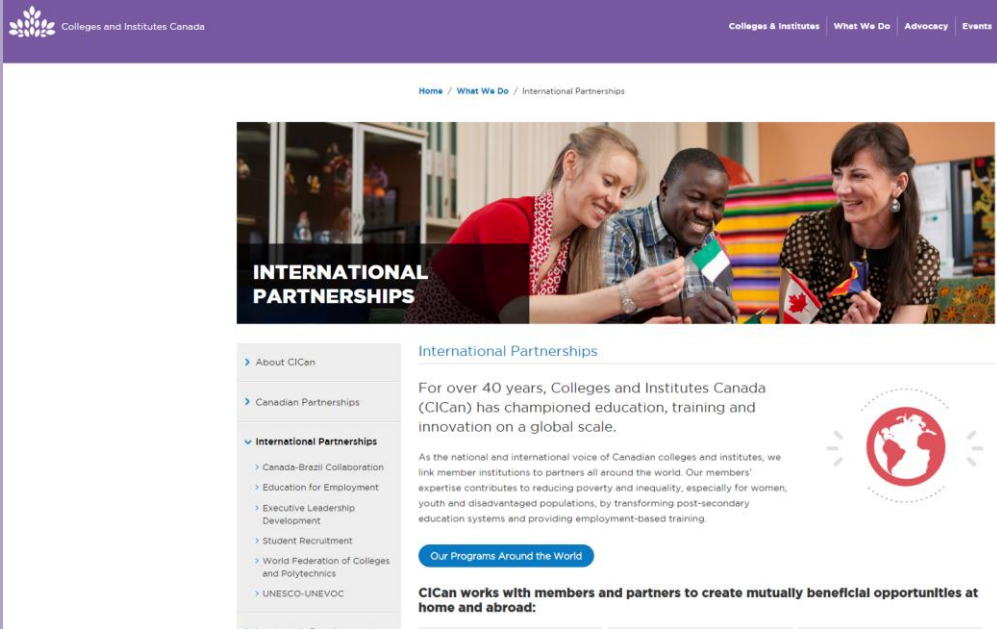
(Access Date 20 April 2018)

Overall TNE student numbers are increasing because IBCs are also increasing in numbers and therefore, there is far greater promotion of TNE programs. In 2009 the OBHE identified 162 IBCs globally.⁵⁸¹ Ziguras (2011) stated that over a quarter of these campuses had come into existence during the last decade. By the end of 2011 there were 200 degree-awarding IBCs in operation worldwide,

⁵⁸¹ Ziguras, Christopher. 2011. 'Global Trends and Key Issues in Transnational Education'. Paper presented at the 'Excellence in TNE: Partnerships for the Future' Conference, Kuala Lumpur, Malaysia, 15-16 Nov 2011.

and 37 more will open over the next two years.⁵⁸² This indicates the pace at which TNE has developed to meet the increasing demand from potential TNE students.

VISUAL AID 53: Colleges and Institutes Canada Developing Education Partnerships Abroad



The screenshot shows the 'International Partnerships' page on the Colleges and Institutes Canada website. The page includes a navigation menu with links for 'Colleges & Institutes', 'What We Do', 'Advocacy', and 'Events'. The main content area features a large image of three people (two women and one man) smiling and looking at a small object. Below the image is a sidebar with a menu and a main content area with text and a globe icon.

Web image extracted from:
<https://www.collegesinstitutes.ca/what-we-do/international/>
 (Access Date 21 March 2017).

Chapters 1 (Introduction) and 2 (Literature Review) provide extensive information on the evolving nature of universities today. Of importance is the discussion on why universities had to consider TNE as part of their internationalization strategy. Simply put, the needs of the student as a consumer had changed. Students were no longer flocking to the West and instead were opting to study locally or regionally. 'The USA and the UK, for example, are predicted to see a steady decline in their numbers in coming years, and according to a British Council report, this trend is set to continue through 2025.'⁵⁸³

⁵⁸² William Lawton and Alex Katsomitros. 'International Branch Campuses: Data and developments'. A Report of the OBHE, UK, 2012. Also available at: http://www.obhe.ac.uk/documents/view_details?id=894 (accessed 14 August 2013)

⁵⁸³ <http://www.qs.com/education-hubs-good-news-or-bad-news/> (accessed 14 January 2018)

TABLE 21: Student Enrolments in the Top Fifteen International Branch Campuses – Year 2016

1. Xi'an Jiaotong Liverpool University – 7,000
2. University of Nottingham Ningbo, China – 6,219*
3. Monash University (Malaysia) – 6,000
4. RMIT Vietnam – 6,000
5. ESSEC Asia Pacific (Singapore) – 4,880
6. University of Nottingham Malaysia Campus – 4,866*
7. College of the North Atlantic – Qatar – 4,600
8. Curtin University of Technology (Malaysia) – 4,411
9. Beijing Normal University^[SEP]- Hong Kong Baptist University United International College – 4,400
10. University of Wollongong in Dubai^[SEP]- 4,163
11. Temple University – Japan campus – 4,000
12. Heriot-Watt University Dubai – 3,500
13. Limkokwing University of Creative Technology (UK) – 3,000
14. Middlesex University – Dubai – 2,500
15. Westminster International University in Tashkent – 2,400

Data extracted from <https://wonkhe.com/blogs/registrarism-branching-out-new-international-campus-developments/>
(Access Date 13 April 2018)

4.3 The Competition for International Students is now Global

Historically most international students were drawn to universities in the west with the US, UK, Australia, France, Canada and New Zealand being the recipient of large numbers of international students. This however, changed as students demanded options for studying closer to home. *Universities now go to where the international students are in order to deliver the types of programs that are demanded by students, employers, local municipalities and governments and this is an emerging trend.*

VISUAL AID 54: UK's Heriot-Watt University Malaysia Campus Website

ENGLISH / 中文网 ABOUT / STUDENTS / STAFF / ALUMNI

HERIOT WATT UNIVERSITY THE JARVIS TIMES GOOD UNIVERSITY GUIDE 2016 INTERNATIONAL UNIVERSITY OF THE YEAR LEADERS IN IDEAS AND SOLUTIONS

STUDY RESEARCH BUSINESS CAMPUSES SEARCH

United Kingdom Dubai Malaysia Global student programme

MALAYSIA

Our Malaysia campus brings high quality British education within easy reach of students in the South East Asia region and beyond.

Search our Malaysia courses GO

OR BROWSE ALL MALAYSIA COURSES >

About us Student services Accommodation Clubs and activities
Transport Our team Contact us Youth Transformation Programme (YTP)

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Web image extracted from:
<http://www.hw.ac.uk/malaysia.htm>
 (Access Date 17 November 2017).

The advent of TNE brought foreign programs to students in their home countries. Countries that lacked sufficient education infrastructure to support their student populations were welcoming to foreign universities, to enter their countries and provide study programs to their students. These initial TNE activities set the stage in supporting local infrastructure. *As more and more foreign universities arrived to set up TNE arrangements, it became clear that there was 'money to be made' and soon TNE receiving countries saw the potential that TNE could offer to their countries.* Hence there commenced education hubs, shared campuses, twinning and at the same time greater exposure for local institutions as well as giving governments the opportunities to promote their countries to the rest of the world. Good examples of this are Singapore and Malaysia which promote their institutions as well as foreign providers.

The competition for students is now global. There is growing 'awareness' among universities, particularly those in the west who were historically accustomed to students coming to their main campuses that they now serve students in a global, borderless marketplace and the competition for students is now also coming from the universities and governments which they have supported with capacity building and educational infrastructure.

4.3.1 TNE Receiving Countries become Competitors of TNE Provider Countries

The literature review and the data confirm that TNE has grown exponentially and there is much evidence that historically much of the TNE activity was driven by the higher education sector in the West (namely, the USA, UK and Australia). However, in recent years TNE receiving countries have actively been promoting their institutions and programs to international students. Examples of receiving countries promoting their institutions as well as the foreign institutions on their campuses are in Visual Aids 55, p 259 to 60, p. 262. *This is an emerging trend.* These activities are expected to increase and will likely have a significant impact on incoming international students to countries in the West, given that international students undertaking degrees in TNE locally have access to (a) lower living and tuition costs; (b) access to degrees from many universities in the West; and (c) no issues related to visa and cultural integration.

Visual Aid 60, p. 262 shows that Malaysia promotes the IBCs of foreign universities which operate in Malaysia but at the same time also promotes its own university programs as being cheaper than the local IBCs. This is not a situation that is unique to Malaysia. Singapore, China, Korea, Hong Kong, and South Africa are countries that are also continuing to promote their own institutions side by side with IBCs and often listing the overall fee structures as a way of directing students to their own institutions. *This is an emerging trend.*

VISUAL AID 55: Malaysian Government Sponsored Website Promoting Study Options at Malaysian institutions and Foreign Universities with a Presence in Malaysia

Why Malaysia

The Malaysian government is committed to the vision of turning the country into a high quality education destination for students from all over the world. The Ministry of Higher Education monitors all institutions to ensure that they adhere to the highest standards.

By choosing Malaysia, you will have access to an internationally-renowned education system in an environment that gives you countless opportunities.

Quality Education

Malaysia is ranked as the World's 11th most preferred study destination by UNESCO.

[Learn More](#)

Affordable Tuition Fees

Malaysia is mainly attractive to foreign students for the affordability of its education.

[Learn More](#)

Reasonable Cost of Living

Voted as Most Affordable City in The World for Students by QS Best Student Cities 2016.

[Learn More](#)

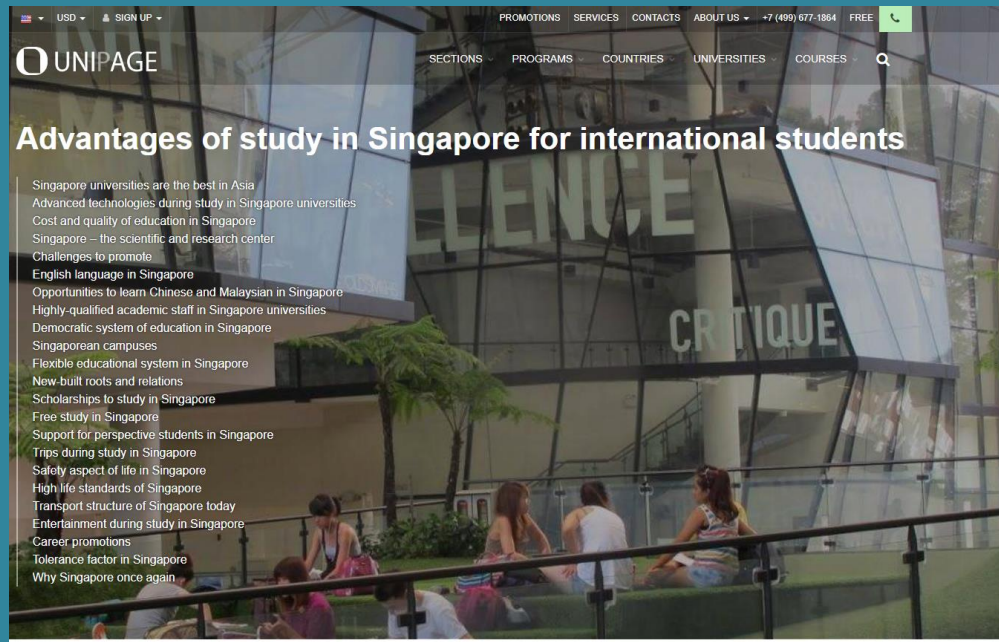
Do you have questions? [Check out Frequently Asked Questions](#)

Web image extracted from:
<https://educationmalaysia.gov.my/why-malaysia.html>
 (Access Date 27 November 2017).

The investment made by foreign universities in Malaysia is also actually helping local universities meet their enrolment targets faster. This is not necessarily a negative outcome for Malaysia and the overseas provider, however, it needs to be considered in the context of long term planning for TNE providers as there is a possibility that as the Malaysia market matures and Malaysian education infrastructure further develops, the role of the IBC may be minimized or that the IBC may in fact have to close or be absorbed by the larger Malaysian institutions. TNE providers in Hong Kong, Singapore, Korea and South Africa

are in a similar position as those that invested in Malaysia because of the competitive environment locally in the TNE receiving countries as well as regionally.

VISUAL AID 56: Website Promoting Singapore as a Study Destination for International Students



Web image extracted from:

https://www.unipage.net/en/advantages_study_in_singapore

(Access Date 14 March 2018).

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VISUAL AID 57: Korean Government Website Promoting Study in Korea to International Students

Ministry of Education About MOE Introduction Document Archive Policies & Programs Statistics E-application National Symbols of the Republic of Korea

✓ < Student Selections >

Regular Admission		Select applicants within the fixed quota, prospective students are considered based on transcripts of high school records, CSAT score, and university examinations
Special Admission	Within the Fixed Quota	Select applicants based on special experiences, talents, and so forth. Applicants who need affirmative action are also considered
	Beyond the Fixed Quota	Select students beyond the fixed quota based on the relevant laws regarding affirmative action (e.g., students from low socioeconomic status, students from rural areas, students with special needs, vocational high school graduates)

* The number of foreign students in Korea is 104,262 students as of 2016. Among them, students who pursue undergraduate degree is 63,104 students (60.5%), and students in the non-degree course is 41,158 students (39.5%). In order for foreign students to enter universities in Korea, Korean language ability is mainly evaluated, yet universities have different college entrance requirements.

Number of Foreign Students in Korea

Year	Regular Admission	Special Admission	Total
2011	89,537	25,884	115,421
2012	86,878	26,280	113,158
2013	85,923	29,208	115,131
2014	84,891	31,255	116,146
2015	91,332	35,593	126,925
2016	63,104	41,158	104,262

Government Complex-Sejong, 408 Galmae-ro, Sejong, Republic of Korea (30119)
TEL : 82-2-6222-6060, 82-44-203-6118/6119
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Web image extracted from:
<http://english.moe.go.kr/sub/info.do?m=020105&s=english>
 (Access Date 11 January 2018)

VISUAL AID 58: Study in South Korea Website for International Students

University search: Study Level Subject of interest Study destination EKO Site Search GO

Country Guides

Study in South Korea

678 shares

Fast Facts

- Officially named the Republic of Korea, but widely known as South Korea or just Korea.
- Capital city is Seoul, classed as a 'megacity' due to its population of more than 10 million.
- The country has an area of 99,313 square kilometers, with 2,413 kilometers of coastline.
- Located on the Korean Peninsula, South Korea shares its only land border with North Korea. To the west, across the Yellow Sea, is China; to the East, across the Sea of Japan, is Japan.
- Currency: South Korean won (₩/KRW)

See more

Having split from North Korea in 1948 into a separately governed country, South Korea has diverged considerably from its neighbor, developing into an internationally recognized Asian powerhouse in the fields of technology, education and tourism, to name but a few of its strengths. Embracing both tradition and modernity, this 'Asian Tiger' has much to offer international students, and capital city Seoul is currently ranked among the world's top 10 student cities.

Investment in education and research has been at the heart of the South Korea's growth into the world's 13th largest economy and the third largest economy within Asia. It's this investment and growth in innovation and technology that has meant the country is known as one of the four 'Asian Tiger' economies, alongside Hong Kong, Singapore and Taiwan.

In 2004 the South Korean government set a target of attracting 100,000 foreign students to its universities by 2012, and by 2011 the country had enrolled over 85,000 international students from 171 different countries. Now the initiative has set its sights even higher, with an aim of 200,000 international students by 2020.

As part of this ongoing focus on internationalization, several universities in South Korea, including Yonsei University, are opening new international campuses to meet growing demand, while five universities have opened branch campuses at the Incheon Global Campus (IGC), including the State University of New York (SUNY).

Click on the tabs below to find out about universities in South Korea, student cities, tuition fees and more.

The Top 10 Universities... WORLD UNIVERSITY RANKINGS 2018

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Web image extracted from:
<https://www.topuniversities.com/where-to-study/asia/south-korea/guide#tab=1>
 (Access Date 11 January 2018)

VISUAL AID 59: Malaysian Government Promoting Affordable Tuition Fees for International Students

One of the main attractions Malaysia holds for foreign students is 'affordability'. The major cost considerations when it comes to a foreign education are tuition fees and living expenses.

Once they calculate the cost of education and living in Malaysia, many international students discover that studying in Malaysia offers them an affordable cost of quality tertiary education is one of many good reasons why international students choose Malaysia.

For example, you can acquire a UK engineering degree (3 years) in Malaysia through a franchised degree programme at an estimated RM51,000. The tuition fee of the same degree programme at the host university in the UK is about RM144,000 (USD45,000).

Web image extracted from:
<https://educationmalaysia.gov.my/why-malaysia/affordable-tuition-fees.html/>
 (Access Date 27 November 2017)

VISUAL AID 60: The Competition for International Students: Promoting Lower Tuition Cost at Malaysian Public Universities

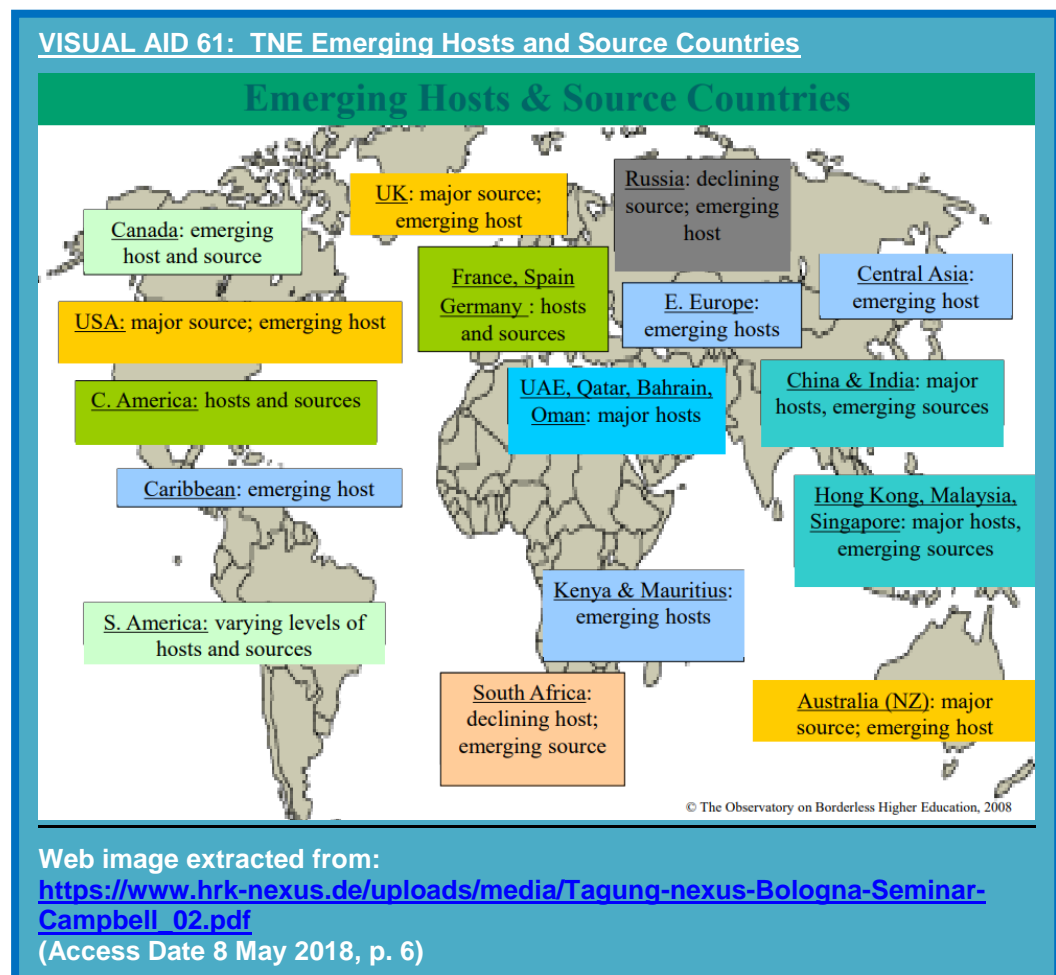
Bachelor's Degree Programmes

Area of Study	Paths of Study		
	Cost in USD for Private College 3+0 Foreign Degree Programme (3 years)	Cost in USD for Foreign Branch Campus University Degree Programme (3 years)	Cost in USD for Malaysian Private University Degree Programme (3 years)
Business	11,100 – 14,300	13,700 – 24,000	8,600 – 11,400
Engineering	13,000 – 15,000 (3 yrs., UK; 4yrs., Aust)	21,100 – 40,000 (3 yrs., UK; 4yrs., Aust)	12,900 – 14,300 (4 yrs.)
IT	9,700 – 12,900	13,400 – 25,100	9,400 -12,300
Hospitality & Tourism	13,700 – 18,600	-	12,000 -14,300
Medicine	-	114,300 (5 yrs.)	62,900 -108,600

Web image extracted from:
<https://educationmalaysia.gov.my/why-malaysia/affordable-tuition-fees.html/>
 (Access Date 27 November 2017)

4.3.2 TNE and IBCs start up in the West

Universities from the west are also beginning to see the arrival of overseas universities. Visual Aid 61 below indicates that IBCs of developing countries are also operating in overseas countries. *In future, universities in the west are likely to be competing for domestic students, side by side with IBCs (and partners) of overseas universities at a time when they are already experiencing fewer domestic students as well as declining international student numbers to their main campuses. This is an emerging trend.*



Malaysia, China, Iran and the Philippines already have IBCs operating abroad.⁵⁸⁴ More recently Iran is in the process of establishing an IBC in Canada. Therefore, the movement of institutions via IBCs and other TNE activities is not

⁵⁸⁴ http://cbert.org/?page_id=34 (accessed 14 January 2018)

merely from the developed world to the developing world. *TNE sees no geographic boundaries*. Universities and indeed also other education and training providers are seeing opportunities around the globe. This is changing the competitive nature of the student marketplace. Where historically institutions in the developed world competed for international students, now institutions from the developed world will also be competing with institutions from the developing world.

4.4 TNE Supporting Development Aid

TNE is not a movement restricted only to the developing world, however, there is reason to believe that there is *more* TNE activity happening there because there is more scope to service `clients' (students and building infrastructure for local universities) in these regions rather than in the developed world. Of importance to `developing countries are the challenges in terms of the need to support the further expansion of their higher education system; to redefine its role and situation in the regional context, and to struggle with the impact of global forces confronting it'.⁵⁸⁵ Universities Canada in a 2016 report states that `as the pace of internationalization of Canadian institutions accelerates, universities are increasingly active in – and targeting collaboration with developing countries through institutional partnerships; student mobility; teaching, learning and faculty engagement; and international research collaboration.⁵⁸⁶ Long before TNE became fashionable, Canadian universities were providing infrastructure support to universities in the developing world e.g. the University of Athabasca which promotes distance education with offshore visits and select twinning arrangements.⁵⁸⁷ *TNE is increasingly viewed as a low cost and viable method to underpin aid-based educational support to developing countries.*

⁵⁸⁵ Sirat, *op. cit.*, p. 8.

⁵⁸⁶ Universities Canada. 2016. *'Mobilizing people and ideas for an innovative, inclusive and prosperous world'*. Universities Canada's response to Canada's international assistance review consultations. p. 6, July 2006. Also available at: <https://www.univcan.ca/wp-content/uploads/2016/08/canadas-international-assistance-review-consultations-universities-canada-response-july-2016.pdf> (accessed 14 February 2018)

⁵⁸⁷ <https://www.athabascau.ca/> (accessed 13 February 2015)

TNE opportunities in the western world may focus on certain discipline areas which require an emphasis on 'global' knowledge e.g. business studies, nursing, medicine, etc. whereas TNE in the developing world can offer opportunities across the board in almost any subject area as most of these countries have many students who simply can't get places into programs due to a shortage of space within their own institutions.

In 2000 the UN implemented the Millennium Campaign with eight specific goals to be achieved by 2015. The Millennium Development Goals (MDGs) emphasized the need to reduce poverty around the world and one way of doing this was to address the issue of gender equality in education. Further to this, in 'conjunction with the Dakar Declaration (2000), which pledged to achieve *Education for All*, the MDGs provided a skeleton framework and devised a set of yardsticks with which to establish the current status of gender educational equality in each nation and assess their progress.⁵⁸⁸ While there is much debate about whether gender inequalities can really be addressed solely through global poverty agendas, Fennell and Arnot (Eds, 2008) suggest that adult learning rather than mass schooling appears to bring about change.⁵⁸⁹ Again, TNE offers a multitude of options and much adult learning at present comes through options provided by institutions and organizations that are offering TNE. It is rare to find an institution that is offering adult learning and is not involved in TNE in some way. This is because the operational infrastructure needed to support adult learners in a 24/7 driven world has the same ingredients as that required to make programs available across borders. *This is an emerging trend.*

Governments continue to discuss TNE within the context of development aid. In May 2013 representatives from national education ministries and education organizations of 17 countries got together for a Higher Education Summit in the UK. The Summit had its focus on how TNE could support development aid, in order to meet targets set down by the UN in 2000.

⁵⁸⁸ Shailaja Fennell and Madeleine Arnot (Editors), *Gender Education and Equality in a Global Context - Conceptual frameworks and policy perspectives*. Routledge, London and New York, 2008. p. 2-3.

⁵⁸⁹ *Ibid.*

As most literature refers to higher education as a private and a public good to advance societies, this section discusses the role of TNE in the developing and developed world and whether the delivery of TNE can be viewed as another way of meeting the same goals as those set by some countries for educating the world's poor within the framework of their development aid agendas. Visual Aid 62, p. 267 provides details of NUFFIC's (Dutch Government supported) Orange Knowledge Programme. For some regions such as Africa, the challenge 'is to stem current and forestall future international educational inequalities and hierarchies by revitalizing its own universities and building regional centers of excellence and systems of intra-continental and international academic mobility, exchange, collaboration, connectivity, and regulation that generate and sustain empowering knowledge.'⁵⁹⁰

There are already a number of TNE activities that are creating opportunities targeting students of lower socio-economic backgrounds. For example, UNICAF offers a robust scholarship program and states on its website that the 'primary objective of the UNICAF Scholarship Programme is to make education affordable for students from Africa and to provide opportunities to African students to pursue advanced academic studies and to earn internationally recognized qualifications.'⁵⁹¹ Refer Visual Aid 63, p. 268.

Countries round the world are supporting more and more educational projects through their aid efforts. For example, the Canadian International Development Agency (CIDA) is making its 'international assistance more efficient, focused, and accountable.'⁵⁹² CIDA undertakes this through collaboration with Canadian university partners in securing the future of children and youth in the developing world. Canada's aim is to improve access to basic education and the quality of education, promote learning achievement and places a great emphasis on teachers and teacher training and the development of the curriculum and

⁵⁹⁰ Paul Tiyambe Zeleza. 'Transnational Education and African Universities'. *Journal of Higher Education in Africa / Revue de l'enseignement supérieur en Afrique*. Vol. 3, No. 1 (2005), p. 19. Also available at: https://www.jstor.org/stable/24486240?seq=1#page_scan_tab_contents (accessed 12 November 2013)

⁵⁹¹ <https://southwales.unicaf.org/about-us/> (accessed 12 January 2018)

⁵⁹² https://international.gc.ca/world-monde/issues_developpement-enjeux_developpement/priorities-priorites/aidagenda-planaide.aspx?lang=eng (accessed 14 February 2018)

learning materials. It is early to make the direct connection with universities offering transnational programs or having branch campuses offshore, however, it is clear that those Canadian universities at the forefront of this engagement with CIDA will have the ability to contribute to development in innovative

VISUAL AID 62: NUFFIC's 'Orange Knowledge Programme' Providing Aid and TNE Study in 50 Countries

The screenshot shows the Nuffic website's page for the Orange Knowledge Programme. The page is titled "Orange Knowledge Programme" and provides detailed information about the program's objectives, scholarship application process, priority themes, instruments, and participating countries.

nuffic The Dutch organisation for internationalisation in education

Home > Global development > Orange Knowledge Programme

Orange Knowledge Programme

Nuffic's Orange Knowledge Programme is a € 185 MIO global development programme, funded by the Dutch government. It was kicked off mid-2017 for a period of 5 years and involves around 50 countries.

Our objective is to contribute to a society's sustainable and inclusive development by strengthening the skills and knowledge of both individuals, groups of individuals and organisations.

Scholarship applicant?

If you want to apply for an individual scholarship you can find all candidate information on our [Study in Holland website](#).

Priority themes

The programme offers scholarships, training and institutional partnerships between education institutions in Technical and Vocational Education and Training (TVET) and higher education, in fields related to the priority themes of the Dutch government:

- Food and nutrition security
- Water
- Sexual and reproductive health and rights
- Security and the rule of law
- Energy and climate

Instruments

The Orange Knowledge Programme consists of 4 instruments:

1. partnership projects between TVET and higher education institutions locally and in the Netherlands;
2. Tailor-Made Training (TMT) for groups;
3. [individual scholarships for mid-career professionals](#);
4. alumni activities.

Participating countries

There are 3 types of participating countries.

1. Full programme countries (approx. 70% of budget): all 4 programme components are available in these countries:
Bangladesh, Benin, Burundi, Colombia, Egypt, Ethiopia, Ghana, Indonesia, Kenya, Mali, Mozambique, Myanmar, Uganda, Palestinian Territories, Rwanda, Tanzania, Vietnam and South Africa

Web image extracted from:
<https://www.nuffic.nl/en/global-development/orange-knowledge-programme>
 (Access Date 13 April 2018)

VISUAL AID 63: Private Partners in Africa Promoting Online Courses of Foreign Universities

The screenshot shows the UNICAF website for the University of South Wales. The header includes the UNICAF logo and navigation links: Home, About, Programmes, Admissions, Online Experience, and Contact us. A prominent banner image displays a modern building at night with the text "University of South Wales - online courses delivered by UNICAF". Below the banner, the "About Us" section states that UNICAF has partnered with the University of South Wales to offer a variety of courses. It mentions that the University of South Wales is one of the largest in the UK and offers more opportunities and better prospects for students. The University leads the agenda across a number of industries with Faculties including:

- Business and Society
- Computing, Engineering and Science
- Creative Industries
- Life Sciences and Education

UNICAF is part of an educational organisation (EDEX) which has campuses and learning centres at international locations. A testimonial from Lizzy Santander reads: "Studying at the University of South Wales was definitely one of the best experiences I have ever had, not only for the academic part but also for taking recreational classes, and living and sharing with students from different countries and cultures."

Web image extracted from:
<https://southwales.unicaf.org/>
 (Access Date 13 April 2018)

ways that complement the roles and functions of governments and the private sector, especially in its efforts to address the issues of the most marginalized in society'.⁵⁹³

In a policy paper in 2012, the Netherlands Organisation for International Cooperation in Higher Education (NUFFIC) discussed the work that **is** being undertaken in capacity building, improving access to technology, building and strengthening research capability and academic networks, creating training programs and supporting staff and study mobility. The view put forward was that TNE 'can help reduce brain drain in the South, but if profit-oriented may hinder capacity development.'⁵⁹⁴

⁵⁹³ *Ibid.*

⁵⁹⁴ <https://www.nuffic.nl/en/publications/find-a-publication/international-higher-education-collaboration-in-the-south-worldwide-developments.pdf> (accessed 19 April 2018).

While it is clear that aid-based development assistance provides free services to the developing world, it is also clear that the rapid development of TNE programs in these countries, will facilitate the process of bringing education to the 'masses' which is one of the goals of governments in the developed world. Discussions continue amongst major countries about how TNE can assist developing countries. The *2013 Higher Education Summit* in the UK's G8 Presidency Year hosted by the British Council focused 'on the local impact of transnational education (TNE) in supporting economic empowerment and the development of global knowledge societies.'⁵⁹⁵ This Summit was the third Summit held; previous summits were held in 2011 in Paris hosted by Edu France (France's international education agency) and in 2012 in Washington DC hosted by the IIE.⁵⁹⁶

In the Summit's Summary Report there was discussion of preliminary findings of research undertaken by the British Council on the 'social, economic and academic impact of TNE on 10 host countries (Botswana, China, Malaysia, Mexico, Pakistan, Russia, Singapore, South Africa, the United Arab Emirates and Vietnam).'⁵⁹⁷ Authors of the research, Jane Knight and John McNamara focused on 'four key areas: economic growth; skills/knowledge development; capacity building; and socio-cultural environment'.⁵⁹⁸ The research findings suggest that in the main host countries benefit the most in the area of capacity building which suggests that from the aid perspective, the input into these countries through TNE adds to the overall efforts towards improving the position of these countries economically and socially. In August 2018, Prime Minister Theresa May stated that 'Trade is also an important part of our efforts to support countries out of poverty in a way that aid-spending alone cannot, whilst creating our trading partners of the future.'⁵⁹⁹

⁵⁹⁵ https://ei.britishcouncil.org/sites/default/files/import-content/summary_summit.pdf p. 1 (accessed 11 January 2018)

⁵⁹⁶ *Ibid*, p. 1.

⁵⁹⁷ *Ibid*, p. 2.

⁵⁹⁸ *Ibid*, p. 2.

⁵⁹⁹ <https://www.gov.uk/government/publications/export-strategy-supporting-and-connecting-businesses-to-grow-on-the-world-stage/export-strategy-supporting-and-connecting-businesses-to-grow-on-the-world-stage> (accessed 8 April 2019).

Faculty and programs have crossed borders over many years 'as part of development aid projects and international academic linkages and networks'.⁶⁰⁰ For decades, components of the development aid budgets of many countries including Britain, USA, New Zealand, several European countries and Australia have gone towards creating educational opportunities for people, particularly young people in the developing world. The budget for education has usually been provided for local schooling and infrastructure building plus scholarships to bring students for higher education to host countries that offer development aid based educational scholarships.

As part of this research project telephone calls were made in 2012 and 2013 to CIDA and Australia's then Australian Development Assistance Agency (AusAid) in relation to whether students could participate in their own home countries or through distance education where aid-based scholarships were provided so that the aid budget could stretch further and more students could afford to study. The response from CIDA was that this matter is under discussion and AusAid advised that students in the then proposed 'New Colombo Plan' scholarship program were not precluded from studying at Australian university campuses in low cost countries. Monash University's IBC campus in South Africa was suggested as one option. There was however, very little information available on CIDA's and AusAid's websites. The amalgamation of AusAid into the Australian Department of Foreign Affairs and Trade (DFAT) in 2015 meant that even less information was available. At the same time, there is ample evidence that CIDA 'contributes to university international initiatives by funding development projects—for example, through the University Partnerships in Cooperation and Development program.'⁶⁰¹

In 2015, the United Nations 70th General Assembly, adopted 17 Sustainable Development Goals (SDGs) which called for universal action to end poverty, protect the planet and ensure peace and prosperity for the world's people. Part of

⁶⁰⁰ Knight, *Trade in Higher Education Services: The implications of GATS*, *op cit.*, p. 63.

⁶⁰¹ Trilokekar and Jones, *op. cit.*, p. 13.

the SDGs was to 'ensure inclusive and equitable quality education and promote lifelong learning opportunities for all.'⁶⁰²

With TNE, it is important to consider that aid donor countries can now receive far more extensive outcomes from their education aid budgets by directing the flow of students to TNE programs running in the students' home countries or regions. This would allow the aid budget to cover more students. It would also short cut the process of aid donor countries attempting to familiarize themselves with local and regional education systems that are usually already strained in terms of the numbers they can educate; instead students can be directed to TFN programs of universities of the donor countries. While there is no data available on how TNE facilitates development aid by 'stretching' the aid budget one would have to assume that the emphasis governments are placing in discussing TNE in the context of building infrastructure and supporting education does in fact mean that TNE facilitates development aid.

A hypothetical scenario on how TNE can 'stretch' the aid budget is as follows:

- US Aid offers \$100,000 per annum in aid funds for education to Burma.
- Airfares, living costs and tuition fees for a study to come to the US for study would mean that these funds could cover only 2 single students for 1 year.
- Instead, US Aid could direct the students to go to a cheaper destination closer to home for part of the study (that is if there are no TNE programs offered in Burma by the US) such as Vietnam, Malaysia and even the Philippines where costs related to tuition, living and airfares would be cheaper.
- Where USA does not have campuses in the region, they could work closely with other donor countries such as Canada, Australia, UK that do have campuses and work out suitable arrangements.
- The students could be allowed to undertake a final year of study in the USA to gain the American experience.

⁶⁰² https://read.oecd-ilibrary.org/education/education-at-a-glance-2017_eag-2017-en#page28 (extracted 7 February 2018.)

- This would mean the first few years of study could be undertaken at much lower cost, stretching the US Aid budget further to allow more students to get an education.

Governments of countries that offer TNE are already aware of their 'influence' in developing countries particularly when it comes to enhancing or supporting the education infrastructure in these countries. However, given the emphasis placed on the 'financial' imperatives of TNE there is less thought given to the direct link of how TNE may help governments to disburse development aid in education. Despite this there is mention made indirectly of TNE in the context of bilateral educational relationships. For example, Australia does have many bilateral education relationships in the developing and developed world and understands that 'opportunities exist to deepen these relationships as world investment in education continues at high levels despite the effects of the global recession.'⁶⁰³

At the *2016 International Higher Education Summit* in Tokyo, where the main international players in aid were gathered – namely Australia's Department of Foreign Affairs and Trade (DFAT), the EU, the French Ministry of Foreign Affairs, DAAD, the Korean National Institute for International Education (NIIED), the BC, OECD, The Southeast Asian Ministers of Education Organization (SEAMEO) Regional Centre for Higher Education and Development (RIHED) and the IIE, there was much discussion on mobility. Some of the trends discussed included the fact that mobility is on the rise; there is a growth of non-traditional education abroad including internships, mentorships and volunteering and that 'the concept of mobility itself is changing; we now need to include and address a wider variety of issues such as offshore and transnational education, joint and dual degrees, and international education in the digital space.'⁶⁰⁴ The discussion at the Summit also raised the issue of the refugee crisis from Europe to Southeast Asia and the role of

⁶⁰³ Department of Education, Employment and Workplace Relations, *op. cit.*

⁶⁰⁴ <https://www.iie.org/en/Learn/Blog/2016/06/2016-June-Insights-From-The-G7-International-Higher-Education-Summit>(accessed 19 June 2018)

education in all societies as well as the rising cost of education which would promote inequality.

TNE provides an additional impetus to the trend of making education a priority for all people. It ensures that governments of aid granting countries can have far greater scrutiny of local educational institutions if some of these institutions are from their own countries with infrastructure set up offshore that can provide the basis of additional development aid towards education. At the least, it may provide more value-added opportunities for aid organizations to work together to provide more education opportunities in terms of scholarships to those who cannot afford an education. The cost benefit of TNE needs to be considered in the context of bringing persons to a host country compared to offering the education in the home country or a regional country which is a cheaper location. There is therefore, opportunity for the aid community to also work with local institutions to reinforce the TNE option as a means of extending further the aid budget for education.

There are other indirect ways in which TNE is supported. Recently an 'A26 Backpack' was developed as a human rights tool for vulnerable students to be mobile for study and employment by an academic at the University of California Davis (UCD) in collaboration with the American University in Beirut, and the American Association of Collegiate Registrars and Admissions Officers (AACRAO).⁶⁰⁵ The plan is for vulnerable youth (specially refugees) to overcome some of the structural and bureaucratic problems they encounter as they seek their right to an education as defined by the 1948 *Universal Declaration of Human Rights* that establishes education as basic human right.

In the case of Australia, there is clear evidence that by supporting developing countries the world prospers and 'contributes to jobs and improved living standards for Australians at home.'⁶⁰⁶ Nurturing and supporting and developing

⁶⁰⁵ Hana Addam El-Ghali. 'The Article 26 Backpack: A New Tool for Empowering Vulnerable Youth'. World Education News and Reviews (WENR) Online. 6 Feb 2018. Also available at: <https://wenr.wes.org/2018/02/the-article-26-backpack-a-new-tool-for-empowering-vulnerable-youth> (accessed 14 May 2018)

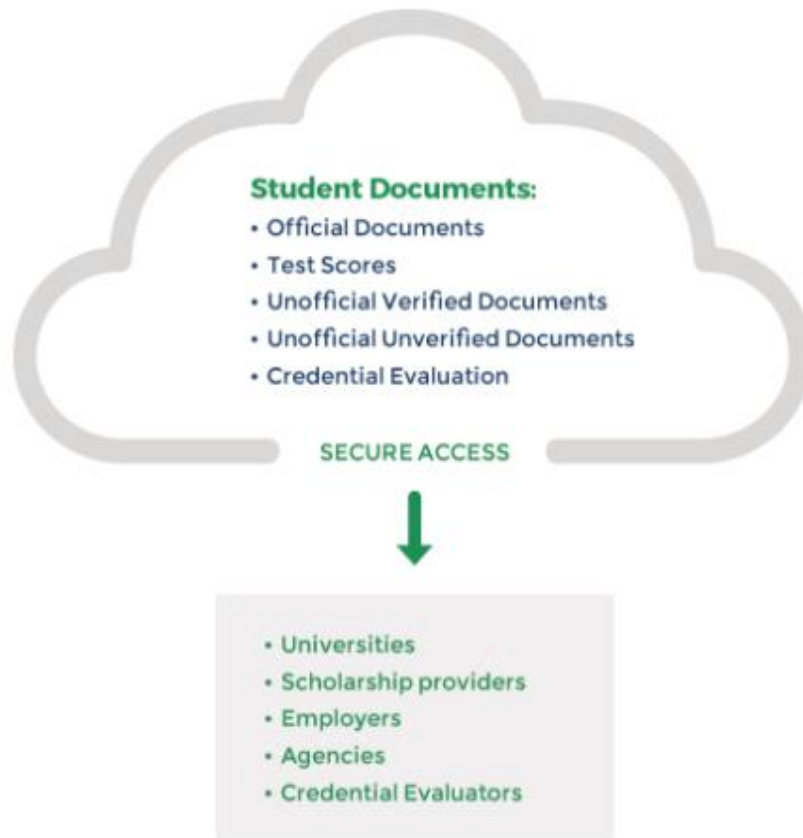
⁶⁰⁶ <http://www.aisaid.gov.au/Publications/Documents/AidReview-Response/effective-aid-program-for-australia.pdf> p.6. (accessed 11 February 2012)

countries also means that in time these countries mature and become self-sufficient. In Australia's case, Thailand and South Korea were once the recipients of aid but are now active trade partners.

The impact of TNE on aid budgets is more than likely to be closely watched by aid-granting governments as they look to greater outcomes from limited aid budgets. *This is an emerging trend.*

VISUAL AID 64: Article 26 Backpack Developed to Support Vulnerable Youth (Specially Refugees) Seek their Right to an Education

The Article 26 Backpack™ Cloud-Based Platform



Source: UC Davis

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Source: World Education News & Reviews of World Education Services

Web image extracted from:

<https://wenr.wes.org/2018/02/the-article-26-backpack-a-new-tool-for-empowering-vulnerable-youth>

(Access Date 14 May 2018)

4.5 Greater Recognition and Support for TNE

The decrease in government funding for higher education experienced in many countries around the world in the late 1980s and early 1990s had set many higher education institutions on the path to become entrepreneurial. The OECD (2009) stated that the ‘Pressure on national public funding for higher education in certain countries has encouraged or forced institutions to seek additional income from cross-border sources.’⁶⁰⁷ Universities in Australia and the UK were particularly vulnerable as a result of government funding cuts and had to look for revenue to support their higher education sector.

The pursuit of market-oriented activities by colleges and universities in search of new revenue streams, increased enrolments, greater prestige, and amplified visibility for their ‘brand names’ became common practice in the late 1990s and the early 21st century.⁶⁰⁸ Bringing in international students to their campuses and in the more recent years looking for offshore opportunities through TNE options was the way to raise revenue. They set out actively recruiting students from overseas, particularly the booming Middle Eastern and Asian countries and exploring other ways they could turn their knowledge and skills into income streams for the universities.⁶⁰⁹

The lessons learnt from the last 20-25 years of universities earning income from international students coming to their home campuses as well as in the last approximately 20 years to their offshore campuses through the TNE mode enormously changed some of the perceptions of what universities can and cannot do. Whereas at one point there was the regular questioning of educational institutions being involved in ‘fee for service’ activities as it was considered that this would in some way affect the quality of education, more individuals were coming to terms with universities needing revenue to survive. Indeed, local students and faculty increasingly understood that their universities

⁶⁰⁷ <http://www.oecd.org/edu/cei/highereducationto2030volume2globalisation.htm> p. 47 (accessed 14 March 2018)

⁶⁰⁸ Bleak, *op. cit.* p. 1.

⁶⁰⁹ Gareth Williams. ‘The Higher Education Market in the United Kingdom’. In Teixeira P., Jongbloed B., Dill D and Amaral A. (eds) *Markets in Higher Education*. Higher Education Dynamics Series, v. 6, Kluwer Academic Publishers, Netherlands, p.244.

bringing in revenue from international students would in fact subsidise universities at a time when government funding was diminishing.

It became an accepted norm that universities in most of the developed world now earn income from international students and other education related services. It also became common knowledge that countries such as Australia, Britain, Canada, New Zealand and the USA have an active trade agenda to promote their education systems to overseas students. With federal funding for domestic students in short supply, international student fees have cross-subsidized the education of Australians and the research output of our universities.⁶¹⁰ There is more information on Trade and GATs in pp. 156-159.

The UK and Australia, who are credited for being the early TNE entrants into Malaysia, South Africa and Singapore, continued their somewhat 'aggressive' push into capturing a greater share of the international student market including TNE. The USA, which has historically had many partnerships in developing countries, accelerated their efforts in TNE to ensure that their market position and brand name could be maintained. When reviewing existing data on country 'performance' in the recruitment of international students, note that while the USA has the largest number of international students on their campuses, Australia, the UK, New Zealand and Canada have smaller populations and fewer universities but have done substantial work in the last 25-30 years in developing their international student policies which has led to a significant growth in TNE student numbers. The trend is for these countries to continue to grow their TNE programs. Universities UK International recently released a report which indicates that 'over 700,000 students were studying for UK degrees outside the UK in 2015-16, which is 1.6 times the number of international students in the UK in the same year'.⁶¹¹ This is the reality of TNE. In a matter of 25-30 years higher education not only established the booming business of full-fee paying international students to their campuses but also rose to the challenge brought on by funding and other issues to develop TNE as an income producer.

⁶¹⁰ Sean Gallagher and Geoffrey Garrett. 'Overhaul the Export Strategy or Fall Behind'. The Australian Online, 1 August 2012. Also available at: <http://www.theaustralian.com.au/higher-education/opinion/overhaul-the-export-strategy-or-fall-behind/story-e6frgcko-1226439769584> (accessed 12 May 2013)

⁶¹¹ Universities UK International, *op. cit.*, p. 2.

In addition to the financial benefits provided by TNE, individual countries raced to develop their TNE initiatives as they wanted to be viewed as 'supporting' capacity building and meeting the local needs of students in developing countries.

Some long term TNE provider countries from the developed world saw the recruitment of international students by developing countries (TNE receiving countries) as a 'win-win' situation. There was a view that while receiving countries had become competitors for international students with TNE provider countries from the developed world, overall efforts in TNE helped developing countries benefit socially and economically and this led to peace and stability. TNE provider countries also benefited by increasing the world's educated population because this also influenced democratic thinking in today's somewhat 'fractured' world; it also helped raise awareness about the environment and sustaining the planet. (Refer also to Capacity Building and 'Soft Power' in Chapter 2, p. 145-152.)

The market for TNE has not slowed and is on the increase. Both onshore and offshore enrolments of foreign students assure dividends in terms of tuition fees and other related revenue (housing packages, English language study, additional short courses or foundation programs, etc.).

There is also a direct link now made between research on immigration and the value placed by governments on awarding greater 'points' to potential immigrants who have received degrees from their own institutions. For example, Australia and New Zealand provide a fast track immigration process for those students who have earned degrees in select disciplines through an Australian university. These immigrants are considered to have overcome cultural and language barriers which means greater demonstrated integration potential and less need for investment by governments in settlement services.

The transformation of higher education to be entrepreneurial and of governments supporting these initiatives has not changed. It has accelerated. Enhancing their nation's economic competitiveness seems to be a driving force

behind educational policies of major countries importing transnational education.⁶¹² Universities are now continuously looking for income streams and new markets. Moreover, universities continue to adapt to the realities of the student marketplace. What is unique in this scenario is that traditional universities are making changes at a rapid pace because not doing so will make them irrelevant and undermine their survival. *This is an emerging trend.*

As the research has indicated, there are now common operational themes in the way in which TNE is managed at the government, university and international organization level. Nearly all developed countries and some developing countries now have a trade and/or financial agenda for education; all want to be engaged in international cooperation that brands their country's or region's curriculum. TNE receiving countries will become more involved in trade and GATS discussions as they develop their export markets. *This will become an emerging trend.*

Despite governments of developed countries having some involvement in TNE there is no clear evidence which suggests that governments actually have 'control' of the higher education sector's decisions to offer TNE although some governments are setting up quality assurance standards for TNE, sometimes with the support of their international education organizations. There are also some countries where government funding is available for TNE venture capital. Examples include Australia's Austrade⁶¹³ and New Zealand's Trade and Enterprise.⁶¹⁴

Today, governments and international organizations have become more involved in supporting the 'branding' of their institutions abroad. These branding opportunities also directly and indirectly support a country's TNE efforts which have a 'trade' component. There is now far greater 'intelligence gathering' of data that is shared between a country's government, higher education organizations and institutions about where there are 'gaps' around the

⁶¹² Lane and Kinser. *Looking Ahead: 5 International Trends for 2013*. *Op. cit*

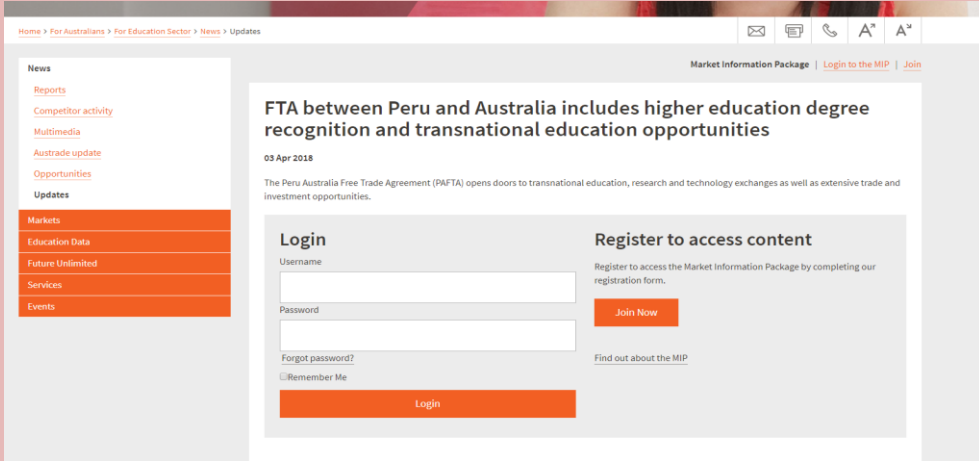
⁶¹³ <https://www.austrade.gov.au/> (accessed 19 August 2016)

⁶¹⁴ <https://www.nzte.govt.nz/> (accessed 19 August 2016)

world where foreign institutions can provide a service. Intelligence gathering will not be the domain only of western countries as more and more developing countries also pursue education export markets. *This is an emerging trend.*

The import of higher education services depends on the existing gap in local higher education services, the failure of private provision to fill this gap, a sufficient mass of people capable of paying for private education, a lower rating

VISUAL AID 65: Australian Government's Austrade Supporting Australian Institutions in the Development of TNE



Source: Austrade
 Web image extracted from:
<https://www.austrade.gov.au/australian/education/news/updates/fta-between-peru-and-australia-includes-higher-education-degree-recognition-and-transnational-education-opportunities>
 (Access Date 11 April 2018).

of local education compared to imported, an extra value attached to education supplied by foreign institutions, a language advantage and a regulatory framework that favours import.⁶¹⁵ Refer to Visual Aid 69 on p. 286 which provides an example of an international education organization, namely the BC which is supporting UK institutions with advice on opportunities for TNE in Mexico. Similarly, Austrade provides country profiles of education, news, opportunities and information as well as market intelligence and analysis through its network of specialists all over the world to support Australia's international education sector.⁶¹⁶ The type of work carried out by Austrade now extends to providing marketing intelligence on transnational opportunities as

⁶¹⁵ <http://www.aau.org/sites/default/files/proceedings.pdf> - p. 10.

⁶¹⁶ <https://www.austrade.gov.au/> (accessed 20 April 2018).

well as the provision of seeding money and grants. Refer Visual Aid 65 on p. 279 which provides an example of how Austrade supports Australian institutions in developing TNE and Visual Aid 66 on p. 281 which provides an example of how the US Government's Trade Office provides market information to institutions about opportunities abroad.

There is also recognition by governments that TNE requires quality oversight to protect brand name and safeguard overall quality. The evidence indicates that quality assurance agencies are working together. One such example is Dubai where the University Quality Assurance International Board (UQAIB) has Board Members appointed from France, USA, Austria, UAE, Oman, India, China, Malaysia, Australia and New Zealand. Furthermore, UQAIB cooperates beyond its borders with agencies in the US, UK, Australia, Singapore, Malaysia and Hong Kong. The UQAIB is responsible for the oversight of all TNE as well as local education programs delivered in Dubai. This includes distance education/online programs.

Governments, institutions and national organizations are also working together to support technological developments which could enhance the underpinning of TNE activities. Such discussions cross national borders to ensure that best practice is utilized to harness technology in a way that can benefit TNE in the broadest sense possible. For example, in discussing a collaborative program between Queen Mary University of London and Beijing University of Posts and Telecommunications, there is information about the effectiveness and cost-efficiencies in delivering courses via lectures and tutorials through 'real-time video, voice and instant messaging (IM) technology, while bandwidth-intensive Virtual Learning Environments (VLEs) underpin course work and email for communication with students' and at the same time 'teaching staff from the UK visit China to give lectures and tutorials (through the 'Flying Professor' model)'.⁶¹⁷

⁶¹⁷ <https://www.inthefieldstories.net/tne-taking-global-learning-to-a-new-level/> (accessed 13 May 2018)

VISUAL AID 66: The US Government's Trade Office Supporting US Institutions Promote Educational Opportunities in International Markets

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Mexico - Education and Training

This is a best prospect industry sector for this country. Includes a market overview and trade data.

Last Published: 4/5/2018

Overview

Education

Mexico has taken a leading role in international education, fostering student mobility and academic exchanges with institutions abroad, to become more competitive in the international market.

According to Mexico's National Population Council, Mexico's population was 122.7 million people in 2016. Approximately 63 percent of the population is aged 15-60, and of these, 80 percent live in urban locations. In 2016, the National Institute of Statistics and Geography (INEGI) reported that 54 million of Mexicans as economically active. The rising middle class has led to changing consumption patterns and one of the categories that is expected to benefit most from this surge to improve quality of life is education.

IIE Open Doors® latest report shows that Mexico is the ninth largest country of origin for students studying in the United States. In 2014-15, 11,925 Mexican students

Source: US Department of Trade
 Web image extracted from:
<https://www.export.gov/article?id=Mexico-Education-and-Training-Services>
 (Access Date 11 April 2018)

4.5.1 International Education Organizations Active in TNE Research

The organization that has been at the forefront of research related to TNE and makes its research available to all those interested either free and/or at cost is the Observatory on Borderless Higher Education (OBHE) which was established in 2001 by the Association of Commonwealth Universities (ACU) and Universities UK. The OBHE represents 500 universities across 35 countries. The lead up to the establishment of the Observatory was a report commissioned by Universities UK and also the Funding Council for England which was `to review the scope

and scale of what had been termed 'borderless' higher education...⁶¹⁸ The report set out to understand borderless higher education in the context of challenges for the higher education sector in the UK and importantly to suggest how the sector would respond to these challenges. The conclusions drawn in the report were that 'the drivers behind borderless developments are strong and will strengthen.'⁶¹⁹

The OBHE is an independent, global strategic services organization that conducts high level research and disseminates emerging trends, best practices, policy frameworks, and assessment and quality assurance information relevant to cross-border higher education program delivery across the globe.⁶²⁰ It is important to note that the OBHE has global representation and outreach through its membership. Currently the Observatory has 150+ organizational members in more than 70 countries. It therefore, remains the most relevant organization committed to research in TNE. As the OBHE is a membership driven organization, some of its in-depth research is available free only to members with others having to pay for the research.

The OBHE's mandate is to ensure that developments in borderless education are followed by the dissemination of regular strategic intelligence to their constituents - governments, international bodies and institutions round the globe. Universities thus would be better prepared to develop policies and strategies that were beyond the realms of the traditional university. This flow of strategic market intelligence also helped governments to understand this phenomenon of borderless (or transnational) education which supported their education structures and overcame the challenges faced by a new wave of entrepreneurial thinkers and leaders managing traditional institutions in a borderless world.

⁶¹⁸ The Association of Commonwealth Universities. '*Mapping Borderless Higher Education: policy, markets and competition*'. Selected reports from The Observatory on Borderless Higher Education, published by The Association of Commonwealth Universities, p. ix, 2004.

⁶¹⁹ *Ibid.*, p. x.

⁶²⁰ http://www.obhe.ac.uk/who_we_are/about_the_observatory (accessed 11 March 2015)

In addition to the OBHE, some of the other major government funded organizations that undertake research in TNE include:

- Austrade
- British Council (BC)
- Education New Zealand (ENZ)
- Netherlands Organisation for International Cooperation in Higher Education (NUFFIC)
- Organisation for Economic Cooperation and Development (OECD)
- The German Academic Exchange Service (DAAD)
- United Nations Educational Scientific and Cultural Organisation (UNESCO)

Of the above group of organizations, the BC has undertaken the most substantial research on TNE, some in cooperation with DAAD. Much of the research by the BC is publicly available. There is also some 'commercial in confidence' research that the BC holds for its UK members.

There are many international education organizations that now have some focus on TNE. Examples include:

- Association of Universities and Colleges of Canada (AUCC)
- Canadian Bureau of International Education (CBIE),
- European Association of International Education (EAIE)
- IDP Education (IDP)
- Institute of International Education (IIE)
- International Education Association of Australia (IEAA)
- National Association for International Educators (NAFSA)
- Universities Australia (UA)
- Universities UK International

While the emphasis is on international education organizations, mention needs to be made of government departments that now conduct research in TNE. Some of the major Government bodies that undertake some research in TNE include the governments of:

- Australia – Australian Education International (AEI)
- Canada (provincial governments and also through a consultative body within the Dept of Foreign Affairs and International Trade (DFAIT))
- New Zealand
- UK

While research may be skewed towards issues of significance to the research funders, much of the research is relevant internationally. Some of the research undertaken by international education organizations and governments is not made available to the general public and/or other agencies as the material is held as 'commercial in confidence' for the exclusive use of their members and/or free to local institutions. Examples are at Visual Aid 67 on p. 285 and Visual Aid 69 on p.286. At times a snapshot of the material is however made available on websites or referred to in the media.

International education organizations such as the IIE in New York actively support US institutions in managing collaboration offshore. Visual Aid 68 at p. 285 shows the work IIE has been undertaking in joint and double degree programs. In preparing a briefing paper on how to evaluate and initiate offshore partnership programs the IIE states that 'With the current focus on strategic internationalization and institutional partnerships, joint and double degree programs are becoming increasingly attractive to higher education institutions around the world.'⁶²¹

The Association of International Education Administrators (AIEA) conference handout states that: 'The 21st century is witnessing a global reorganization of higher education, in which campus boundaries are giving way to global systems – sometimes guided by a competitive race for market share, sometimes by collaborative efforts at mutual development, and sometimes by the ever-expanding reach of wikis, tweets, and distance learning.'⁶²² This statement by the AIEA goes some way in demonstrating an understanding that the global phenomenon of TNE is already underway since the advent of instant global

⁶²¹ <https://www.iie.org/Research-and-Insights/Publications/Joint-Double-Degrees-2013> (accessed 10 May 2016)

⁶²² <http://www.aieaworld.org/2011-conference> (accessed 19 May 2016)

connections and many organizations are becoming active in better understanding TNE and the collection of research and data.

VISUAL AID 67: The EAIE Delivering Research on TNE Exclusively to Member Institutions

Transnational education strategies: what works, what doesn't?

EXECUTIVE
SUMMARY

#5

This title is part of the *EAIE Executive Summary* series, which provides takeaways from key sessions at the EAIE conference. At EAIE Prague 2014, panellists Rahul Choudaha, Robert Coelen, Nigel Healey and Eugene Sebastian suggested taking a forward-looking approach to transnational education by examining future internal institutional as well as external global trends.

Conference

PUBLICATION DATE

November 2014

TOPICS

- Learning, teaching & curriculum

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Source: European Association for International Education. Web image extracted from:

<https://www.eaie.org/our-resources/library/publication/Executive-summaries/transnational-education-strategies.html>

(Access Date 11 April 2018)

VISUAL AID 68: IIE Provides Member Institutions Support for Screening Joint and Double Degree Programs in International Partnerships

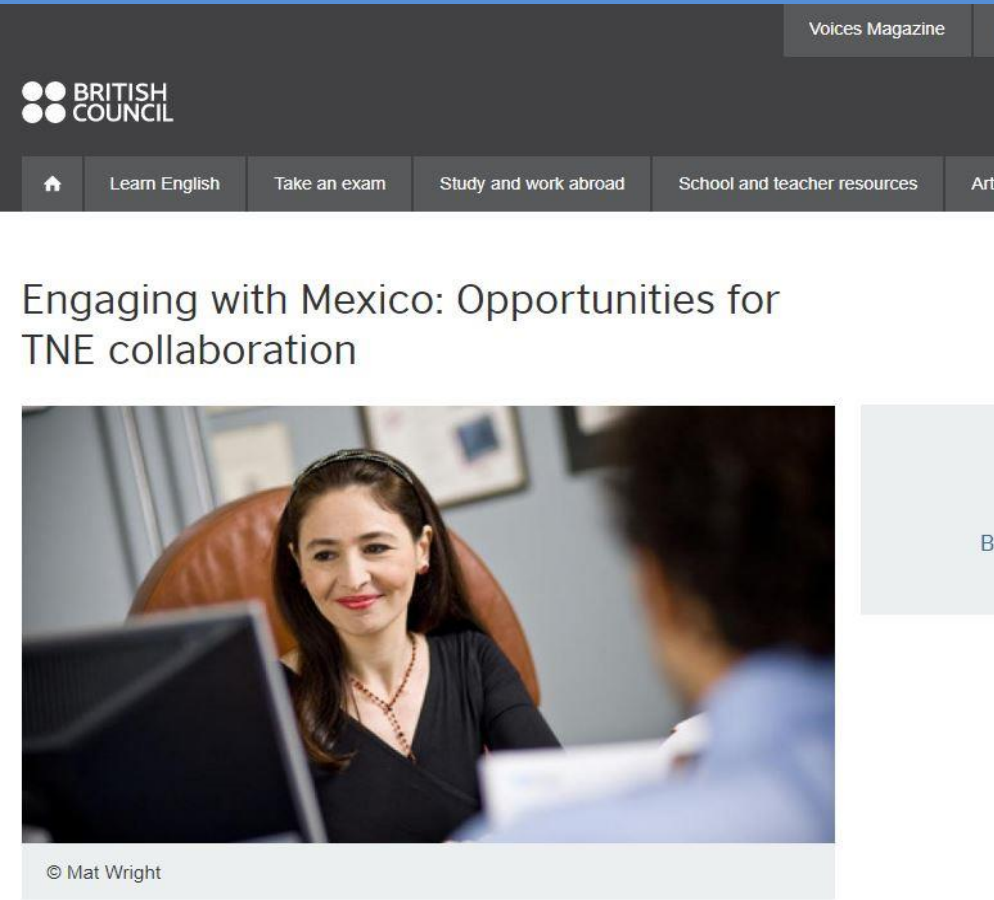
The screenshot shows the IIE website header with the logo 'The Power of International Education' and navigation links: STUDENTS, ALUMNI & FRIENDS, PROFESSIONALS, BLOG, CONTACT US, and a search icon. Below the header is a red navigation bar with dropdown menus for 'Why IIE', 'Work With Us', 'Research & Insights', 'Find a Program', and 'Give to IIE'. The main content area features the title 'A Process for Screening and Authorizing Joint and Double Degree Programs (2013)' under the heading 'RESEARCH & INSIGHTS - PUBLICATIONS'. A short summary follows, stating that joint and double degree programs are becoming increasingly attractive but more complex to implement. Below this is a brief description of the IIE briefing paper, written by Arnaud Chevallier, which describes a process for evaluating potential new joint and double degree programs developed by Rice University.

Source: The Institute of International Education. Web image extracted from:

<https://www.iie.org/Research-and-Insights/Publications/Joint-Double-Degrees-2013>

(Access Date 21 July 2017)

VISUAL AID 69: The British Council Promoting Opportunities for TNE Collaboration to its Members



Source: The British Council: Web image extracted from: <https://www.britishcouncil.org/education/ihe/events/engaging-mexico-tne-collaboration> (Access Date 18 October 2017).

It is not possible within the scope of this study to provide detailed information on all organizations that have undertaken substantial research on TNE, besides the OBHE. However, to ensure that future researchers are engaged in research on transnational education, most of the organizations listed above are referenced in this research.

4.5.2 Cross Border Education Research Team (C-BERT)

The Cross-Border Education Research Team (C-BERT) undertakes extensive research on cross border mobility with a focus on education hubs and IBCs. The team is housed at the University of Albany. Often the team works closely with

OBHE to produce joint reports. The C-BERT team also actively contributes to journals and media reports.

C-BERT is well recognized for its work on IBCs and are often cited in the press. Their website states:

Because C-BERT is the most comprehensive source of information on international branch campuses, our research is regularly cited in news articles about cross-border higher education. Jason Lane and Kevin Kinser are frequently sought out for their expertise in international higher education. Here we provide a list of articles where C-BERT data and expertise have been cited.⁶²³

4.6 Information Gathering at TNE Conference Sydney - May 2013

In a discussion at the *Transnational Education Conference* in Sydney from 8-9 May 2013 discussion focused on the following themes:

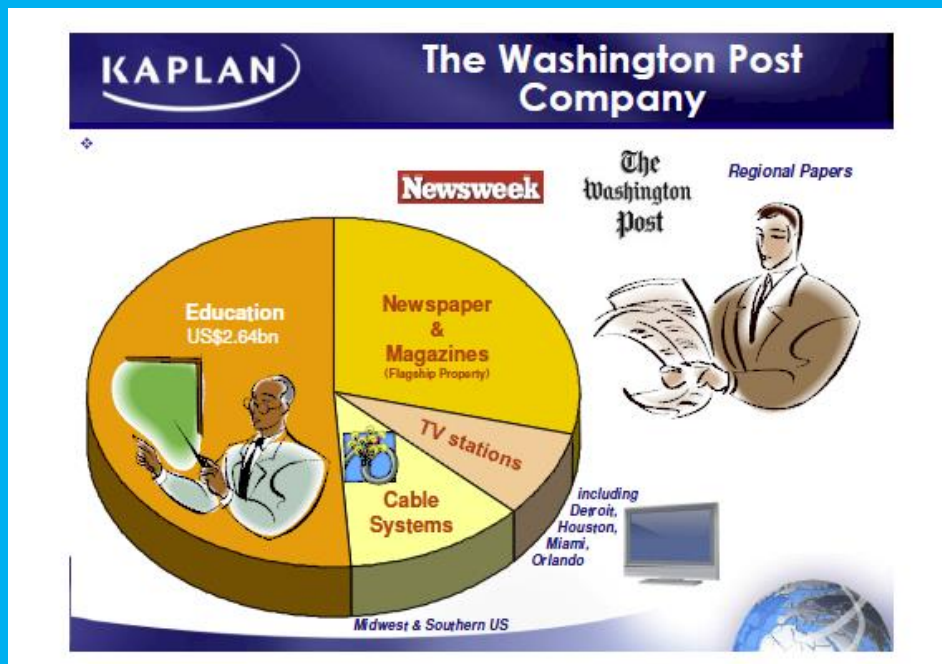
- 'Culture' of the working environment offshore and what it takes to engage locally
- Overcoming challenges including
 - curriculum design and delivery
 - reputation - quality and compliance
 - local accreditation

The discussion at the conference was largely based on the belief that there is much to be gained from TNE and 'motivations tend to sit within public service, increased revenue, reputation and overall internationalization of the university.'⁶²⁴ The conference brought together high level professionals involved in TNE to gain various perspectives - for example, there was discussion on how a US private education provider, Kaplan University managed courses in Singapore as well as discussions about how public institutions such as Curtin University and James Cook University (both from Australia) had set up and

⁶²³ <http://cbert.org/archives/c-bert-in-the-news/> (accessed 8 May 2018)

⁶²⁴ <http://www.transnational-education.com.au/default.aspx> (accessed 24 May 2014)

VISUAL AID 70: The Washington Post Company (Kaplan University) Invests US\$2.64 Billion in Education including TNE



Data and image presented by Dale Anderson and Jim Jackson in a power point presentation to the Transnational Education Conference in Sydney from 8-9 May 2013.

Extracted from

<http://www.transnational-education.com.au/default.aspx>

(Access Date 21 December 2014)

maintained IBCs in Singapore and Malaysia. As part of conference proceedings, a presentation was made on The Washington Post Company which operated Kaplan University and invested US\$2.64 billion in education.⁶²⁵ Refer also to Visual Aid 70 above.

There were some useful insights on how TNE was evolving and what were the major concerns from TNE provider perspectives. One of the emerging concerns was the level of regulation that was being put into place, particularly now that some countries were developing their own education systems to attract students to their own universities – examples were Singapore and Malaysia who compete with Australian TNE provider institutions to attract students. A number of universities which had already invested in developing TNE infrastructure and were fairly successful still felt the ever-increasing regulatory framework in some

⁶²⁵ Dale Anderson and Jim Jackson. Information extracted from power point presentation at the Transnational Education Conference in Sydney May 2013 by Dale Anderson and Jim Jackson. Details at <http://www.transnational-education.com.au/default.aspx> (accessed 24 May 2014)

countries (e.g. Singapore) to be a barrier because significant investment was needed to stay on top of the type of regulations that were coming through. A few countries were concerned about TNE institutions bringing students into their countries from particular regions with different cultural attributes which could lead to social issues. Some appeared to be totally unfounded concerns but for a TNE institution in a foreign country, it was important to 'listen' due to the constraints placed on TNE institutions through the regulatory environment. Thus, TNE institutions had to ensure that they were seen as listening to the needs of the countries where they were carrying out their activities even if some of these views were not 'requirements' within the regulatory framework and

VISUAL AID 71: TNE Delivery – A Component of Overall Offshore Engagement

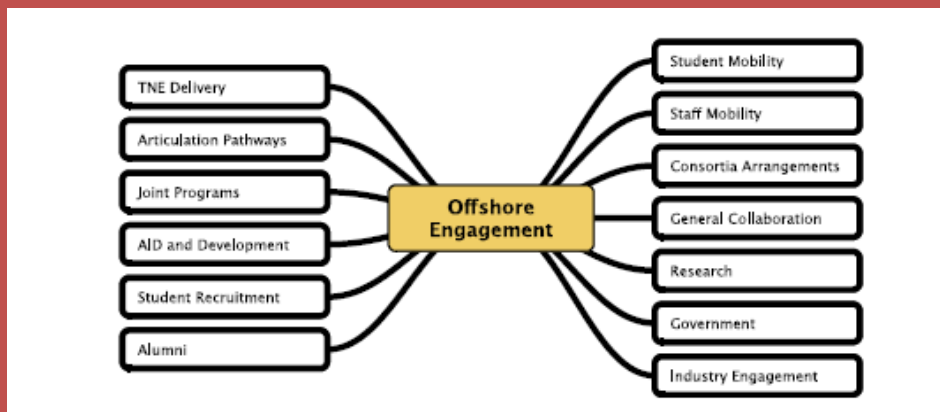


Image presented by Lorne Gibson (Deakin University) in a power point presentation to the Transnational Education Conference in Sydney from 8-9 May 2013. Extracted from <http://www.transnational-education.com.au/default.aspx> (Access Date 21 December 2014)

indeed could be seen as not meeting the principles of equity and merit required at the university's main campus. An example included one university being advised that they should not bring in large cohorts of students from a named country.

There was also discussion about the need to have a multifaceted offshore engagement strategy and how to include TNE as part of the strategy. This is presented in Visual Aid 71 above.

Other themes included encouraging best practice by learning from other TNE partners and understanding overall student outcomes. There was discussion on closing the loop on TNE and understanding the lessons learnt. Refer Visual Aid 72 below.

VISUAL AID 72: Closing the Loop on TNE – Is TNE Worth Doing and Why?

Closing the loop on offshore delivery

- How comparable are the student outcomes with those located in Australia?
- Are you assured the teaching is of high quality?
- What lessons have been learnt and how has that informed future delivery?
- Are lessons shared across other offshore programs?
- Is best practice shared?
- *Is it worth doing? Why?*




Image presented by Shelda Dobowski, Deputy Vice Chancellor, University Notre Dame in a power point presentation to the Transnational Education Conference in Sydney from 8-9 May 2013.
 Extracted from:
<http://www.transnational-education.com.au/default.aspx>
 (Access Date 21 December 2014)

Overall the Conference provided an opportunity to hear TNE `news' from those that were on the ground managing TNE operations. As this was a major conference which attracted only 30 senior delegates, it provided an opportunity for small group discussion. (The cost of the conference at \$3,500 seemed to be the reason for fewer delegates participating in the conference.)

There was no opposition to TNE and all delegates spoke about the positive attributes of TNE with the only negative discussion stemming from the level of investment required to run a quality TNE operation in face of the increasing regulatory requirements from some countries as they develop their own `brand'.

4.7 Feedback from Discussions with Universities

The researcher made several approaches to universities in the UK, USA and Australia about the research and a discussion on TNE. The first approach was in relation to the completion of survey questionnaires for the primary data collection component of this research. (Refer Chapter 5, pp. 301-335.)

The second approach involved random emails and phone calls to a number of universities to gain an 'internal' university perspective on TNE within the context of internationalization. This approach was made with a view to 'encouraging' universities to complete the survey questionnaires and if there was a lack of interest in doing so, then attempt to 'discuss' TNE. Despite continuing contact, there was very little response as many stated that they preferred not to discuss their institutional policy; others requested more information about the TNE research being undertaken and stated quite quickly that the results of the research might be counterproductive to their plans.

A 'third' approach involved visits to 4 universities in the USA which was a visit partially supported by UNE. Discussions were held with 3 public universities and 1 private university. Discussion focused on how TNE was viewed and what was the major driver of TNE for the respective universities. The discussions with public institutions revealed a reluctance to discuss TNE. One public university representative spoke of their study abroad programs and suggested this was the 'real' TNE that their institution focused on. *One representative advised that 'compared to Australia', US universities received funding from the US Department of Education and did not have to go beyond their shores.* At the same time, the major concerns for US public universities stem from the reality of their financial situation and the basis of funding - public US universities are set up mainly to service the local student population and any investment beyond borders must clearly show cost recovery. One university representative stated that they had much to do in their local region to 'educate' their own people and going abroad was not a reality although they would hope to have more foreign students come to their campuses.

In one case a Vice President of a US public university advised that she could not speak to the Researcher over the phone as 'it is not possible to allocate resources for discussions with researchers because there was simply no time.'

The private university that discussed TNE stated that TNE was a part of their overall strategy to internationalize the campus. Their interest was not only to bring students to their campus in the USA but to ensure that they have 'satellite' campuses offshore where they are sending faculty to teach and importantly send their own students to the offshore campuses to support local students - a type of mentoring system. Currently the university worked in partnership with international institutions and universities abroad - whereby satellite campuses existed within universities offshore and some classes were taught by the US university faculty. It was not quite clear whether a qualification would be issued by the US university as discussions were still ongoing with overseas partners. When the question was asked about whether the university offered their home school Testamur to students student TNE courses through foreign partners, the Researcher was not provided with a clear answer.

Other discussions held with institutions (mainly in Australia due to ease of contact) were from the standpoint of the 'surveying' process for the primary data collection component of the research. Refer Chapter 5. Most informal discussions did not provide any support for the research other than a 'wait and see' attitude. Most did express concern that the research project may reveal less than satisfactory outcomes from TNE.

4.8 A 4-Year Update (2013-2017) on Trends in TNE

As, due to personal issues, the research project had been halted during the latter part of 2013 and did not recommence until 2017, it was considered important to provide an update covering the period 2013-2017. Wherever possible, prior work has been re-checked and current materials incorporated.

The following update provides some of the important developments in TNE during 2013-2017 which are worth noting:

- The UK had a huge increase in TNE student numbers: there are now more than 700,000 students enrolled in British TNE programs which is about 60% more than fee-paying foreign students hosted in the UK by education providers.⁶²⁶
- The British Council was concerned about a current slowdown in TNE given that during 2013-2014 there had been 6% growth whereas from 2016-2017 the growth was just under 1%.⁶²⁷
- Graduate employment and salaries were being considered as an important element in approving TNE programs. There are now regulatory initiatives underway in countries such as Singapore where steps were being taken to ‘introduce the requirement of mandatory reporting by private providers of graduate employment and salaries which they are going to benchmark.’⁶²⁸
- In late 2017, there were 263 worldwide branch campuses as per the Observatory on Borderless Higher Education and the State University of New York Albany’s Cross Border Education Research Team (C-BERT) and 42 IBCs were expected to close. It was not clear whether the 263 was the net number of IBCs that remain open or whether the 42 IBCs would reduce that number.⁶²⁹
- Of the 249 IBCs operation around the world in 2015, more than half were operated by just three countries – the USA, the UK and Australia and Asia was the host to 27% of all IBCs.⁶³⁰

⁶²⁶ Mike O’Donnell. ‘*Kiwi education should be taken to the world*’. Opinion Analysis. Stuff Online. 10 March 2018. Also available at: <https://www.stuff.co.nz/business/opinion-analysis/102018808/kiwi-education-should-be-taken-to-the-world> (accessed 13 April 2018)

⁶²⁷ Mitchell, *op. cit.*

⁶²⁸ *Ibid.*

⁶²⁹ Ellie Bothwell. ‘*Branch campus leaders told to be ‘more patient’ to taste success*’. Times Higher Education Online. 11 December 2017. Also available at: <https://www.timeshighereducation.com/news/branch-campus-leaders-told-be-more-patient-taste-success> (accessed 13 April 2018)

⁶³⁰ Rahul Choudaha. ‘*‘Global’ students get a chance to attend foreign universities at home*’. Asia Times Online. 5 April 2017. Also available at: <http://www.atimes.com/opportunities-foreign-universities-glocal-students/> (accessed 13 April 2018)

- In 2017, after two years of political debate the lower House of the Dutch Parliament passed a Bill to allow Dutch universities to offer TNE programs. An election intervened before the Senate could ratify the Bill.⁶³¹ Netherlands' Wittenborg University opened its first international campus in Vienna in September 2017.⁶³²
- In December 2017, Malaysia's Minister for Higher Education stated that there would be 'no more building or opening' of new university campuses because 'saturation point had been reached'.⁶³³
- The British Council and DAAD cooperated in a pilot study (2014 and continuing) to consider a common TNE framework and TNE definitions for data collection systems.⁶³⁴ (Details of this study have been included in Chapter 2 – Literature Review, pp. 71-176.)
- As of 2016, the largest number of IBCs were in China.⁶³⁵
- More and more Chinese students are returning home after their education abroad. With language skills and plenty of jobs in China, there are less Chinese students now opting for further degrees overseas and/or considering other future opportunities.⁶³⁶
- The 2017 Open Doors Report stated that the number of new international students arriving in the USA for study had decreased for the first time in 2016 by 10,000 students. This was the first drop in the twelve years since Open Doors had reported on such enrollments.⁶³⁷
- Given 'flat' enrolments in recent years, the UK is strategically promoting its agenda for TNE. In 2015/16 there were 673,000 foreign students enrolled in British higher education institutions via TNE. At the

⁶³¹ The PIE News. 'Netherlands one step closer to full degrees overseas as TNE bill passes'. 13 March 2017. Also available at: <https://thepienews.com/news/netherlands-one-step-closer-full-degrees-overseas-tne-bill-passes/> (accessed 13 April 2018)

⁶³² <https://www.wittenborg.eu/vienna.htm>

⁶³³ Bothwell, 'Branch campus leaders told to be 'more patient' to taste success', *op. cit.*

⁶³⁴ John McNamara and Jane Knight. *Transnational education data collection systems: awareness, analysis, action*. A report commissioned by the British Council and German Academic Exchange Service (DAAD). June 2015. Also available at: <https://www.britishcouncil.org/education/ihe/knowledge-centre/transnational-education/tne-education-data-collection-systems> (accessed 14 May 2017)

⁶³⁵ <http://monitor.icef.com/2016/11/china-now-leading-host-international-branch-campuses/> (accessed 14 July 2017)

⁶³⁶ <http://monitor.icef.com/2018/02/increasing-numbers-chinese-graduates-returning-home-overseas/> (accessed 11 July 2018)

⁶³⁷ <https://www.iie.org/Research-and-Insights/Open-Doors> (accessed 1 May 2018)

2017 *International Higher Education Forum* in London, Mark Garnier MP, Parliamentary Under-Secretary, Department for International Trade (DIT) stated that “Many countries with a large school-leaver population are without sufficient higher education in the country to meet demand. This presents a huge export opportunity for our top-class educational institutions...and we look to fill this demand.”⁶³⁸

- The OECD reported a flattening of foreign student enrollments in its 2017 report.⁶³⁹
- Yale University Singapore was previously considered an IBC but is now reported as an independent college established in 2011 by two universities with its own website - <https://www.yale-nus.edu.sg>

An emerging trend in TNE is the evolution of IBCs. One example is the Arizona State University’s network of micro-campuses aimed at minimizing infrastructure costs by using local partners and then permitting students to move between micro campuses (and countries) to complete their programs. Whatever the final form of this evolution, the micro-campus offers a new model for providing affordable, cutting-edge higher education across the globe.⁶⁴⁰ There is information on micro-campuses in Chapter 1 on pp. 19-24.

4.9 Conclusions - Emerging Trends

There is growing interest amongst universities to set up TNE through IBCs, twinning and partnerships. Given the history of IBC closures, universities setting up TNE arrangements are giving a great deal of thought to the likely volume of potential students before entering a market. Recouping investment costs is a huge factor.

⁶³⁸ <http://www.universitiesuk.ac.uk/events/Pages/International-Higher-Education-Forum-2017.aspx> (accessed 19 October 2017)

⁶³⁹ https://www.oecd-ilibrary.org/education/education-at-a-glance-2017_eag-2017-en (accessed 11 February 2018)

⁶⁴⁰ White. ‘*Are micro-campuses a new model for international HE?*’ *op cit*.

There are more US, UK and Australian campuses investing in and delivering TNE options than other countries. However, the challenge for TNE providers is that many receiving countries are also competing for international students to come to their shores - examples include China, Malaysia, Singapore and Korea. TNE receiving countries, Dubai being notable amongst them, are undertaking substantial work in the area of research and quality control.

TNE as 'soft power' for future collaboration in foreign lands is now more widely recognized. Governments are supporting market research and quality control in TNE. *Soft power collaboration with partnerships is viewed as increasingly important.* Australia with seven Australian university outposts in China has 'a platform not just for recruiting students directly to their Australian campuses but also to explore collaboration in Asia'.⁶⁴¹ There is greater recognition amongst the major TNE provider countries that they can have more influence particularly in developing countries if they support the social development of those regions. The importance of tertiary education in promoting economic and social development has been the subject of many studies worldwide and has influenced economic development policies across the world and in the Asia Pacific region specifically.⁶⁴² In the case of Australia, a report in March 2010 stated that despite challenges there were opportunities for collaboration because 'Australia has great strengths to draw on as a partner of choice for leading overseas education institutions.'⁶⁴³

Universities are now more focused on making strategic decisions based on good governance in areas of planning and oversight and forming collaborations offshore with local partners: on streamlined communications including a greater use of modern technologies to ensure quality control from the main campus; and on socially responsible marketing; human relations and dealing with efficiency measures.

⁶⁴¹ Michael Sainsbury, 'Blitz to lure Chinese students'. The Australian Online. 9 March 2011. Also available at: <https://www.theaustralian.com.au/higher-education/blitz-to-lure-chinese-students/news-story/aa6b9fd114098c8e1a92fb7d0c5b9c94> (accessed 15 September 2014)

⁶⁴² Department of Education, Employment and Workplace Relations. *New AEI – A Discussion Starter*, *op cit.*

⁶⁴³ *Ibid.*

National organizations and governments are creating networks (including regular conferences, seminars and formal government to government or national association dialogues) to ensure their positioning in the TNE space. Ziguras (2012) stated that 'more formal engagement by universities with branch campuses in such networking activities at a regional level would provide much needed opportunities for management and teaching staff to engage with their peers at other institutions.'⁶⁴⁴

TNE has become a priority for many 'major' countries and regions around the world that were previously considered the major players in internal internationalization. This 'shift' in thinking can be seen in a paper by Simon Marginson which was incorporated within the report of a Dialogue commenced by the IAEE in October 2012 between Australia and the UK:

'... Of these developments, much the most important, even in relation to Bologna, is the spectacular rise of northeast Asia and Singapore to become the third great zone, after North America and Europe/UK, of high participation, R&D and 'world-class universities'. In 2009 Asia as a whole invested \$402 billion in R&D compared to \$319 billion in Europe/UK; and northeast Asia alone spent as much as did Europe/UK. The rise of higher education in this zone has been fueled by state policy and selected state investment, in systems where income per head is already at UK and Australian levels (except in China). These systems can be called 'Post-Confucian' because they combine Confucian educational tradition and the comprehensive Sinic state with modernization driven by the desire to catch-up to the West. Thirty years ago there was only Japan. It has now been joined by South Korea and Taiwan, Hong Kong SAR, Singapore, and China. China is on course to become the largest research system in the world in this decade, though it will be much longer before it achieves the quality of American science.'⁶⁴⁵

The historical trend of students going abroad is slowing down given that western countries are facing their own dilemmas with job markets for university graduates; pockets of social unrest; and most importantly a decrease in funding for universities. TNE receiving countries are now in the enviable position of having increased job security within robust or rapidly developing economies so that they reinforce their education systems. More rigorous regulatory frameworks (as has happened in Malaysia) and lower tuition and living costs has led to international students undertaking foreign degrees locally or regionally.

⁶⁴⁴ IEAA, *op cit.* p. 39.

⁶⁴⁵ IEAA, *op cit.* p. 19.

Universities in the west are likely to lose some of their domestic market to foreign countries. *The direction of mobility is likely to change swiftly.*

India and China are likely to continue to be the world's leading exporters of students, but China has already started taking in more foreign students overall—mostly from other Asian countries—than it sends overseas.⁶⁴⁶ The trend for TNE receiving countries to become exporters of education will continue.

Another trend which is emerging is that countries that have previously not been active in TNE are looking at this phenomenon more closely and considering participation. An example is The Netherlands.

There is an awareness, if not a concern about the possible shifting of the domestic market to offshore destinations. This may lead more and more universities from the West to consider TNE as a matter of priority because at least in that way, with an IBC, the institution could well attract students from its nation but to a lower cost campus. According to the OBHE, even Germany which has previously not been active in IBCs (except for a German branch campus in Chile), reported in early 2012 that the `Technische Universitat Berlin had announced that it would set up a campus in Egypt in October 2012.⁶⁴⁷ As per C-BERT data, the campus has been operating in Egypt since 2012.⁶⁴⁸

Technology will continue to influence TNE as it will be possible for countries to duplicate, fast track their research and processes to reach the `masses' of students far more quickly than any earlier generations.

The country specific data presented in this Chapter is somewhat limited in nature due to the complex nature of data gathering. This is partly because of the diverse range of universities and countries researched all of whom have varying levels of material available for viewing in the public domain.

⁶⁴⁶ Ben Wildavsky. 'University Globalization is Here to Stay', The Chronicle of Higher Education online, Aug 26, 2010.

⁶⁴⁷ Alex Katsomitros. 'International branch campuses: Even more developments'. March 2012. Also available at: http://www.obhe.ac.uk/newsletters/borderless_report_march_2012/international_branch_campuses_even_more_developments (accessed 14 July 2014)

⁶⁴⁸ <http://cbert.org/branch-campus/> (accessed 5 Oct 2018)

There is clearly a move by some nations to become hubs and beneficiaries of TNE, some have used TNE to keep students local and to stem the flow of currency out of the country. There is a growing consciousness amongst countries whose universities are setting up TNE arrangements abroad that domestically they have an issue with costs and/or policies that are driving their institutions to set up arrangements abroad. There is a concern about the barriers faced by American universities. At the College Board Forum in October 2012 in Miami, Seth Allen, Vice President and Dean of Admissions and Financial Aid at Ponomo College stated that 'if other nations can devise a low-cost, high-quality model' there will be more families directing their children to overseas institutions.⁶⁴⁹ The data from IIE in relation to more full degree American students going abroad confirms this view.

The emerging global trends in TNE suggest that TNE is a phenomenon that is still evolving and will potentially have a major impact on the way traditional universities have operated since inception.

Chapter 5 will discuss the research methodology and findings.

⁶⁴⁹ Eric Hoover. 'In Admissions Many Shades of 'Uncertainty''. The Chronicle of Higher Education Online. 25 October 2012. Also available at: http://chronicle.com/blogs/headcount/in-admissions-many-shades-of-uncertainty/32560?cid=pm&utm_source=pm&utm_medium=en (accessed 1 May 2014)

Chapter 5 - Research Methods and Major Findings

5.1 Conducting the Research

The research encompassed both qualitative and quantitative components. important to this study.

5.1.1 Research Based on Secondary Sources

The component of the research covering secondary data included the following:

- *An extensive literature review of TNE*
- *A search of websites and media releases*
- *Statistical data-* Statistical data was compiled on trends in TNE across major countries exporting and importing TNE. For example, there was discussion on whether some countries were doing more in TNE than others and if so why.

While the more recent literature available particularly through the media and organizational websites provided a fairly comprehensive view on TNE in the context of the questions that were raised within the sections on '*Aims and Objectives of the Research*' and '*Importance of the Research*' (refer Chapter 1, pp. 1-70) the survey component of the research, whilst limited was also important to this study.

5.1.2 Research Based on Primary Data Collection

- *Visits/discussions/conference attendance* – Information was gathered to better understand the varying perspectives of stakeholders.
- *Surveying relevant stakeholders* - where possible to also conduct phone and personal discussions with relevant government bodies, university staff and employers.

The surveying in the primary data collection component comprised the following components:

5.1.2.1 Surveys

The surveys were developed with a view to gathering data which would provide a better understanding of global trends in transnational education and to address the questions raised in the proposal for the research - refer Section 1.10 Research Questions in Chapter 1, pp. 69-70. The main question the survey aimed to address was related to whether studying through the TNE mode led to the same outcome for students studying at the institution's main campus.

Transnational Student Surveys (or interviews)

This survey had the aim of gathering data from current transnational students.

Information was sought on:

- Whether the TNE program being undertaken is believed to be as good as the program that is offered at the university's main campus; if so, on what basis were these conclusions drawn.
- The reasons for undertaking the TNE study program in preference to actually going abroad to the overseas university's main campus.
- The reasons for choosing a TNE study program compared to studying at a local institution.
- The level of information a TNE student had about their host university's main campus. For example, the survey sought to better understand if there was any contact between TNE students and the host university's main campus students and faculty.

Students were provided with an option to respond with a `yes', `no' or `unsure' to questions and provided opportunity to add any comments at the end of the survey.

Employment Agencies and Employer Group Surveys (or interviews)

This survey aimed to gather information from employment agencies and employers. Information sought included:

- Whether employers can identify qualifications obtained via the TNE mode as being distinct from qualifications obtained by students who went abroad to the main campus. If so, how? Would this factor be important and what relevance does it have to employment?
- If there is knowledge that the prospective employee received a qualification via the TNE mode, would this have less, more or the same effect as other prospective employees who received degrees from the institution's main campus?
- How employment ready is the applicant that has studied through the TNE mode compared to the student that has studied at the institution's main campus? Is this even an issue? Does employer feedback suggest any variables in performance of students with completed degrees via the TNE mode compared to the traditional method of studying at the main campus of the university?

Employers were also asked for their perceptions of TNE.

- Would they consider that a qualification is a qualification through whichever mode of study - online, TNE, onshore at the main campus?
- Is a student that has studied through TNE better prepared to work locally than a student that has gone overseas to the main campus?

Employers were provided with an option to respond with a 'yes', 'no' or 'unsure' to questions and provided opportunity to add any comments at the end of the survey.

University Surveys

The University surveys targeted the following groups in order to determine whether their view points are different based on the nature of their work at universities:

- international office staff.
- academic staff who worked closely with international students and/or their university international offices and therefore were more 'connected' to the issues related to TNE.

The purpose of these surveys was to determine how respondents perceived the following statements:

- Students undertaking study within the TNE mode received the same quality of education as students at the home campus.
- There are some concerns related to the lack of cross cultural benefits within TNE which disadvantage the student studying through the TNE mode.
- There would be similar outcomes in terms of employment, migration, living standards, etc. for students that have studied at the home campus and through the TNE mode.
- The university and country 'cultural' experience of the onshore international student can be duplicated to the student studying via the TNE mode.
- TNE benefits universities and the country as an income earner (exporter of goods and services).
- In the longer term TNE helps build infrastructure (capacity building) offshore.
- Offshore capacity building will provide experience and credibility for onshore operators who would be able to set up their own degree programs, thereby disadvantaging the original investors (the foreign universities that set up the TNE programs).
- TNE can eventually lead to reverse internationalization if universities continue with capacity building activities with local partners offshore.
- TNE is available as one of the options to students because it portrays the university as being truly international, it earns income for the university and/or it is necessary as otherwise students from some regions around the world will not have access to the university's programs.

University respondents were provided with an option to respond with a 'yes', 'no' or 'unsure' to questions and provided opportunity to add any comments at the end of the survey.

Government (Departments of Education, Trade, Foreign Affairs) and International Education Organizations' Surveys

The *same* survey which was to be used for universities was to be used for this group of TNE stakeholders. It was understood from the outset that it would be

difficult to create a survey tool that would be sufficiently bland for government officials, but it was envisaged that some discussions would be held to gauge short and long-term outcomes for TNE.

Government/International education organization employees were provided with an option to respond with a 'yes', 'no' or 'unsure' to questions and provided opportunity to add any comments at the end of the survey.

5.1.2.2 Interviews

It was proposed that where there was insufficient interest in the completion of survey questionnaires, direct contact would be made with relevant personnel in universities that offered TNE programs; government bodies and employers that were involved in TNE. As discussed below, this is what happened.

5.2 Methodology

Web Site for Research Project

To ensure maximum/wider outreach, convenience and due to time constraints (as this research project aimed to gather data internationally), it was proposed that the Researcher set up a website that was specific to the research project. In this way, it would be possible to provide a brief description of the research project, state the importance of conducting the research and why the success of the project depends on the involvement of students, employers, universities, relevant government departments and international organizations.

Survey questionnaires would be kept on line and participants assured confidentiality. Those persons who were not interested in completing survey questionnaires would be provided the option of requesting a telephone interview by simply contacting the Researcher.

Details about the project and the website were sent out as a letter attached to an email (after approval from UNE supervisors) to various institutions, student groups and universities and international education/government organizations.

Similarly, the direct approach to institutions, organizations, government departments and employers was via telephone and/or email advising of the website set up for the surveys and requesting feedback directly via email and/or phone if surveys were not a possibility.

Surveys & Interviews

The surveys (and interviews where feasible) were compiled in a manner where the data collected for each completed survey questionnaire and interview would ensure anonymity for the participant or organization.

Target Group (for surveys/interviews)

Students:

Information about the research project, its importance and the proposed survey questionnaires was to be sent out in the form of a letter (via email attachment) from the Researcher on UNE letterhead to Presidents/Vice Chancellors/CEOs of universities who are involved in TNE activities, with the request that they encourage students through their websites and/or newsletters to complete the survey questionnaires which will be held online.

To ensure that only students who were studying or have already studied via the TNE mode actually completed the survey questionnaires, the information clearly indicated that only students who have studied or are studying via the TNE mode should complete the forms.

Completed survey questionnaire forms were used to compile data in the research findings for this project.

Universities:

To commence the process of notifying universities of the research project and asking for their support with the completion of surveys, a letter (via email attachment) from the Researcher on UNE letterhead was to be sent to Presidents/Vice Chancellors/CEOs of universities. The Researcher would also request access to international office and other relevant departments (including

sections of the registrar offices that have responsibility for offshore activities and/or commercial arms of institutions) for the purpose of gathering feedback about TNE.

It was also proposed that where possible, meetings and/or phone interviews with personnel in international offices and with academics take place.

Employers & Employment Agencies:

A letter from the Researcher on UNE letterhead (via email attachment) went out to a select number of employers and employment agencies from a number of countries. The letter discussed the project and its importance and invited participants to complete an online survey questionnaire on the research project's website.

Government Departments:

Information about the research project's website was also to be made available to select government departments in the hope that they could post the information with relevant (student) sections of their web site. This would be a 'tall' order but worthy of consideration. As it was understood that often public servants despite being assured of confidentiality may not be prepared to contribute to survey questionnaires, the letter from the Researcher to relevant public service departments and agencies would also suggest phone or personal (where possible) interviews. While perspectives from a government department or agency seldom can translate to a clear and detailed prescription for developing recommendations, nevertheless the compilation of this data (perspectives) would provide some opportunity to expand our understanding of how government policies related to TNE were formulated and how they spearheaded their higher education systems' efforts to offer TNE.

International Education Organizations and Relevant Bodies:

Where possible, discussions would take place with country specific international education organizations about the research project and its importance. The following organizations were targeted:

- the British Council (BC)

- the Canadian Bureau of International Education (CBIE)
- Universities Australia (UA)
- The Netherlands Organisation for International Cooperation in Higher Education (NUFFIC)
- Deutscher Akademischer Austausch Dienst (DAAD)
- US Information Agency (USIA)
- National Association of International Educators (NAFSA)
- European Association of International Educators (EAIE)
- Institute for International Education (IIE)
- World Education News and Reviews (WENR)

Where there was insufficient interest in discussing the topic more emphasis would be placed on researching the publications and websites of these organizations.

5.3 A Comprehensive Plan for Data Collection

There is much research undertaken on internationalization and in the last decade there has been an emphasis placed on TNE within the context of internationalization. However, the research to date on TNE appears to be limited and dwells mainly on the importance of TNE for a variety of reasons and the need to retain quality. This research focuses on TNE in the context of outcomes for students and whether the programs taught through the TNE mode provide students the same experience as the students who went abroad to an overseas university's main campus. In this context, the research sought to understand whether there is widespread knowledge about TNE amongst employers and how they perceive employees with TNE qualifications compared to those that travelled abroad to the main campus for study. It was also important to address the issue of who benefits with TNE - is it the institution itself, the country the institution belongs to in terms of export earnings, the importing country in terms of infrastructure support/nation building efforts in developing countries and where the student fits into this equation.

The research methodology was considered in the context of what was the likely success of questionnaire returns from universities given the fact that TNE was

very much valued as an additional income stream by universities. The questions for the surveys were carefully considered to minimize the risk of universities and government departments not participating at all in the completion of questionnaires. From the outset there was some concern that universities would likely not distribute the survey questionnaire to their TNE students, however, it was proposed that the student questionnaire was nevertheless important and therefore should remain integral to the research.

It was critical to add other elements such as interviews/phone discussions and attendance at conferences to the research methodology to ensure that when the research project was constrained due to a lower than expected number of returns of survey questionnaires, some assessment could be made through feedback obtained from direct face to face or telephone conversations.

5.4 Presentation of Research Findings

This Chapter focuses on the findings of the research and how these have been presented within this study.

5.4.1 Secondary Data Presented

The research has been presented as follows:

- *Literature Review* (Chapter 2, pp. 71 -176)
- *Country Specific Data and Education Hubs – Who is Doing What?* (Chapter 3, pp. 177-238)
- *Global Trends and Emerging Issues in Transnational Education* (Chapter 4, pp. 239-299)
- *Statistical Data* has been presented throughout this thesis which has come from government organizations, agencies and/or universities. Many organizations were prepared to provide data that was available for release to the public. Some data was purchased by the researcher.

5.4.2 Survey Research

The tool used for the survey research was a questionnaire targeting students and relevant universities, international education organizations, employers and government bodies. When discussing 'relevant' it is important to state that the researcher only targeted those universities, education organizations and government bodies that were active in TNE and would be able to provide the level of feedback that was necessary to bring this research project to fruition. In the case of employers these were randomly chosen across the globe based on available contact information.

The survey questionnaires were approved by the University's Higher Education Research and Education Committee (HREC) via Approval No. HE11/135 - refer **APPENDIX 2.**

Disseminating Information about the Research Project (Including Survey Questionnaires for Completion)

In the first instance, the information about the research project, the information sheets and the survey questionnaires (for each target group) were placed on a website specially designed for this research project. Refer www.transnationalstudy.com As it is likely that the domain/website will be abolished in the near future as the research project has now been completed a copy of the home page of the website is at **APPENDIX 3.**

The survey questionnaires prepared and distributed included:

- Survey Questionnaire for Transnational Student Participants – **APPENDIX 4.**
- Survey Questionnaire for Employment Agencies and/or Employer Organizations – **APPENDIX 5.**
- Survey Questionnaire for International Education, Government and Related Organizations – **APPENDIX 6.**
- Survey Questionnaire for Universities and Relevant Higher Education Representative Groups – **APPENDIX 7.**

The survey questionnaires were accompanied by Information Sheets to describe the research project and its aims:

- Information Sheet for Transnational Student Participants – **APPENDIX 8.**
- Information Sheet for Employment Agencies and/or Employer Organizations – **APPENDIX 9.**
- Information Sheet for International Education, Government and Related Organizations – **APPENDIX 10.**
- Information Sheet for Universities and Relevant Higher Education Representative Groups – **APPENDIX 11.**

The questionnaires and information sheets were targeted via email to Vice Chancellors and Presidents of universities, Directors of international offices and the Chief Executives of international education organizations. There were several different versions of letters created. Sample copies are at **APPENDICES, 12, 13, & 14.**

For ease, the surveys could be completed on line and emails contained the link directly to the survey document (for completion) as well as the Information Sheet on the website www.transnationalstudy.com

To ensure that the surveys were sent to the right audience, extensive email lists were created which targeted Vice Chancellors, Presidents, CEOs of universities and international education organizations across Australia, France, Finland, Germany, Hong Kong, India, Italy, Malaysia, New Zealand, Norway, Singapore, Sweden, UK, and USA. A list of 50 major employer emails was also created, to direct surveys and receive feedback about employers on TNE. *It is not possible to include these lists in appendices but the various contact lists as well as the returned surveys have been provided to the UNE University Library Research Advisory and Engagement Services in accordance with UNE thesis submission requirements. Refer **APPENDIX 15.***

A Consent Form was prepared as confirmation of the Researcher's agreement to keep any feedback provided through an interview process, confidential. Phone

interviews were considered as a backup plan where there were concerns about completing the surveys. A sample of the Consent Form is at **APPENDIX 16.**

The deadline date provided for the completion of all survey questionnaires was 30 October 2012.

Despite an extensive campaign to gather data by way of survey questionnaires, only 51 respondents completed the survey questionnaires for this project.

Table 22	
SURVEY RETURNS - Total Count	
GROUP	No. of Surveys
Universities	25
Students	4
Employers	0
International Education Organizations/Govt	21
Duplicate therefore ignored	1
TOTAL SURVEYS COMPLETED	51

University Survey Questionnaires and Data Analysis

There were only a total of 25 responses from university respondents. A comprehensive 'data collection' response sheet is included at **APPENDIX 17.**

The surveys were placed in an order that would easily allow a reader to 'track' responses from within countries i.e. a country perspective while at the same time tracking a respondent identified only as a number. In this way the data provides useful insight into how a respondent may answer differently to the different components of the survey questionnaire.

Key Findings

Survey Overview

- Countries represented in the surveys:
 - Australia
 - Canada

- Norway
 - Philippines
 - Russia
 - Sweden
 - UK
 - USA
- As there was only one respondent from each of the following countries: the Philippines, Russia and Sweden, it was somewhat problematic to consider those viewpoints to be representative of a whole country.
 - Australia and Canada seemed to have the larger number of survey returns. UK and the USA also had fewer surveys which again raised concerns about whether the data from these countries would provide an accurate view of TNE other than a possible scenario.
 - Of the 25 survey questionnaires returned from universities:
 - 20 were from public universities
 - 3 were from private universities
 - 1 from a community college/TAFE; and
 - 1 from a `specialist' university. (No definition was provided as to what constituted `specialist'.)
 - Of the 7 respondents who stated that they had campuses abroad with local partners, none were private universities. An additional respondent stated that they had `local partnerships only, not overseas campuses', suggesting that this respondent should have ticked the box related to `campuses abroad with local partners'. One could assume therefore, that there were in fact 8 respondents who had campuses abroad with local partners.
 - Of the 2 respondents who stated that they had campuses abroad in their own right, 1 was a private university and 1 was public.
 - There were 2 universities that were looking to develop campuses abroad with local partners, 1 private and 1 public.
 - 2 respondents from public universities expressed interest in TNE but advised that they did not wish to pursue TNE due to the high cost of developing overseas campuses.

- 9 respondents which included 7 from public and 2 from private universities stated that developing campuses abroad was not an option for their universities. These universities were from Australia, Canada, Norway, Philippines, Russia, Sweden and the USA.
- 1 university reported that 'we teach in several places offshore. Students are enrolled with us but they are not on our campuses.' This did not necessarily suggest that there were offshore arrangements with local partners as this could mean that there were students through distance education supported by regular meetings/sessions at local venues.
- 1 university reported that it had closed an offshore campus but had Memoranda of Understanding (MOUs) in place, suggesting that it had local partnerships, and these may not be the typical campus abroad managed by local partners but rather a form of twinning arrangement where a relationship with an overseas partnership did exist, although no further details were possible within the context of this survey.

Feedback from respondents to "Why does your institution support transnational education?" is included in Table 23, p. 315.

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Table 23					
Why does your institution support transnational education?					
25 respondents (1 did not complete question 2)					
Statement	Important	Very Important	Not Important	Unsure	Do not support TNE
1. Students want an education but some cannot afford to travel abroad to the institution/university due to the cost of studying abroad; educating this group of students is a priority.	7	5	5	1	7
2. Higher education institutions are well placed to expand infrastructure offshore through local partnerships in order to provide opportunities for a greater number of the world's students.	7	5	4	1	7
3. Offshore campuses through the transnational mode meet the government's aid agenda.	0	3	11	4	7
4. Transnational education is another way of teaching and generates revenue for the institution while teaching a greater number of students	9	6	2	1	7
5. Student visa issues and increasing security risks makes delivering programs through the transnational mode viable.	2	5	10	1	7
6. Students commencing study through the transnational mode often later travel as tourists and further degree students to the country which is most familiar to them	5	2	10	1	7
7. Institutions/Universities support local institution capacity building that has the potential to create future partnership in education, business and trade.	8	7	3	0	7
8. Some students will not leave to go overseas due to work and family commitments.	12	4	2	0	7

Respondents were asked to rate several statements as important, very important, not important, unsure and do not support TNE.

The data indicated that:

- Out of 25 respondents:
 - 7 respondents were opposed to TNE
 - 18 respondents supported TNE.

- Respondents who supported TNE generally agreed with the following:
 - Students pursuing study through TNE are doing so because they cannot leave their families; have work commitments locally or can't afford to go abroad.
 - TNE is seen as an opportunity for revenue generation
 - Universities are well placed to expand infrastructure offshore to help an expanding student base and capacity building of overseas universities is important.
- Respondents placed less or no significance on:
 - TNE helping the aid agenda
 - Students undertaking TNE due to security and visa issues; and
 - TNE facilitating future tourists or further degree students to their main campuses.

Under comments within this section, one respondent advised that partner campuses were not the only TNE programs available through their university as they also provided distance education. The responses from Norway suggests that Norwegian universities do not use TNE as much because Norway did not charge international student fees for its overseas students.

Feedback from respondents who do not support TNE is included in Table 24, p. 317.

Respondents were asked to rate several statements as important, very important, not important and not sure. Despite stating that this section was to be completed only by those respondents that did not support TNE, there were respondents who had stated that they supported TNE but still chose to complete this section of the survey. (Refer responses in earlier Table 23 which shows only 7 respondents of the 25 indicating that they did not support TNE, yet there were 12 respondents who completed this component of the survey suggesting that those who had stated that they supported TNE had mixed feelings and also included their comments on why they didn't support TNE, making analysis somewhat difficult.)

Table 24				
Institutions that do not support transnational education				
<i>Total Respondents 12</i>				
Statement	Important	Very Important	Not Important	Unsure
1. Concerns about managing 'quality' in teaching programs	4	7	0	1
2. Transnational education is unsustainable as there are too many providers entering the market; this has the potential to undermine the full fee paying international student market to our main	1	1	8	2
3. It is not possible to build infrastructure offshore using local institutions/organisations that could compromise our standing in offshore markets	4	2	3	3
4. We have much to do locally and cannot pursue transnational education as an added business initiative	4	3	4	1
5. Students obtaining qualifications through the transnational mode will increasingly be seen as obtaining an inferior qualification to the onshore home campus student who will receive amongst other benefits also the cultural experience of studying at the main campus amongst students from the home campus which also hosts students from other parts of the world.	4	2	4	2
6. International education besides offering an education was meant to create cultural ambassadors (students who understood the norms of a new country); transnational education on the other hand provides the curriculum amongst students who have no knowledge or experiences of the university's home campus and country.	4	4	3	1
7. Students studying through the transnational mode will not receive all the services which are usually offered to international students going abroad to the main campus of a university.	4	3	3	2
8. It is expensive to fund the infrastructure of an overseas campus	5	6	0	1

The majority of respondents placed greater emphasis on the following statements:

- There were concerns about managing quality in TNE
- The TNE curriculum does not provide students, knowledge and experiences of the university's home campus and country
- Overseas campuses are expensive to manage
- Students through TNE do not receive all the services as students who come to the home campus abroad.

Splitting evenly, six respondents agreed that using local partners to build infrastructure offshore would in some way compromise an institution's standing, and six did not think this was important or were unsure about this statement.

Feedback from respondents to “The Student Experience of Transnational Education from the viewpoint of universities” is included in Table 25 below.

Table 25				
Feedback on the Student Experience of				
Transnational Education (from viewpoint of university)				
<i>Total Respondents 15</i>				
Statement	Yes	No	Unsure	
1. It is not possible to provide the same level of service to transnational students as it is to main campus, onshore students	10	3	2	
2. Students on transnational programs do not receive the benefit of interacting with students from the university's main campus; therefore, the experience is quite different.	12	3	0	
3. Prospective employers will increasingly become aware that the transnational student does not receive the same international experience as actually going abroad to study.	4	8	3	
4. Transnational students interact in online chat rooms with home campus students to overcome barriers of studying through the transnational mode.	6	8	1	
5. Students obtaining qualifications through the transnational mode will increasingly be seen as obtaining an inferior qualification to the onshore home campus student who will receive amongst other benefits also the cultural experience of studying at the main campus amongst students from the home campus which also hosts students from other parts of the world.	4	8	3	

Respondents were asked for feedback about their perceptions of the student experience of TNE by answering yes, no or unsure to several statements.

Most respondents agreed that:

- It is not possible to offer the same level of service to TNE students as it is the case for students at the main campus students;

- TNE students do not receive the benefit of interacting with home campus students

There were somewhat mixed results with the following statements as 8 respondents disagreed whereas 4 agreed and 3 were unsure:

- TNE students received an inferior qualification to the onshore student
- Employers will increasingly become aware that the TNE students do not receive the same international experience as students going overseas to the home campus

International Education Organization/Government Survey Questionnaires and Data Analysis

There were a total of 21 responses from international education organizations, government and private agencies. A comprehensive 'data collection' response sheet is included at **APPENDIX 18** and provides the responses that were received from the survey questionnaires to international education organizations/government department and similar entities. These responses were put in an order that would easily allow a reader to 'track' responses from within countries i.e. a country perspective and also track a respondent identified only as a number. In this way the data provides useful insight into how a respondent may answer differently to the different components of the survey questionnaire.

Key Findings

Survey Overview

- Countries represented in the surveys:
 - Australia
 - Canada
 - Hong Kong
 - India
 - Mexico
 - Philippines

- Singapore
- Vietnam.
- There were only single survey returns received from Hong Kong, Mexico, Philippines and Singapore making it impossible to provide any clear findings about these sites. Therefore, an emphasis was placed on the responses from Australia and India which provided the majority of survey responses.
- Of the 21 responses:
 - 13 respondents were from international education organizations
 - 2 respondents were from government organizations
 - 3 respondents were from private organizations
 - 1 respondent was from a discipline or sector-based organization
 - 2 respondents belonged to multiple categories.
- A majority of respondents agreed that students undertaking TNE go to an offshore campus managed by the main university which issues the academic transcript; TNE students had the same level of academic competency as onshore (main campus) students; students study through the TNE mode because they cannot afford the cost of going abroad to study; TNE education has an 'aid' component to it; somebody would need to offer TNE (as if an institution does not offer it, someone else will) and that TNE is a revenue earner for institutions.

Feedback from respondents to “Knowledge of Transnational Programs” is included in Table 26, p. 321.

Respondents were asked to tick the relevant box which best described TNE.

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Table 26	
Knowledge of Transnational Education	
Total Respondents 21	
Statement	Agree
1. TRANSNATIONAL EDUCATION is when a student undertakes a program of study externally using distance education methodologies such as web, email and snail mail delivered materials. Sometimes this form of external studies is complimented by student and faculty chat rooms via the internet.	1
2. TRANSNATIONAL EDUCATION is when a student undertakes a program of study by attending a foreign university's offshore campus in their own home country (example - a university in America offers a study program through a campus which it opens in a student's home country) or another country (example - the student lives in Malaysia but attends an American university campus in Hong Kong). On some occasions a foreign university also offers its programs through a partner (example - the American university is offering its program through a university in Indonesia.)	9
3. TRANSNATIONAL EDUCATION is both of the above statements are correct because they refer to different forms of transnational education.	11

The majority of respondents stated that the definition of TNE was that a student studied at a university's foreign campus located in their (student's) own country or another (third) country in the region. There was only 1 respondent who believed TNE only encompassed distance education.

Feedback from respondents to "Familiarity with Transnational Programs" is included in Table 27, p. 322.

Respondents were asked to agree, disagree or state 'unsure' against a list of statements to provide a better understanding of their familiarity with TNE programs.

A majority of respondents agreed that TNE students:

- studying at offshore campuses were managed by the university that issued the academic transcript
- had the same level of *academic* competency as local onshore students
- were taught by the faculty of the institution that issued the academic transcript
- would have also travelled to the university's home campus and/or country where the main campus is located.

Table 27			
Familiarity with Transnational Education			
Total Respondents 21			
Statement	Agree	Disagree	Unsure
A. Students undertaking study through the transnational mode go to the university's offshore campus which is totally managed by the institution/university which issues the academic transcript.	13	6	2
B. Students undertaking study through the transnational mode have the same level of academic competency as students that are studying at the institution/university's home campus.	13	7	1
C. Students undertaking study through the transnational mode have the same level of language competency as students that are studying at the institution/university's home campus.	7	12	2
D. Transnational programs are taught with academic staff and faculty of the institution/university which issues the academic transcript.	12	6	3
E. Students undertaking study through the transnational mode have traveled to the institution/university's home campus and/or country where the main campus is located	10	8	3

A majority of respondents disagreed with the statement that transnational students had the same level of *language* competency as onshore/main campus students.

Feedback from respondents to "Importance of Transnational Programs" is included in Table 28, p. 323.

Respondents were asked to agree, disagree or state 'unsure' against a list of statements in relation to the importance of transnational programs.

In summary there were more respondents who agreed with all statements listed above which support TNE. Interestingly when compared to the survey responses from universities, the responses from international education organizations/government bodies seem different. For example, in terms of the importance of TNE to 'aid' the responses from universities indicate that aid is not a factor in TNE whereas international education organizations and government bodies held the view that aid is also an important consideration in TNE activities.

Table 28			
Importance of Transnational Education			
Total Respondents 21			
Statement	Agree	Disagree	Unsure
A. Students want an education but some cannot afford to travel abroad to the institution/university due to the cost of studying abroad; educating this group of students is a priority.	13	4	4
B. Higher education institutions are well placed to expand infrastructure offshore through local partnerships in order to provide opportunities for a greater number of the world's students.	15	1	5
C. Student visa issues and the ever increasing security risks associated with travel, provide higher education institutions with an opportunity to deliver programs offshore through local partnership arrangements.	16	4	1
D. Transnational education has an 'aid' component to it - it is seen as providing opportunity for those that cannot travel overseas to study.	14	4	3
E. Students that are not offered a transnational option will undertake transnational study options offered by other countries. (If we don't do it, someone else will!)	15	3	3
F. Transnational education provides revenue to institutions/universities	16	1	3
G. It is important that our country's curriculum is promoted offshore to enhance the country's image and future relationships including those in business and trade.	17	2	2
H. It is important that institutions support transnational education and develop campuses abroad because (a) it contributes to education infrastructure development in the relevant overseas country and/or (b) it ensures that we are able to absorb more students into programs offshore, particularly in countries where there are few student places and many prospective students applying.	17	2	2

Feedback from respondents to "Your Organization's Current Policy in Transnational Programs" is included as Table 29, p. 324-325.

Respondents were asked to mark important, very important, not important and unsure against a list of statements. These statements were split between those that were interested in transnational education and those that weren't. This was considered important so that there could be some feedback based on each of these categories i.e. respondents that supported TNE and those that didn't.

Despite making it clear in the survey questionnaire as to semi-separate areas of this questionnaire being targeted for those that supported and those that didn't support TNE, there were a few respondents who responded in both categories, possibly because they hold mixed views.

There were more respondents from the group that 'supported TNE' who agreed that TNE provided:

- Capacity building of offshore institutions and this helped build future partnerships; and
- Students who could not go abroad due to family and other issues, opportunities for further education while staying in their home countries.

There were more respondents from the group that 'did not support TNE' who agreed that:

- Students studying through TNE will not receive the services which are offered to students at the home campus.
- Quality was a major concern
- TNE is unsustainable
- Building infrastructure offshore will compromise standing in overseas markets

Table 29					
Your Organization's Current Policy on Transnational Education					
<i>Total Respondents 21 (Part 1 - completed by 18 & Part 2 -completed by 13) ***</i>					
Statement	Important	Very Important	Not Important	Unsure	Did not respond
PART 1 - ONLY FOR RESPONDENTS WHO SUPPORT TRANSNATIONAL EDUCATION					
A. Offshore campuses through the transnational mode meet the government's trade agenda.	8	2	7	1	
B. Offshore campuses through the transnational mode meet the government's aid agenda.	7		8	2	1
C. Institutions/Universities require an additional income stream	5	6	5	1	1
D. Student visa issues and increasing security risks makes delivering programs through the transnational mode viable.	8	2	7	1	
E. Students commencing study through the transnational mode often later travel as tourists and further degree students to the country which is most familiar to them	9	1	2	6	
F. Institutions/Universities support local institution capacity building that has the potential to create future partnership in education, business and trade.	10	5	1	2	
G. Some students will not leave to go overseas due to work and family commitments.	6	4	3	4	1

PART 2 - ONLY FOR RESPONDENTS THAT DO NOT SUPPORT TRANSNATIONAL EDUCATION					
A. Concerned about quality.	3	10			
B. Transnational education is unsustainable as there are too many providers entering the market; this has the potential to undermine the full fee-paying international student market.	7	1	1	4	
C. It is not possible to build infrastructure offshore using local institutions/organizations that could compromise our standing in offshore markets	5	4		4	
D. We have much to do locally and cannot pursue transnational education as an added business initiative.	2	2	3	6	
E. Students obtaining qualifications through the transnational mode will increasingly be seen as obtaining an inferior qualification to the onshore home campus student who will receive amongst other benefits also cultural experience of studying at the main campus amongst students from the home campus which also hosts students from other parts of the world.	6	2	3	2	
F. International education besides offering an education was meant to create cultural ambassadors (students who understood the norms of a new country); transnational education on the other hand provides the curriculum amongst students who have no knowledge or experiences of the university's home campus and country.	6	2	2	3	
G. Students studying through the transnational mode will not receive all the services which are usually offered to international students studying at the institution's main campus.	8	3		2	
*** some respondents completed both sections of the questionnaire.					

There were some marked discrepancies in how respondents perceived 'the importance of TNE' (refer Table 28) and their organization's current policies on TNE (refer Table 29). Responses appear to be somewhat 'guarded'. For example, while 14 respondents agreed that TNE had an 'aid' element to it as it supported those that could not afford to go abroad to study (refer Table 28), when asked about their organization's policies (refer Table 29) and whether they agreed with the statement that 'TNE supports the government's aid policies' only 7 supported the statement.

Feedback from respondents to “The Student Experience with Transnational Programs” is included as Table 30, p. 327.

Respondents were asked to answer yes, no or unsure against a list of statements. The section of the questionnaire clearly asked respondents to complete this section only if they supported transnational education.

TABLE 30: The Student Experience with Transnational Education			
<i>COMPLETED by only those respondents who support TNE</i>			
<i>Respondents 16</i>			
Statement	Yes	No	Unsure
A. It is not possible to provide the same level of service to transnational students as it is to main campus, onshore students.	6	8	2
B. Students on transnational programs do not receive the benefit of interacting with students from the university's main campus; therefore, the experience is quite different.	13	3	
C. Prospective employers will increasingly become aware that the transnational student does not receive the same international experience as actually going abroad to study.	11	3	2
D. Transnational students interact in online chat rooms with home campus students to overcome barriers of studying through the transnational mode.	11	2	3
E. It is not possible for a foreign institution to offer the same level of service away from the main campus	7	7	2
F. The level of service is specific to the country or region; students expect the 'usual' level of service as other institutions within their region.	11	3	2
G. Students studying locally (away from the degree granting institution's home campus) do not expect the same level of service as their counterparts who have gone abroad to study.	4	8	4
H. It would not be cost effective to offer the same standard of service to transnational students (offshore) as offered to students at the main home campus; to do so would prevent institutions delivering courses through the transnational mode.	9	7	

There were more respondents who agreed that:

- The student experience of TNE is different to those of students that travel to the home campus.
- TNE students do not receive the benefit of interacting with home campus students.
- Prospective employers will increasingly become aware that TNE students do not receive the same international experience of going abroad.

- It would not be cost effective to offer TNE students the same level of service as that offered to home campus students as it would prevent institutions offering TNE.
- TNE students should receive services that are on par with other institutions in the region.

There seems to be some inconsistencies in the statement about services to TNE students. For example, of the 16 respondents, 8 respondents stated that it was possible to offer TNE students similar services as those offered to main campus students (refer A in Table 30) and that TNE students expected the same level of service as main campus students (refer G in Table 30). Yet 13 of the 16 respondents stated that TNE students do not interact with home campus students (refer B in Table 30) and 11 respondents state that services to TNE students are specific to the country or region (refer F. in Table 30).

Student Survey Questionnaires and Data Analysis

There were only 4 survey questionnaires returned from students. A comprehensive 'data collection' response sheet is included at **APPENDIX 19.**

As advised earlier on in this Chapter, it was clear from the very few survey responses from universities as well as the many phone calls made by the researcher to various personnel (at universities) that universities were not keen to send information about the student survey to their TNE students. This made it extremely difficult to get a sense of how students perceived TNE. Some universities indicated quite openly that they would not be prepared to send advice to students even via newsletters and blogs; an international education organization which supported student recruitment and provided management support for TNE indicated that they could not advise TNE students about the survey questionnaire because of the difficulties this might cause to their relationships with universities.

The results below from the student survey, while useful should not in any way act as the catalyst to develop or drive any policies because responses from 4 students from a potential worldwide population of millions of TNE students

(particularly given distance education students across international borders) is simply not enough data for a study that warrants far greater participation.

Key Findings

Survey Overview

There were a total of 4 student survey respondents.

- There was 1 respondent who was a current TNE student; 3 had previously studied through the TNE mode.
- 1 respondent studied at a private university which operated in partnership with a foreign university to deliver the foreign university's qualification; 2 respondents studied at a public university which operated in partnership with a foreign university to deliver the foreign university's qualification; 1 respondent studied at a public university in a third country (not the student's home country) where the university operated in partnership with a foreign university to deliver the foreign university's qualification.
- 1 respondent undertook an undergraduate qualification; the other 3 respondents undertook Master programs
- *3 respondents were to receive qualifications for their TNE programs from public foreign universities, 1 from a private foreign university;*
- In response to a question about research supervision, 1 respondent advised that the local university managed supervision for research; 1 respondent advised that supervisors from the foreign university regularly visited the region to provide supervision; 2 respondents did not respond to this question and this may be because the qualification may not have required research supervision.
- 2 respondents stated that their qualification through TNE was as good as the qualification obtained by those that went abroad to the main campus; 1 respondent stated that they did not believe the qualification was as good as the qualification obtained by those going abroad to the main campus; 1 respondent was unsure.

The paucity of responses from transnational students made it difficult to draw conclusions on student perceptions of TNE. *What is however clear is that all 4 TNE students received their qualifications from foreign universities.*

Employer Survey Questionnaires & Data Analysis

There were no survey returns from employers despite many follow up emails and phone calls by the Researcher.

Interviews/Discussions

When it became clear that the direct approach via email did not receive many survey returns, the researcher sent out multiple reminders by email prompting personnel in government, universities and employer groups to participate in the surveys. Despite these efforts, there were very few survey returns.

5.5 Barriers Encountered

Feedback received verbally suggested that the `resistance' from universities, international education organizations and governments was because there was concern that the research may provide negative responses about TNE. It was also made clear to the researcher that TNE provided governments and universities much needed revenue and/or support (such as sharing resources) and that the research should not in any way undermine these efforts.

It was not possible to get even a single survey return from employers despite many phone calls after the initial emails were sent out requesting support for the completion of surveys. Most employers contacted stated that as they did not understand TNE they were reluctant to provide feedback as they did not want to be viewed as not having knowledge of TNE. Some employers expressed surprise that degrees could be awarded by universities through the TNE mode without reference to where the student had studied but no employer was prepared to put their views in writing via the survey tool or to complete the consent form indicating that they were prepared to participate in an interview with the

researcher although some were prepared to discuss their views over the telephone as long as they were not quoted.

Most employers who were willing to have a brief conversation stated that they would expect that the applicant who presented a qualification of an overseas university had studied overseas.

Some employers made commitments that they would complete the online surveys but there were no employer surveys received through the online surveying platform. It soon became clear that it would not be possible to get survey returns from employers.

5.6 Consultation with the HREC

When it became clear that there were insufficient returns on the survey questionnaires from each of the target groups: students, international education organizations/governments, universities and employers, contingency plans were put in place to conduct some in-person and/or telephone interviews. The HREC was consulted via the supervisor about how a further approach would be made to potential informants i.e. an explanation of the project and the need for the research.

The HREC suggestion was that an interview process through the informant signing an agreement (agreeing to the interview) may be a viable option.

APPENDIX 16. This approach however, was more problematic as informants were prepared to listen, some provided extensive comment but in all formal approaches in relation to an interview, informants were not prepared to complete any forms. In one instance a university representative in the USA stated quite clearly that she received many such requests for surveys and personnel in universities are no longer able to provide time for such surveys nor do they like to provide information that they believe is private to their universities. In the case of employer groups, some did not feel they had the necessary background on TNE to feel they could contribute in anyway and most employers were very

concerned despite assurances that they would not be quoted and that their individual or organizational details would not be released in the report.

The group that expressed the most concern with the research was universities.

Some universities stated quite clearly that TNE was not their doing but in the absence of government funding it is one of the income producers for universities which they must pursue. One university representative in Australia suggested that research such as this simply adds more bureaucratic interference with regulation when 'things have been going good so far for Australia which is the envy of the world when it comes to international student recruitment'.

5.6.1 Conclusions from Phone and In-person Discussions

Employers:

- Believed it is important to know at the outset where (location) the student obtained the qualification from because a job may require language, culture and an understanding of local norms from the qualification granting country.
- Assumed that students have had some study at the university's main campus; many employers did not realize that many universities who engage with local partners and/or have overseas campuses allow students to undertake a full degree without setting foot on the university's main campus.
- Would provide 'preference' to students that actually go for part or all of their study abroad.
- Did not fully understand TNE but once an overview was provided thought it was a good concept.
- Thought that universities would be doing employers a disservice if they are not listing on the degree and transcript where the student had studied. Some employers believed there was an obligation to provide transcripts which indicated the location for each segment of the qualification. (One employer suggested that universities will soon realize that if they are not 'honest' with employers about where the qualification was issued then it

would lower the standard of their qualification and this is not an issue for employers but rather for universities.)

University Representatives:

- Did not believe the research would help the cause of TNE particularly if it was out to discuss the student's qualifications – one representative stated that universities were educating students and that was more important than where a transcript was issued from.
- The research would end up creating far more bureaucratic hurdles for universities and there was already enough bureaucracy from government.
- The university sector is in the market to educate and education costs money.
- With decreasing funding for universities, universities have been forced to look for income streams.

5.7 Additional Primary Data Presented

Once it became clear that primary data collection (survey returns) was going to be limited, the researcher decided to use open opportunities to gather extra information. This data is described elsewhere:

- *Information Gathering at TNE Conference – Sydney, May 2013* (Chapter 4, pp. 287-290)
- *Feedback from Discussions with Universities* (Chapter 4, pp. 291-292)

*Additionally, a list of the major organizations and researchers active in TNE management and research since its inception in the early 1990s was compiled for this research project and included as **APPENDIX 1.***

5.8 Summary

Given that this is a study on global trends in TNE, it is clear that the research project did not receive the level of support from universities, international education and government organizations necessary to provide a comprehensive view on outcomes for TNE students when compared to the onshore student or the student who goes overseas to the university's main campus for study.

It is also clear from the telephone discussions with employers that they were 'guarded' because they simply did not have as much knowledge about TNE and in the absence of universities listing the 'student location' on the qualification/transcript it is fair to say that employers have been assuming that students with a foreign qualification have been to the university's main campus that has issued the qualification.

Responses from students were also very limited and one of the main reasons for this is because it is difficult to access TNE students without going through their universities or international education agencies (such as the British Council and IDP Education) who are active in research and/or recruitment of TNE students.

It is hoped that in future, researchers will be able to offer students an incentive to support the research. An example of this could be the offer of an i-pad or a bookstore voucher for one to two respondents through a 'raffle' process. Such incentives could provide researchers the opportunity to make available the information more widely through student and social media such as Twitter which acts as a catalyst to disseminate information as a 'good news story'. Without incentives, social media in the student world would rarely pick up a story on students completing survey forms that will clearly take up their time with no return.

While the survey questions were quite similar for universities and international education organizations/government departments, the research indicated that in some instances the responses were quite different and based on different perspectives on a whole range of issues related to transnational education (as

perceived from the stand point of universities compared to, international education organizations and government).

When comparing the responses to the survey questionnaires between the three groups - students, universities and international education organizations/governments (leaving out employers because there were no survey questionnaires returned by employers) it becomes clear that the responses are quite different depending on the group. *For example, university respondents did not agree with the statement: Prospective employers will increasingly become aware that the transnational student does not receive the same international experience as actually going abroad to study. Yet most respondents from international education organizations and government departments agreed with this statement. This indicated that the response was at least partly based on vested interests.* Universities had a vested interest to uphold TNE as providing the same international experience because not doing so will suggest that TNE is in some way an inferior product to the onshore, main campus program. At the same time, it is also possible that TNE offers a different experience and the case may have to be made that it is a completely different 'product' of universities, and therefore should not be considered side by side with the international student program which brings students to a country's home university. After all, given the job market in most of the West students may prefer to study locally or regionally through the TNE simply to gain the local and regional experience where jobs may be plentiful and are less inclined to concern themselves about the overseas/international experience.

The survey responses indicate that the role played by TNE and how it is viewed is based on who responds to the survey questions. If it is a university which has a vested interest in managing TNE operations, the view put through is that TNE is special and offers more or less the same structure and service as given to the international student that goes abroad to the home campus to study. Yet government departments and international education organizations view TNE as a different product with different outcomes. Clearly it is possible that students to date who have received transcripts of a foreign university's home campus (which is the case with many TNE providers offering their own home university

transcripts) may not have had any disadvantage through the TNE study in terms of post-qualification and employment and it is quite possible that should TNE institutions start to offer their foreign university transcripts but with the local country specific information, it may diminish some of the advantages of the TNE 'foreign' qualification. Despite this it is important to state that the student would clearly still have an advantage through TNE if due to lack of spaces in local institutions the student was not able to pursue further study. TNE therefore, still has an impact on the student's education and employment prospects.

Chapter 6 follows with a more comprehensive discussion on the research findings and makes recommendations.

Chapter 6 - Summary of Research Findings and Recommendations

This Chapter summarizes the research findings and better understands the trends in TNE and where these are headed in the near to distant future; what opportunities and risks exist in TNE and how these could affect students, faculty, institutions of learning (particularly universities or institutions of higher learning) and most importantly society itself.

6.1 Key Research Questions

A detailed discussion on what the research planned to achieve in terms of outcomes is in Chapter 1, pp. 52-70. The research attempted to address the following key questions.

1. Does the TNE student receive the *same benefit* as the student that travels to the university's home campus?

- Is the university experience different and if so, why?
- What will be the future implications for TNE graduates holding qualifications of foreign universities if they have not travelled to the degree granting university's main campus (and country)?

2. What are the lessons for universities pursuing TNE opportunities?

- Has TNE diminished the value of the international qualification and the on-campus/foreign country experience?
- Will a university's international standing be compromised in some way by offering degrees to international students through the TNE delivery mode if it does not offer the 'going abroad' experience?
- Will university involvement with local partners ensure capacity building of local institutions and if so, what are the longer-term implications if any for internationalization?

3. How will human resource managers view degrees offered through the TNE mode?

4. Who benefits from TNE?

Though the survey responses were limited, it is clear from the Literature Review as well as the data available particularly in media, government and institutional reports, conference documents and websites that it is possible to analyze trends in TNT and make recommendations.

The chapters containing the Literature Review (Chapter 2), Country Specific Data and Education Hubs – Who is Doing What? (Chapter 3) and Global Trends and Emerging Issues in Transnational Education (Chapter 4) suggest that TNE is a fast moving, constantly evolving phenomenon. From its inception when 'collaboration' related to joint/dual degrees and/or twinning agreements were seen to be TNE activities, TNE now encompasses the breadth of an academic institution's dealings beyond its own country borders. Universities that cross borders for discussion of any academic activity are usually also discussing aspects of TNE in the form of collaboration on joint programs, delivery of programs or shared or subcontracted space and even sharing teaching staff.

The research indicates that globalization and the internet have forced higher education institutions to change at a very rapid pace. To understand the context of the rapid pace at which universities are having to adapt to the world's use of technology, one needs to consider the issues discussed in this research. These include: technology and the influence of MOOCs, international mobility and the phenomenon of IBCs, the expectations of the 21st Century student (on demand 24/7 accessible teaching facilities and/or online learning); employment trends with employers demanding on the job training and employees who are willing to adapt to change; trade and aid; reduced government spending, collaboration and networks, competition.

6.2 Major Findings

The major findings from this study can be summarized as follows:

1. The UK, USA and Australia are the major providers of TNE.
2. TNE is no longer the sole domain of Western institutions.
3. Receiving countries of TNE are now also competing for international students. Examples include China, Singapore, Malaysia and Dubai.
4. Students are no longer choosing only the 'go abroad' option as was the case historically; TNE numbers are up whereas international student numbers going abroad are showing some stagnation.
5. There is no evidence that students obtaining a qualification from a foreign university without leaving home are disadvantaged in their employment prospects (refer also the next point)
6. Employers are not familiar with TNE and this appears to be of some advantage to TNE students who obtain a qualification of a foreign university locally; employers are likely to accept the foreign qualification and assume that the student has gone abroad
7. Factors in the advancement of TNE include:
 - **For universities**
 - ***Revenue Generation:*** Less government funding, fewer domestic students and the need to go to where the students are.
 - ***Domestic student demographics are shifting:*** domestic students are shifting to pursue jobs and lifestyle.
 - ***Diversification of Student Market:*** Inbound international student market is slowing down (issues with visas, cultural immersion, hostility to international students, fewer employment/migration prospects).

- ***Lower cost for student services offshore*** – less bureaucratic issues related to visas, health insurance, etc.
 - ***Collaboration and Partnerships:*** Benefits include research, student/staff exchange.
 - ***Protecting university `brand`:*** Not participating in TNE is not an option – familiarity beyond borders matters.
 - ***Infrastructure development in countries which require it:*** Supporting education infrastructure is a good thing.
 - ***Technology:*** Embracing and benefiting from technology leads to many options (MOOCs, satellite campuses, etc.).
- **For governments (exporting TNE)**
- ***Revenue/Trade:*** Support for cross border initiatives brings revenue to institutions and this means the government can spend less on the education sector.
 - ***Protecting country's `brand`:*** support quality assurance, trade, government to government negotiations
 - ***Goodwill and stewardship (soft power initiatives)*** – It doesn't matter if we train/educate students offshore and build networks (faculty, researchers and business incubation centers) as we are creating ambassadors.
 - ***Oversight of quality*** – ensure trade competitiveness so institutions can continue to earn income (helps government spend less on education)
 - ***`Aid' outcomes (another form of soft power)***
- **For governments (importing TNE)**
- ***Stopping the `brain drain`*** – historical trends have seen students go abroad and later immigrate; TNE offers them local options and they contribute to the economy.

- *Assistance with building capacity/infrastructure development*
 - *Stop the outbound flow of money*
 - *Building manpower in-country*
 - *Promoting local programs and institutions internationally* side by side with TNE partners, creating export earnings
 - *Reducing local concern about westernized curriculum and doctrine being taught to students who go abroad*
 - *Oversight with some `control` over quality (through regulation) of TNE programs.*
- **For international organizations such as UNESCO**
 - *Research, training and support for countries and institutions to develop education infrastructure*
 - *Support quality, collaboration, research including data collection and develop partnerships*
 - *Create mechanisms that can provide on demand education to serve the world's population – reduce poverty*
- **For country specific international educations**
 - *Support for universities and/or members*
 - gather **market intelligence** - how to overcome barriers into new markets including understanding regulatory framework in TNE receiving countries, best practice workshops, seminars and conferences
 - **sector wide advice to government**; support with quality assurance measures

- **represent university sector with government**, including external governments and institutions (when forming collaborative relationships)
- ***Protecting the country's education 'brand'*** - ensuring universities are stronger financially and supporting activities that bring in revenue which in turn also supports government and umbrella organizations, e.g. OBHE.
- ***Support quality, collaboration, research including data collection and develop partnerships***
- ***Goodwill and stewardship (contribute to 'soft power')*** - helping in infrastructure development
- **For students**
 - ***Access to qualifications from foreign universities.***
 - ***Access to a wide choice of international universities and colleges***
 - ***Wider choice of location, university and program; greater choice in mode of study:*** Opportunity to study locally or regionally and can access TNE through various modes including IBC, MOOCs, twinning, and have option to undertake part of study overseas.
 - ***Cost factor*** (lower cost studying in country or regionally)
 - ***No requirement for cultural immersion***
 - ***Less issues related to visas*** or feeling of alienation in the post September 2001 environment in many host countries
 - ***Job retention/family needs***

8. There are varying perceptions of TNE

There are varying perspectives of TNE. This is reflected in the responses received in the survey of universities and international organizations (refer Chapter 5). International organizations and governments (based on the survey

results) understand the importance of TNE from an aid, trade and 'soft power' perspective, whereas the view of universities offering TNE is that they do it because there is a market and they require to raise revenue in light of less government funding. Universities are less concerned about soft power.

9. Success in TNE depends on the objectives from a government and institutional standpoint

If an institution participates in TNE from the standpoint of earning an additional income stream for the university (through tuition fees from TNE students) and does not earn that income within a specified period of time it is assumed that the move to TNE (programs) did not work and hence, the venture was unsuccessful. Yet for another institution which believes participation in TNE is important for the overall wellbeing of its student body because it offers opportunities for home base students to also study at overseas campuses (including shared facilities at offshore institutions) and bring TNE students to their shores for brief periods (such as residential schools) and offer opportunities for internships through a two way flow of students, even if the TNE arrangements do not earn sufficient fee income, the activity is seen as successful because it contributes to the overall breadth of the university's offerings and impact.

Some universities may choose to support TNE particularly through the early years of establishment and run at a considerable loss because there is a sense of the 'greater good' through delivering TNE to parts of the world where access to education is not available to all. *Therefore, the definition of success in TNE activities is dependent on institutional objectives, which can be varied.*

The research indicates that wherever an IBC is considered to have 'failed', it is because of financial issues. Seldom is there mention that a branch campus shut down because it was no longer needed or had met its original mandate. While there is recognition that universities cannot exist without sufficient funding, particularly in light of diminished government funding, the emphasis on TNE being a 'money' earner for universities can create barriers to success.

International organizations and government agencies on the other hand view TNE in terms of goodwill i.e. it is a good thing to do as well as the fact that it financially supports the education sector.

10. The student experience through TNE is different yet in most cases foreign universities are continuing to offer the same degree (Testamur) to TNE students as they offer their home campus students.

The research indicates that the TNE student experience is different compared to students that go abroad, yet most universities offer their TNE students offshore the same Testamur as their onshore students which *suggests the same experience*. Often, TNE students have never set foot on the university's main campus.

11. Employers assume that students have studied in the country of the university that has issued the Testamur

The 'nil' response to the survey questionnaire for employers and the feedback from phone calls suggests that employers do not know much about TNE from the standpoint of how qualifications are awarded or indeed that TNE is offered with many different variations (distance education, IBC, affiliations/twinning or a combination thereof). *Employers assume that the student has studied at the main campus of the university that issues the Testamur. This suggests that students that are investing in an 'abroad' experience may not be more valued by employers than TNE students.*

12. TNE does support development aid and trade initiatives of most Governments

Despite responses from universities indicating that TNE had less to do with development aid and trade, there is evidence in the literature (refer Chapter 2) as well as the responses from international education organizations and governments in survey responses (Chapter 5) that TNE serves the aid and trade agenda.

13. MOOCs are increasing in significance within the context of TNE

The relatively recent phenomenon of MOOCs has created some additional pressures for those already undertaking TNE who now need to be more 'MOOCs aware' and provide more options for their TNE students (example a 24/7 study platform online). MOOCs are also viewed as a relatively easier model to begin to engage in TNE for those universities that have been sitting on the sidelines and are not currently involved in TNE. For this group of universities MOOCs provide an entry into TNE operations for far less investment dollars than IBC, twinning or other arrangements. The issue with MOOCs however, is that with the advent of some universities offering 'free' online courses which sometimes equate to 'college level' credit, this can lead to shorter fee-paying study. This will eventually decrease revenue for universities as students will be paying less for their degrees.

14. The micro-campus is a new form of TNE which could provide both lower local tuition costs to students, the opportunity to freely move within a network of countries, less red-tape in regulations

Unlike the IBC model, the micro-campus appears to be a form of TNE which may provide greater flexibility both for students and overseas institutions. Students can receive a foreign qualification at local tuition prices and have the option to gain the cultural experience by going abroad. *For universities wanting an international presence, forming networks based on the micro-campus model would mean international exposure with less investment and less bureaucratic hurdles. This model of TNE (micro-campus) may however, lead to the demise of IBCs.*

15. TNE is constantly evolving

TNE has gone from an initiative of mainly universities from the developed west to now becoming a global phenomenon whereby universities from the developing world are also increasing their influence in the TNE space.

16. TNE reverses brain drain and helps under-developing and developing countries to keep much needed foreign currency within country

Many developing countries around the world need their top students as well as the foreign currency that would usually flow out when students go abroad to study. Transnational education stems that outbound flow and it contributes to the economy by bringing in students to developing countries from other parts of the world. For example, Monash University Melbourne Australia operates also out of Monash University Malaysia. In the case of Africa, `given the widespread higher education capacity problems on the African continent and concerns about the possible problems of brain drain, transnational provision may be part of the solution.⁶⁵⁰

17. Data collection on TNE student numbers is challenging

It is unclear how data is collected by international organizations and agencies, individual governments and institutions to avoid double counting or under-reporting of TNE students within the many `modes' of TNE study. While the British Council and DAAD have invested resources and Knight and McNamara have created an initial plan for data collection, questions remain whether these measures will provide TNE provider and receiving countries and institutions with accurate data. While there is reason for optimism given the progress made by Knight and McNamara in such a short time, the concern remains whether it will be possible to overcome the barriers faced. Refer discussion in Chapter 2.

18. TNE's rapid pace of development is usually reported far quickly in the media than in text books

TNE is a `hot' topic and depending only on published material in journals and books is insufficient to gain a broad understanding of this phenomenon. From a research perspective, there was more current information available through

⁶⁵⁰ <http://www.aau.org/sites/default/files/proceedings.pdf> p.11 (accessed 11 March 2014)

regularly updated websites, international education news supplements and even social media such as twitter and blogs.

Given the pace at which TNE is evolving it is difficult for research students to keep up with developments other than through the media. *By the time a few good books and papers on TNE were out, there was already more updated information on TNE provided by the press and on websites of international education and media organizations.*

19. More research is required on TNE

While there is research available, the fast-evolving nature of TNE has meant that there is insufficient information on the many modes of TNE delivery and how TNE programs can evolve between several modes or indeed fall within more than one mode. *For example, micro-campus are somehow excluded from the published research, even though they appear to be cost effective and have fewer hurdles to clear from a regulatory standpoint. Refer discussion on the micro-campus at pp. 19-24 in Chapter 1.* Also, is it possible that a foreign university offering a program via TNE can do so operating within several modes – its own IBC, through twinning with a local partner as well as via distance education? If so, how will TNE student numbers be recorded within each mode of study?

6.3. Recommendations


The Recommendations which follow are intended for Universities in the West which are intending to become involved in TNE or who hope to improve their sustainability as TNE providers. To provide such recommendations may appear an unusual conclusion to a PhD thesis, but they are all based on the research carried out for the thesis and are intended to provide a usable practical result for the benefit of the University of New England and other universities across the globe.

To understand how quickly TNE is developing refer to Chart 15 below. Refer also to The Future of TNE at pp. 167-170 in Chapter 2.

CHART 15: TNE Impact – Year 2030


A Changed World – The TNE Footprint and the Year 2030

TNE will continue to grow exponentially: Universities will deliver programs to students wherever they may be around the world. The student market will be global



To survive, universities will diversify: Market specific study options will be developed including offshore campuses, partnerships and online

Employers will demand 'employment ready' graduates



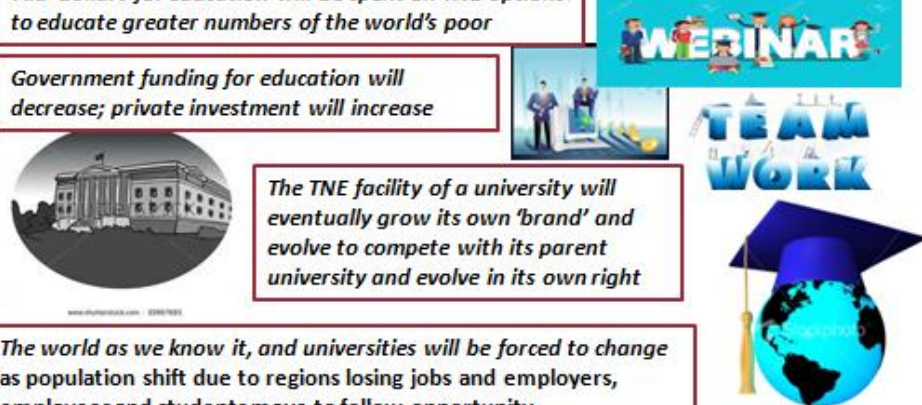
Students will demand internships and jobs in return for investment in education

Faculty will go to where the students are: curriculum & research will be shared across international borders

Patterns of Migration and Overseas Study will Change: Fewer jobs in West; student will stay or go where the jobs are


'Aid' dollars for education will be spent on TNE options to educate greater numbers of the world's poor

Government funding for education will decrease; private investment will increase



The TNE facility of a university will eventually grow its own 'brand' and evolve to compete with its parent university and evolve in its own right

The world as we know it, and universities will be forced to change as population shift due to regions losing jobs and employers, employees and students move to follow opportunity



Source: Author

To keep the development of TNE in context and to understand the Recommendations made in this report, refer to Chart 16 below which shows Australia as an example.

CHART 16: The Australian TNE Footprint – 1980-2030

The University Footprint – Going from Local to Global - The Australian Story



Until the 1980s

- Colombo Plan students arrived in Australia— aid focused (no fee paying students)
- Very limited faculty/research student exchanges



From mid-late 1980s

- Introduction of the full-fee international student
- Formal student exchanges; scholarship programs
- Government & international education organizations become aware of opportunities in international education and trade

From 1990s

- Some universities commence TNE – twinning, IBCs, online, etc.

From 2000 – TO PRESENT

- Even more universities are now involved in some form of TNE.
- Some TNE 'receiving' countries (e.g. Malaysia, Korea) are competing for international students with IBCs established by foreign universities.
- There is greater awareness that there is a shift in student demographics – (a) domestic student recruitment is becoming tougher as students are looking to their universities for job readiness and access to internships and employment; (b) many international students are undertaking TNE at home due to jobs, family, fewer cultural and visa issues; and the cost of tuition for TNE programs is cheaper.

YEAR 2030 (BASED ON CURRENT TRENDS)

- Less government funding for Australian universities which will lead to acceleration of TNE and identification of gaps in current TNE offerings
- More Australian students will undertake some TNE through their university
- The main campus will 'reinforce' its position and differentiate the main campus as being distinct from branch campuses and other forms of TNE operations
- TNE receiving countries will become fierce competitors for international students
- The Australian university will offer Testamurs based on the program and location (IBC/ twinning or distance); this will become a sustainability issue for main campus.
- The 'culture' of the IBC will evolve and it may become an entity in its own right not necessarily severing its ties from the main campus, but asserting its own 'brand'

Source: Author

To better understand the advice being provided to universities to modernize and change based on global forces impacting universities, refer to Visual Aid 73, p. 352 which is part of an EY Report⁶⁵¹ for Australian universities and shows four models of a future university. Note that for all four models, 'how do customers get our services', *digital access* is listed as a means of service delivery. This suggests that students will be able to access their education wherever they live and therefore, universities will have access to a global audience of learners.

Recommendation #1 - Engaging in TNE is crucial to the survival of a university

It is not possible to slow down the progress of TNE. It is a phenomenon which universities will have to embrace to survive. *To educate, universities will need to go to where the students are.* This should not be at the detriment of the onshore student market. The TNE strategy should be about capturing *additional* student markets because universities will not be sustainable by solely depending on the main campus (domestic and international) students.

To embrace all the advantages of TNE, universities will need to consider carefully the meaning of TNE and accept it in the broadest sense to ensure flexibility to make changes when required. Pursuing markets with a TNE strategy that is limited and duplicated across many countries, without consideration of the specialist nature of each country market will fail. *Therefore, there is an absolute need to understand individual student markets* as TNE broadly 'covers a range of sins – from online and distance learning and its hybrid/supported variants (the largest chunk in terms of student numbers), articulation arrangements, twinning programmes that typically lead to double or joint degrees, franchising and validation arrangements, and international branch campuses.'⁶⁵²

It is important to integrate TNE within the university's internationalization strategy so that it provides greater opportunity to create a 'global exchange' of students. Using the opportunity to exchange researchers and staff and home

⁶⁵¹ <http://cdn.ey.com/echannel/au/en/industries/government---public-sector/ey-university-of-the-future-2030/EY-university-of-the-future-2030.pdf> p. 28 (accessed 8 May 2018)

⁶⁵² William Lawton, *op. cit.*

school students makes more sense as it creates more opportunities for the exchange of ideas. If a TNE facility exists, students, researchers and staff at the home and TNE IBCs, micro-campuses/partner campuses should have the ability to 'exchange' even while TNE continues to deliver what it was set up to do - provide education to a country or region of the world, possibly in disciplines which are in demand. But increased mobility of students, researchers and staff also matters from a more 'educational' and 'cultural' point of view: the development of intercultural competencies, enabling students to embrace differences without feeling threatened in their own cultural identity, the opportunities to learn to master adequate attitudes and skills to function optimally in a globalised world.⁶⁵³ *Embracing modern technologies and strategically creating 'university outposts' will ensure plugging into student markets wherever they might be.*

Recommendation #2 - The role of the university will need to be redefined - who does the University mainly serve? Is it only local students?

The question to ask is who are the universities to serve in the future?

Primarily serving local or regional populations will not sustain the current university model in most developed countries as locals and regional students (from the developed world) will also seek 'on demand' education from across the globe and will not necessarily study and/or work locally or regionally. This will mostly affect universities in the developed world where the job market has provided a greater impetus for students to move beyond their borders to undertake study abroad, internships, work and volunteer opportunities. Internationalization strategies need to move beyond student recruitment and target collaborative relationships of varying complexity and intensity, ranging from research collaborations to short-term exchanges to in-country branch campuses.⁶⁵⁴

To survive universities will need to cater to a global mix of students. Today's local student may actually belong to another 'local' region in the next 3-5 years





⁶⁵³ De Moor and Henderikx, *op. cit.*

⁶⁵⁴ Choudaha. *Are you prepared for the arrival of 'glocal' students? Op. cit.*

depending on where the jobs are, where migration takes them and where they seek out a better standard of living. It is particularly important to consider these factors in light of the fast pace at which countries are developing - take the examples of Malaysia, China and India.

VISUAL AID 73: The Disruptive Forces Driving Change at Universities

Scenario business model comparisons

		 Scenario 1 Champion University the base case	 Scenario 2 Commercial University the likely case	 Scenario 3 Disruptor University the alternate case	 Scenario 4 Virtual University the extreme case
 How do universities create value?	What are the jobs to be done for customers?	Just-for-knowledge learning	Just-for-work learning	Just-for-you learning	Just-in-time learning
	What products/services are we providing?	Liberal arts degrees, specialised degrees	Work-integrated degrees	Micro-certifications	Individual courses
	How do customers get our services?	Blended face-to-face and digital screen	Blended face-to-face, digital screen and workplace	Digital screen	Digital screen
	What support does the customer receive?	Lecturer, tutor, digital assistant	Lecturer, tutor, work sponsor, digital assistant	Personalisation via artificial intelligence, customer service	Digital classroom and support group, personal coach
 How do universities deliver value?	How do we produce it?	University owns the entire value chain	University partners with business	University unbundles the value chain	University unbundles the value chain but orchestrates the network
	How do we distribute it?	Campus, digital platforms	Campus, digital platforms	Digital platforms	Digital platforms
 How do universities capture value?	How do we make money?	Annual fees	Annual fees	Memberships, subscriptions	Memberships, course fees
	What are key variable costs?	People	People	People Cloud services	People Cloud services
	What are the fixed costs?	Facilities	Facilities	Technology infrastructure	Technology infrastructure
	What are key investments?	Research, facilities, student engagement	Facilities, industry engagement, student engagement, research	Digital distribution platforms, digital content creators, marketing, customer acquisition and retention	Digital distribution platforms, digital content creators, marketing, customer acquisition and retention

Data and image presented in The Ernst and Young Report 'Can Universities of Today Lead Learning for Tomorrow? – The University of the Future'.
<http://cdn.ey.com/echannel/au/en/industries/government---public-sector/ey-university-of-the-future-2030/EY-university-of-the-future-2030.pdf>
 (Access Date 8 May 2018, p. 28)

If job markets shift and the developed world loses jobs to the developing world, then there will be a shift of students and professionals from the developed world to the developing world and when this shift happens, *universities that have engaged in the varying forms of TNE (distance, IBC, twinning, micro-campuses, joint/dual degrees) will be better placed to service their own populations but in a different part of the world.* Importantly, in the long term, there may not have to be the emphasis on 'culture' as populations shift.

Recommendation #3 –Universities will need to differentiate the study experience; understand that the 'cultural' and 'brand' experience is very much part of the international study experience; issue Testamurs that are specific to the study program and region as they would increase the value of the qualification to the student who invests in going abroad.

Universities will need to place a value on the cultural experience in the context of a university and country specific experience.

- Consider an 'abroad' experience so students get 'cultural exposure' even if it is for only a short time e.g. TNE in the student's home country/regional and then one or two semesters at the University's main campus;
- Issue transcripts and Testamurs that are specific to the TNE experience - this will ensure that those that actually invest in going abroad to a university's home campus are recognized as making the investment in gaining a broader cultural experience.

If students don't leave their countries or regions but undertake a foreign qualification locally through a TNE program then they have chosen not to invest in the overseas experience. To ensure credibility of all programs and to ensure a quality process, there must be transparency, so that all students whether home campus or transnational get a qualification that depicts their actual study and does not in any way provide a distorted view of their education.

In an IIE Seminar in Indonesia in 2012 titled 'Why Indonesia should Invest in International Education' Dr Goodman, President and CEO of IIE states that

`through international education Indonesians will gain mutual understanding, be able to live with and understand other peoples and cultures outside of the classroom, and bring back graduates who will be able to develop their community, environment, people, and government.⁶⁵⁵ *Universities therefore, must not lose sight of the significance placed on the cultural immersion (experience) of an overseas stay and understand the consequences of educating TNE students who may not have any long term relationship with the educational institution or country that provided them with the qualification.*

If an institution is crossing borders, adapting to local norms and customs and thus becomes less inclined to be part of its own national system (where the parent institution is established and operates), and more a part of the importing country's education framework through regulatory processes, then there must be recognition that the student is receiving a *different* service from the university. Changing the `look' of the Testamur itself is worthy of consideration given that students that complete degrees through networks in several countries could have this recognition listed in their Testamur.

Promoting TNE programs in a manner which `suggests' the student is receiving the same educational experience as home campus students undermines the value placed on the experience of going abroad. It is also unfair to employers who believe they are receiving applicants with qualifications (and therefore experience) from a country where the student has never been. An example includes the University of Manchester's MBA program which delivers `a `one degree/one standard' approach to ensure quality, which is why MBS regularly brings faculty to the region to teach our MBA students at workshops in Dubai.⁶⁵⁶ There is every reason to believe that the University of Manchester offers certainty that the curriculum and style of teaching are the same in the TNE program as is offered in the home campus. However, does the TNE student have the same cultural experience of their counterparts who invested in going to the University of Manchester and the UK? The University of Manchester makes

⁶⁵⁵ <http://www.iie.org/Who-We-Are/News-and-Events/Events/2012/IIEF-Indonesia-Event-2012> (accessed 15 September 2013)

⁶⁵⁶ <http://www.diacedu.ae/media-center/latest-news/1-2011/437-dubai-well-placed-to-support-transnational-education> (accessed 9 March 2014)

it known that `all successful MBA students are awarded a degree by the University of Manchester and no distinction is made between the different learning formats – all have reached the same high standard expected of a

CHART 17: Should the University Testamur be Based on the Student Experience?

The Onshore and Offshore TNE Student Experience is Different – Should the Testamur also be different?

ONSHORE STUDENT

- ❖ Travels to/from another country
- ❖ Engages with home (main) campus and other international students
- ❖ Learns to access facilities of the main campus (not all local TNE facilities offer facilities similar to main campus)
- ❖ Better understands the home campus (and country)
- ❖ More independent as is forced to live with other students or independently as not in home country
- ❖ Likely to pursue internships, part time work and travel opportunities
- ❖ Follows home school curriculum

OFFSHORE TNE STUDENT

- ❖ Usually studies locally or regionally in `comfort zone`
- ❖ Little opportunity to engage with home (main) campus students
- ❖ Less likely to engage with other international students at TNE facility as already networked locally with friends and family
- ❖ Does not gain a good understanding of the home campus (and country)
- ❖ Likely continues to engage in local region
- ❖ Does not receive an `abroad` experience including internships, part time work and travel opportunities
- ❖ Is more likely to follow an `adapted to local market` home school curriculum



Does the value of the Testamur to students who invest in going abroad for an `international` student experience diminish, because the same Testamur is issued to the TNE student who studies locally?

Source: Author

Manchester MBA'.⁶⁵⁷ *Note that the University of Manchester has been listed as one example of a university issuing the same Testamurs to its TNE students as it does for students coming to its main campus. There are however, many, many universities offering their TNE students the same Testamurs as are awarded to their home campus students even though the overall experience is different.*

Recommendation #4 – Be Clear about the Curriculum and the Services Offered. Are TNE students accessing home school curriculum and/or modified curriculum? Is the course offered fully online?

It is hoped that the regulatory framework in which universities will operate offshore will provide a greater degree of scrutiny to ensure that there is no dilution or misinterpretation of what is being offered. In simple terms if the IBC or local partner is offering a university qualification that includes the home campus curriculum which has been adapted to meet local market needs then be prepared to say so.

Recommendation #5 - TNE should not undermine the University's home campus – Promote the main campus!

While clearly TNE is seen as being important, it does not diminish the importance of the University's main campus. Through *an intensive immersion* in another country, the student gains an international/ intercultural experience, (s)he learns another language and acquires social skills, and (s)he benefits from a personalized, international curriculum, contributing to the student's later employability.⁶⁵⁸ *The main campus of a university offers students a difference experience than that which is offered to TNE students.* Among the benefits of studying abroad perceived by an increasing number of students are the cultural enrichment and improved language skills, high-status qualifications, and a competitive edge to access better jobs.⁶⁵⁹ In an article in the Chronicle of Higher Education, David Eastwood, Vice Chancellor of the University of Birmingham

⁶⁵⁷ <http://www.diacedu.ae/media-center/latest-news/1-2011/437-dubai-well-placed-to-support-transnational-education> (accessed 9 March 2014)

⁶⁵⁸ De Moor and Henderikx, *op. cit.*, p. 9.

⁶⁵⁹ <http://www.oecd.org/edu/skills-beyond-school/EDIF%202013--N14%20%28eng%29--v2bis.pdf> (accessed 18 May 2016)

in Britain, makes the case about the importance of the main campus experience for students despite the virtual (MOOCs) business of the university. He states that the traditional model is a place for students which is important as it gives students the experience which is of immeasurable value. To study at a particular university means to study in a unique setting and a distinctive program.⁶⁶⁰ It is important that students can travel to a destination where they can actually engage with the local people there including instructors, researchers and their peers. Crucially, they want to buy into a university experience that is more than just a learning experience, relishing the university as a social and cultural community.⁶⁶¹

Providing international students coming to the main campus an opportunity for further study in their own home countries through TNE can also be an option thereby, removing the downside of TNE which is that it does not offer the same experience as going abroad (culture and broader understanding of people and places in a foreign location). There were 1.3 million tertiary students studying outside their home country in 1990 and 4.3 million in 2011, and over half of them are from Asia.⁶⁶² *Given that Asia is the main area where TNE activity is currently taking place it seems that there is logic to the idea of planning onshore and offshore study plans within the TNE degree so students have a clear choice on whether to take the onshore TNE option, offshore option or a mix of the two.*

Recommendation #6–Embracing MOOCs within TNE is likely to provide greater outcomes and outreach to even more students

Since massive open online courses exploded into public consciousness, college presidents have been trying to work out how to use higher education's most hyped innovation to deal with one of its greatest challenges: enrolling and

⁶⁶⁰ David Eastwood. *Being Global While Sounding Local*. The Chronicle of Higher Education Online. 7 March 2013. Also available at: <http://chronicle.com/blogs/worldwise/being-global-while-sounding-local/31915> (accessed 15 November 2014)

⁶⁶¹ *Ibid.*

⁶⁶² Stephen Matchett. 'High Wired Update: Degrees Don't Deliver Like they Used to'. The Australian Online. 12 July 2013. Also available at: <http://www.theaustralian.com.au/higher-education/high-wired-update-degrees-dont-deliver-like-they-used-to/story-e6frgcjx-1226677869892> (accessed 14 November 2014)

graduating more students at a time of rising costs and declining support.⁶⁶³ Be aware though that the plan for managing a MOOC presence needs to be thought through to understand who an institution services. It cannot be a one size fits all plan. Depending on where students are located and the varying stages of development of infrastructure particularly technological developments may require different approaches. Certain courses may not be feasible for certain regions. Providing access for people who are underserved, for example, might dictate different course offerings from a goal of attracting people who have, or may develop, ties to your university, such as prospective students, alumni, or donors.⁶⁶⁴

MOOCs can act as a facilitator to onshore and offshore (through TNE) programs. However, what is clear is that there must be recognition that there are organizations that are looking at providing credit for free online courses from elite universities.

An additional factor that is important and relevant to TNE providers is that students could fast track their degree programs because of obtaining credit for their free online courses. Clearly the issue of credit for free online courses is a relatively new concept; therefore, this is an issue that needs to be monitored to ensure that it does not destabilize TNE programs that are set up on the basis of current statistics of students wanting an education.

A university does not lose its 'identity' by embracing online programs. It is how quality measures are put in place and how programs are delivered that matters. 'Globalization and technology, including the rise of massive open online courses, or MOOCs, are changing the education landscape, but university leaders said they shouldn't allow those developments to compromise their

⁶⁶³ Steve Kolowich. 'Universities Try MOOCs in Bid to Lure Successful Students to Online Programs'. The Chronicle of Higher Education. 23 January 2013. Also available at: http://chronicle.com/blogs/wiredcampus/universities-try-mooc2degree-courses-to-lure-successful-students-to-online-programs/41829?cid=at&utm_source=at&utm_medium=en (accessed 26 June 2015)

⁶⁶⁴ Alison Byerly. 'Before You Jump on the Bandwagon'. The Chronicle of Higher Education Online. 3 September 2012. Also available at: http://chronicle.com/article/Before-You-Jump-on-the/134090/?cid=wb&utm_source=wb&utm_medium=en (accessed 12 February 2013)

identities.⁶⁶⁵ In 'closed' societies women may not be permitted to attend colleges even locally but could access online distance education through home computers. An online global classroom is adaptable: it can cross gender, religious and cultural borders to create an open forum for learning.⁶⁶⁶

Recommendation #7 - The greater good of humanity should be an important principle of TNE – seek out government partnerships that can 'fund' TNE activities so that government 'aid' for education can be disbursed through its own institutions to support education in developing countries.

It is highly unlikely that universities can manage TNE programs without these being self-funding.

One way of sustaining some TNE activities is through partnerships with government whereby aid dollars for education can be better managed through cost effective educational programs in developing countries. For example, it is cheaper for the Australian Government to provide aid dollars to teach students from a developing country, first in their home country via MOOCs, followed with a period of study at an Australian university's TNE facility in a lower cost country (e.g. Malaysia), followed with a semester in Australia, rather than bringing the student for the entire degree to Australia.

Recommendation #8 - Understand the role of business partnerships in TNE. Local and regional partnerships may offer better platforms to springboard TNE operations. Local relationships in the area of internships, on the job training and employment opportunities for graduates should be integral in planning TNE operations.

The involvement of business in education will change the landscape of the traditional university. Local and regional businesses have local knowledge and know the skills that are required in the region. Partnering with local and regional

⁶⁶⁵ Karin Fischer. 'University Leaders from Asia and the Pacific Consider Challenges of Globalization'. The Chronicle of Higher Education Online. 14 March 2013. Also available at: http://chronicle.com/article/University-Leaders-From-Asia/137907/?cid=pm&utm_source=pm&utm_medium=en (accessed 21 June 2014)

⁶⁶⁶ Francesca Cichello, Alan Davis and Deborah Smith. 'Crossing Borders through Open and Online Learning: Collaborative Strategies for Learner Success'. Presentation to the 2011 Global Forum OBHE. Also available at: http://www.obhe.ac.uk/conferences/the_2011_global_forum_canada/Cichello.pdf (accessed 29 May 2015)

businesses to operate TNE can provide dividends such as classrooms for teaching and training, opportunities for TNE students for internships and even future (graduate) employment.

There are lessons to be learnt from business - business usually has the funding to go into newer markets far more quickly than public universities; therefore, it is possible to springboard certain offshore activities including TNE by collaborating with others if this meets institutional objectives. An example is Laureate Education a private company which `operates a network of 65 universities in 29 countries, has received a \$150-million investment from the International Finance Corporation, an arm of the World Bank.⁶⁶⁷ This will enable Laureate to expand into education markets in Africa and Latin America. It already has a campus in Morocco. In January 2013, `a British company that helps to bring students from China and other countries to campuses in the United States and other English-speaking nations has announced an investment of more than \$100-million from a private-equity firm.⁶⁶⁸

Capital for education projects seems to have no bounds whereas traditional institutions seem to be strapped for cash. This creates the perfect incentive for traditional educational institutions to form a marriage of convenience with the private sector which has the investment funds and capabilities to assist the education sector in developing and moving beyond some of the stagnation that is currently being experienced by universities in some countries, particularly English-speaking countries.

As the main reason for TNE is the overall demand for education and/or upgrading of skills, universities need to market programs which are specific to regions (markets). In other words, deliver what the market needs and not what the main campus was well known for.

⁶⁶⁷ Blumenstyk, *op. cit.*

⁶⁶⁸ Goldie Blumenstyk. 'Private Equity Steps Into the International Student Market'. The Chronicle of Higher Education Online. 16 January 2013. Also available at: http://chronicle.com/blogs/bottomline/private-equity-steps-into-the-international-student-market/?cid=gn&utm_source=gn&utm_medium=en (accessed 24 September 2013)

Recommendation #9 - Remain relevant. Reassess market requirements to ensure delivery meets market expectations!

Be prepared to adjust the TNE model based on supply and demand. As TNE receiving countries become 'developed' and their educational systems and institutions become more prominent, it is likely that the demand for a 'foreign' qualification may diminish. Indeed, the developments in some of these countries (better standard of living, more jobs, stronger economies) may mean that 'foreign' may no longer have the attraction it currently has. Therefore, universities involved in TNE need to have an internationalization strategy that can be readily adapted to meet market conditions. Still over time, as the capacity of the local public and private institutions grows, and more students can afford to study abroad or access local institutions at lower cost, demand for transnational programmes may well peak and decline in mature markets.⁶⁶⁹

Plan for less reliance on domestic student markets as these will change based on economic factors – so will, international markets change (refer previous point). Students will become mobile and this will include students from the modern, western and developed world - The cost of tuition fees and living costs and accessibility to 'familiar' institutions from the west who now have IBCs, micro-campuses or twinning arrangements offering low cost tuition and cheaper living costs will draw some students to leave their countries in the west. Another attraction will likely be that while the developing countries continue on their path to development, there will be more jobs in these regions, thereby attracting some students from the West. A factor of these developments will be the effect on students of minority backgrounds. In the US for example, 'by the year 2020, minority students will account for 45 percent of the nation's public high-school graduates, up from 38 percent in 2009, according the latest edition of Knocking at the College Door, a regular report on demographic changes published by the Western Interstate Commission for Higher Education'.⁶⁷⁰ This scenario

⁶⁶⁹ Grant McBurnie and Christopher Ziguras, 'Trends and Future Scenarios in Programme and Institution Mobility Across Borders', in *Higher Education to 2030, Volume 2, Globalisation*. Series: Educational Research and Innovations, OECD. p. 96. 2009.
Also available at <http://www.oecd.org/edu/cei/highereducationto2030volume2globalisation.htm> (accessed 14 May 2018)

⁶⁷⁰ Eric Hoover. 'The Bottom Line vs. Social Good'. The Chronicle of Higher Education. 10 January 2013. Also available at: http://chronicle.com/blogs/headcount/the-bottom-line-vs-social-good/33371?cid=at&utm_source=at&utm_medium=en (accessed 19 July 2016)

could have a devastating effect on universities in the western hemisphere unless steps are taken to make university education affordable and students welcome. Minority groups, particularly migrants to the west may adapt more quickly to the notion of returning to home countries or going to third countries in search of jobs and better living conditions as well as lower cost TNE programs. Already there are American style summer programs offered in China to Chinese born students who study in the US but return for summer holidays to China and undertake short term courses for which they receive credit from their US universities. There is already evidence that in the case of the US, Chinese born students do choose to return to China for short courses and summer holidays. China is 'yet one more player in the complex and often opaque Chinese education industry, an industry in which American colleges are finding themselves increasingly entwined'.⁶⁷¹

Therefore, if already students studying in the West are undertaking courses that are cheaper in other countries such as China and/or fast tracking their US degrees, it should not be a surprise that over a period of time, as countries in the developing world build their education infrastructure particularly with support from universities in the developed world - such as the TNE options currently on offer - these countries will be in a far better position to offer students lower cost tuition and living costs coupled with jobs as compared with what is offered in developed nations.

Connect employment to education - people studying are looking to transition to jobs! There is already evidence that students are looking for university programs which offer internships with industry and/or options for work placement as part of study programs so real-life experience helps them transition into a job at the end of their education. As universities are placing more and more emphasis on work placement and internships for their main campus students, it is also important that those offering TNE programs develop strategies that will provide support for such activities for their transnational students. Whilst the experience

⁶⁷¹ Beth McMurtrie and Lara Farrar. 'Chinese Summer Schools Sell Quick Credits'. The Chronicle of Higher Education. 14 January 2013. Also available at: http://chronicle.com/article/Chinese-Summer-Schools-Sell/136637/?cid=wb&utm_source=wb&utm_medium=en (accessed 19 June 2016)

may not be entirely the same for transnational students as it is for onshore main campus students, universities need to ensure some equity so that transnational students are not seen as the 'poor cousins' of a system that already shows that the services offered to transnational students are not the same as those offered by universities to their main campus students. To ensure success for their students whether transnational or main campus students, universities will require 'collaboration across academic and corporate lines and mutual agreement to revisit and revise learning experiences on both sides to insure students develop strong competence in essential workforce skills.'⁶⁷²

Understand that the University's home campus students may need to diversify their own education and may need to study at the home university's other 'campuses' (TNE) to have access to jobs and training. Simply providing the domestic students with main campus offerings with a handful of semester abroad options is not enough. Strategically developing TNE in a variety of international markets and permitting all students (TNE and main campus) to have access will ensure better outcomes to students. Outcomes for students and employers must be considered.

Understand the importance of quality, academic freedom and brand protection in the context of regulations of foreign governments which may not be in keeping with the values of the university/country brand. These requirements go hand in hand. Universities should consider very carefully how far, if at all, they are willing to sacrifice their values for overseas sales. There is little point in establishing the same partnership in transnational education programs in say, Singapore as in South Korea. Markets are different; countries are different and government regulation is different. The complexity of individual markets requires universities to invest in fact finding and learning from the lessons that others have already learnt. Duplication of a good idea is great but given the global reach of transnational programs, reputation built on quality is important.

⁶⁷² Kathleen C. Rentsch. 'Aligning Learning Outcomes with Industry Expectations'. The Chronicle of Higher Education, Letter to the Editor. 13 March 2013. Also available at: http://chronicle.com/blogs/letters/aligning-learning-outcomes-with-industry-expectations/?cid=cc&utm_source=cc&utm_medium=en (accessed 19 June 2014)

Reputation is a key driver in developing alliance partnerships within the education sector.⁶⁷³

Quality is a major issue which is constantly raised in transnational education. Universities are entering a brave new world when they set up collaborative degree or academic programs overseas, and they must be vigilant in ensuring proper academic standards.⁶⁷⁴ Many governments, universities and groups representing universities are dialoguing the issue of accreditation and standards and why these need to be rigorously applied for fear of destabilizing their student markets and indeed the quality of their degrees. At the annual conference of the Association of International Education Administrators in February 2012, which drew 900 attendees from 47 countries, the Vice President of the Western Association of Colleges and Schools, Richard Osborne stated that 'you get tainted with the brush of these programs being questionable' and together with his colleague, Marsal Stoll, his counterpart from the Southern Association of Colleges and Schools stated that she 'encouraged institutions that begin academic collaborations abroad to ask themselves a few key questions, such as which partner will vet course content and supervise students and faculty members, as well as how academic credit will be awarded'.⁶⁷⁵ The 'export' of higher education through transnational programs is unlike moving physical products and requires face-to-face contact where 'intellectual property is vested in the program content *and* delivery to the consumer through qualified and expert faculty'.⁶⁷⁶ A 2005 report commissioned by the Australian Government concluded that to form successful strategic alliances in education, institutions would need to: formulate a winning strategy, ensure clarity of objectives, select a suitable strategic partner, develop core competencies in collaboration, establish an effective governance structure, actively manage cultural challenges, protect intellectual property and brand, align decision rights to create and

⁶⁷³ Paul Bannerman, Joan Spiller, Philip Yetton and Jeremy Davis. '*Strategic Alliances in Education and Training Services - A Literature Review*'. AEI Report to the Dept of Education, Science and Training, Canberra, March 2005, pg. 9.

⁶⁷⁴ Karin Fischer. '*Accreditors Caution American Colleges as They Create Academic Programs Abroad*'. The Chronicle of Higher Education Online. 22 February 2012. Also available at: <http://chronicle.com/article/Accreditors-Caution-American/130888/> (accessed 19 July 2016)

⁶⁷⁵ *Ibid.*

⁶⁷⁶ Bannerman, Spiller, Yetton and Davis, *op. cit.*, p. 48.

capture value, build core capabilities in change management and agree to an exit strategy.⁶⁷⁷

The ethos and the values the institution places on academic freedom should be promoted - where there are differences between home campuses and their TNE operations, these should be clearly defined. In some countries there are restrictions placed on how TNE operations can operate in the local sphere and these need to be considered in the context of the qualification being offered through the TNE mode as `not all countries believe as fully in academic freedom, and shared governance is not always a part of universities around the world—potentially curtailing the involvement of faculty in the process of assessing quality.⁶⁷⁸ Not all universities offering TNE who have such restrictions placed on them are willing to discuss these issues but it is important to understand these in the context of `branding' and identifying what sets a university apart from another.

Recommendation #10 – Invest in more research on TNE

TNE is fast moving. While there are many organizations actively conducting research, the pace at which TNE is travelling will require a much greater degree of commitment from providers and receivers of TNE to commit to further research. It is also hoped that by the time more research is conducted in the area, universities involved in TNE will be more receptive to their students participating in surveys which provide feedback on their experiences through the various modes of TNE whether it is an IBC or a micro-campus or through a twinning program. Such surveying is crucial if the world is to create best practice for the establishment of IBCs and other forms of TNE for institutions of higher learning.

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⁶⁷⁷ *Ibid.*, p. 67.

⁶⁷⁸ Jason Lane and Kevin Kinser. 'Why Higher-Education Accreditors Need International Offices'. The Chronicle of Higher Education Online. 12 March 2013. Also available at: http://chronicle.com/blogs/worldwise/why-higher-education-accreditors-need-international-offices/31749?cid=pm&utm_source=pm&utm_medium=en (accessed 19 July 2014)

6.4 Conclusion

Globalization has meant enormous change for the higher education sector, particularly universities.

Universities have been forced to embrace TNE, particularly as some countries began to experience a drop or stagnation in international student enrolments. At the same time universities grappled with reduced government funding and a somewhat 'unsure' domestic market. The significance of communication and technologies to reduce the cost of education as taught in traditional brick and mortar buildings cannot be understated as today's students seek new ways of securing the education they need to move into jobs. TNE is therefore, an inevitably evolving phenomenon.

Most universities have been promoting their TNE programs and offering the 'one brand' qualification - providing home campus degrees to TNE students who have often never set foot on the university's main campus or even inside the country where it is located. Currently employers do not fully understand TNE in the context of the job market and assume that a qualification is specific to a university's home country. Clearly this thinking will change in time as TNE is better understood. However, it is important to understand that offering a qualification from the home school to students on TNE programs that have never left their native shores is 'diluting' the home brand and undermines the capabilities and significance of the main campus. It also leads to questioning of how important the 'cultural' experience was to the overall international education experience when the student actually did go abroad. Much will depend upon the nature of the employment which the students are seeking and how far it requires foreign language and cultural adaptation skills. In the medium to longer term concerns about the overall survival of the university itself (main campus) will arise when TNE arrangements mature and there is no longer the need for the main campus. This could have a detrimental effect on the main (parent) campus particularly if there are other factors at play such as a shrinking domestic student market and declining government funding for education.

At the same time the advent of the micro-campus which provides extensive international networks for students at lower costs than the IBCs ensures that there may be more possibilities for students to travel to distant shores for the international experience at lower prices and even for shorter periods, given the

CHART 18: Different Strokes for Different Folks – Are Students Any Different to Coffee Drinkers Wanting Quality & Access Closer to Home and Work?



Source: Author

need of many students to study in their home countries due to their employment and family situations.

To survive, today's universities will need to evolve to go to where the students are. This is likely to mean that over time the significance of the bricks and mortar traditional main campuses will not be the drawcard they currently are. Instead, how quickly and where locally or regionally, the student can access teaching and training will become more significant. The future will see students gravitating towards their nearest education and training facility (based on 'brand name', quality and convenience), in much the same way as consumers access the nearest brand name coffee shop (e.g. Starbucks). Refer Chart 18, p. 367. The future may also see today's TNE facility (IBC and twinning arrangements) evolve and become a 'local' brand name in its own right, breaking up from the parent institution, to navigate its own course.

This researcher has made broad recommendations to ensure universities understand the implications of the evolving nature of TNE for their survival. It is hoped that future researchers can take this research even further to better understand the complex nature of TNE and survival of the traditional university.

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Note: A list of Researchers and organizations active in ongoing TNE research has been compiled as Appendix 19 (Volume II of the thesis).

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