TRANSNATIONAL EDUCATION DATA COLLECTION SYSTEMS: AWARENESS, ANALYSIS, ACTION

International
Higher Education

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Acknowledgements

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Preface

After 25 years of substantial activity, transnational education (TNE) has become a significant component of the international higher education landscape. A growing number of countries strive to enhance their higher education systems by encouraging universities from abroad to offer their study programmes to local students. At the same time, the number of countries and higher education institutions endeavouring to widen their reach and sharpen their international profile by teaching their degree courses in collaboration with local partners, or establishing a physical presence abroad continues to increase. TNE can be seen by hosts and providers as a tool to expand the range of study options available to local students, improve the quality of national HE systems and increase access to higher education programmes with an international component.

In contrast to the dynamic development of worldwide TNE activity, our knowledge on the overall scope, extent and impact of TNE has remained limited. This report documents the second part of a research project commissioned by the British Council and the German Academic Exchange Service (DAAD) dedicated to help narrow the gap. This joint project began in earnest in 2013 at the

'Higher Education Summit in the year of the UK's G8 presidency', which discussed the impact of TNE in host countries on the basis of a pilot study initiated by the British Council. Realising the need for further research, the British Council and DAAD teamed up to enable deeper investigation into the academic, cultural, economic and skill-related impact of TNE activity in ten host countries. The combination of our networks and resources in a project with the aim of deepening our understanding of a crucial area within the development of a global science and knowledge society is a logical consequence of both our organisations' dedication to the internationalisation of higher education, and we are very pleased with the productive partnership which we have developed.

The first part of our joint project, carried out with additional support from IIE, Commonwealth of Australia, and Campus France and first presented at the Going Global Conference 2014, yielded valuable insights and deepened the understanding of the expectations and experiences of students, graduates, academic staff and higher education experts connected to the activities of international higher education providers in their countries. At the same time, the study highlighted the lack of comprehensive data needed

for a thorough analysis of the effects, benefits and potential challenges that might arise from study courses and education providers crossing national borders, and especially the lack of data collection systems in place in host countries to produce comparable and reliable information on student enrolment in TNE.

This result called for a continuation of the combined effort and motivated the present study which focuses on an analysis of existing host country data collection mechanisms with the aim to identify good practice and derive recommendations for the development and introduction of data collection systems on TNE enrolment. Based on common definitions and a shared terminological framework, such systems will enable host countries to capture, monitor and compare TNE activities within and beyond national HE systems and thus provide a valuable tool for capacity building and policy formation.

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Executive summary

Background

Transnational education (TNE) is a dynamic, vibrant sector of higher education internationalisation. In general terms, TNE refers to the movement of higher education providers and programmes across national borders, allowing students to study foreign programmes without having to leave their home country. Not only has there been an exponential increase in the number of new TNE programmes being offered, there are new forms of TNE partnerships and delivery modes emerging onto the higher education landscape. However, the research and monitoring of these new developments is simply not keeping pace with the accelerated rate of change. While opinion and anecdotal evidence reveal the benefits and risks attached to this burgeoning field, there continues to be a significant lack of research, robust data and information regarding TNE programmes. This is especially true in terms of host country TNE activity and is something which the British Council, DAAD and others highlighted at the HE summit in the UK's G8 presidency year [1] and in research findings published in 2014. [2] This reality, and the imperative to address it, gave rise to the current British Council and DAAD study, which focuses on the existence and characteristics of TNE data collection systems in host countries and the capacity to produce robust data on TNE programmes and enrolment rates. This report has three primary aims:

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

Approach to research

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

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

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1. https://ei.britishcouncil.org/sites/default/files/import-content/summit_declaration_1.pdf
2. British Council and DAAD (2014) *Impacts of transnational education on host countries*: www.britishcouncil.org/sites/britishcouncil.uk2/files/tne_study_final_web.pdf

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

Main findings

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

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

Rationale for collecting TNE data

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

Systematic approaches to collecting TNE data

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

How TNE data is collected

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

• initial registration of institutions and accreditation of their TNE programmes

• follow-up survey/information request/annual return or review to monitor the registered institutions and accredited programmes.

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

Data templates are usually sent to the HEIs for completion and are crucial in collecting detailed TNE programme and enrolment data. Online data collection systems can work well and there are examples of good practice that host countries can learn from sending countries in this regard. Guideline documents are useful in assisting HEIs with completion of templates, and close communication and co-ordination between the data collection agency and HEIs is highly recommended.

Overall, templates and guidelines are a priority area, which requires significant attention and which can result in major improvements in the TNE data collected by host countries.

TNE data produced

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

Distance education is part of the TNE landscape, but it is not well researched or understood. Only one of the ten host countries reviewed has adopted a systematic approach to capturing this activity, by co-ordinating and cross referencing data from a number of governmental and private sector sources – but this does, at least, demonstrate that it is possible. One of the surprising findings of the research is the lack of priority attached to collecting TNE enrolment data in the host countries. This may be a consequence of the data collection

agencies being regulatory bodies and, consequently, their primary duty is to ensure the quality of the institutions and programmes. However, the sending countries of Australia and the UK place greater priority on collecting enrolment data than on collecting programme data.

How TNE data is used

Register of approved providers and programmes

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

Quality assurance and enforcement action

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

Higher education planning and policy development

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

Main challenges for collecting TNE data

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

Some concerns were raised by data collection agencies around the quality of the data provided by HEIs, including: non-response to information requests; late provision of data; poor quality of data provided; and a lack of capacity at HEIs to assist with queries. However, HEIs themselves raised concerns about the data collection process administered by the data collection agencies, including: poor co-ordination between different government agencies, resulting in duplication of data requests; data request overload for HEIs; time constraints; poor lines of communication with HEIs; lack of detailed guidelines to assist with completing the data templates; and lack of expertise in government agencies. Use of outdated or poorly structured data templates is considered a major reason for lack of TNE data in a few countries, and lack of clear guidelines can result in HEIs developing their own templates, resulting in inconsistent data returns.

Main enablers for collecting TNE data

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

Towards a common TNE categorisation framework

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

Guidelines and recommendations

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

National government: ministry of education and affiliated agencies

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

Higher education institutions engaged in TNE activities

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

Non-governmental higher education associations

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

International governmental agencies

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

Awareness, analysis, action

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

1. Introduction

1.1 The changing landscape of transnational education

Transnational education (TNE) – described as *programme and provider mobility* for the purposes of this report – is a dynamic, vibrant sector of higher education internationalisation. Not only has there been an exponential increase in the number of new TNE programmes being offered, there are new forms of TNE partnerships and delivery modes emerging onto the TNE landscape. The last decade has seen a steady increase in the number of branch campuses and the development of internationally co-founded institutions, such as binational universities. Franchised universities are new to the TNE landscape and involve a foreign or local entity establishing a private independent university in a host country which offers franchised academic programmes from different foreign providers. The number of twinning and franchise programmes is now being surpassed by the staggering increase in double and multiple degree programmes, and distance education is being revolutionised by the development of new technologies and massive open online courses (MOOCs).

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

1.2 Why a study on TNE data collection systems in host countries?

In spite of the fact that TNE is increasing in scope and scale, there is a significant lack of reliable information regarding the characteristics of the TNE programme (that is, numbers, mode, level, discipline, duration, partners) operating in host countries and, furthermore, student enrolment data is scarce. Of course, there are highly active TNE countries such as Malaysia, Hong Kong and Mauritius, who have developed TNE regulatory processes and databases on all TNE activity under their jurisdiction. However, it is fair to say that the majority of TNE host countries, especially the ones who have only recently become more TNE active, do not have appropriate registration of foreign programmes or TNE data collection systems in place and, therefore, are not able to monitor TNE activity. This means that there is insufficient information to effectively include TNE provision in their higher education planning processes, policies, and regulatory functions.

1.3 Purpose of report: awareness, analysis, advocacy, action

This report provides the first analysis of the TNE data collection systems in ten TNE host countries around the world. In addition, it also gives an overview of TNE data collection systems in three sending countries, so as to see similarities and differences and identify common reference points. Based on this analysis, key TNE actors, methodologies, issues and challenges are identified, and a set of guidelines are developed for host countries early on in the stage of developing TNE data collection procedures.

The primary aims of this report are:

- to raise awareness about the lack of TNE information and data in an field which is both growing and changing rapidly

- to provide an overview of ten host countries, all of which are at different stages of developing and operating a TNE data collection system, in order to identify good practices, as well as key issues and challenges;

- to advocate for commitment and action by TNE active countries – both sending and receiving – to work towards a set of common definitions of TNE modes and programmes, and to develop an international protocol for the collection of TNE programme information and enrolment (similar to the ones used by UNESCO and OECD to gather data on international student mobility).

The intended readers of this report are varied, given its goal of raising awareness about the importance, use and benefits of a more systematic effort to gather TNE data. Potential readers include education planners, policy makers, decision makers, and researchers attached to the variety of government agencies, non-governmental organisations (NGOs), higher education institutions (HEIs), research centres and think tanks involved in TNE. While readers from the higher education sector are the primary target there are issues and implications for other sectors, such as trade and industry, immigration and foreign affairs. The report may raise more questions than it answers, but it will achieve one of its primary goals if it results in increased attention and action given to TNE data collection at institutional, national and international levels.

1.4   TNE terminology: chaos and confusion

Given the iterative and accelerated way in which international academic mobility has evolved over the last two decades, it is not surprising that there are countless terms, definitions and labels used to describe programme and provider mobility. A review of policy documents, reports and research papers shows that the four most common terms to label the phenomenon of programme and provider mobility (as opposed to student or researcher mobility) are *transnational education, crossborder education, borderless education and offshore education*. While there are nuanced differences between these

four terms, in practice, they are used interchangeably. For the purposes of this report, the term *transnational education* is used, even though, at times, it is difficult to explain to non-English speakers and other sectors the difference between international education and transnational education.

The proliferation of terms extends to specific types of TNE activity. There is mass confusion within and between countries regarding the definitions and parameters of individual modes of TNE, such as twinning, branch campus and internationally co-founded universities. Take the recent explosion in the number of joint/double/multiple degree programmes as an example. A scan through recent research literature on TNE reveals that over 20 terms are used to describe the phenomenon of local/foreign collaboration in the joint design and delivery of an academic programme in a host country. These include *joint, double, dual, multiple, tri-national, cross-national, integrated, collaborative, international, consecutive, concurrent, co-tutelle, overlapping, conjoint, parallel, simultaneous* and *common* degree programmes. The emphasis appears to be on the number of qualifications offered. The two most common terms are *joint* and *double degree* programmes. However, the broad interpretation of what these two terms actually mean makes TNE data collection and analysis extremely challenging.

The reality is that HEIs use different terms within and among countries to describe TNE programmes and this is becoming more problematic, with unintended consequences in sight.

The confusion of TNE terms is a fundamental barrier to current data collection; secondly, it poses significant challenges to TNE data analysis; and, thirdly, it can invalidate cross-country comparisons or international census taking.

This report tries to address the complexities of terminology by proposing, in Chapter six, a TNE framework and a set of TNE terms. It may not be the definitive answer, but it is a first step towards addressing the use of different terms for the same TNE activity, and, conversely, the use of the same term for a myriad of different TNE activities.

1.5   Key assumptions: importance of local context and diversity of actors

A number of important assumptions have guided the research study and the preparation of this report. These guiding principles are listed below, so as to be clear about how the study and report were framed.

- The focus is clearly on host countries. TNE can play an important role in the overall provision of and access to higher education in host countries. Consequently, there are major implications for TNE planning, policies and priorities, which clearly require solid data. It is acknowledged that more and more countries are involved in both sending and hosting TNE programmes, and that data collection for sending countries is also necessary.

- Higher education governmental agencies and non-governmental organisations are key actors in TNE policies, regulations and data collection. There are other sectors, such as immigration, trade, industry, foreign affairs and labour, which also have a stake in TNE and may need to be consulted in the design of the system and the use of the data.

- Local context is of fundamental importance for TNE in general, but especially for host country TNE data collection systems. The adage that one size/system does not fit all applies. Host countries have different rationales and priorities in terms of TNE provision. They have their own system for collecting higher education data and face different challenges in terms of introducing a new TNE system or integrating TNE into existing higher education data collection systems. They have varying levels of technical capacity, human resources and political will to address the TNE data collection challenge.

- Any common TNE framework, set of definitions and data protocol need to be robust and systematic, but also flexible, to accommodate commonalities and differences across institutions and countries.

1.6 Outline of the report

Following on from the first chapter, which focuses on the changing landscape of TNE and the importance of TNE data collection systems, the second chapter outlines the design and major objectives of the research study. In Chapter three, the profiles of the ten TNE host countries are presented and information is provided on the level and scope of TNE activity and the key elements of TNE data collection where such a system exists. In Chapter four, the focus shifts to three active TNE sending countries and how they track TNE programme information and enrolment data. Chapter 5 then presents the cross-cutting analysis of the ten host countries according to major themes and issues. Differences and commonalities across the countries are highlighted in terms of major actors, data collection methodologies, and types and uses of data. Chapter six addresses the thorny issue of developing a robust, but flexible, analytical TNE framework and a commonly understood set of TNE terms. Finally, Chapter 7 presents enablers and challenges in developing and operating a TNE data collection system, and a framework of key questions and issues to assist countries in the early stages of developing a TNE data system. It also sets out a series of recommendations targeting institutional, national and international actors who have a role in TNE data collection systems.

2. Design of the research project

2.1 Previous studies: British Council and German Academic Exchange Service

A commitment to a deeper understanding of TNE trends, policies, and regulatory issues kick-started the British Council's engagement in further research into the phenomenon of provider and programme mobility. The long track record of the British Council's research into international student mobility needed to be augmented by more in-depth TNE research that was of benefit not only to the British Council, but also to the wider higher education community around the world. The first two studies were entitled *The Shape of Things to Come 1* and *The Shape of Things to Come 2*.[3] These studies focused on mapping the evolution of TNE during the last decade and analysing the regulatory, market and international mobility environments in both TNE sending and host countries.

The results of the studies identified the importance of examining TNE from a host country perspective and, particularly, the identification of positive and potentially negative impacts of TNE on host countries. A pilot study was conducted on TNE impacts in host countries and presented at the G8 summit on higher education in 2013. Based on the findings of the pilot study, the British Council and the German Academic Exchange Service, in collaboration with the Institute Of International Education in New York, the Commonwealth of Australia and Campus France, launched a full study of academic, economic, skills and social/cultural impacts on students, institutions and education systems in host countries.

The results of the full study on TNE impacts[4] provided new insights into host country rationales for TNE, its role in providing increased access to higher education, perceived benefits and risks, quality assurance and accreditation issues and TNE student profiles. The process of undertaking the impact study and analysing the results vividly illustrated that there was an unsettling lack of hard data on many aspects of TNE programmes and student enrolment. While anecdotal and opinion data are valuable, they are not, in themselves, sufficient, and prove how critical it is to have additional hard, reliable data, which is comparable both within and between institutions in one country – and across countries, as well. This imperative gave rise to the current British Council and DAAD study, which focuses on the existence and characteristics of TNE data collection systems in host countries and the capacity to produce robust data on TNE programmes and enrolment rates.

2.2 Objectives of study

The overall purpose of this study is to review key features of data collection systems in ten TNE host countries and identify the major enablers and challenges to operating the system and using the data. The project's main focus is not on gathering TNE programme and enrolment data, but, rather, learning about the processes that agencies use to retrieve and analyse the data and how HEIs provide the information. The specific objectives of the project are as follows:

- Profile and compare the TNE data collection systems in ten host countries. Assess the extent to which national level data collection is aligned with institutional-level data collection.

- Examine the data collection systems in three sending countries, as well as the TNE data produced by these countries. Assess the extent to which host countries can learn from these experiences and the degree to which synergies are possible between sending and host country data collection systems.

- Identify examples of good practice to improve the collection and publication of TNE data in those host countries that are in the early stages of TNE data gathering. Make recommendations targeting host country institutions, national education agencies, the international higher education community and international governmental organisations.

2.3 Selection of host countries

The ten countries chosen for this study represent a cross-section of TNE host countries from all regions of the world. The diversity of host countries and their level of TNE engagement indicate the realities and challenges in establishing, operating and improving a TNE data collection system. Furthermore, the ten countries were included in the 2014 TNE impact study and eight were included in the 2013 mapping project, which assessed the TNE regulatory, market and international mobility environments in 25 countries (*The Shape of Things to Come 2*). This allowed for a deeper understanding of the local context of each country, which, in turn, facilitated an appreciation of how TNE data collection systems operate in their own particular environment.

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3.   British Council (2013) *The Shape of things to come 2*. Available online at: www.britishcouncil.org/education/ihe/knowledge-centre/transnational-education/the-shape-of-things-to-come-2

4.   British Council and DAAD (2014) *Impacts of TNE on host countries*. Available online at: www.britishcouncil.org/education/ihe/knowledge-centre/internationalisation/impacts-transnational

Table 1: List of ten host countries included in this study

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

2.4 Host country TNE data collection profiles

A common template was developed to gather information and develop a profile of the TNE data collection systems for the ten host countries. The template evolved during the research process in order to accommodate the individual approaches used in each country. It is important to note that, of the ten host countries, a few are operating active TNE data collection systems, but the majority are in the early stages of establishing the system, or have no system at all. This was expected and reflects the situation in most host countries involved in TNE.

The major categories of the country profiles are as follows:

• overview of scope and scale of TNE activity
• agency/ies responsible for higher education data collection
• name of higher education data publications
• frequency of data collection/ publication
• inclusion of TNE data in higher education data
• TNE categorisation and descriptions
• types of HEIs included in data collection exercises

• method of data collection and analysis
• TNE data captured
• use of TNE data
• contact information.

The profiles were developed using this common template to allow for comparative analysis and the identification of cross-cutting issues. Important to note is that information was not available for each template category in all ten countries.

2.5 Targeted interviews

In addition to the extensive research to develop the country profiles, interviews were conducted with key people in each of the ten host countries. These were used to confirm and elaborate upon the information obtained through desk research and to obtain further insights into the following issues and questions:

• how the higher education policy environment impacts TNE data collection
• key factors and rationales driving TNE data collection and intended use
• collaboration and/or co-ordination between collectors and users of data
• the role that registration, accreditation, and quality assurance plays

• priority attributed to TNE data collection by national education bodies and HEIs
• technical and human resource capacity at national and institutional levels
• enablers and successes in TNE data collection and analysis
• issues and challenges in TNE data collection and use
• political will to establish a TNE data collection system or improve an existing one
• future outlook for TNE and TNE data collection systems.

Given the scope of issues, the interviewees represented a broad range of actors and stakeholders involved in different aspects of developing and operating a TNE data collection system. These included senior higher education officials, policy makers, technical experts, HEIs representatives, quality assurance and accreditation agency officials and data system analysts. The availability and participation of interviewees varied enormously across countries.

2.6 Research challenges

In spite of the extensive research involved in developing the TNE profiles for each of the ten host countries and the three sending countries, some country profiles were more complete than others. This was anticipated, given that host countries are at very different stages in collecting higher education data in general and TNE data in particular. The expectation that interviews could help fill in the gaps and provide contextual information turned out to be unrealistic and provided challenges to the research. In the end, the number of interviews (25 in total) and feedback from institutional representatives across the ten countries was less than expected and did limit a deeper understanding of institutional efforts at TNE-data collection and the alignment of institutional data collection processes with national level TNE data collection systems.

Another major limitation was the issue of TNE terminology. Efforts to understand what countries meant by their use of TNE terms vividly illustrated the diversity of terminology used, and, even more compelling, what any given TNE term (for example, *twinning, joint/ double-degree programmes, distance education, branch campus*) actually meant or involved. Consequently, TNE terminology was a major limitation to undertaking comparisons across countries or conducting in-depth analysis within a country. Terminology will continue to be a major limitation in TNE research until a common framework of terms is developed.

As in all research that includes countries from around the world, language continues to be an issue, particularly in terms of interviews and access to national policy documents. This reality necessitates working with local researchers, who provide important insights, information and access to relevant documents and interviewees.

3. TNE host country profiles

3.1 Introduction

The following sections provide a summary profile for each of the ten host countries reviewed as part of this study. Host countries, for the purposes of this report, are countries in which the TNE programmes are being delivered and where all or most of the study is taking place. Sending countries, by contrast, are the countries awarding or provided academic oversight for the TNE programmes. And while countries often have experience of both hosting and sending, the ten countries reviewed in this chapter host far more programmes than they send, although Malaysia is becoming increasingly active as a sender.

The profiles are informed by a desk-based review of government websites, annual reports, statistical publications, higher education legislation and HEI websites. The profiles are also informed by telephone interviews and/or written correspondence with 25 TNE stakeholders across the ten host countries, comprising: higher education policy makers; higher education data collection officials; and representatives of international branch campuses and local HEIs delivering TNE programmes.

The profiles are structured to provide a comparative overview of local TNE context across the following areas:

- main TNE delivery modes and local TNE terminology used
- higher education/TNE data collection systems and the programme and enrolment data they produce
- details of data collection agencies and main public sources of information used.

3.2 Botswana

Botswana is a relatively active TNE host country and a significant proportion of the higher education population is enrolled in programmes awarded by foreign universities, mainly accounting, marketing, business and IT programmes from the UK, Malaysia and South Africa. The main modes of TNE are described locally as 'franchise' and 'partnership' programmes, although foreign distance learning programmes – with and without local support – are also quite common. The franchise programmes are mainly delivered by local private HEIs (often only delivering TNE programmes), but local public HEIs are also moderately involved. The partnership programmes are delivered by locally registered private partners of foreign universities, analogous to what sending countries might term international branch campuses, although this term is not used locally.

The higher education data collection system is administered by one agency, covering both public and private HEIs. While TNE-specific data is not published, it is possible to identify individual TNE programmes from the list of registered institutions and programmes published online, because details of the awarding body are provided for each programme. In total, 141 TNE programmes are listed on the register, but it is not clear when this was last updated. The most recent publicly available annual report from the data collection agency is for the academic year 2011–12. A 2014 report from the Botswana Education Hub provided summary details of 107 franchise programmes and 90 partnership programmes. Aggregate enrolment data is provided for the entire private higher education sector, but not specifically for TNE programmes.

Table 2: Botswana higher education data collection, summary details

Agency responsible for higher education data collection	
• **General higher education data**	Human Resource Development Council (HRDC) – formerly the Tertiary Education Council (TEC) – as yet without a website.
• **TNE data**	HRDC collects data from public and private HEIs. TNE programmes can be identified from the data, with some effort.

Sources used	**1.** TEC Annual *Report 2011–12*;[5] unable to source more recent HRDC annual report.
	2. TEC list of registered institutions and their programmes;[6] unclear when data was last updated.
	3. Botswana Education Hub report, Study in Botswana, December 2014.[7]
TNE terms used	Franchise programmes; partnership programmes.

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5. TEC Annual Report 2011–12. Available online at: www.tec.org.bw/tec-documents.php (item no 30).
6. TEC register. Available online at: www.tec.org.bw/tec-institutions.php
7. Report available from Botswana Education Hub on request www.beh.gov.bw/contact.html

3.3 Egypt

The foreign-backed German University in Cairo (GUC) is the most significant TNE operation in Egypt, with almost 10,500 students enrolled in 2014. Otherwise, TNE mainly consists of double/multiple and joint degree programmes delivered in collaboration with local public and private HEIs. The majority of these programmes are funded by external agencies, such as DAAD and the European Commission. Overall, TNE constitutes a small proportion of overall higher education activity in Egypt. Other modes of TNE, such as international branch campuses, franchises and distance learning programmes, are not common in Egypt. GUC is categorised locally as a private university.

There is no systematic approach to collecting TNE data in Egypt. However, local public and private HEIs are obliged to provide information to the National Authority for Quality Assurance and Accreditation of Education (NAQAAE) about programmes they deliver in collaboration with foreign universities. This information is collected by NAQAAE as part of its quality assurance and accreditation mandate. A separate agency, the Supreme Council of Universities, has responsibility for collecting general higher education programme and enrolment data. NAQAAE does not separate information about TNE programmes from domestic programmes and there is no centralised database from which to source TNE programme or enrolment data.

Table 3: Egypt higher education data collection, summary details

Agency responsible for higher education data collection	
• **General higher education data**	Supreme Council of Universities.[8]
• **TNE data**	National Authority for Quality Assurance and Accreditation of Education (NAQAAE) – Cultural Affairs and Mission Department.[9]

Sources used	Ministry of Higher Education (MoHE) – Strategic Planning Unit, *Higher Education in Figures 2011–12*.[10] Not available in English.
TNE terms used	Joint/multiple and double degree programmes.

8.   Supreme Council of Universities. Available online at: www.scu.eun.eg/wps/portal
9.   National Authority for Quality Assurance and Accreditation of Education http://naqaae.eg/
10.   Available upon request from the Ministry of Higher Education www.egy-mhe.gov.eg/en

3.4 Hong Kong

TNE or 'non-local courses' as it is known in Hong Kong (HK), is a core component of the HK education system, with TNE-specific regulations in place since 1997. The vast majority of TNE is collaborative in nature. TNE programmes run in collaboration with the 11 specified local institutions, which include the eight publicly-funded universities, are called 'exempted courses', because they are exempt from the registration process. These 11 specified local institutions are known as 'partners' of the foreign awarding bodies. Programmes in collaboration with all other HK institutions must go through a registration process, and are consequently called 'registered courses'. The local institutions delivering registered courses are known as 'operators' of these courses, and represent a diverse group, including: vocational training bodies, agents and franchise operators, and adult education colleges. Foreign distance learning courses without local support – known as 'pure distance learning' in HK – are exempted from registration; however, operators of these courses are encouraged to apply for registration to demonstrate that they fulfil the registration criteria.

HK has a dedicated and well developed TNE data collection system in place, separate to the two systems in place for collecting general higher education data from public and private HEIs. TNE data is collected by the Education Bureau as part of their registration and accreditation function. This includes detailed information about registered and exempted courses provided annually by the public and private HEIs. Comprehensive guidelines are provided to the HEIs to assist them in completing the data request templates, and a separate template must be completed for every non-local course. All registered and exempted courses are listed on a public register, which included a total of 1,188 courses in January 2015. Enrolment data is also collected for every non-local course, but only aggregate TNE enrolment data is published, which stood at 37,900 in 2012–13, representing about 13 per cent of total higher education enrolment.

Table 4: Hong Kong higher education data collection, summary details

Agency responsible for higher education data collection	
• **General higher education data**	University Grants Committee [11] (public HEIs); and Education Bureau [12] (private HEIs).
• **TNE data**	Education Bureau – non-local course registry.

Sources used	1. *Hong Kong Annual Digest of Statistics 2014.* [13]
	2. Register of higher and professional non-local courses. [14]
	3. Education Bureau guideline documents for completion of data templates. [15]
TNE terms used	Non-local registered courses; non-local exempted courses; purely distance learning courses.

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11. University Grants Committee www.ugc.edu.hk/eng/ugc/index.htm
12. Education Bureau www.edb.gov.hk/en/index.html
13. Hong Kong Annual Digest of Statistics 2014 www.censtatd.gov.hk/hkstat/sub/sp140.jsp?productCode=B1010003
14. Register of higher and professional non-local courses www.edb.gov.hk/en/edu-system/postsecondary/non-local-higher-professional-edu/index.html
15. Education Bureau guideline documents www.edb.gov.hk/en/edu-system/postsecondary/non-local-higher-professional-edu/info-for-course-providers/index.html#formlist

3.5 Jordan

The foreign-backed German Jordanian University (GJU) is the most significant TNE operation in Jordan, with just over 3,700 students enrolled in 2014. The only international branch campus identified by the Observatory on Borderless Higher Education [16] (New York Institute of Technology) closed its operations there in 2014. Of the 31 HEIs in Jordan (ten public, 19 private and two regional), very few examples of TNE programmes were found in the course of the current research. Distance learning programmes are available through the Arab Open University, but other foreign providers of distance programmes have no significant presence in Jordan.

There is no systematic approach to collecting TNE data in Jordan. However, local public and private HEIs are obliged to provide information to the Higher Education Accreditation Commission (HEAC) about programmes they deliver in collaboration with foreign universities. This information is collected by HEAC as part of its quality assurance and accreditation mandate. HEAC specifies that a foreign partner university must be ranked in the top 1,000 (although the details appear quite vague), and also maintains a register of approved foreign universities on a country-by-country basis, for the purposes of international student mobility. Jordan produces fairly robust data on outbound student mobility. HEAC does not separate information about TNE programmes from domestic programmes and there is no centralised database from which to source TNE programme or enrolment data. A unit within the Ministry of Higher Education and Scientific Research has responsibility for collecting general higher education data and, overall, the higher education data collection systems appear quite onerous for the HEIs.

Table 5: Jordan higher education data collection, summary details

Agency responsible for higher education data collection	
• **General higher education data**	Ministry of Higher Education and Scientific Research (MoHESR), Policy Analysis and Planning Unit. [17]
• **TNE data**	Higher Education Accreditation Commission (HEAC). [18]

Sources used	1. MoHESR *Annual Report 2012–13*. [19] Not available in English.
	2. MoHESR *Annual Statistics Report on Higher Education in Jordan 2012–13*. [20]
TNE terms used	Joint/multiple and double degree programmes.

16. OBHE (2012) International Branch Campuses: Data and Developments.
17. Ministry of Higher Education and Scientific Research www.mohe.gov.jo/ar/Pages/default.aspx
18. Higher Education Accreditation Commission www.heac.org.jo
19. Annual report must be requested in writing from Minister of Higher Education and Scientific Research.
20. Annual Statistics Report on Higher Education in Jordan www.mohe.gov.jo/ar/pages/Statistics.aspx

3.6 Malaysia

Malaysia has been an active TNE host country for almost 20 years and TNE forms an integrated and significant component of the private higher education system. As the private higher education sector expanded rapidly in the late 1990s and early 2000s, local private colleges, many without their own degree awarding powers, collaborated with foreign universities under twinning/franchise arrangements to offer foreign degree level programmes. These typically involved '2+1' arrangements, with the first two years of study taking place in Malaysia and the final year in the foreign partner country. Over time, '3+0' arrangements have also become common, with all study taking place in

Malaysia. In addition, Malaysia has been hosting international branch campuses since 1998 and currently has eight in operation: three from Australia and five from the UK, accounting for about one third of all TNE programmes. In more recent years, Malaysia has become increasingly involved in joint and double degree programmes, but does not appear to be significantly involved in distance learning. Overall, Malaysia is engaged in a broad base of TNE delivery modes.

The Malaysian Qualifications Agency (MQA) is responsible for the quality assurance and accreditation of all public and private higher education programmes in Malaysia, including TNE programmes. MQA collects the relevant

data via biannual audits of universities and university colleges; however, the Ministry of Education (MoE) audits the non-university colleges using an online data portal. In addition, MoE collects scheduled statistical data from all institutions every six months, and there are separate units for public and private HEIs. The data collected relating to TNE programmes is not separated from domestic programmes; however, the MQA qualifications register does allow for these programmes to be identified on a case by case basis, and 964 such programmes were listed as at January 2015. Enrolment data is only available for the six international branch campuses (IBC), which stood at 16,259 for the academic year 2013–14.

Table 6: Malaysia higher education data collection, summary details

Agency responsible for higher education data collection	
• **General higher education data**	Ministry of Education – Planning, Research and Policy Co-ordination Division [21] (public HEIs); and Ministry of Education – Private Higher Education Management Sector (private HEIs).
• **TNE data**	Malaysian Qualifications Agency. [22]

Sources used	**1.** *National Education Statistics: Higher Education Sector 2013*. [23]
	2. *Malaysia Education Statistics 2014 – Quick Facts*. [24]
	3. Malaysian Qualifications Register. [25]
TNE terms used	International branch campus, franchise, twinning and collaborative programmes.

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21.   Ministry of Education www.moe.gov.my/en/home
22.   Malaysian Qualifications Agency www.mqa.gov.my
23.   National Education Statistics: Higher Education Sector 2013 www.mohe.gov.my/web_statistik
24.   Malaysia Education Statistics 2014 – Quick Facts http://emisportal.moe.gov.my/emis/emis2/emisportal2/doc/fckeditor/File/Quickfacts_2014/Buku%20 Quick%20Facts%202014.pdf
25.   Malaysian Qualifications Register www.mqa.gov.my/mqr/english/eperutusan.cfm

3.7 Mauritius

The private higher education sector in Mauritius is almost entirely composed of TNE programmes. Local private providers, of which there are 55, offer few of their own programmes, and only four have degree awarding powers. Private providers sometimes offer programmes from more than one foreign university and country, under what appear similar to franchise arrangements, although this term is not used locally. Since public HEIs do not deliver foreign programmes, private higher education and TNE are largely synonymous terms in Mauritius. There are three IBCs in Mauritius, but these are relatively small operations and are not clearly distinguished from the private HEIs for the purposes of data collection and reporting. Distance learning is popular in Mauritius and over 5,000 students are enrolled directly in overseas distance learning programmes in 2013–14, mainly with UK universities. The Open University Mauritius offers programmes in collaboration with awarding bodies in India, South Africa and the UK.

The higher education data collection system is administered by one agency, covering both public and private HEIs. Since private higher education activity is analogous with TNE, Mauritius has, by default, a relatively detailed stock of TNE programme and enrolment data. The data collected by the Tertiary Education Commission (TEC) is augmented with information provided by other governmental and non-governmental agencies. This includes data sourced from local examination offices – the main ones being the Mauritian Examinations Syndicate, and the British Council – on students enrolled directly in overseas distance learning programmes. All registered private providers and their programmes are listed on the TEC register. As at January 2015, there were 325 TNE programmes listed on the register, and total enrolment in the private higher education sector was 17,994 for 2013–14.

Table 7: Mauritius higher education data collection, summary details

Agency responsible for higher education data collection	
• **General higher education data**	Tertiary Education Commission (TEC).[26]
• **TNE data**	TEC collects data from public and private HEIs. Since almost all private activity is TNE, this results in TNE data.

Sources used	1. TEC report, *Participation in Tertiary Education. 2013.*[27]
	2. TEC register of private higher education providers.[28]
TNE terms used	IBCs, self study (students directly enrolled in overseas distance learning programmes); private HEIs offering overseas awards.

26.   Tertiary Education Commission http://tec.intnet.mu
27.   Participation in Tertiary Education 2013 tec.intnet.mu/pdf_downloads/pubrep/Participation2013280714.pdf
28.   TEC register tec.intnet.mu/private_institutions

3.8 Mexico

TNE in Mexico appears to be mainly composed of joint and double degree programmes between Mexican universities and foreign partner universities in the US, Canada, Spain and France. A number of foreign distance learning providers have operated in Mexico, but apparently without much success. Mexico also has some, albeit minimal, experience of hosting IBCs from the US and two Mexican multi-campus universities are now part of the Laureate International Universities Network. Overall, Mexico is not an active TNE host country and any activity taking place is driven at institutional level, outside any formal federal or state level regulatory framework.

The Secretariat of Public Education (SEP) has overall responsibility for collection of data from both public and private HEIs. The data collection system, known as Format 911, operates under a decentralised structure across 31 state level agencies and five federal agencies. One of these federal agencies has specific responsibility for the private higher education sector. Each HEI has responsibility for provision and validation of information requested via four questionnaires, which is subsequently made official by the state and federal level agencies and reported back to SEP. To date, no TNE programme or enrolment data has been collected by SEP or any other federal or state level agency in Mexico.

Table 8: Mexico higher education data collection, summary details

Agency responsible for higher education data collection	
• **General higher education data**	Secretariat of Public Education (SEP) – Department of planning and educational statistics. [29]
• **TNE data**	N/A

Sources used	SEP report, *Education System of the United States of Mexico, 2011/12*.[30] Not available in English.
TNE terms used	Joint/multiple and double degree programmes.

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29. Secretariat of Public Education www.sep.gob.mx
30. Secretariat of Public Education www.sep.gob.mx/es/sep1/sep1_Estadisticas

3.9 Turkey

Joint and double degrees are a fairly common feature of the Turkish higher education system and are officially recognised from associate degree to doctoral level by the Council on Higher Education (CoHE). Many of these programmes are funded by the European Commission and DAAD, but a growing number are run, independently of these bodies, with universities across the world, particularly in the US and the UK. This trend appears to be linked to existing outbound student mobility patterns and related inter-institutional agreements. The German-backed Turkish German University (TGU) was established in 2013, enrolling 120 students in its first year, and is expected to expand quickly. Turkey is not active as a host of IBCs and, currently, the regulatory environment does not provide for their establishment. Overall, Turkey is at a relatively early stage as a TNE host country and internationalisation is still very much framed within a student and faculty mobility context.

CoHE is responsible for collecting data from both public and private HEIs, but there is no systematic approach to collecting TNE data in Turkey. However, CoHE must approve foreign university partners of joint and double degree programmes and, therefore, can report that, in 2014, there were almost 200 joint/double degree programmes in place. No TNE enrolment data is available. Turkey produces fairly robust data on outbound and inbound student mobility and the reports from CoHE are easily accessible and informative about the overall higher education sector.

Table 9: Turkey higher education data collection, summary details

Agency responsible for higher education data collection	
• **General higher education data**	The Council of Higher Education (CoHE). [31]
• **TNE data**	CoHE collects data on the number of joint/double degree programmes, but the data is not publicly available.

Sources used	1. CoHE *National Education Statistics – Formal Education 2012–13*. [32]
	2. CoHE *Higher Education System in Turkey 2014*. [33]
TNE terms used	Joint/multiple and double degree programmes.

31. Council of Higher Education www.meb.gov.tr/english/indexeng.htm
32. National Education Statistics www.turkstat.gov.tr/Kitap.do?metod=KitapDetay&KT_ID=5&KITAP_ID=36
33. Higher Education System in Turkey 2014 www.yok.gov.tr/documents/10348274/10733291/TR%27de+Y%C3%BCksek%C3%B6%C4%9Fretim+Sistemi2.pdf/9027552a-962f-4b03-8450-3d1ff8d56ccc

3.10 United Arab Emirates (Dubai)

United Arab Emirates (UAE) hosts the largest number of IBCs of any country in the world. TNE is a core component of the private higher education sector in the UAE, and makes a major contribution to the overall social and economic landscape of the country. Collaborative forms of TNE, such as franchise, joint and double degrees and distance learning, are not common. To a large extent, IBCs are used as a mechanism to educate the considerable expatriate population and their children, who live and work in UAE, since they don't have access to the public HEIs – which are attended almost exclusively by Emiratis. IBCs in the UAE also serve as a market for significant numbers of international students who travel to the UAE to study. These students come mainly from the wider Middle East and North Africa; and from South Asia. All TNE planning and policy development is done at the level of the individual emirate in UAE; and, of the seven emirates, Dubai is by far the most TNE active, however, Abu Dhabi is actively expanding its TNE activity, and Fujeirah and Ras Al Khaimah also host IBCs. Since Dubai is the only emirate systematically collecting and publishing TNE data, the current research focuses on this emirate.

The majority of IBCs in Dubai are located inside one of the dedicated education Free Zones. Institutions within the Free Zones are regulated by the Dubai Knowledge and Human Development Authority (KHDA). KHDA collects detailed programme and enrolment level data annually from the IBCs and maintains a public register of approved HEIs, including a list of programmes they offer. As at November 2014, the 26 IBCs in the Dubai Free Zones offered 233 programmes and had a total of 25,565 enrolled students. Enrolment data is not published at programme level. All institutions located outside the Free Zones in Dubai, and across the other six emirates, are regulated at the federal level by the Commission for Academic Accreditation (CAA). However, data published by CAA does not distinguish TNE from other local private and public HE providers and programmes.

Table 10: Dubai higher education data collection, summary details

Agency responsible for higher education data collection	
• **General higher education data**	Ministry of Higher Education and Scientific Research (MoHESR) – Commission for Academic Accreditation (CAA).[34]
• **TNE data**	Dubai Knowledge and Human Development Authority (KHDA).[35]

Sources used	1. CAA – Register of licensed institutions and approved programmes.[36]
	2. KHDA – *Private Education Institution Directory.*[37]
	3. KHDA report *Dubai Private Education Landscape, 2013/14.*[38]
	4. KHDA report *Study in Dubai – International Campuses 2013.*[39]
TNE terms used	IBCs; open and distance learning.

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34. Commission for Academic Accreditation www.caa.ae/caa/DesktopDefault.aspx
35. Knowledge and Human Development Authority www.khda.gov.ae/en/home.aspx
36. CAA register www.caa.ae/caa/DesktopModules/InstPrograms.aspx
37. KHDA Directory www.khda.gov.ae/En/Directory/directory.aspx
38. KHDA report Dubai Private Education Landscape 2013/14 www.khda.gov.ae/En/Reports/Publications.aspx
39. KHDA report Study in Dubai – International Campuses www.khda.gov.ae/En/Reports/Publications.aspx

3.11 Vietnam

The Law on Higher Education 2012, which came into effect in January 2013, has provided regulatory certainty and clarity in support of TNE activity, although the establishment requirements can be quite onerous. The majority of TNE is collaborative in nature, referred to locally as 'joint training programmes', and both public and private Vietnamese HEIs are involved. International branch campuses, referred to locally as 'foreign invested education institutions', are permitted, but approval is required from the Prime Minister and, legally, they are considered to be Vietnamese private HEIs. RMIT University from Australia has branch campuses in Ho Chi Minh City and Hanoi, with over 5,000 students enrolled in total. The German-backed Vietnamese German University (VGU) was established in 2008 as a public university and had 1,001 students enrolled in 2014. The France-backed Vietnamese French University, Hanoi University of Science and Technology, had over 1,000 students enrolled in 2014.

Overall, however, given the size of the Vietnamese higher education system, TNE still represents a small fraction of higher education activity.

In general, joint training programmes at diploma level or higher must be approved by the Minister of Education, and a register of these programmes is maintained on the Vietnam International Education Development (VIED) website. As at June 2014, there were 246 such programmes listed, up from 173 in 2012 and 119 in 2010. In addition, five designated universities (two national and three regional) are permitted to approve their own joint training programmes and these do not appear to be listed on the register. Programmes offered by IBCs or foreign-backed universities are also not included on the register. VIED collects data on an annual basis from local HEIs delivering joint training programmes, separately from the general higher education data collection system. No TNE enrolment data is currently available for Vietnam. However, VIED piloted an online TNE data portal in mid 2014 to capture detailed programme and enrolment level data. The results of this have yet to be made publicly available.

Table 11: Vietnam higher education data collection, summary details

Agency responsible for higher education data collection	
• **General higher education data**	Ministry of Education and Training (MoET) – department of Planning and Finance.[40]
• **TNE data**	MoET – Vietnam International Education Development (VIED).[41]
Sources used	MoET – Register of approved 'joint training programmes'.[42]
TNE terms used	Foreign invested education institutions; joint training programmes.

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40. Ministry of Education and Training http://moet.gov.vn/?page=9.6
41. Vietnam International Education Development www.vied.vn/index.php?lang=vn
42. Register of approved joint training programmes http://lienket.vied.vn/index.php?lang=vi&mid=9

3.12 Summary comments

The profiles highlight the differences as much as the commonalities across the ten host countries. This is to be expected, given the different local cultural contexts, varying stages of economic development and variations in the size and composition of the higher education systems. For example, Turkey and Mexico have approximately 4.4 million and 3.2 million students enrolled respectively, compared with fewer than 50,000 in each of Botswana and Mauritius. Although the profiles are interesting in their own right, and provide a fascinating snapshot of current approaches to TNE data collection across a diverse range of countries, the main purpose of the research was to enable an aggregate level of analysis across all countries reviewed. This includes a review of data collection systems in three sending countries, which is discussed in the following chapter. Chapter 5 provides a thematic analysis of the main issues and findings across all ten host countries.

4. TNE sending country profiles

4.1 Introduction

The following sections provide a summary profile for each of the three sending countries reviewed as part of this study: Australia, Germany and the UK. The main purpose of the profiles is to assess whether there are lessons that can be learned for the benefit of host countries for establishing or improving their TNE data collection systems. Sending countries, for the purposes of this report, are countries awarding or providing academic oversight for the TNE programmes. As recognised elsewhere in this report, the lines between sending and host countries can become blurred for some of the collaborative forms of TNE, such as joint and double degree programmes.

The profiles are primarily informed by a desk-based review of government department and statistical agency websites, non-governmental higher education association websites, annual reports, statistical publications and higher education legislation. The profiles are also informed, to a more limited extent, by telephone interviews and/or written correspondence with a representative of the main agency with responsibility for TNE data collection in each of the three host countries. The sending country profiles differ from the host country profiles in that local context and institutional composition are not included in the analysis. The sending country profiles are broadly structured as follows:

- main TNE delivery modes
- local TNE terminology used
- higher education/TNE data collection systems in place

- TNE programme and enrolment data produced
- details of data collection agencies and main public sources of information used.

4.2 Australia

Australia is one of the pioneers of TNE and a leading sending country of higher education programmes and vocational education and training programmes. Its main TNE modes of delivery are international branch campuses (known as offshore campuses), twinning arrangements and distance learning programmes. Responsibility for curricular development and quality assurance rests primarily with the Australian universities. Australia's main TNE partner countries are Singapore, China, Malaysia, Vietnam and Hong Kong SAR, and there were approximately 110,000 students enrolled in Australian TNE programmes in 2013.

The Department of Education and Training (DET) publishes an annual snapshot called *Transnational Education in the Higher Education Sector*. This includes aggregate enrolment data for 2013 on students enrolled in offshore campuses (which include twinning), students enrolled offshore via distance learning, and an overall breakdown by: level of study (bachelor's 70 per cent), field of education (management and commerce 58 per cent), average age of TNE student (19–23), and mode of study (71 per cent full time). Enrolment data is also provided for each of Australia's top five TNE partner countries, as listed above. The snapshot uses unpublished data from the *Student 2013 Full Year: Selected*

Higher Education Statistics, Department of Education (2014), sourced from the University Statistics Unit.

The DET also publishes an annual snapshot called *Transnational Education in the Public VEC Sector*, using data from an annual survey conducted by the National Centre for Vocational Education Research (NCVER). This appears to be the only TNE data source dedicated to the vocational education sector (VEC) in any of the sending or host countries reviewed as part of this study. The snapshot includes data for 2013 on the number of Australian institutions offering VEC qualifications offshore (35), the aggregate number of students enrolled in these courses (49,000), an overall breakdown by: level of study (diploma 44 per cent), field of education (management and commerce 54 per cent), language of instruction (English 77 per cent). Enrolment data is also provided for the top five host countries: China, Kuwait, Fiji, Philippines and Mauritius.

Finally, Universities Australia published a report in April 2014 called *Offshore programmes of Australian Universities*. The information contained in the report was supplied by Universities Australia member universities, in response to a survey undertaken in late 2012 and early 2014. The data has been collected since 1996, in response to requests for information on twinning and other offshore programmes. The report includes summary details of 819 Australian TNE programmes, including data on: branch campuses; joint degrees; level of study; duration of study overseas; duration of study in Australia; duration by distance learning; and year of first intake. No enrolment data is provided.

Table 12: Australia higher education data collection, summary details

Agency responsible for higher education data collection	
• **General higher education data**	Department of Education and Training (DET) – Higher Education Group.
• **TNE data**	DET – International Group (IG). Universities Australia (UA). National Centre for Vocational Education Research (NCVER).

Sources used	**1.** IG research snapshot: TNE in the higher education sector (October 2014). [43]
	2. NCVER research snapshot: TNE in the public VEC sector (February 2015). [44]
	3. UA offshore programmes database (2014); and associated report. [45]
TNE terms used	Offshore campuses; twinning, distance education students offshore (only included when overseas HEI participates in delivery); joint degrees.

43.   TNE in the higher education sector https://internationaleducation.gov.au/research/research-snapshots/pages/default.aspx
44.   TNE in the public VEC sector https://internationaleducation.gov.au/research/research-snapshots/pages/default.aspx
45.   UA offshore programmes database and report www.universitiesaustralia.edu.au/global-engagement/international-collaboration/international-links/International-Links-Data#.VT-vxyFVhHy

4.3 Germany

The majority of German TNE activity (known as 'TNE projects') is part-funded by the German government, via DAAD. The main modes of TNE are degree courses offered in collaboration with foreign HEIs; and so-called 'bi-national universities', through which a combination of German, local, joint, double and multiple degree programmes are delivered. Twinning/franchise or validation arrangements are not common. Germany's main TNE partner countries are Egypt, Jordan, China, Oman and Vietnam, and there were an estimated 23,400 students enrolled in DAAD-funded TNE projects in 2014.

The main agency in Germany responsible for collection of higher education data from publicly funded HEIs is the Federal Statistical Office and the statistical offices of the 16 German states or 'Laender'. In addition, the German Centre for Research on Higher Education and Science Studies (DZHW) collects higher education data in support of its research activities.

As the main funding agency for TNE, DAAD is the main source for TNE data in Germany. The annual joint publication by DAAD and DZHW, Wissenschaft Weltoffen, includes a section called 'TNE projects', which presents student enrolment data for each of Germany's ten biggest DAAD-funded TNE projects abroad, as well as aggregate TNE student enrolment from funded TNE projects overall. The two largest projects in 2014 were the German University Cairo and the German Jordanian University, with 10,491 and 3,717 students enrolled, respectively. Data is also provided on the number of applications and first year entrants for some of the larger projects. A breakdown of total TNE enrolment is provided at study level (bachelor's 81 per cent and master's 19 per cent) and subject area, with engineering, mathematics and science accounting for over 80 per cent of programmes.

DAAD also lists details of funded projects on its website, and each partner country has its own dedicated page. However, the list is not exhaustive and includes many non-TNE type activities, such as conferences and language programmes. Finally, the Hochschulrektorenkonferenz (HRK, German Rectors' Conference, a voluntary association of state and state-recognised universities) maintains a public register of international higher education partnerships of German universities on its website. The register includes details of more than 400 double and joint bi-national programmes, but enrolment data is not available.

Table 13: Germany higher education data collection, summary details

Agency responsible for higher education data collection	
• **General higher education data**	Federal Statistical Office, Wiesbaden.
	German Centre for Research on Higher Education and Science Studies (DZHW).
• **TNE data**	German Academic Exchange Service (DAAD).
	German Rectors' Conference (HRK).

Sources used	**1.** DZHW and DAAD report – *Wissenschaft Weltoffen – Facts and Figures on the International Nature of Studies & Research in Germany (2014)* Chapter C. [46]
	2. DAAD position paper – *Transnational Education - German Higher Education Projects Abroad (2012)*. [47]
	3. HRK list of partnerships with foreign institutions by country. [48]
TNE terms used	The terms 'TNE' and 'education exports' are used synonymously; bi-national university; affiliated or branch campus; German courses abroad; joint and double degrees; blended learning, but not 'complete' distance learning; franchise and validation are not common.

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46. DZHW and DAAD 'Wissenschaft Weltoffen' www.wissenschaftweltoffen.de/?lang=en
47. DAAD Transnational Education – German Higher Education Projects Abroad www.daad.de/medien/hochschulen/projekte/studienangebote/2012_phb_tnb_postionspapier_engl__2014_.pdf
48. KRK list www.hochschulkompass.de/en/partnerships/search-for-partnerships.html

4.4 United Kingdom

The UK is the leading provider of TNE programmes in the world, with over 20 years' experience of exporting its higher education programmes. Its main TNE modes of delivery involve franchise, validation, and distance learning. Responsibility for curricular development and quality assurance rests primarily with the UK universities. The UK also has a number of international branch campuses, but these account for a small proportion of overall TNE activity. The UK's main partner countries are Malaysia, Singapore, China, Pakistan and Nigeria and there were approximately 360,000 students actively enrolled in UK TNE programmes in 2013–14.

The Higher Education Statistics Agency (HESA) has primary responsibility for collecting both general higher education data and TNE data from publicly-funded HEIs in the UK. The HESA TNE database, known as the Aggregate Offshore Record, is updated annually via an online data collection system, where templates are completed and returned by HEIs. Detailed guidelines, updated annually, are published on the HESA website to assist HEIs with completion of the templates and aggregate data is shared back with the higher education sector. A number of automated data quality checks are built into the system and information from the other portals administered by HESA is all stored together centrally.

The TNE data published by HESA is aggregate TNE enrolment for all countries, as well as enrolment data for each of the top 20 host countries. In addition, HESA capture TNE enrolment data per UK university, broken down by level of study (certificate to doctoral level) and type of study (international branch campus; distance learning (where student is known to be outside the UK); collaborative, where the student is registered with a UK HEI; and collaborative, where the student is registered with a foreign HEI. It is important to note that HESA does not collect data about individual TNE programmes or qualifications being offered.

The UK Quality Assurance Agency (QAA) also collects and reports TNE data as part of its annual review of TNE activity, which covers a different country every year. The review covers a sample of UK institutions and results in detailed reports and case studies, which provide an overview of the main modes of TNE and an estimate of the overall enrolment rates. The TNE categorisation and terminology used can differ from country to country, depending on the local context.

Finally, the UK Department for Business, Innovation and Skills produced a report in 2014 that assessed the value of TNE to the UK economy. The report was informed by a census of all publicly funded HEIs, achieving a response from 63 TNE active institutions reporting 2,785 individual TNE programmes and 253,695 active enrolments.

Table 14: United Kingdom higher education data collection, summary details

Agency responsible for higher education data collection	
• **General higher education data**	Higher Education Statistics Agency (HESA).
• **TNE data**	HESA Aggregate Offshore Record. Quality Assurance Agency for Higher Education (QAA). UK Government – Department for Business, Innovation and Skills (BIS).

Sources used	
	1. HESA Aggregate Offshore Record database, 2012–13.[49]
	2. QAA annual TNE reviews: Caribbean 2014, UAE 2014, China 2013, Singapore 2012, Malaysia 2011.[50]
	3. BIS report *The value of TNE to the UK* (2014).[51]
TNE terms used	Branch campus; administrative campus; joint venture; franchise; validation; joint/double/dual degrees; partnership; collaborative provision; supported distance/flexible learning; unsupported distance/online learning; articulation.

49. HESA aggregate offshore record www.hesa.ac.uk/free-statistics
50. QAA annual TNE reviews www.qaa.ac.uk/reviews-and-reports/how-we-review-higher-education/review-of-overseas-provision
51. The value of TNE to the UK www.gov.uk/government/publications/transnational-education-value-to-the-uk

4.5 Lessons for host countries

A review of data collection systems in three major sending countries provides an interesting and informative perspective, from which a number of observations and insights can be drawn. Australia and UK are the most advanced countries in the world in terms of collecting and reporting TNE data and much can be learned from their experiences. Germany is the largest funder of TNE projects in the world, providing it with a unique in-house source of TNE data and detailed information about its HEIs' activities in TNE partner countries. It should be noted that sending countries are collecting data for higher education activities taking place outside their country, whereas host countries are concerned with local activities.

Also, sending countries are only concerned with the TNE activities of their own institutions, and usually only those that are publicly funded, whereas host countries are concerned with all sending country institutions, public and private, operating in their country. Therefore, host countries appear to have a bigger, and, in some cases, more complex job to collect and analyse the data. Notwithstanding these different perspectives, there are a number of relevant observations to be made in terms of potential synergies between the sending and host country data collection systems.

Categorisation and definitions of TNE programmes

As with host countries, a major challenge for sending countries is the categorisation of different modes of TNE for the purposes of data collection. There is no consistent approach in this regard, with each country developing a typology consistent with their main modes of delivery; for example, twinning in Australia; bi-national universities in Germany and franchise/validation in the UK. There are numerous variables used to distinguish one form of TNE from another, such as: the institution the student is registered with; which HEI(s) awards the qualification(s); responsibility for curriculum design and quality assurance; and responsibility for, and location of, teaching. Based on the feedback received from the sending countries, categorisation is still a major issue for sending countries and is also the main challenge that host countries face in developing a TNE data collection system.

Enrolment data the main focus

The agencies with the main responsibility for collecting TNE data in Australia (DET) and the UK (HESA) prioritise the collection of enrolment data over programme level data. This is related to the background and rationales for collecting the data, which have, historically, been student-focused and fulfil more a statistical than a quality assurance function. However, both agencies are placing increasing emphasis on how the data can be used for quality assurance purposes, including protection of their higher education brand and reputation overseas. Germany produces less detailed enrolment data, but has a good idea of the individual programmes being delivered in each partner country, given that the majority of these are part-funded by the German government; however, the data are not available in a centralised database. The enrolment data produced by sending countries is useful for host countries, in that it provides a general overview of their main foreign partner countries and main modes of TNE delivery. This can help with the design of the data collection frameworks, as well as identifying the main institutions to target for data collection. However, it is a major challenge for host countries to combine sending country data as, once again, the terms used vary among sending countries.

Variety of agencies involved in collecting TNE data in sending countries

It is interesting to note the different kinds of agencies involved in data collection in the sending countries. In the UK, in addition to the main agency with responsibility (HESA), other agencies collecting TNE data on an ad hoc basis include QAA and the Department for Business, Innovation and Skills – the former fulfills a quality assurance (QA) mandate and the latter is interested in assessing the economic significance of TNE for the UK economy. In Australia, Universities Australia collects fairly detailed programme level data from its member institutions and the NCVER collects data on offshore vocational education programmes. This demonstrates the importance of cross-department communication and co-ordination and the potential benefits of having one integrated system.

Competitive environment

TNE active universities in Australia and the UK operate in a very competitive international environment. This can create concern among HEIs that TNE data requested is commercially sensitive information; competition law has even been cited in the UK in this regard, according to feedback received. This underlines the importance for host countries of treating information with due sensitivity, such as publishing aggregate level, instead of institutional level, data.

Legal requirement/clarification for HEIs to provide data

The experiences of sending countries suggests that provision of data by HEIs is vastly enhanced by setting out the requirements clearly in law. In contexts where legal requirements are in place, it is often still the case that clarification is needed to support HEIs to correctly provide the data. Communication and agreement with HEIs is important in both sending and host countries.

Use of online data collection systems

Collecting data via an online portal is standard practice in the sending countries. Investment in online systems would appear to be an area for host countries to prioritise. The extent to which various sources of higher education data can be merged, stored in a single database and shared back with the higher education sector is of particular note in the UK. Automated processes built into the systems to check the data, raise queries, etc., are very much the direction that host countries need to be going.

5. Comparative and thematic analysis of host countries' TNE data collection systems

5.1 Introduction

Chapters three and four summarised a wealth of information that highlights the diversity and complexity of TNE landscapes. The differences between sending and host countries, the importance of local higher education context, and the variety of systematic approaches to capturing TNE data are evident. While it is clear that no one size fits all, and probably never will, comparative analysis of the experience in different countries is useful in identifying a number of common themes and issues relevant to any country or agency attempting to collect TNE programme and enrolment data. These issues can have varying levels of priority for any country and can play out differently over time.

The purpose of this chapter is to undertake a comparative and thematic analysis of the ten host countries. The following themes are discussed in this chapter: rationales and factors driving TNE data collection; key national actors and systematic approaches to collecting data; how TNE data is collected and recorded; an overview of TNE data produced; and the use and benefits of TNE data for host country governments.

5.2 Factors influencing the development of TNE data systems in host countries

It is important to understand why some governments collect TNE data and to get a sense of the priority attached to this activity. This allows for an assessment of whether the rationales and influencing factors are consistent across countries, and whether data collection objectives are being fulfilled. Of course, a corollary to

this is why governments are not collecting TNE data. Of the ten host countries reviewed, three countries (Hong Kong, Vietnam and UAE [Dubai]) have a dedicated TNE data collection system in place. Three countries (Botswana, Mauritius and Malaysia) have a system where TNE data collection is part of the overall higher education data collection system, which means that TNE data can be extracted with considerable effort. It is important to note that, for this kind of integrated system, producing TNE data is not the primary objective. The four remaining countries (Jordan, Turkey, Egypt and Mexico) do not currently collect any significant level of TNE data.

The factors identified for collecting TNE data are primarily based on direct feedback provided by policy makers in the host countries, as well as document and policy analysis, and are discussed in the following sections.

Registration, accreditation and quality assurance of providers and programmes

One of the main rationales for collecting TNE data relates to the regulatory functions associated with registration, accreditation and quality assurance of TNE providers and programmes. This highlights the important role that regulatory bodies, as opposed to statistical agencies, play in gathering TNE and, in turn, influences how the information is collected and used. As a result, more emphasis is placed on gathering programme information than student enrolment data. Rationales relating to registration are distinct from those relating to accreditation. While registration is concerned with the initial

recognition of the institutions and programme, accreditation and quality assurance are concerned with ongoing assessment to ensure that minimum standards are being maintained. It is important to note that *accreditation* and *quality assurance* are terms that vary enormously across the host countries and are often used interchangeably. This confusion is, in itself, problematic for data collection.

Policy formation and decision-making

The motivations for collecting TNE data can also be framed within a policy development and decision-making context. Policy makers want to be informed about the extent and nature of TNE, so that long-term planning for higher education and the development of education policies and regulations have due regard to this increasingly important component of the higher education system. The popular adage, 'what you can't measure, you can't improve', applies here. Examples of policy areas influenced by the existence of TNE data include: internationalisation strategies, accreditation and quality assurance, recognition of foreign qualifications, visa and immigration policies, promoting access to higher education, and knowledge and research development.

Responding to an increase in TNE activity

The scale of TNE activity, relative to domestic programmes, appears to be an important factor in establishing data collection systems. A few respondents reported that TNE data collection systems were initially established to

close information and data gaps identified by the Ministry of Education. The most active data collection systems are generally in countries with most experience of hosting TNE programmes. This reactive, as opposed to proactive, approach to collecting TNE data is lamentable, but understandable. One of the objectives of this research is to develop a broad data collection framework to allow countries to proactively plan ahead.

Data collection culture

In some cases, the reason for collecting TNE data was simply explained as being a natural extension of the data collection culture that exists more generally. Countries with experience of collecting data on international students, for example, have been introduced to some of the complexities associated with TNE data collection.

External funding of TNE programmes

For the 'early-stage' countries (see Table 15), one of the main reasons for maintaining records of TNE activity is that a significant number of double or joint degrees are funded by external bodies, such as the European Commission or DAAD. External funding or assistance may place some data collection obligations on the host country. While this is not an optimal or sustainable way to design a TNE data collection system, for some countries it represents a starting point.

5.3 Key national actors and systematic approaches to collecting data

Table 15, below, presents a summary of the key national level actors and systematic approaches to TNE data collection in the ten host countries reviewed. The countries are divided into three categories: those which have a dedicated TNE system, those where TNE data is part of a more comprehensive higher education data systems, and those who are at a very early stage or are not active in TNE data collection.

Table 15: Key national actors in TNE data collection

	Agency collecting TNE data	Type of agency	Agency collecting general HE data
Dedicated TNE system			
Hong Kong	Education Bureau – Non-local course registry.	Central government.	• University Grants Committee (public) • Education Bureau (private).
Vietnam	MOET – Vietnam International Education Department.	Central government.	MoET – Planning and Finance Department.
UAE (Dubai)	Dubai Knowledge and Human Development Authority.	Independent regulatory authority.	MoHESR – Commission for Academic Accreditation.
Part of national higher education/ quality assurance data collection system			
Botswana	Human Resource Development Council – Directorate of Knowledge Management.	Regulatory authority reporting to MoE.	Same.
Mauritius	Tertiary Education Council – Research and Planning Division.	Regulatory authority reporting to MoE.	Same.
Malaysia	Malaysia Qualifications Agency.	Regulatory authority reporting to MoE.	• MoE – Planning Research and Policy Coordination Division (public). • MoE – Private Higher Education Management Sector (private).

	Agency collecting TNE data	Type of agency	Agency collecting general HE data
Early stages/no system			
Egypt	National Authority for Quality Assurance and Accreditation of Education – Cultural Affairs and Mission Department.	Regulatory authority reporting to the Office of the Prime Minister.	Supreme Council of Universities.
Jordan	Higher Education Academic Council.	Regulatory authority reporting to MoE.	MOHESR, Policy Analysis and Planning Unit.
Turkey	Council on Higher Education.	Regulatory authority reporting to MoE.	Same.
Mexico	N/A	N/A	Secretariat of Public Education – Department of Planning and Educational Statistics.

Key national actors

All agencies collecting TNE data are government agencies: either departments within the ministry of education (MoE), or regulatory bodies, usually reporting to the MoE. A broader base of national actors might have been expected, given that TNE can overlap with other jurisdictions, such as immigration, economic development and international relations. The only significant exception to this was observed in Mauritius, where the Tertiary Education Commission makes use of a number of government and private sector information sources to complement their own higher education database.

Agencies are collecting TNE data primarily as part of a registration and accreditation function, which differs from a 'statistical-exercise' approach. TNE data from registered TNE programmes are collected on a recurring basis, usually annually, to ensure that minimum standards are being maintained. This is true whether it is the MoE or an independent regulatory body collecting the data.

Systematic approaches

The three host countries (Hong Kong, Vietnam and UAE [Dubai]), which have been identified as having a 'dedicated' TNE data collection system, have their own TNE data collection department, separate from the department collecting general higher education data. For these systems, the main distinction is whether higher education programmes are offered by local or foreign institutions, and, therefore, whether the published data clearly identify TNE programmes.

Three of the host countries reviewed (Botswana, Mauritius and Malaysia) collect data on public and private higher education providers and programmes as part of the national higher education data collection system. For these 'integrated systems', the main distinction is whether higher education programmes are offered by public or private HEIs. Important to note is that the published data does not clearly identify whether the programmes are offered by local or foreign HEI/providers. Only with some knowledge and considerable effort can the data be manually reorganised to produce a TNE database.

Given the work involved in extricating the TNE data, it is obvious that TNE data collection is not the primary objective of these systems. For these countries, TNE is largely treated as part of the private higher education sector, and whether it is a local or foreign provider is not clear. This creates problems in distinguishing TNE programme data from private programme data, and enrolment data more generally. Even though Mauritius is identified as a country with an integrated TNE/HE system, this scenario does not apply to that country, because the vast majority of privately offered HE is, in fact, TNE and, therefore, private programmes are largely analogous with TNE programmes. In addition, the local public HEIs are not involved in the delivery of TNE programmes. However, as local private HEIs increasingly deliver their own degree programmes, as has happened in Botswana and Malaysia, or as local public HEIs get more involved in TNE, it will become more important for these countries to disentangle TNE data from local programmes data.

For three of the host countries reviewed (Egypt, Jordan and Turkey), TNE data collection systems are in the 'early stages'. While information is requested from HEIs about programmes delivered in collaboration with foreign universities, it does not appear to be a priority for the data collection agencies. Furthermore, it is not possible to extract TNE programme and enrolment data from the general higher education data. TNE is a small part of the overall activity in these countries, but the accreditation agencies are now asking for information about programmes offered in collaboration with foreign providers and are making (fairly vague) pronouncements to the effect that these should only be undertaken with highly ranked institutions. Now would seem to be a good time to make changes in these systems and, on the basis of qualitative feedback received as part of the current research, there is a real appetite to learn from the experience of other countries. To date, Mexico does not have a systematic approach to collecting TNE data.

The role of legislation

An analysis of the regulatory environment for TNE across the ten study countries sheds light on why different systematic approaches to TNE data collection have evolved. The three countries with dedicated systems in place all have a regulatory framework that makes explicit reference to foreign education providers and programmes. Therefore, the concept of TNE is set out in the legislation and this appears to support the collection of TNE specific data.

For the three countries with integrated systems, TNE is not clearly defined in the legislation, but is covered more broadly under the private higher education regulations. Therefore, it is easy to see why the data systems in these countries concentrate primarily on private providers and programmes, and do not address TNE specifically.

None of the early stage/no system countries have TNE specific legislation in place, but joint delivery of programmes with foreign providers are covered to some extent in the private higher education regulations. This is an area that warrants further research, but it does appear that the legislative underpinning for TNE has a direct bearing on the data collection systems that are subsequently developed.

5.4 How TNE data is collected and recorded

Given that TNE data is generally collected in host countries as part of registration procedures or accreditation functions, there is generally a two-step process in place.

- Initial registration of institutions and some form of accreditation of their TNE programmes, although the meaning and process of accreditation differs enormously across countries.
- Follow-up survey/information request/annual return review to monitor the registered institutions and accredited programmes.

Initial registration of institutions and accreditation of TNE programmes

As previously discussed, having regulations in place that provide for the establishment and recognition of TNE providers appears to be an important part of data collection. However, TNE programmes can develop, and even thrive, outside of any formal regulatory framework, and so the starting point for data collection is generally a census or stock-take of current TNE activity. In smaller countries, where TNE is still developing, it is not unusual for the establishment of an international branch campus to require approval from a very senior government official, such as the prime minister, as is the case in Vietnam.

If the TNE programme is being delivered independently by a foreign HEI – that is, without any collaboration with a local HEI – it is usually a branch campus, which is required to be registered, or a distance learning provider, which generally falls outside any formal regulatory requirements. In practice, the foreign university who wants to establish a branch campus will normally be required to establish a local legal private entity, through which the programmes are delivered. It is this entity that must be registered and that deals directly with the MoE or regulatory body, including for the purposes of data collection. This entity is usually categorised in the host country as a private HEI, and it can be difficult to distinguish these programme from local private programmes, especially for the integrated data collection systems, as previously noted.

If a TNE programme is offered in collaboration with a local HEI, it is the local institution that must be registered with the MoE/QA body and is the ongoing point of contact for the collection of data. An important consideration is whether the local partner is a private or public HEI. This is important for several reasons. Firstly, there may be separate regulatory requirements for private, as opposed to public, HEIs. For instance, in Hong Kong, TNE programmes delivered with local public HEIs are exempt from registration, but are reported in the annual returns submitted by public HEIs. Secondly, there are sometimes separate data collection systems for public and private HEIs, as exist in Hong Kong and Malaysia. This is not an issue in Hong Kong, since there is a dedicated TNE data collection system in place. However, the situation in Malaysia is somewhat confusing. Both the Malaysian Quality Agency and MoE collect data from private HEIs and it is not clear to what extent these data collection systems overlap. Thirdly, there may not be a legal requirement for private HEIs to provide data.

The actual approval process will not be discussed in detail here; the important issue is that it results in a list of institutions that are registered to deliver TNE programmes. The proposed programmes are then individually reviewed and accredited if they pass certain minimum criteria. The extent to which the programmes are reviewed depends on the level of maturity of the quality assurance system. Less mature systems usually concentrate on the status of the foreign parent university, ensuring that it is recognised in its home country. More mature QA systems place more emphasis on evaluation of the programmes and whether they are in line with host country requirements and priorities.

The list of TNE accredited programmes is then usually placed on a register or directory, as discussed in more detail in the following sections.

Survey of registered HEIs offering TNE programmes

Registered institutions and their TNE programmes are usually approved for a set period of time, usually three to five years, with approval contingent on their meeting certain minimum accreditation or quality assurance criteria. Regulatory bodies require information from registered HEIs to evaluate whether these criteria are being met and this usually takes the form of an annual return.

Generally, the data collection agency sends an official letter or circular, requesting HEIs to provide the necessary data by a certain date. Whether there is a legal requirement to provide the data is an important consideration discussed later in the report.

Data templates are usually sent to the HEIs to complete and return by a certain date. The templates may be in Word or Excel format and there is sometimes flexibility to make changes to the data templates as required. A guideline document is sometimes provided to assist with completion of templates. Data is then extracted from the templates by the data collection agency and uploaded to their own centralised data system. HEIs sometimes have their own data management systems, which produce the data necessary to populate the templates, for example, the Banner system in Mexico and the Enterprise Resource Planning system in Botswana.

The data templates are crucial for collecting detailed TNE programme and enrolment data. This is a priority area, which requires significant attention and which can result in major improvements in the quantity and quality of TNE data collected by host countries.

Online data collection systems can work well and are becoming more popular. For instance, Mexico and Malaysia have developed online data collection systems for their general HE data collection. HEIs are provided with access to an online platform where data templates are completed by an authorised user. Vietnam and Turkey are currently developing online portals and this appears to be the direction in which general higher education data collection is going. However, some of the most developed data collection systems still rely on the traditional email and postal methods. The benefits of an online portal include: clearly defined points of contact at HEIs; less time needed to complete and submit; consistency of data reporting framework; ability to integrate HEI and government systems; ability to cross-check data and compare data across HEIs.

However, online systems present their own challenges. The system in Mexico was reported as being complicated and not providing mechanisms to ensure the consistency and accuracy of the information, while the Malaysia system crashed while the current research was being undertaken. This underlines the importance of investing properly in the design and implementation of these systems. As more countries are developing or improving their TNE data collection systems, consideration should be given to the benefits of an online system.

Use of additional secondary sources to supplement the survey data

Only one of the ten host countries reviewed (Mauritius) currently supplements its annual survey data with information from other, secondary sources. Mauritius supplements its annual survey data with additional information from: local examination offices (data on students enrolled on foreign distance learning programmes); foreign embassies and high commissions based in Mauritius (number of student visas issued to foreign students); Ministry of Education (scholarship data) and private recruiting agents. This is an example where cross-referencing TNE data with other sources enriches the reliability and detail of the data.

5.5 Overview of TNE data produced

Although the primary purpose of this project was not to source TNE data, the review of data collection systems has produced a stock of TNE programme and enrolment data for six of the ten study countries. This provides an opportunity to compare and contrast the data produced by diverse systems at different levels of maturity, and to identify issues and potential problem areas. Although a small sample, this does raise discussion topics of interest to newly developing systems.

Number of institutions offering TNE programmes

Since the data is being collected in the context of registration and accreditation of foreign/private programmes and institutions, there are some similarities in the data being produced across the six countries. A summary of the institutional level data is provided in Table 16, below.

Table 16: Institutions delivering TNE programmes*

	IBCs Independent Foreign HEI	Private local and foreign HEIs	Public local HEIs collaborating with foreign HEI	Total HEIs
Countries with dedicated TNE systems				
1. Hong Kong	0	114	9	**123**
2. Vietnam	0	18	58	**76**
3. Dubai	23	0	0	**23**
Countries with integrated HE and TNE systems				
4. Botswana	0	9	3	**12**
5. Mauritius	3	52	0	**55**
6. Malaysia	8	86	0	**94**

*Based on data published by host country

In Hong Kong, the data published by the Education Bureau does not refer to IBCs, since all TNE programmes must be undertaken in collaboration with either a local public university, or a local private institution, known as an 'operator'. The Hong Kong IBCs identified by the 2012 Report of the Observatory of Borderless Education are included in the data published by the Education Bureau, but are categorised as local private operators. This raises an important point about differing sending and host country perspectives on what constitutes an independent, as opposed to a collaborative programme, and, secondly, the confusion about labelling an IBC as a local private HEI.

In Vietnam, the data published by VIED does not refer to IBCs and the focus is clearly on TNE programmes delivered in collaboration with local public and private HEIs. The RMIT IBC identified by OBHE and the Germany Bi-national University (Vietnamese–German University) are not included in the published data. A response provided by a Vietnamese HEI explained that these programmes were not included because 'they are not classified as joint training programmes, as per the legislation'. This is another example where inconsistent TNE terminology across countries causes confusion. It is interesting to observe that the majority of HEIs delivering TNE programmes in Vietnam are public universities.

In the Dubai free zones, all TNE programmes are delivered via IBCs, which are also referred to as private HEIs. Collaborative forms of TNE are not common in Dubai or the wider UAE. This makes the data collection process relatively straightforward, because the target institutions are easy to identify and all their programmes are TNE.

The Botswana data does not refer to IBCs. Similar to the approach in Hong Kong, the Limkokwing IBC identified by OBHE is included in the published data, but is categorised as a local private HEI. Local private and public HEIs are involved in delivering TNE programmes.

The Mauritius data does not refer explicitly to IBCs, but close examination of the data allows three such entities to be identified. For the purposes of data presentation, these are simply referred to as private HEIs by the Mauritian Tertiary Education Council. Public HEIs appear not to be involved in delivering TNE programmes.

The Malaysia data identifies six IBCs, but, again, these are categorised as private HEIs for the purposes of data presentation. The MoE makes more explicit reference to these institutions as IBCs. Public HEIs appear not to be involved in delivering TNE programmes. The MQA goes to some effort to record the previous name of the private HEIs, since many of them changed their name at some point. While clearly a QA concern, the ability of institutions to change their names also has implications for data collection.

This cross-county analysis vividly illustrates the multiple use of terms that describe the same TNE activities. This causes considerable confusion and chaos for policy making and for data collection. While categorisation and definitions of TNE terms need to reflect the host country's situation, there also needs to be some common understanding of the key elements of TNE activity and the terms used. Otherwise, there are missed opportunities to fully understand the scale and impact of different types of TNE activity and to monitor trends, benefits, risks and unintended consequences.

Distance education is part of the TNE landscape, but it is not well researched or understood. The comparative analysis reveals that two basic approaches to distance education are being used to enhance access to foreign higher education programmes and qualifications. The first is a direct relationship between the distance education provider and the student. This is often referred to as 'pure distance education'. In this case, it is difficult for the host country to monitor enrolment rates. The second approach includes a local body that provides academic support to students enrolled in a foreign-sponsored distance education programme. This is a type of collaborative TNE provision and consequently could be tracked by the host country.

Total number of TNE programmes being offered in host TNE country

Table 17 focuses on the actual number of TNE programmes being delivered by the host country TNE providers/institution counted in Table 16. Because three of the countries (Hong Kong, Vietnam and Botswana) do not differentiate an IBC from a local private HEI, it is not possible to determine the actual number of programmes being offered by independent foreign providers, such as branch campuses. It also prevents identifying solid enrolment data for branch campus programmes.

Table 17: TNE programmes delivered by institutions*

	IBC programmes	Private local and foreign HEIs	Public HEIs collaborating with foreign HEI	Total
Dedicated systems				
1. Hong Kong	0	467	721	**1,188**
2. Vietnam	0	42	203	**245**
3. Dubai	233	0	0	**233**
Integrated systems				
4. Botswana	0	120	21	**141**
5. Mauritius	17	308	0	**325**
6. Malaysia	326	638	0	**964**

*Based on data published by host country

The amount and kind of information collected on the TNE programme varies from country to country, but usually includes the following details:

- **Programme approval date** and expiry date are generally published, as well as whether the approval is provisional or full.

- **Field or subject area of programme**. This provides useful information about the main fields of specialisation in which TNE programmes are in demand, generally in the areas of business, computing and accounting. However, the classification systems used do not allow for direct comparability across countries and only Botswana appears to apply the UNESCO ISCED subject code.

- **Programme level**. All of the six systems report TNE programme data from certificate to master's level, and a few report foundation level programmes. It is encouraging to observe this depth of coverage, which demonstrates that the full range of undergraduate and postgraduate TNE programmes should be targeted by newly developing systems.

- **The mode of delivery** (part-time, full-time) is often provided, which could prove useful for calculating full-time equivalent student enrolment data. In Mauritius, distance learning is also included as a mode of delivery.

- **Programme duration**, usually in years, is an important factor to capture. Dubai specifies 0.25, 0.3 and 0.5 years. This information may be used to distinguish between short-term and regular length TNE programmes, as well as assigning credits for study undertaken.

- **Details of the qualification awarded** (for example, Bachelor of Architecture) and name of awarding body are always provided. For the integrated systems, the name of the awarding body is the main way by which to identify the TNE programmes.

The more active data collection systems of Hong Kong, Malaysia and Dubai provide more detailed programme information, such as:

- Mode of pedagogy: face-to-face, distance learning with face-to-face, distance learning without face-to-face (Hong Kong). It is interesting to see distance learning recorded as a mode of pedagogy, and not a TNE delivery mode.

- Tuition fees per programme, sometimes in local currency, sometimes in sending country currency (HK). Dubai reports the annual tuition fee range, in local currency, for each HEI, sorted by foundation, bachelor and master's level programmes.

- Number of credits per programme (Malaysia). This can be useful in comparing the relative intensity levels of different programmes and can be more informative than a generic full-time/part-time description.

Programme terminology

The comparative review of host country systems has provided concrete evidence of the range of terms used to describe TNE activity and, more specifically, how different terms are used to describe the same TNE activity. The TNE terms listed in Table 18 demonstrate the need to develop a common, but flexible, TNE framework, including a set of concise definitions that differentiates one TNE activity from another.

Table 18: TNE terms used by host countries

Host country	Terms used to describe TNE activity
Hong Kong	Non-local courses
Vietnam	Joint training programmes
UAE (Dubai)	International branch campus programmes
Botswana	Franchise and partnership programmes
Mauritius	Private programmes offered by overseas bodies
Malaysia	International branch campus, franchise, twinning and collaborative programmes
Egypt, Jordan, Turkey	Joint/double/multiple degree programmes

5.6   Enrolment data

One of the surprising findings of the research is the lack of priority attached to collecting TNE enrolment data in the host countries. This may be a consequence of the data collection agencies being regulatory bodies and consequently, their primary duty is to ensure the quality of the institutions and programmes. For the dedicated systems, disentangling local and foreign enrolment data is even more challenging than disentangling programme data.

Table 19: TNE enrolment data by country*

Host countries	TNE enrolment (year)	Source
1. Hong Kong	37,900 (2012–13)	*Hong Kong Annual Digest of Statistics 2014.*
2. Dubai	25,565 (2014–15)	*KHDA Directory.*
Private HE enrolment (year)		
3. Vietnam	312,652 (2012–13)	Ministry of Education and Training website
4. Botswana	12,628 (2010–11)	*TEC Annual Report 2011/12*
5. Mauritius	17,994 (2013–14)	*TEC Participation in Tertiary Education 2013*
6. Malaysia	484,963 (2013–14) of which IBCs 16,259	*National Education Statistics: Higher Education Sector 2013*

*Based on data published by host country

Overall, the review of the enrolment data shows that only the dedicated TNE data systems are producing TNE enrolment data and, in general, the integrated TNE data systems are relatively uninformed about the enrolment impacts of TNE programmes. It is striking that an active TNE host such as Malaysia does not have this data, although enrolment data for the IBCs as a group is published. Mauritius only has the data because private programmes are largely analogous with TNE programmes, for now at least. In Botswana, about half of the private HEIs are not delivering TNE programmes, and therefore only a rough calculation of aggregate TNE enrolment is possible. Vietnam has not historically collected TNE enrolment data, but this is being addressed by a new online data collection system piloted in July 2014.

There is a general absence of programme level enrolment data. Hong Kong only publishes aggregate system-level enrolment data, and Dubai publishes institutional level enrolment data. Distance learning enrolment data is captured by Mauritius by using examination centre data. This is an important lesson for other countries wanting to capture such data.

5.7 Use and benefits of TNE data for host country governments

Analysis of data collection systems leads on to an important question about how the resulting data is being used by host countries' governments. Since there is clearly a cost associated with the collection and analysis of data, an understanding of the use and benefits are of interest.

Obviously, the countries producing the most detailed TNE data have more options for use of the data. Overall, it is encouraging to see the extent to which the more active systems have incorporated TNE data into their higher education planning, policy development and strategies to increase access to higher education. However, integrated systems are not making optimal use of their data, primarily because the concept of TNE is not clearly defined, even when TNE programmes have been hosted for over a decade.

For the early-stage countries, very little data is available to make use of. Where data is being collected on joint/double degrees funded by external bodies, this data is not publicly available and even seems difficult to collate into one source internally. However, on the basis of the feedback provided, these countries are aware of the importance of collecting TNE data and are keen to make progress in this regard.

The main uses of the data are summarised as follows:

Registration and accreditation of providers and programmes

This is the primary rationale for collecting TNE data and also the main use and benefit of the data. All six countries with dedicated or integrated systems place details of their approved providers and programme on a register or directory hosted on their website. Usually, the approved institutions are listed alphabetically and their accredited programmes can be viewed by clicking on the institution name. In Hong Kong, the approved programmes, as opposed to the institutions, are listed alphabetically. And, in Mauritius and

Dubai, the list can be re-arranged by institution or field of study. These registers are an important self-enforcing mechanism by which HEIs can engage in the data collection process, since not being listed effectively places providers outside the official system, which may limit their credibility or attractiveness to potential students.

Higher education planning and policy development

Higher education planning and policy development were cited most frequently as priority uses of data. TNE data is normally summarised and discussed in the annual report of the data collection agency or ministry of education. This permits deep analysis of whether TNE increases access to higher education and tracks programme availability in terms of subject, level and duration. Having access to the data also allows for comprehensive monitoring of TNE and can lead to identification of benefits, risks and even unintended consequences. It also allows benchmarking between institutions or countries. This is a major benefit to the development of higher education policies generally and TNE policies specifically. Examples where access to reliable TNE data has benefited the development of policies and regulations include:

- regulations for establishment of TNE operations
- availability and use of local and foreign scholarships for TNE students
- access for part-time and full-time students
- quality assurance and accreditation procedures

- recognition of foreign qualification
- visa and migration policies
- development of incentives to attract foreign universities
- policies to develop the host country as a regional higher education hub.

Being aware of the extent and nature of TNE activity also allows host countries to become more informed about setting realistic goals for TNE provision. In Dubai, for example, the regulatory body uses the data to assess the extent to which particular skills requirements are being met. Botswana has also started to become more concerned with how well TNE programmes are suited to the local context and labour market.

Quality assurance and enforcement action

Although an apparent factor driving TNE data collection, quality assurance systems are still developing in a few of the countries reviewed (and other countries around the world). Consequently, the data appears to be used more for registration than for ongoing quality assurance reviews. There is clearly a trade-off between the level of detail requested from TNE providers and the response rates achieved. Nevertheless, there are some examples of strict enforcement of QA standards in the more active systems of Malaysia and Hong Kong, on the basis of the data collected. In some cases,

the data has been used to ensure that enrolment caps per programmes are enforced. Definite periods of programme approval also ensure that the programme must be re-accredited at certain intervals, such as every three to five years.

Users and target audience for data

In some cases, it is clear that the data is used to target certain audiences. The register of approved programmes is primarily used by prospective students, whether local or international, to inform them that the programmes have met some minimum registration criteria and are, therefore, formally approved. Employers of TNE graduates can also find a register of programmes of use, although, in general, employers are often unaware of TNE, and how it differs from local programmes.

In some cases, the register provides a link to other government departments, such as immigration or employment departments. In general, however, there would appear to be significant scope for increased levels of communication and sharing of data, both within and across government departments.

Overall, the primary users of the data are higher education policy analysts and planners within the higher education governmental bodies and both local and international HEIs, who want to know what TNE programmes are being offered in a country.

The comparative analysis of the ten host country TNE data collection systems yields an enormous amount of information that is important to share across countries, so that lessons can be learned from each other concerning how to establish or strengthen a TNE data system. It also points to the need for more attention to be given to capacity building for national agencies that have the responsibility to design and operate a TNE data system. Evidence is provided on the benefits that TNE databases can bring to higher education planning, development of policies and frameworks, quality assurance, enrolment planning, and the monitoring of trends, new developments and unintended consequences. The most significant factor is the diversity of terms used to describe TNE programmes and the need for a common TNE framework. The next chapter discusses the issue of TNE terminology and proposes a common TNE framework that is robust enough to differentiate between different modes of TNE, but is flexible enough that it can be used by countries at different stages of collecting TNE data.

6. A common TNE framework and set of definitions

6.1 Why a common framework of TNE terms?

The country profiles and the comparative analysis illustrate the confusion within and among countries about what the different types or modes of TNE actually mean and involve. 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 common understanding and use of TNE terms across countries. The lack of a common understanding of the terms raises serious issues related to appropriate quality assurance processes, qualification recognition procedures, registration and completion rates and the collection of programme level information and enrolment data.

This chapter addresses the complexities of terminology by proposing a common framework of TNE terms. The framework needs to be robust enough to ensure that the characteristics of each mode of TNE are clearly defined, but flexible enough to reflect the realities faced by more than 120 countries involved in TNE. Furthermore, the differences between terms need to be explicit, so as to avoid two different terms being used to describe the same activity, or one term describing very different TNE activities. A framework also needs to take into consideration the perspectives of both host and sending countries, as research shows most TNE activities are collaborative in nature, making communication between partners

essential. Finally, terms will need to be translated into different languages. This emphasises again the need for clarity, conciseness and consistency.

Much meaning can be lost when a framework becomes too complex and the definitions too nuanced or, conversely, too detailed. *Too nuanced* means that the definitions are too generic and there is room for confusion; *too detailed* means that there is room for exclusion of some TNE activity. The same challenges of clarity, conciseness, rigour and flexibility faced the development of terms to describe the many different forms of student mobility, as well as the definition of what is an international student. However, without a common definition of international student or student mobility, information cannot be collected or analysed on source country, destination country, discipline, level of programme, type of mobility, etc. The same situation now faces TNE. A commonly understood set of TNE terms is critical.

6.2 Collaborative TNE programmes versus stand-alone/independent TNE activities

Important lessons have been learned from the previous studies undertaken by the British Council and DAAD. A key issue is the necessity of delineating 1) whether the TNE activity was a joint effort between host and sending HEIs or 2) whether the TNE activity could be described as a stand-alone or independent activity without direct academic involvement with a local

partner HEI. This distinction has important implications for both host country and sending country regulations and policies related to registration, quality assurance, degree recognition, availability of scholarships and, of course, data collection.

The concept of *joint* and *collaborative activities* is clear, even though it can take many different forms, such as twinning, joint/double/multiple degree programmes, locally supported distance education programmes and co-founded universities. However, the interpretation of the term *stand-alone or independent* does raise issues. A stand-alone or independent activity, from the host country perspective, means that no local HEI or organisation was involved in the design or delivery of the academic programmes. Examples would be an international branch campus or distance education programmes. However, *stand alone or independent* can be confusing when viewed from a sending country perspective, because a branch campus is not independent from its parent institution, nor is a distance education programme. There is a parent body or institution in the sending country that usually provides the curriculum, the qualification and some kind of oversight. However, for developing a common framework, it is assumed that independence refers to the lack of direct academic co-operation in programme design or delivery with local HEIs in the host country and, secondly, recognises that a branch campus is closely linked to its parent institution in the sending country.

Table 20 illustrates the first principle in a common TNE framework – collaborative TNE activity versus independent activity, in terms of co-operation with local institutions.

Table 20: TNE framework on collaborative versus independent TNE provision

Category	Type of TNE activity	Notes
Collaborative TNE provision Collaboration exists between local and foreign providers	Twinning programme. (Note: In some countries twinning programmes are called franchise programmes.)	Collaboration of local host HEI can involve providing physical space, administration support, and student services to help the foreign provider, who is responsible for the academic programme.
	Joint/double/multiple degree programme. Co-founded or co-developed institution.	Collaboration between all partners in the design and delivery of curriculum and programme.
	Locally supported distance education programmes.	While the foreign sending HEI is primarily responsible for the curriculum, the local host country provides some degree of academic support to students.
Independent (foreign) provision Foreign sending provider operates without any formalised academic collaboration with local HEIs	International branch campus. Franchise university (independent entity). Distance education provider. Foreign private institutions.	Foreign provider must meet host country regulations and policies, but does not co-operate with local HEIs.

Source: Knight 2015*

The first step in developing a common TNE framework is determining whether the TNE programme involves collaboration between a foreign and a local provider. This relates primarily to the actual delivery or teaching/ learning of the academic programme and is differentiated from the relationship between investment partners. It is important to note that there can be local regulatory processes, such as registration, quality assurance, eligibility for scholarships, awarding of qualifications and recognition that impact both collaborative and independent TNE provision, albeit differently.

Developing a common TNE framework introduces the question of what exactly is TNE. While the short-hand definition is *the mobility of programme and provider between countries*, there is a set of complex issues behind this straightforward definition. The first is what is actually *mobile* in TNE? Is it the curriculum, the faculty, the qualification, the accreditation, the oversight or the knowledge exchange? What are the essential elements of programme and provider mobility for it to be labelled TNE?

To answer this, one needs to go back to the origins of the term. It was first developed to distinguish between students moving to foreign countries to take a full (or part of an) academic programme abroad from the situation where foreign providers are delivering academic programmes to students in their home country. In short, was the student moving to the programme or was the programme moving to the student? With time, this distinction has become blurred. The students enrolled in current TNE programmes include host country domestic students, as well as expatriate students living in the host country and also international students travelling to the TNE host country specifically to take a TNE programme.

There are many reasons why international students find it attractive to travel to a TNE host country, rather than the country of the foreign sending provider. Consequently, it is not only the TNE programme/provider that moves to the students; there are also students who are moving to a TNE host country to take a TNE programme.

6.3 Defining characteristics of a TNE programme

To answer the question, what are the key distinguishing features of a TNE programme, it is necessary to examine each element individually. Table 21 looks at the different forms or modes of TNE in relation to a number of key features.

Table 21: A comparative analysis of TNE key elements across different forms of TNE

Category and form of TNE	Curriculum/ knowledge	Qualification(s) offered	Academic oversight	Faculty
Collaborative TNE provision				
Twinning programme	Curriculum provided by the foreign sending HEI/country. Import/export model.	Qualification traditionally offered by foreign sending HEI only. But with the increased interest in double/joint degrees some twinning programmes now offer two degrees, one from a local partner and another from the foreign sending HEI.	Oversight normally provided by foreign sending HEI through their own monitoring and quality assurance and accreditation process. Local host country QA agency may or may not be involved.	Fly-in faculty from foreign sending HEI. Local faculty from partner HEI. Expatriate faculty resident in host country.
Joint/double/ multiple-degree programmes	Both local and foreign HEIs involved in the joint design and delivery of programme. Joint-curricular model.	Three options: • Joint: one certificate/ qualification with names and badges of all partners on same certificate. • Double: two separate certificates/ qualification offered – one from each partner. • Multiple: three or more individual certificates/ qualifications issued – one from each partner.	All collaborating partners have responsibility for academic oversight. Quality assurance and accreditation procedures differ, but, typically, each partner has the programme quality assurance and accreditation done by their own national QA agency. New trend is for one independent QA agency to provide quality assurance and accreditation.	Faculty from each partner HEI.

Category and form of TNE	Curriculum/ knowledge	Qualification(s) offered	Academic oversight	Faculty
Collaborative TNE provision				
Co-founded or co-developed HEIs (local HEI established in collaboration with foreign HEIs)	Curriculum developed independently by local HEI and collaboratively with foreign HEIs involved in the founding of the HEI. Joint-curricular model.	Variety of arrangements exist and include: • Joint/double/multiple degrees. • Local HEI qualification. • Foreign sending HEI's qualification.	General oversight is responsibility of local HEI and local quality assurance and accreditation agency. Foreign sending partners responsible for their own TNE programmes and have joint responsibility for collaborative programmes.	Local faculty from co-developed HEI. Fly-in faculty from foreign partner HEIs.
Locally supported distance education programmes	Curriculum provided by foreign sending distance HEI, but local academic support provided.	Qualification offered by foreign sending distance HEI.	Oversight by foreign sending HEI. Academic support by local entity. Quality assurance and accreditation from foreign sending country.	Faculty from foreign sending distance HEI, with support from local entity.
Independent (foreign) provision				
International branch campus	Curriculum provided by foreign sending parent HEI. Import/export model.	Foreign sending parent HEI grants one qualification.	Oversight by foreign sending parent HEI. Quality assurance and accreditation by foreign sending country and sometimes with local QA agency.	Fly-in faculty. Expatriate faculty. Locally hired faculty.
Franchise university/provider	Curriculum provided by foreign sending HEIs and delivered by an independent private HEI. Import/export model.	Qualification normally from foreign sending HEIs providing the curriculum and oversight for each programme.	Oversight by foreign sending HEI through monitoring, quality assurance and accreditation from sending and/or local QA agency.	Fly-in faculty from foreign sending HEI. Local faculty. Expatriate faculty.
Distance education	Foreign sending distance HEI responsible for curriculum. Import/export model.	Foreign sending distance HEI grants qualification.	Oversight by foreign sending distance HEI with quality assurance and accreditation from foreign sending QA agency.	Foreign sending distance HEI provides all faculty.

Source: Knight 2015*

Qualifications are becoming one of the more complicated and controversial issues of TNE programmes. Both students and providers are attracted to double or multiple degree programmes, as two or more qualifications/degrees are awarded for the credits completed for the workload of one academic programme or, in some cases, some additional credits. This is troublesome, as it puts the integrity of the qualification in jeopardy. How can two or more separate certificates/ qualifications be awarded for the same programme? TNE needs to be cautious and aware of the risks of double counting credits for two or more qualifications. The idea that *discount degrees* are being offered by TNE double or multiple degree programmes is a reputational risk for all partners involved and especially for the host country. This trend requires further investigation if the integrity of TNE degrees is to be sustained.

Comparing the key features of the different types of TNE programmes is revealing. In the collaborative form of TNE, there are two approaches to curriculum/knowledge development or transfer. In the import/export model of twinning programmes, the curriculum, qualifications and academic oversight are primarily the responsibility of the foreign sending HEI. Collaboration is often minimal and limited to a host HEI providing the physical space, students, support services and programme advertising. However, as already noted, the popularity of double degrees is now transforming twinning programmes into double/multiple degree programmes, even though the role of the local HEI traditionally does not involve curricular design, only a hosting function.

The second approach of joint-curricular design ensures closer academic co-operation, as both curriculum design and delivery are the joint responsibility of all partners involved. This form of TNE poses some definitional challenges; as one could argue that mobility of the curriculum is not an essential feature, as it is jointly constructed. In this case, one can say that there is two-way mobility of the knowledge and resources necessary to design a joint, double or multiple degree programme.

Quality assurance and accreditation of collaborative TNE programmes is an evolving and somewhat troublesome issue. As the British Council and DAAD study on TNE impacts reveals, there are instances where no quality assurance or accreditation system is in place and, conversely, there are times when the TNE programme undergoes quality assurance and accreditation processes conducted by agencies in both the sending and host countries. While the former situation of no quality assurance and accreditation is problematic, quality assurance and accreditation by both partner countries can be burdensome and bureaucratic, and will not necessarily lead to improved quality. Quality assurance and accreditation is necessary for host countries to ensure that the programme meets host country national education policy objectives, and is relevant to the local environment. Quality assurance and accreditation from sending countries is necessary to maximise quality and minimise both the reputational and business risks of the sending provider. Therefore, quality assurance and accreditation is a critical issue, but the discussion of optimal approaches is still ongoing.

The one feature that does not seem to differ within or across the collaborative or independent categories of TNE is the issue of who does the teaching. In most cases, fly-in faculty are involved for courses where local talent is not available. Fly-in faculty bring welcome foreign expertise, but they also raise many concerns as to their commitment, the intense teaching schedule for students and the availability of ongoing support. Local expatriate faculty are also used extensively in TNE programmes, especially if the faculty have been educated in the foreign sending country. Moreover, in several cases, the local partner TNE institution also shares the teaching load. Therefore, the use and mobility of faculty are not a distinguishing characteristic within TNE provision.

6.4 Definitions of different types/modes of TNE programmes

It is true that all TNE activities involve a foreign sending HEI/provider offering academic programmes in a host country, either in collaboration with a host country HEI or independently. This is the fundamental reason why it is called TNE. Consequently, when developing clear, concise definitions of TNE activity, it is important to elucidate the role of the foreign sending provider and the relationship with the host country. This is one of the fundamental criteria for defining and differentiating between different types of TNE activity.

In the majority of cases, the foreign sender is a higher education institution, but, in some cases, there are foreign professional organisations, NGOs, and other bodies offering the academic programme and, therefore, the term HEI/provider is used to capture this reality. In the host country, when a local partner is involved, it is normally a private or public HEI, but this, too, is changing. Host country counterparts are varied and can include private entities and, therefore the term *HEI/provider* can also apply to host country counterparts.

To ensure that the definitions are clearly differentiated from one another, it is necessary to use the same elements or criteria in each definition. In Table 22 the definitions are based on 1) the role and relationship between the foreign sending HEI/provider and the host country HEI/provider and 2) the qualification offered. These two criteria are chosen because they are common to all modes, but serve to differentiate one mode from another. The quality assurance and accreditation is highly dependent on national regulations in both host and sending countries and consequently differs from country to country. Therefore, quality assurance and accreditation is included in the definition, but is not able to be a defining feature because it is highly dependent on local context. Table 22 presents a proposed common TNE framework and a set of definitions for all modes of TNE.

Table 22: Common TNE framework and definitions

TNE mode	Definition	Descriptive notes
Collaborative TNE provision		
Twinning programme	A foreign sending HEI offers academic programme(s) through a host country HEI. Foreign sending HEI provides curriculum and awards qualification.	Joint/double degrees from host country HEI and from foreign sending HEI are increasingly being offered. Quality assurance and accreditation dependent on national regulations of host and sending country. Twinning is often labelled *franchise* in some countries.
Joint/double/multiple degree programme	Curriculum is jointly designed, delivered and monitored by all local and foreign partners. Different combinations of qualification provided, depending on host country regulations.	A joint degree programme offers one qualification with badges of both sending and host HEI on the certificate. A double degree programme offers two qualifications – one certificate/qualification from each partner. A multiple degree programme offers three or more certificates/qualifications, depending on the number of partners. Quality assurance and accreditation normally the responsibility of each partner HEI.
Co-founded/developed universities	A HEI is established in the host country in collaboration with foreign sending HEIs. The academic programmes are offered through twinning or joint/double/multiple degree arrangements. Local host HEI also develops academic programmes independent of foreign partners.	Different kinds of qualifications are awarded and can include 1) host country HEI qualification, 2) joint qualification with foreign sending HEI, 3) double or multiple qualifications depending on number of foreign sending HEIs. Quality assurance and accreditation dependent on host and foreign country regulations.

TNE mode	Definition	Descriptive notes
Locally supported distance education programmes	A foreign distance education HEI/provider offers programmes with academic support for students, available from local entity. Qualification and curriculum offered by foreign distance education provider.	Quality assurance and accreditation normally undertaken by sending HEI and host country.
Independent (foreign) TNE provision		
Branch campus	A foreign sending HEI offers academic programmes through their own satellite campus, located in the host country. Qualification and curriculum offered by foreign sending HEI.	Quality assurance and accreditation dependent on national regulations of both host and sending countries.
Franchise university	A private independent country HEI/provider offers a series of franchised academic programmes from different foreign sending HEI/providers. Qualification and curriculum offered by foreign sending HEIs.	Quality assurance and accreditation dependent on national regulations of host and sending country. Joint/double degrees between foreign sending HEIs and local private franchise university are increasingly being offered.
Distance education	Foreign sending distance education provider offers academic programmes directly to host country students. No local academic support available. Qualification, curriculum, quality assurance and accreditation offered by foreign sending HEI.	Quality assurance and accreditation from foreign sending country.

Source: Knight 2015*

6.5 Use of common TNE framework and TNE definitions for data collection systems

It is worth repeating that a TNE framework and set of definitions are necessary to develop a common understanding of terms within and between countries. For the framework to be useful, it must be robust enough to differentiate between the two categories of TNE provision (collaborative and independent) and each mode of TNE, but flexible enough so that countries with different approaches and levels of involvement can use it to meet their particular needs and circumstances.

Consequently, the use of the common TNE framework for data collection will vary from country to country, depending on the prevalent category and modes of TNE, as well as how they want to use the data for planning, policy analysis and development of regulatory processes. It is important to emphasise that the use of the TNE framework will vary, but not the actual content, because countries are at different stages in establishing TNE data collection systems and may have to develop their capacity over several phases. To allow for an incremental approach to data collection, the framework must be flexible and have different entry points, but still have robust definitions.

How a country uses the common TNE framework and definitions will depend on a number of factors, such as 1) the most prevalent TNE category, collaborative or independent; 2) the most popular mode: that is, twinning, joint/double/multiple degree programmes, branch campus, franchise university or distance education; 3) the use that will be made of the information collected: that is, analysis of enrolment data, TNE programme trends, quality assurance and accreditation conditions and the need for new policies or regulations. The use of the common TNE framework will also determine the kind of data that is to be collected. The following list demonstrates very clearly that there is a wide variety of information that can be collected to assist a host or sending country in analysing TNE provision trends, and to develop appropriate policies and regulations.

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

• The degree to which TNE provision is collaborative between local and foreign providers and how much is provided exclusively by foreign sending country HEIs and providers. This is valuable information for host country HE long-term planning and policy development.

• Within the collaborative category of TNE provision, how much of the TNE curriculum is imported/exported and how much is jointly developed? This is useful information in terms of capacity building of local host HEIs and for determining how relevant programmes and curriculum are to the local environment.

• For each TNE mode, programme information on discipline, level (undergraduate, master's, PhD), qualification(s) offered, tuition fees, duration, internships and study abroad opportunities etc. This is useful information in determining the overlap of TNE programmes with those provided by local HEIs and current trends.

• For each TNE mode, information on enrolment data by programme, gender, level of programme and country of origin of student. This is helpful in assessing whether TNE does increase access to education, and for which categories of student.

• For each independent TNE programme: source country of provider, type of provider, quality assurance and accreditation procedures and tuition fees. This information is useful for determining priority of foreign TNE countries and for developing quality assurance and accreditation procedures.

• For each collaborative TNE programme: local HEIs involved, source country of partner, number of qualifications being offered (joint, double, multiple), etc. This information is useful for determining what kind of local HEIs are active in TNE collaborative activities and which are the prevalent foreign TNE countries and HEI partners involved. This will help to evaluate TNE provision and, if appropriate, develop a more strategic approach to choice of countries, counterpart HEIs, registration processes, monitoring policies, etc.

The type of information that can be collected is extensive. It will be determined by the host or sending country's desired use of the data collected. These examples show the breadth of information and how it can be useful. Similarly, the information that can be collected by sending countries is extensive and can be used for different purposes, both at institutional and national levels.

This section of the report has addressed one of the most troublesome aspects of TNE provision: terminology confusion and the need for clear, concise definitions of the different modes of TNE. This is critical for both TNE host and sending countries, so that they are talking the same TNE language, and that reliable information is available for appropriate planning, policy and regulation development at national and institutional levels.

The next section of the report identifies the primary enablers and challenges of TNE data collection; provides a guideline to help early stage TNE countries to design their TNE data collection systems; and, finally, sets out a series of recommendations targeting major actors involved in TNE data collection at institutional, national and international levels.

*Parts of this chapter, including the tables are based on Knight, J (2015) Transnational Education Remodelled: Towards a common TNE framework and definitions. *Journal for Studies in International Education* (in press).

7. Conclusions: challenges and enablers, guidelines and recommendations

There is no doubt that TNE is dynamic, growing and increasingly complex. As has been illustrated and discussed in the previous chapters, the changing TNE landscape has many implications for the operation of a TNE data collection system and for the use of the gathered information. The focus of this chapter is to address the challenges that are facing TNE data systems, and identify those factors that enable or help the development of such systems. The discussion of challenges and enablers is followed by a set of guidelines that outline some of the key steps and questions that an early stage country may want to consider when establishing or strengthening a TNE data collection system. Finally, a set of recommendations is proposed. They target the key actors involved in promoting and supporting a more co-ordinated and strategic approach to TNE data collection around the world. Together, the recommendations illustrate the need to develop an international protocol that will enable the collection of TNE data from active TNE countries around the world in a way similar to how information on international students is collected and analysed.

7.1 Main challenges and enablers for TNE data collection systems

The challenges facing TNE data collection are many and varied. They need to be clearly identified, so that efforts can be made to address them. At the same time, it is important to identify those factors that help and enable the development of TNE data systems. Both are discussed in this section and are based on the comments provided by HE policy makers, data collection personnel and HEIs providing data to governments in host countries. To some extent, the feedback received was dependent on the structure and maturity level of the data collection systems in place. For the integrated and early countries, the lines between TNE and HE data collection were often quite blurred. The comments on challenges were fairly consistent across the different respondent groups and countries. A number of quotes are included to illustrate the point in the words of those responsible for, or directly involved in, TNE data collection. The primary challenges are listed as follows:

- Categorisation of TNE for the purposes of data collection is perceived as a significant challenge, across the full spectrum of systems and actors reviewed. Different terms are used for the same TNE activity and, conversely, the same term is used for a variety of TNE activities. For some respondents, the overall concept of TNE is not clearly understood at national policy level, leading to confusion from the top down. *'Part of the historical issue has been definitional'… 'Data is not submitted in a standard format, as the agencies keep their data according to their own definition… 'The key issue is perhaps in the nature of the data collected, as it does not specifically capture or explain the value of TNE as an element of higher education.'*

- The difficulty of sorting TNE data from general HE data was a particular issue of concern for the countries with an integrated system. *'The main challenge in collecting TNE data is to sort them out from the [general HE] list.'* And one of the dedicated system respondents highlighted that *'the delineation between local and non-local courses is becoming less clear.'* It is, therefore, possibly a challenge that has the potential to become more, rather than less pronounced over time.

- Students enrolling directly with an institution overseas or pursuing distance education courses were considered particularly difficult to track. Host countries are at a very early stage in addressing this issue.

- Some concerns were raised by data collection agencies around the quality of the data provided by HEIs, including: non-response to information requests, late provision of data, poor quality of data provided, and a lack of capacity at HEIs. *'The biggest challenge remains non-responses/low response/delayed response to our surveys'… 'HEIs have been very slow in their response'… 'Lack of capacity at the institutions'… 'Poor data management at the HEIs'… 'Lack of a regulatory framework that creates a network of responsibility and commitment to the quality of the information provided and reported'.* This addresses the capacity and commitment of HEIs to provide the data. It is important to remember that information in national TNE databases is only as good as what is sent to them by the HEIs.

- However, HEIs raised concerns about the data collection process administered by the data collection agencies, including: poor co-ordination between different government agencies, resulting in duplication of data requests; data request overload for HEIs; time constraints; poor lines of communication with HEIs; lack of detailed guidelines to assist with completing the data requests; and lack of expertise in government agencies. In some cases, these were considered system-wide issues, not just related to TNE. Overall, there was a palpable sense of frustration concerning the lack of co-ordination and clarity at national government level. *'Time constraints because enrolment for an academic year might not have been completed before data is required'* … *'Lack of expertise in MoE resulting in officers not providing consistent answers when clarifications are sought'* … *'There are challenges related to insufficient evidence and guidelines provided by the government and the fact that guidelines, timeframe for reporting and requirements are not consistent'.*

- Use of outdated or poorly structured data templates is considered a major reason for lack of TNE data in a few countries. Lack of clear guidelines can result in HEIs developing their own templates, resulting in inconsistent data returns. 'No database design' … 'Use of archaic data templates' … 'data templates simply do not consider this issue' … 'the template is largely of our own making since the guidelines are not clear or consistent'.

- Some HEIs were concerned about having data published and available to the public, in particular enrolment data. The TNE environment is very competitive in a few of the host countries reviewed. There were also some views expressed about the challenge of ensuring data security and privacy. Examinations records, for example, are sometimes deleted before any use can be made of the aggregate data.

- A lack of processes in place to verify and check the data provided by HEIs appears to be an important issue. This is linked to resource constraints, outdated data management systems and poor communication between data collection agencies and HEIs.

Important factors that enable the development of a TNE data collection system include:

- For HEIs, clear and efficient lines of communication between the data collection agencies and HEIs was the main issue. Several examples were provided of duplicate and ad hoc information requests, as well as a lack of clarity about what was being requested. Having one overall data collection system that produces a central repository of data was the single clearest message from the HEIs. *'A single and coherent, centralised agency and process would ensure consistency, transparency and would make our job much easier from a data management and reporting perspective'* … *'There should be one overall system, where all the required information should be provided and not two different entities and several departments in each entity. We tend to send some information over and over again'.*

- A coherent strategic approach at policy level is considered an important enabler for collection of TNE data. This includes having a well developed regulatory environment in place, providing for the establishment and recognition of TNE providers and programmes. Lack of a systematic approach to data collection is a particular issue identified for the early stage/no system countries.

- Ensuring that the concept of TNE is clearly understood in the host country, including developing a consistent TNE terminology. Even in relatively active TNE host countries, the concept of TNE is not always clearly understood. *'TNE is generally a concept that seems to be understood and driven through the Education Hub, without a broader conceptualisation across the higher education sector'.*

- The importance of using standardised reporting templates with clear instructions and guidelines is something that HEIs and data collection agencies are in general agreement about. However, this requires reaching a consensus about the variables to be included in the questionnaires and the level of disaggregation at which to capture the information.

- Education and training for HEIs about the importance of providing the requested information, including briefings and meetings between HEIs and data collection agencies. Having a dedicated point of contact at HEIs for TNE-related queries is also considered important. *'Private institutions need to be sensitised about the importance of keeping proper records of their activities, for*

reporting purposes. To do this, they will require a statistics unit and a proper management information system in place. They need also to appoint a desk officer, with proper training, to act as liaison officer and submit the requested data.'

- Development of online data collection portals was generally enthusiastically supported. Linking HEI and government data collection systems is considered a good way to drive data consistency and comparability across the HE sector. However, considerable investment in infrastructure and human resources is required to ensure the systems operate to their full potential. The capability for these online systems to share back aggregate information with HEIs was also picked up by a few respondents. *'We need a more modern way to provide the data, such as an online data portal'* … *'Online systems linking universities with [MoE] would allow us to keep up with changes that occur in universities'.*

- The importance of having a legal requirement, or clarification of existing requirements, for private HEIs to provide data to government, was raised by a few respondents. *'Legislation binding HEIs to submit data to [MoE] was not there; now there is provision in the Law that compels HEIs to provide TNE data.'*

The list of main challenges and enablers provides a realistic on-the-ground view of current issues related to the development and operation of TNE data collection systems, both in host and sending countries. Given the complex nature of TNE and the variety of forms it can take, it is somewhat encouraging to see that issues relating to challenges and enablers are fairly consistent from one country to the next. This offers the prospect for countries to share knowledge and potentially learn from each other's experience.

7.3 Guidelines for establishing a TNE data collection system

The information and insights given in the previous chapters of the report provide much food for thought regarding the establishment, operation and use of a TNE data collection system. The purpose of this section is to translate this information into a set of practical guidelines to help countries in the early stages or who have no TNE data system in place, to get a fuller picture of what is involved. As previously noted, one size does not fit all, and so each country will deal with the realities of their own particular context and interpret the guidelines to suit their situation. The guidelines are purposely generic to encourage local adaptation to host or even sending countries. The guidelines identify issues and steps important to national governments and higher education institutions.

Clarify rationales, purpose and use of TNE data

The first fundamental step in developing a TNE data collection system is to establish a clear sense of purpose, objectives and use of the system. This involves having a deep understanding of the underlying rationales for collecting TNE data and to what extent this is a priority for government. The current research highlights a number of rationales, including: accreditation and quality assurance; higher education medium-term planning, policy and regulation development; analysis and research; and enrolment planning. Different rationales have different implications for the type of data being produced.

This has particular relevance for whether the data is focused on institution, programme or student level issues. Therefore, data collection systems should have regard to the rationales most relevant to the host country. Having a clear perspective on this also allows for countries to make optimum use of HE data already being collected, a particularly important point for the integrated systems. Publication of an online register of approved TNE providers and programmes is a very important use of TNE data, given its flexibility to address a broad range of rationales.

Table 23: Rationales and uses for collecting TNE data

Topics	Examples/descriptions
1. Registration/accreditation/quality assurance rationale	Data used for: registration of providers with MoE (or relevant body) and accreditation of their TNE programmes. Depending on maturity of quality assurance and accreditation system, data may be used for ongoing monitoring and enforcement purposes. Data for this rationale is generally institution or programme focused; therefore, it is important to ensure robust enrolment data is also collected.
2. Planning, policy development and decision making rationale	Data used for policy formation and decision making across the following areas: enrolment planning, quality assurance and accreditation; immigration policy; regional hub development; international relations; increasing access to HE; human resource policies; capacity development for HE sector. Data also used for consultations with HE sector.
3. Research and analysis development rationale	Data used for: monitoring trends, publication of annual reports and research papers; presentations at conferences and seminars; provision of market intelligence for HE sector; sharing of knowledge and best practice with international HE community.

Develop a framework for TNE categories and definitions

The development of a TNE categorisation and definition framework is one of the most critical factors in developing a TNE data system. This is fundamentally important for ensuring that all national level and institutional level actors have a common understanding of TNE and use the same terms to describe the different types of providers and programmes involved. A broad consultation with TNE stakeholders is advisable, including: policy makers, data collection departments, quality assurance and accreditation agencies, as well as HEIs involved in delivering TNE programmes. A common understanding of the overall concept and modes of TNE and what it means for the host country's higher education system require clarification and agreement at national policy level. There is widespread confusion about the purpose and meaning of TNE and this needs to be addressed from the very start.

Table 24: Categories and definitions of TNE

Topics	Examples/descriptions
1. Independent TNE provision	Main examples include: international branch campuses; franchise university; and distance learning without local support.
2. Collaborative TNE provision	Main examples include: twinning; joint/multiple degree; double degree; co-founded HEIs; distance learning with local support.
3. Topography of locally registered institutions delivering TNE programmes	Consider which local HEIs are partners or counterparts of foreign HEIs in TNE provision. Consider the extent to which local public and private HEIs are delivering TNE programmes, and whether there's a distinction between local private and foreign private HEIs. Also consider extent to which private HEIs are only delivering TNE programmes, or are using TNE as a mechanism to deliver degree level programmes.

Adopt a systematic approach to collecting TNE data

Host countries need to take into consideration the relationship of TNE data collection to the overall HE data collection framework. To do this, governments need to decide upon a number of issues, such as agencies and actors involved in data collection; whether the system can be integrated into an existing system, or whether a new dedicated system should be developed. Clarity about the rationales for collecting data can help to resolve these issues. Other issues for consideration include whether the TNE activities of public and private HEIs are collected separately or together, and whether data is collected on a compulsory or voluntary basis. A review of the legislation underpinning international and private higher education provision is useful in this context. Communication and consultation across the various government agencies and departments is also important. There are pros and cons associated with different systematic approaches, but the most important end-point is that the resulting data can be clearly identified and categorised as TNE.

Table 25: A systematic approach to TNE data

Topics	Examples/descriptions
1. Key actors Integrated versus dedicated system	Decide whether TNE data should be collected separately or together with general HE data; whether MoE or accreditation/QA body collects the data. To what extent synergies are possible with existing data collection systems, including: examination bodies, immigration departments, government scholarship agencies and external TNE funding bodies. If an integrated system, ensure that TNE activity is separately recorded.
2. One system, or separate systems, for public and private HEIs?	Will there be separate data collection systems for public and private HEIs? If so, make sure both systems capture TNE activity and that data is comparable between systems.

Invest in technical capacity and human resource development

Collecting data is a technical undertaking requiring precision, consistency and no small level of expertise on behalf of the personnel involved. Considerable progress can be made in a number of areas in host countries. Developing the right data templates for HEIs to complete is critically important and deserves close attention. The templates should be accompanied by detailed, but user-friendly, guidelines to assist HEIs in providing the correct information.

The data collection personnel in the government agencies need to be trained in data collection techniques, and have good knowledge of TNE and how to categorise the data. All of these measures can achieve considerable results with comparatively modest levels of investment. Developing an online data collection portal for HEIs to submit the requested data online is a more significant undertaking, but definitely worthy of investigation, given the success experienced in a number of countries.

Table 26: Technical capacity and human resource development

Topics	Examples/descriptions
1. Data request template and guidelines	Develop data template based on TNE categorisation framework. Consult and agree with HE sector about design of data template; cycles of data collection; and exact TNE data to be provided, including enrolment data. Develop clear guidelines to assist HEIs in completing the template.
2. Training for government and data collection personnel	Ensure that relevant personnel are familiar with TNE and can respond confidently and consistently to HEI queries. Personnel should have detailed knowledge of the data templates and accompanying guidelines.
3. Online data collection portal	Consider the development on an online data collection portal, allowing HEIs to provide data online. Provide dedicated user access to each registered HEI. Build in functionality to sense-check the data and to automatically flag queries and compare data across HEIs. Consider merging this with other government HE data systems and capability to share back aggregate data with HE sector.

Consult and collaborate with HEIs about the importance of providing TNE data

Much of the confusion expressed by HEIs interviewed for this study stems from a lack of communication and guidance provided by government. This underlines the importance of liaising constructively with the institutions involved in delivering TNE programmes. As a starting point, whether private HEIs are legally obliged to provide TNE data is an area that should be clarified. This may involve some legislative or licence changes, but, more often than not, it can be addressed by clarification of existing regulations. The general sense from the current research is that HEIs are competent and willing to provide the data, but are often unsure about what is being requested and whether they are obliged to provide it. This can be addressed by meetings and workshops with HEIs to deliver training and education about the importance of providing the requested data. Again, guidelines to accompany the data request template are an effective way in which to promote clear lines of communication.

Table 27: Consultation between government and HEIs

Topics	Examples/descriptions
1. Legal requirement to provide data	Clarify whether all public and private HEIs are legally obliged to provide TNE data. Make provision in the regulations as required and inform HEIs about their obligations.
2. Education and training	Arrange meetings and focus groups with HEIs to explain the importance of providing TNE data and how it can benefit HEIs.
3. Publish register of approved providers and programmes	Publish TNE register on website for public access, targeting: prospective students, employers and wider HE sector. Update register on a regular basis using data periodically provided by HEIs.

Participation of higher education institutions

It is important to note that HEIs have much to gain from a more strategic and structured approach to TNE data collection by host country governments; in particular, a more stable policy and regulatory environment, and the potential for TNE programmes to be accredited. HEIs delivering TNE programmes have a big role to play in the establishment of robust data collection systems. It is important that HEIs actively engage with their data collection counterparts in governments, particularly in relation to the categorisation of TNE, the design of the data request templates, and with regard to the most suitable data collection cycle. Assigning a dedicated point of contact for all TNE-related queries and data requests from government agencies is appropriate for HEIs relatively active in terms of TNE. HEIs should also consider the extent to which aggregate TNE data collected by government can benefit the HE sector, and how this data can be beneficial to all parties.

Role of national and international non-governmental organisations

National and international level non-governmental organisations that contribute to TNE in a variety of roles (that is, supporter, funder, policy adviser, capacity builder, researcher) have a critical role to play. These types of organisations, such as the British Council, German Academic Exchange Service, International Association of Universities, European Association of International Education, Asia Pacific International Education Association, African Network for Internationalization of Education, Malaysian Association of Private Colleges and Universities, International Network of Quality

Assurance and Accreditation of Higher Education, to name only a few, can have a strong advocacy role to play in promoting the importance and need for the development of TNE data collection systems. Individually and together, they can make a call for action to support the development of a common TNE data framework and an international commitment to the collection of TNE information within and across countries.

Role of international governmental agencies

International agencies such as OECD and UNESCO have a uniquely powerful and privileged position in their capacity to advise and assist countries in formulating HE policies. Previous work by these agencies in developing common codes for higher education programmes (ISCED 2011) and definitions for international students have been of enormous benefit in promoting the availability of international, comparable higher education data. Lack of a consistent TNE categorisation framework is probably the single biggest inhibitor to countries collecting and reporting internationally comparable TNE data. International organisations such as OECD and UNESCO have a pivotal role to play in developing an international agreement and protocol to develop a common TNE framework and definitions for use by both sending and host countries.

7.4 Recommendations

One of the main objectives of this project is to advocate for commitment and action by TNE active countries, sending and host, to improve their TNE data collection system. In this spirit, a number of recommendations have been produced that are targeted at specific TNE actors, namely:

national government and affiliated HE agencies; national non-governmental HE organisations; HEIs delivering TNE programmes; and international government organisations such as OECD and UNESCO. The recommendations target both host and sending countries and have relevance for countries at varying levels of data collection maturity. The recommendations are closely linked to the guidelines to encourage adoption and implementation.

National government: ministry of education and affiliated agencies

It is recommended that national governments in TNE host and sending countries begin to develop a TNE data collections system or strengthen existing ones. Important steps to consider include the following:

- Clarify rationales and purposes of TNE data collection system in collaboration with key government level actors and HEIs.

- Establish, with actors and stakeholders, a common set of TNE categories and definitions for consistent use across the entire HE sector.

- Develop a systematic approach to collecting TNE data, including carefully designed data request templates with supporting guidelines, potentially administered via an online portal.

- Invest in technical capacity and human resource development to support the data collection systems.

- Consult with HEIs about the importance and methods of providing TNE data.

- Consult with key governmental and non-governmental stakeholders on how to make full use of TNE data.

Higher education institutions engaged in TNE activities

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

Non-governmental higher education associations

It is recommended that national and international higher education non-governmental associations work individually and together to support national governments and higher education institutions to develop and implement national TNE data education systems using a common TNE framework. Such a TNE framework needs to be robust enough to differentiate between various modes of TNE and flexible enough to adapt to the individual contexts of each country.

International governmental agencies

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

The purpose of this report was to increase awareness and bring new knowledge to improving TNE data collection across TNE active countries. To accomplish this objective, an in-depth analysis was conducted of the rationales, goals and uses of TNE data systems in host and sending countries. Furthermore, key actors, data collection methods, enablers and challenges were examined. As a result, a set of guidelines and recommendations were proposed. The goals of this project will be met if further advocacy and action steps are taken towards developing a common TNE framework to support HEI and country level TNE data collection systems and an international commitment is made to gather comparable and reliable TNE data across TNE active countries.