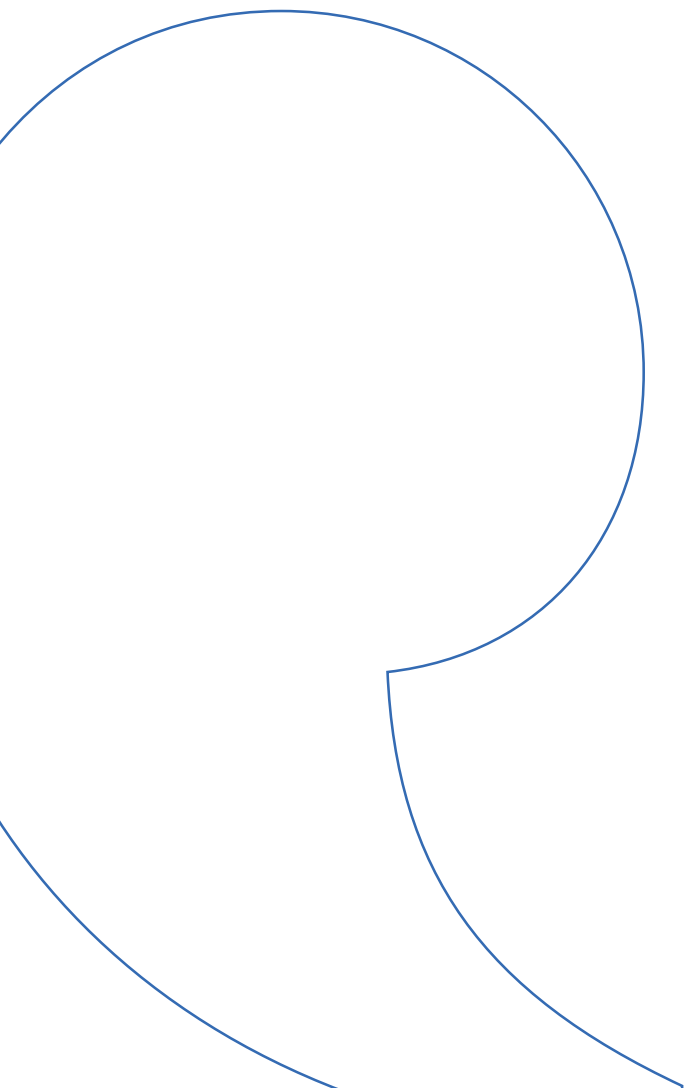# THE SHAPE OF GLOBAL HIGHER EDUCATION: INTERNATIONAL MOBILITY OF STUDENTS, RESEARCH AND EDUCATION PROVISION

Volume 2

International Higher Education

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1. Introduction

The quest for excellence is encouraging a growing number of higher education institutions (HEIs) to reach out to international audiences, partners and collaborators. Increasingly, national governments are also recognising the advantages international engagement brings to their education systems, economy and society. National support for higher education is often manifested in regulatory frameworks which facilitate international collaborations and system-to-system arrangements such as degree recognition, scholar exchange and capacity building. Across the world, these frameworks are a critical factor in determining how successful HEIs are in developing their global engagement.

Three areas of activity are of primary importance – the international mobility of students, international research collaboration and transnational education (TNE). Of these, student mobility has arguably received the most attention from governments. International student demand is often perceived as a signal of the global relevance of a country's education provision. Governments across the world have therefore become key players in shaping this trend.

Research has long been a core activity for HEIs. However, the nature and scale of the problems it seeks to solve have become global and academic research now increasingly addresses areas incapable of being tackled by one country in isolation. Over the last few decades this has encouraged the growth of greater co-operation among research teams worldwide. The international competitiveness of a country's research output is often associated with its openness to international collaborations.

Finally, TNE has become an important part of the traditional higher education landscape. The UK, for example, reaches more international students through TNE programmes delivered overseas than on courses taught in the UK.

The 'Shape of global higher education' series aims to measure the role of governments in international engagement of higher education. This study covers 38 countries and territories:[1] from Peru through Sri Lanka to Australia and from the Netherlands to South Africa.

The initial study, which was published in May 2016, focused on 26 countries. This research is extended to include a further 12 countries and territories. National support across the studied countries is assessed against 37 qualitative indicators. The authors' assessment of each criterion is available in a searchable database, which covers over 1,400 descriptive fields. 'The Global Gauge of higher education policy' is available here: https://www.britishcouncil.org/education/ihe/knowledge-centre/global-landscape/global-gauge

This study is of use to government departments, higher education agencies and stakeholders, HEI leaders and education professionals with an interest in international higher education.

2. Key findings

1. The countries and territories which (from policymakers' perspectives) have the most supportive IHE policies are Germany, the Netherlands, Malaysia and Hong Kong (SAR). Through a commitment to resource IHE and system-to-system arrangements, their policies show a strong government support for mobility of students, academics and academic programmes. If the focus is changed to reflect thematic areas of institutional activities, the nations with the most rounded IHE portfolio include Australia, Hong Kong (SAR), the Netherlands, Malaysia and the UK. This presumably reflects the proactivity of the higher education sector – it is the sector's activities that have shaped the evolution of many national policies.

2. This research shows that the majority of national governments are preoccupied with international student mobility. As a result, streamlined visa policies and generous funding for student mobility have been put in place.

3. Overall, there is a strong positive relationship between the policies supporting international student mobility and policies supporting transnational education.

4. While most of the shortlisted states (71 per cent – 27 countries out of 38) have policies in place to support TNE provision, only a third have strong quality assurance for these programmes (34 per cent – 13 countries out of 38) and recognise TNE qualifications.

5. Globally, there is a consensus about the important contribution of international research collaborations to higher education, the economy and society. Advanced research nations, as well as those building their research capacity, recognise internationally produced research as part of the national research assessments.

6. There is a strong national push towards collaborative funding and structures which encourage greater international collaborations (82 per cent – 31 countries out of 38). However, there is less support for streamlined visas which allow researchers and academics to pursue their research interest beyond national borders (68 per cent – 26 countries out of 38).

7. Increasingly, the world's regions are showing more harmonisation of their higher education systems. This appears to be driven by schemes which facilitate student mobility, collaboration among quality assurance agencies and a wider recognition of academic qualifications.

8. Overall, the European countries perform strongly with regard to national support for student and academic mobility, transnational education and research engagement. A growing harmonisation within the European Union, backed by programmes like Erasmus+ and Horizon 2020, is likely to have contributed to this.

9. Australia and East and South-East Asian countries and territories are attractive to engage with for the purpose of international student mobility, transnational education and research collaborations. In addition to Australia, Hong Kong (SAR) and Malaysia, government efforts across the Association of South East Asian Nations (ASEAN) are encouraging the endeavours of their HEIs to engage internationally.

3. Aims, objectives and methodology

The aim of this study is to measure government support for international higher education engagement and identify the policy areas where collaborations are most sought. A twofold objective underpins this:

- to extend the National Policies Framework with 12 additional countries and territories
- To inform HEI strategies by re-grouping the indicators into thematic categories which focus on:
  - international student mobility
  - transnational education
  - international research engagement.

The indicators which underpin the National Policies Framework consider both inbound and outbound higher education activities in the three areas mentioned above. They examine whether countries' regulatory provision equally supports international engagement of domestic HEIs abroad and the inbound activities of foreign HEIs. The rationale behind this is to allow an unbiased assessment of countries' national support for IHE, irrespective of whether they are exporters or importers of education.

All criteria measured in the study are qualitative, and they draw on nations' policy documents and regulatory frameworks. For example, nations' willingness to engage in international research takes into account policies that enable mobility of academics and encourage collaborations. Quantitative measures such as student mobility, academic mobility, research funding and other relevant information can complement and be used alongside the data collections sourced through this research.

3.1 Research objective: National Policies Framework

This study uses the original framework to draw comparisons across the 38 countries and territories against three broad categories:

- *openness of education systems* measures government-level commitment to internationalisation and support for international mobility of students, researchers, academic programmes and university research

- *quality assurance and degree recognition* considers frameworks in place which maintain standards in education provision and facilitate the international mobility of students, education providers and academic programmes. This category examines quality assurance practices for higher education provision at home and overseas, recognition of prior degrees obtained abroad and recognition of international qualifications by the local labour market

- *equitable access and sustainable development policies* draw on government funding schemes which support student and academic mobility. This category takes into account the unintended consequences of internationalisation, such as brain drain and displacement of marginalised students by international students.

This research uses an index-based methodology. The three categories, mentioned above, use a set of qualitative indicators (37 indicators in total) and contribute equally to the overall National Policies Framework. The information collected against each indicator draws on policy documents sourced from government departments, higher education agencies and regulatory bodies. All data is factual and reflects the political will of the national government to support international engagement. In instances where no adequate policy documents were found, the academic literature is consulted, and interviews with locally based experts have taken place. British Council staff and their access to experts on the ground across the studied 38 countries and territories were a critical part of this study.

Each indicator is assessed regarding whether the criteria are fully met, not met or partly met, and is scored between 0 and 1. The respective scores are 1 when the criterion is fully met, 0.5 when the criterion is partly met and 0 when it is not fulfilled. As such, the higher the score for a country (maximum value of 1), the greater the government support for IHE.

National governments use policy documents and strategies to signal their will to attract international students and academic staff, invite TNE programmes into the country and support research collaborations. However, government will on its own is not enough. A matter for further research is to measure the practical implementation of the respective policies and whether there is a deviation between the published policies and activities on the ground.

Table 1 shows the structure of the National Policies Framework. A detailed outline of the index and description of the 37 indicators is provided in the appendix. Chapter 4 explores analysis of the indicators within the National Policies Framework in more depth.

Table 1: Structure of the National Policies Framework

Overview of categories and indicators	Weight	
1. Openness and mobility	0.33	
1.1 IHE strategy		0.25
1.2 Student mobility policies		0.25
1.3 Academic mobility and research policies		0.25
1.4 Programme and provider mobility		0.25
2. Quality assurance and degree recognition	0.33	
2.1 International students' quality assurance and admissions		0.33
2.2 Quality assurance of academic programmes		0.33
2.3 Recognition of overseas qualifications		0.33
3. Access and sustainability	0.33	
3.1 Student mobility funding		0.33
3.2 Academic mobility and research funding		0.33
3.3 Sustainable development policies		0.33
Total	**1.00**	

Source: Ilieva, J and Peak, M (2016), *The shape of global higher education: national policies framework for international engagement.* British Council.

Available online at: https://www.britishcouncil.org/sites/default/files/f310_tne_international_higher_education_report_final_v2_web.pdf

3.2 Research objective: exploration of thematic areas of institutional activities.

The second aim of this study is to explore further the themes identified in the 2016 study. The methodology developed in the National Policies Framework is applied to capture the following three topics of international engagement:

• international student mobility

• transnational education

• international research engagement.

While the National Policies Framework has been successful in engaging and informing policymakers, HEIs asked for more support in how to navigate the indicators of interest. A steering group was formed to guide the update of this study.

The IHE themes were identified in the British Council's *Shape of global higher education: national policies for international engagement.* While the same indicators are applied to capture the above three areas of engagement, when grouped thematically they contribute to an in-depth exploration of countries' stance in a particular IHE field. For example, various indicators on international student mobility were spread across three policy areas in the original framework: student, visas were part of the *openness* section, quality of teaching and degree recognition were part of the *quality assurance* section and funding for student mobility was part of the *access and sustainability* section. Under the thematic analysis, all indicators that deal with the movement of students are brought into the international student mobility category.

Those countries where institutions are proactive in internationalisation have policy frameworks which reflect activities taking place in that country. In contrast, however, if a country develops a liberal policy framework for TNE, it does not necessarily mean these activities will happen. It is possible that certain structures are drawn up in expectation that activities may follow. Similar to the original National Policies Framework, the thematic framework has limited scope in establishing the efficiency of the policy implementation.

In addition, the three thematic areas are based on HEIs' international strategies. However, some HEIs may place greater importance on research engagement and less on TNE.[2] The interactive database allows HEIs to vary the weight attributed to the different indicators and categories. Table 2 presents the structure of the new thematic framework. Chapter 5 explores thematic analysis of the indicators in more depth.

Table 2: Thematic framework for analysis of national policies

Categories and indicators	Weight
1. International student mobility	0.33
1.1 Policy environment and support for international student mobility	0.25
1.2 Student visas	0.25
1.3 Quality assurance, selection of international students, and degree recognition	0.25
1.4 Student mobility scholarships and sustainability policies	0.25
2. Transnational education	0.33
2.1 International mobility of academic programmes and HEIs	0.33
2.2 Quality assurance of programme and provider mobility	0.33
2.3 Recognition of TNE qualifications	0.33
3. International research engagement	0.33
3.1 Visa policies for researchers and academics	0.33
3.2 Funding for academic/research mobility and sustainability	0.33
3.3 Funding infrastructure for international research collaboration	0.33
Total	**1.00**

3.3 Geographical coverage

There are 12 newly added countries and territories in this extension to the study, which combined with those included in *The shape of global education: national policies for international engagement* cover 38 countries and territories in total. An attempt is made to include a representative number of countries from different regions, which are active in inbound and outbound student demand, academic mobility and education programmes. They are listed in Table 3, and the newly included ones are marked in italics. Please note that information collected for the original study was correct as of 31 March 2016. Information collected for the newly added countries is correct as of 31 March 2017.
This difference should be considered when analysing policy environments.

Table 3: Geographical coverage

Europe	Central and South Asia	The Americas
• *France* • Germany • *Greece* • *Netherlands* • Russia • UK	• *Bangladesh* • India • Kazakhstan • Pakistan • *Sri Lanka*	• Brazil • Chile • Colombia • Mexico • *Peru* • USA
East Asia and Australasia	**The Middle East and North Africa**	**Africa**
• Australia • China • *Hong Kong (SAR)* • Indonesia • Malaysia • Philippines • Thailand • Vietnam	• Egypt • *Iran* • *Israel* • *Oman* • *Saudi Arabia* • Turkey • *UAE*	• Botswana • Ethiopia • Ghana • Kenya • Nigeria • South Africa

4. Update of the National Policies Framework

This chapter outlines findings from analysis of the original format of the National Policies Framework. In the newly added countries and territories, the Netherlands and Hong Kong (SAR) emerge as having the strongest government support for IHE engagement. These sit alongside Germany and Malaysia, which were found in the previous report to have the most balanced IHE portfolio of national policies.

As mentioned in chapter 3, the countries' national support for IHE was assessed across the following broad areas (see the appendix for details on the indicators used in these categories):

- openness of higher education systems
- quality assurance of higher education provision and recognition of international qualifications
- access and sustainability.

Across the three areas, the *access and sustainability* category performs the strongest: 79 per cent of all countries have generous funding in place to support student and academic mobility and sustainable development policies (30 out of 38 countries). Most of the studied countries support outward student mobility, followed by government assistance for international research and foreign language competencies. Alongside Germany, the Netherlands and France, which perform very strongly in sustainable development policies, other states which have well-established policies in this area are China (which has the highest score in this category), Thailand, Indonesia, Turkey and Colombia.

Table 4: Sustainable development policies

Country	Score
China	
Germany	
Netherlands	
France	
Thailand	
Greece	
Indonesia	
Turkey	
Hong Kong (SAR)	
Colombia	
Malaysia	
USA	
UK	
Vietnam	
Kazakhstan	
Peru	
Russia	
UAE	
Sri Lanka	
Iran	
Chile	
Oman	
Brazil	
Pakistan	
Saudi Arabia	
Mexico	
Egypt	
India	
Israel	
Australia	
Philippines	
South Africa	
Bangladesh	
Nigeria	
Ghana	
Kenya	
Botswana	
Ethiopia	
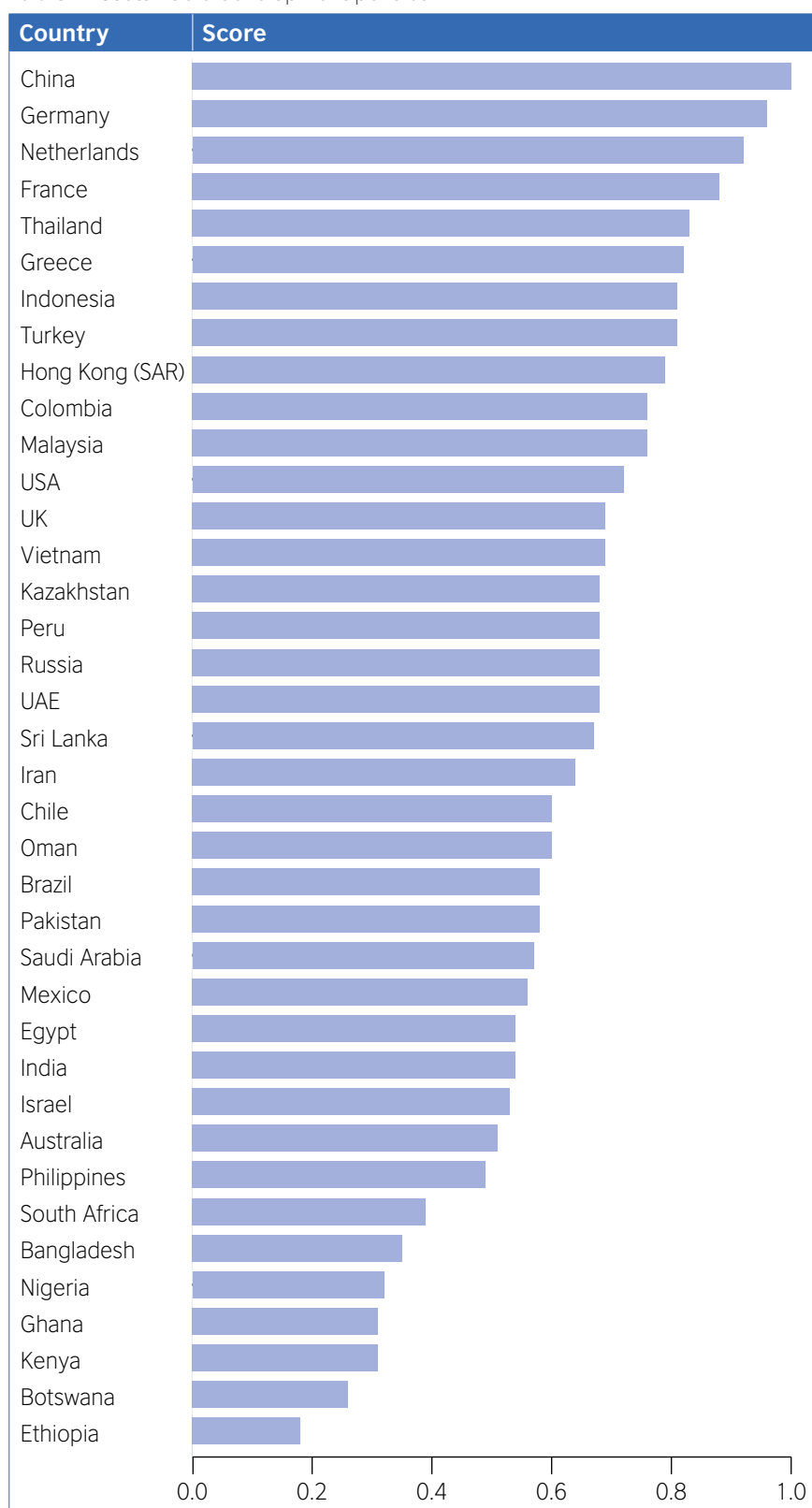
Openness of higher education systems assesses system-to-system IHE arrangements: infrastructures which facilitate mobility of students and researchers; the ability of HEIs to offer TNE; and student and academic visas. Almost two-thirds of the studied countries (28 countries out of 38) perform strongly in this category. Nearly all nations (37 out of 38) have streamlined their student visas in an attempt to attract international students to their countries. Visa application is, in most cases, the students' first encounters with the host education country.

A transparent and simplified student visa process projects a welcoming environment which, in turn, sends a positive message to prospective students. Efficient and streamlined student visa processes do reflect, across most countries, the importance placed on international students by national governments. However, there seems to be a mismatch between national policies to attract international students and policies for international student and graduate employment. For example, one of the indicators which scores the lowest in this study is an opportunity for international students to work during or after their studies. Indicative of this is that only seven out of 38 countries allow international students to work up to a certain number of hours during studies (usually 20 hours) and have graduate employability schemes for a limited period (these are Australia, France, Germany, Hong Kong (SAR), the Netherlands, Peru and Russia).

Table 5: Openness of higher education systems

Country	Score
Australia	1.00
Hong Kong (SAR)	1.00
Netherlands	0.91
France	0.88
UAE	0.83
Germany	0.82
UK	0.81
Malaysia	0.79
Oman	0.79
Israel	0.78
China	0.76
Vietnam	0.71
Thailand	0.68
Turkey	0.68
India	0.65
USA	0.65
Indonesia	0.63
Botswana	0.59
Pakistan	0.59
Brazil	0.58
Greece	0.57
Saudi Arabia	0.56
Russia	0.56
Peru	0.54
Philippines	0.53
Kenya	0.52
South Africa	0.52
Sri Lanka	0.51
Kazakhstan	0.48
Bangladesh	0.46
Egypt	0.43
Chile	0.41
Iran	0.41
Colombia	0.40
Ethiopia	0.30
Ghana	0.30
Nigeria	0.26
Mexico	0.20

The category which appears to have the largest room for improvement is *Quality assurance and degree recognition*. While the governments' preoccupation has been in attracting international students and ensuring sufficient education provision through the means of TNE, less attention has been paid to the instruments needed to make sure that the students (both international and home) on TNE programmes receive a high quality of education.

Recognition of TNE degrees and communicating their value to the local labour market is another area which urgently needs to be addressed, especially in countries which rely on inbound TNE but where their graduates fail to secure employment which matches their education level.

Table 6: Quality assurance and degree recognition

Country	Score
Australia	
UAE	
Netherlands	
UK	
Hong Kong (SAR)	
Germany	
Malaysia	
France	
Oman	
Vietnam	
Israel	
Saudi Arabia	
Philippines	
South Africa	
Greece	
Russia	
China	
Kenya	
Pakistan	
Sri Lanka	
Kazakhstan	
Thailand	
India	
USA	
Turkey	
Botswana	
Egypt	
Indonesia	
Bangladesh	
Ghana	
Brazil	
Iran	
Colombia	
Ethiopia	
Nigeria	
Mexico	
Chile	
Peru	
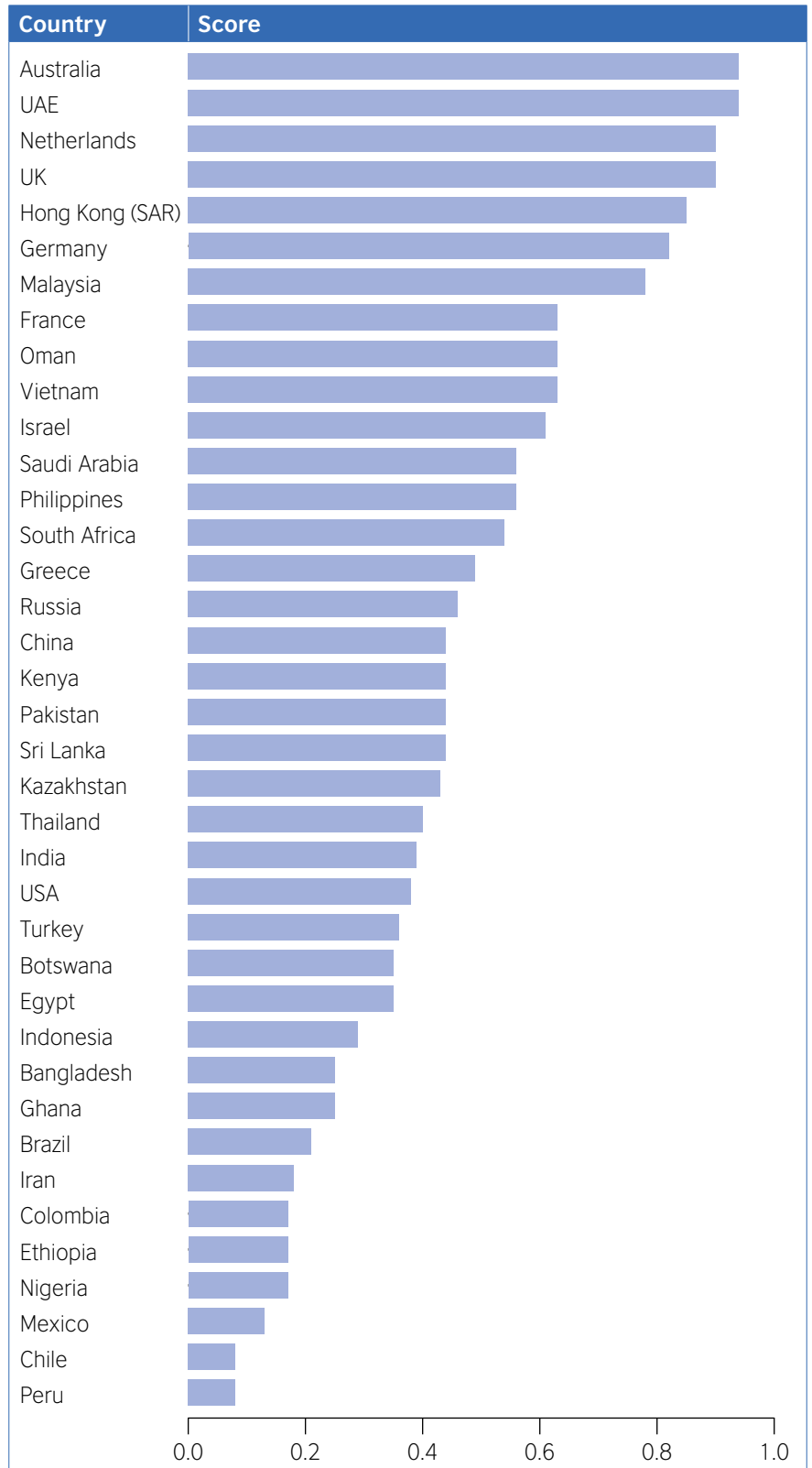
Figure 1 shows how countries perform across the three categories. The overall score is calculated as a weighted average of the categories described above.

The countries and territories which provide the strongest support for IHE are Germany, Hong Kong (SAR), Malaysia and the Netherlands. Other nations which perform well but fall short on one of the three categories are Australia, France, the UAE and the UK.

Figure 1: National policies for higher education engagement – evidence from 38 countries and territories

Openness   Quality assurance   Access and sustainability
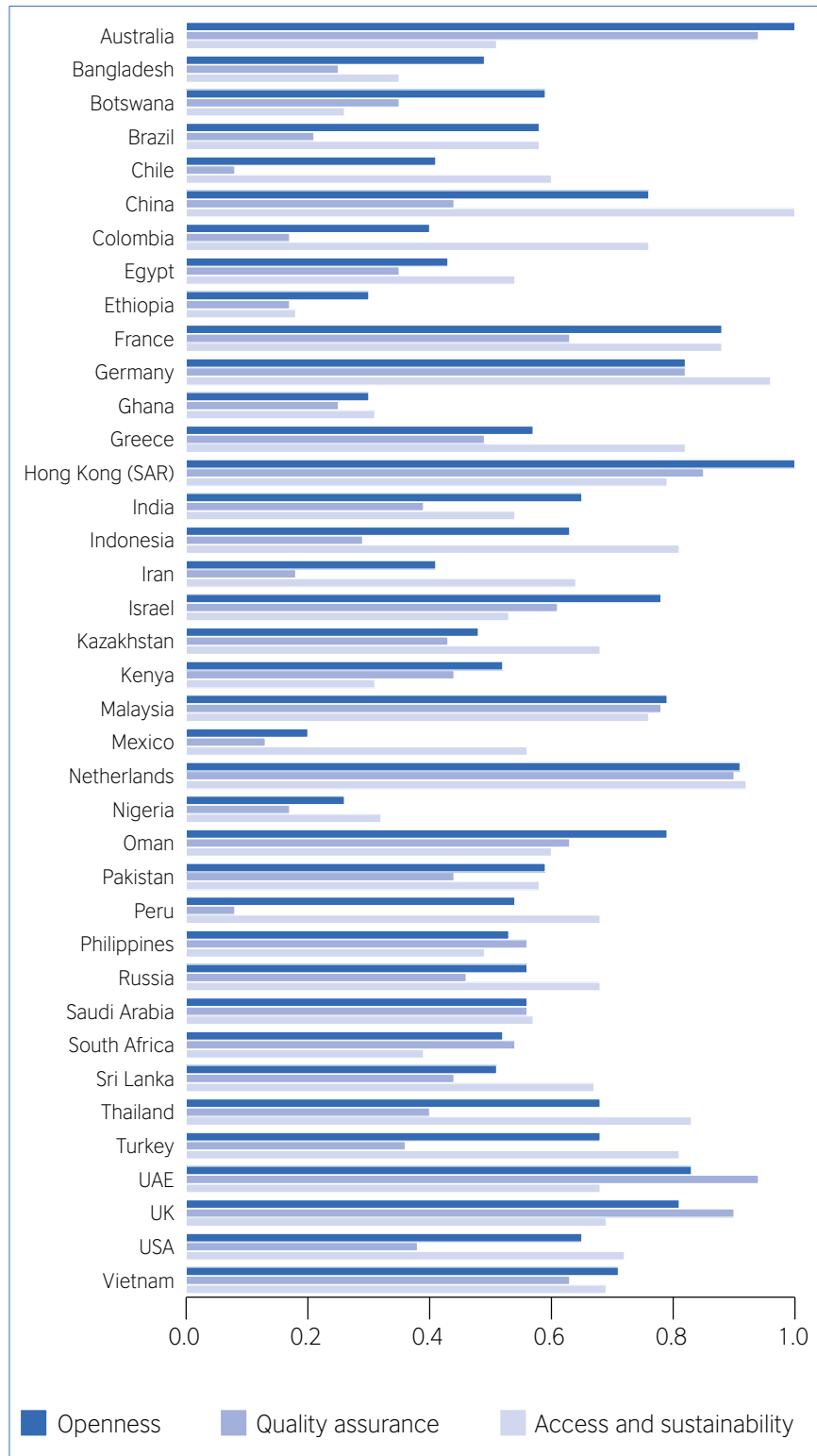
5. Analytical framework for international education engagement from an institutional perspective

This section applies a new analytical framework to the data collected by this research, which is modelled on HEIs' international education strategies. The purpose is to equip HEIs with a knowledge which guides their activities overseas and informs discussions with local partners.

The majority of the internationally active HEIs have strategies which draw on the following strands:

- international student mobility
- transnational education
- international research engagement.

To reflect this we have constructed a framework which allows analysis of national support for IHE in these thematic areas. Similar to the National Policies Framework, this thematic framework places equal importance on inward and outward IHE activities, such as inbound and outbound student mobility, outbound TNE delivery and inbound TNE. It aims to outline a balanced IHE portfolio, though HEIs may use this framework in different ways depending on their priorities.

5.1 Why a new analytical framework?

The new categories introduced in this framework were explored in discussion with the project steering group, which represented national agencies and HEIs with varied interests in IHE.[3]

The same indicators are used as in the National Policies Framework. However, they are structured and presented differently to allow a wider group of stakeholders to engage with this work. While the National Policies Framework is aimed at national-level policy makers, this new, thematic framework focuses more on the needs of HEIs. As such, the categories are modelled on HEI international strategies.

This framework aims to identify areas of IHE which are best supported by national governments and the infrastructures in place which facilitate international engagement. While an attempt is made to avoid bias towards advanced economies, it is possible, however, that there is some bias towards countries with stronger governance. This is reflected in their national regulatory environments that set the rules for the HEIs.

It is possible for countries to adopt regulatory frameworks which they believe will safeguard them or minimise risk in the system. However, while states are adopting higher education frameworks to encourage certain activities, even comprehensive frameworks on their own are not enough to ensure certain events will take place. One example is if a country announces an ambition to become an international education hub and specific student recruitment targets are announced, the strategy on its own may not work if the wider macroeconomic, demographic and education conditions are not present.

This research does not address the implementation of policies and their efficiency. The operating environment is of paramount importance for HEIs active in international engagement, and it will be studied through separate research.

The data collection suggests two possible scenarios shaping the higher education landscape internationally. While it is mainly HEIs' activities shaping the policies (McBurnie and Ziguras, 2007),[4] there are instances where the policy precedes activities, which is discussed further in the text below.

Table 7 shows which IHE areas –
international student mobility, TNE
and international research engagement
– are best supported at a national
level in the shortlisted countries
and territories.

Table 7: National support for international student mobility, TNE and international research engagement

	International student mobility	TNE	International research engagement
Australia	Very strong	Very strong	Very strong
Bangladesh	Weak	Weak	Weak
Botswana	Weak	Weak	Weak
Brazil	Strong	Weak	Strong
Chile	Weak	Very weak	Weak
China	Very strong	Strong	Very strong
Colombia	Strong	Very weak	Weak
Egypt	Weak	Weak	Weak
Ethiopia	Very weak	Very weak	Very weak
France	Very strong	Strong	Very strong
Germany	Very strong	Strong	Very strong
Ghana	Weak	Weak	Very weak
Greece	Strong	Strong	Strong
Hong Kong (SAR)	Very strong	Very strong	Very strong
India	Strong	Strong	Strong
Indonesia	Strong	Weak	Very strong
Iran	Weak	Very weak	Weak
Israel	Strong	Very strong	Very strong
Kazakhstan	Strong	Strong	Weak
Kenya	Strong	Weak	Weak
Malaysia	Very strong	Very strong	Very strong
Mexico	Weak	Very weak	Weak
Netherlands	Very strong	Very strong	Very strong
Nigeria	Very weak	Very weak	Very weak
Oman	Strong	Very strong	Strong
Pakistan	Strong	Strong	Weak
Peru	Weak	Very weak	Strong
Philippines	Strong	Strong	Weak
Russia	Strong	Weak	Weak
Saudi Arabia	Strong	Strong	Weak
South Africa	Strong	Strong	Weak
Sri Lanka	Strong	Strong	Weak
Thailand	Strong	Strong	Very strong
Turkey	Strong	Weak	Very strong
UAE	Very strong	Very strong	Strong
UK	Very strong	Very strong	Very strong
USA	Strong	Weak	Strong
Vietnam	Very strong	Strong	Strong

While the Netherlands and Malaysia, as identified in the National Policies Framework, appear to continue to be active in these three areas, Australia, Hong Kong (SAR) and the UK also have strong frameworks which support student mobility, TNE and research engagement. Australia and the UK are excellent examples of national policy formulation directly informed by HEI activities:

• both countries have HEIs heavily involved in international student recruitment and new ambitions to strengthen outbound student mobility

• Australia and the UK have strong outbound TNE engagement. The UK HEIs teach more international students on their TNE programmes delivered overseas than students enrolled on programmes in the UK

• strong research co-operation, where both countries produce nearly as much research output with international co-authors as nationally produced research.

Interestingly, Hong Kong (SAR) has emerged as an international education hub over the past. It is a top territory for sending students abroad and also a TNE hot spot, alongside Australia and the UK. Its research assessment exercise (RAE) is broadly modelled on that of the UK, with a recent push towards greater prominence of impact assessment, which appears to have been from the recent Research Excellence Framework in the UK. [5]
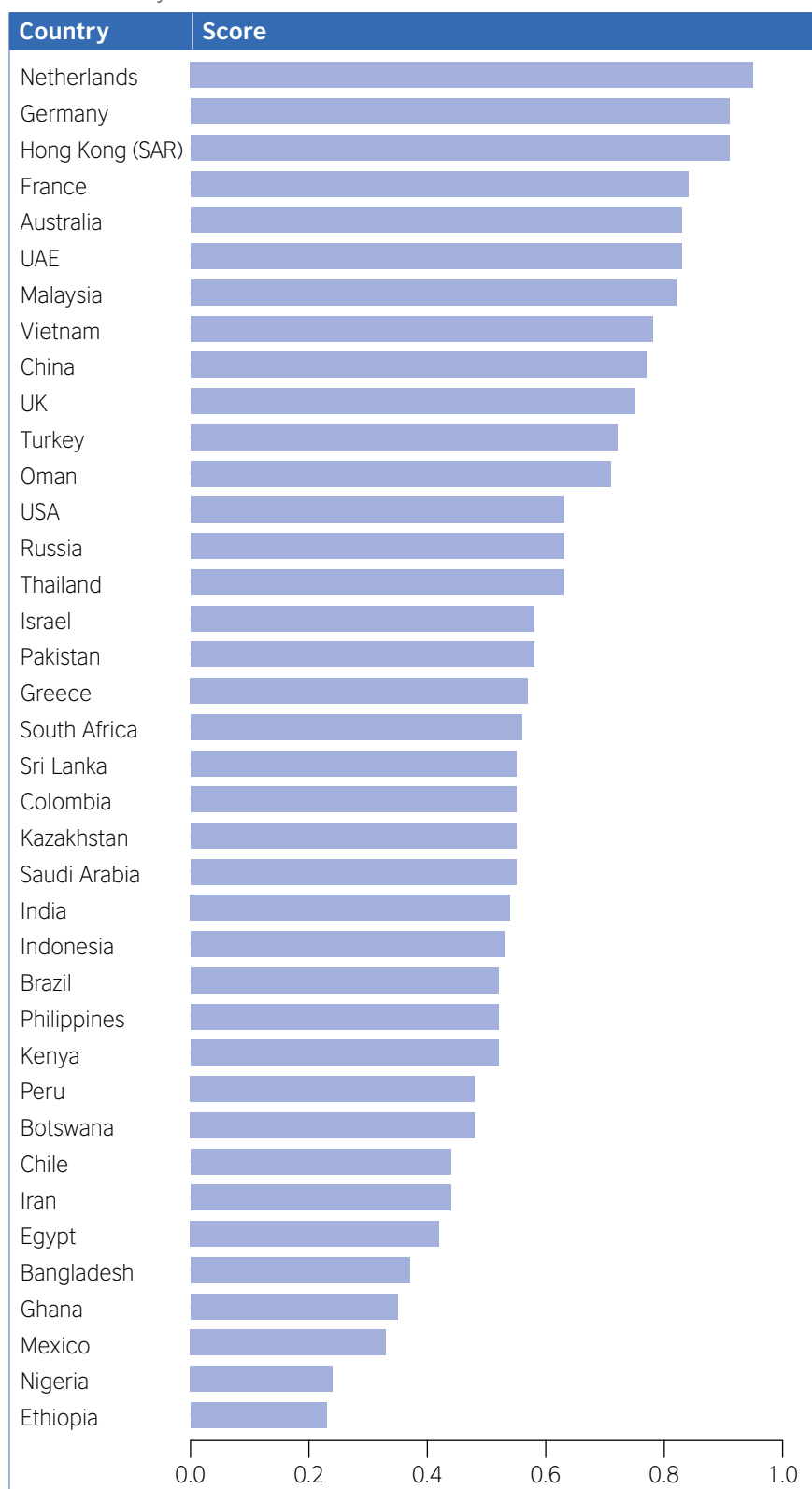
5.2 International student mobility

International student mobility has become an IHE priority across the majority of the studied national education systems.

From an institutional perspective, this research shows that the majority of national governments are preoccupied with student mobility. The most significant shift in priorities over the past decade is across countries and territories, which traditionally have been perceived as 'sources' of international students. Many of these countries have declared ambitions to become education hubs or have published international student recruitment targets, such as but not limited to:

- Malaysia (Aziz and Abdullah (2014)[6] and Ministry of Education Malaysia (2015)[7])
- Hong Kong (SAR) (Mok and Bodycott (2014)[8])
- Russia (The Ministry of Education and Science of the Russian Federation)[9])
- the UAE (Fox and Al Shamisi (2014)[10])
- Botswana (John et al. (2014)[11])
- Sri Lanka (Dou and Knight (2014)[12])
- Thailand (Royal Thai Embassy)[13])
- Turkey (Study in Turkey (2014)[14]).

Figure 2 shows the countries and territories with the strongest national support for international student mobility. It is important to note that alongside national IHE policies, student visas and opportunities to work during and after graduation bear significant weight in this category.

Figure 2: National policy and regulatory environment to support international student mobility

The *international student mobility* category contains 17 indicators, which are grouped into the following sets:

1. *Policy environment and support* looks at national IHE strategies in place: (a) body executing the strategy; international presence; (b) bilateral and multilateral agreements for international co-operation in higher education and research; (c) data collection infrastructure to support the internationalisation endeavours in the country (e.g. TNE data, international student data and research collaborations data); and (d) autonomy to set tuition fees. The countries and territories which perform strongly in this section are Australia, Hong Kong (SAR), the Netherlands and the UK. Bilateral agreements are an area where the majority of the countries perform well. All of the shortlisted countries have signed higher education and research agreements for international collaboration at ministry level.

2. *International student visas* looks at streamlined student visas, application procedures and transparency, students' ability to bring dependants, to work during study for a limited period and opportunity to participate in graduate employability schemes in the host country. This category has the highest average score across the studied nations. All except one of the studied countries and territories have streamlined their student visa processes. In contrast, only seven out of 38 countries have opened up their labour market to international graduates. Peru, at the point of this publication, was the last country to reform its student visa policy. A new law on immigration came into effect on 1 March 2017, which provides for

temporary and resident student visas. Both allow students to attend basic education, higher education or any formal programme that is legally recognised in Peru.[15] Special work permits are required, which can be obtained prior or during the study in Peru.

3. *Quality assurance and degree recognition* analyses countries' practices in admitting international students, international degree recognition and systems in place to support the teaching and assessment of international students. The majority of the countries with ambitions to recruit international students have streamlined their national qualification frameworks and degree recognition. While there is a major preoccupation with welcoming and teaching international students, there is less attention on the quality of education provision and assessment for international students. There are just a few countries catering for international student needs regarding quality teaching and evaluation. These are Australia, Germany, Malaysia, the Netherlands and the UK.

4. *Student mobility scholarships and sustainable policies* focus on:
    *   scholarships for study abroad and incoming international students
    *   policies and regulation for international education agents (for incoming international students and home students studying abroad)
    *   whether international students are displacing local students from disadvantaged backgrounds.

The criterion which appears to be least addressed is policies concerning international education agents. The Commission for Academic Accreditation (CAA) at the UAE Ministry of Higher

Education and Scientific Research has published criteria for licensure of student recruitment offices which are aimed at education agents and locally based recruitment offices of overseas universities.[16] Detailed lists of institutions holding the right permits are published on the CAA website.[17]

In contrast, the criteria which are best addressed relate to outbound scholarships and foreign language provision in the country. The countries with minimal efforts in this space are Australia, Russia and the UK. Many countries have introduced a formal tuition in English as part of the curriculum, which is in addition to a provision in the local language. There are variations across the public and private HEIs in the studied countries. One of the major attractions of TNE provision delivered overseas is that it is almost always delivered in English or another widely spoken language, which is particularly attractive to students.

In summary, international student mobility enjoys increasing national level support across the countries and territories included in this research. The countries which perform strongly in this category are those actively recruiting international students. A significant shift has been observed in countries that have traditionally imported higher education, with some declaring education hub ambitions. While the majority of the countries have streamlined their student visas policies, there is a significant scope for improvement in the area of opening up the local labour market for international graduates for a limited period, which would enable them to apply their new skills in an international environment. Quality assurance of education provision for international students is another area which can be further strengthened.

5.3 Transnational education

It is acknowledged that many terms (including 'Cross border education' and 'International programme and provider mobility') are used to refer broadly to education provision in a country different to the one of the awarding institution.

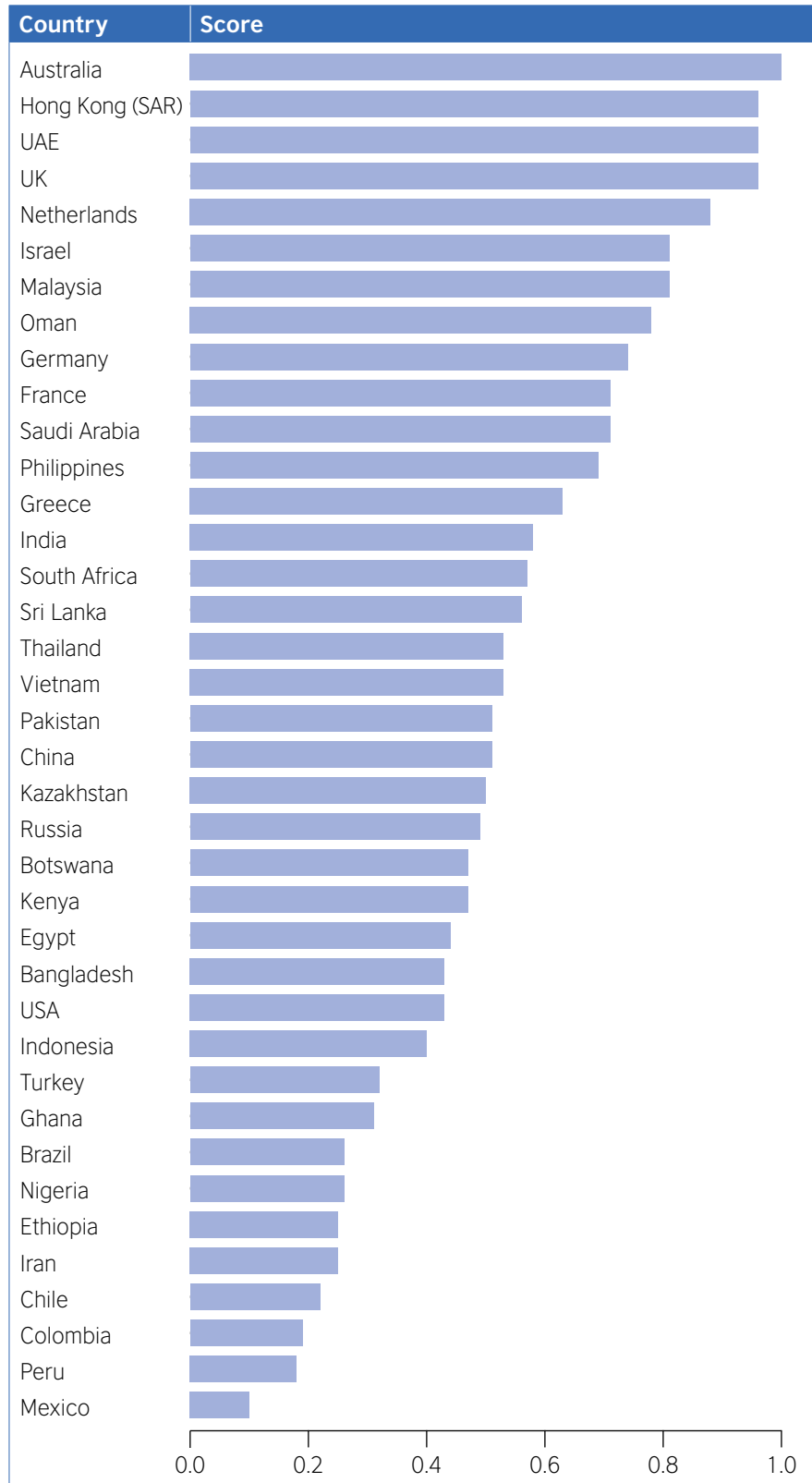In this study we use the term transnational education (TNE).

TNE has become part of the traditional higher education landscape. The TNE category in the thematic analysis of this study places equal importance on regulatory frameworks for inbound and outbound TNE programmes.

This category includes the following sets of indicators:

• *International mobility of educational programmes and providers* considers indicators which assess the regulatory provision for inbound and outbound TNE at programme and provider level, TNE regulations and their clarity

• *quality assurance of TNE* looks at quality standards for inbound and outbound TNE programmes, enforcement actions taken by the quality assurance agencies and international co-operation

• *recognition of TNE qualifications* covers the following indicators: recognition of TNE qualifications, active communication with the labour market regarding comparability of TNE qualifications and international co-operation entered into by the local quality assurance agency.

Each set of indicators contributes equally to the category score. Figure 3 plots the shortlisted countries and territories, depending on how many of the criteria they meet. Australia, Hong Kong (SAR), the UAE, the UK and the Netherlands demonstrate strongest support at the national level in the *TNE* category. While the countries with most supportive environments tend to be either strong on exporting TNE or allowing TNE imports, they have developed strong regulatory provision for both inbound and outbound TNE.

Figure 3: Transnational education engagement

Country	Score
Australia	
Hong Kong (SAR)	
UAE	
UK	
Netherlands	
Israel	
Malaysia	
Oman	
Germany	
France	
Saudi Arabia	
Philippines	
Greece	
India	
South Africa	
Sri Lanka	
Thailand	
Vietnam	
Pakistan	
China	
Kazakhstan	
Russia	
Botswana	
Kenya	
Egypt	
Bangladesh	
USA	
Indonesia	
Turkey	
Ghana	
Brazil	
Nigeria	
Ethiopia	
Iran	
Chile	
Colombia	
Peru	
Mexico	

Countries with HEIs that are proactive in internationalisation have developed frameworks which reflect activities in the country (McBurnie and Ziguras, 2007).[18] However, others are developing regulatory frameworks in expectation that activities may follow.

Oman provides a successful example of the latter. Oman's HEIs are comparatively young. The country's private education institutions were established by Royal Decree No. 41/96,[19] after which private provision rapidly expanded. This was followed by Royal Decree 67/2000, which regulates private HEIs and encourages academic affiliations with reputable overseas HEIs.

These collaborations aim to support quality of education provision in addition to its expansion. Notwithstanding its small population, Oman is one of the UK's largest TNE destinations (19,900 TNE students on UK programmes in 2015/16). Some 37 per cent of all UK TNE students in the Cooperation Council for the Arab States of the Gulf (also known as GCC) are concentrated in Oman.[20] Most of the students are on partnership-based TNE programmes, such as double and joint degrees, twinning (including twinning with localised components), franchises, validation, affiliations for quality assurance purpose, distance and online learning.[21]

In addition to supporting local capacity building and enhancing its quality, TNE provision is catering to the needs of diverse student audiences. TNE in Hong Kong (SAR), as an example, accommodates students from economically disadvantaged families (Forestier et al. (2014)).[22] Hong Kong (SAR) is one of the few regions which

provides bursaries to students on TNE programmes. In countries where labour markets are heavily reliant on third-country nationals, such as the UAE, TNE has emerged to cater to their needs. The majority of the TNE students in the UAE are from South Asia, North Africa and neighbouring countries.[23] One may thus argue TNE has widened local access to higher education to non-traditional university goers.

Countries, irrespective of whether their focus is on outbound or inbound TNE, continue to adjust their regulatory frameworks to respond to the changing global landscape. The Commission on Higher Education (CHED) in the Philippines is using a pilot project, TNE Links, as a means to develop local capacity in niche areas.[24] CHED has now published much clearer rules on the types of TNE which it supports. Its focus is on collaborative types of TNE which aim to strengthen the capacity of local education, such as double and joint degrees, twinning and franchises.

The Netherlands, as an example of a country changing its outbound TNE rules, is in the process of legislating changes in its TNE provision, which is expected to be published in the summer (Becker, 2017).[25] Historically, the Netherlands' approach towards international engagement mainly focused on international student mobility and collaborative TNE. Given shifts in the global higher education landscape, the country is adjusting its TNE strategy, which will allow for independently delivered TNE overseas, such as setting up international branch campuses.

All except three countries in this study have attempted, with varied success, to regulate TNE provision. Given the levels of alignment this requires, such as degree recognition, quality assurance and accreditation, the majority of nations have a strong record in regional and international collaboration on quality assurance. While there is a strong push to collaborate and learn from best practice developed elsewhere, the quality assurance of outbound TNE programmes is lagging behind. This presumably reflects the fact that the majority of the countries in this study are preoccupied with improving domestic higher education provision by importing TNE. As such, the quality of imported provision is of paramount importance. While many countries allow their HEIs to engage in outbound TNE, its quality appears to be left to the quality-assurance agency of the receiving country. Overall, most of the countries that are using TNE to support local capacity building and enhance education provision are less likely to have resources to export TNE.

5.4 International research engagement

Globally, there is a consensus about the important contribution international research collaborations make to higher education, the economy and society. Universities' research addresses global problems that can no longer be tackled in isolation. Over the decades, this has encouraged greater co-operation among research teams worldwide. The international competitiveness of a country's research output is often associated with how open it is for international collaborations. 'International collaboration is increasingly synonymous with excellent research', writes Jonathan Adams (2017).[26] The same study found out that only five per cent of the UK research output was produced in international collaborations in 1981. Today, around half of UK research is produced with international co-authors. Most of the growth in research over the past three decades came from jointly produced research with other nations.[27] Bilateral agreements and strong support for international research collaboration are areas where the majority of the countries perform strongly. The international mobility of researchers as an important factor in high research productivity and research quality is highlighted by a series of bibliometric studies which compare the quality of international research collaborations with that of nationally produced research. These conclude that international partnerships produce an output of superior quality (BIS, 2011;[28] BIS, 2013;[29] Royal Society, 2011[30]). The findings highlight the importance of both academic mobility and ongoing funding for collaborative research.

The *research engagement* category attempts to capture the will of national governments to support international research collaborations as well as the infrastructures in place to sustain them. This category draws on published research which has highlighted the benefits of academic and research mobility and support mechanisms that enable collaborations. The indicators in this category were developed under the National Policies Framework. They should, therefore, be treated as a work in progress which aims to capture the national will to engage in research.
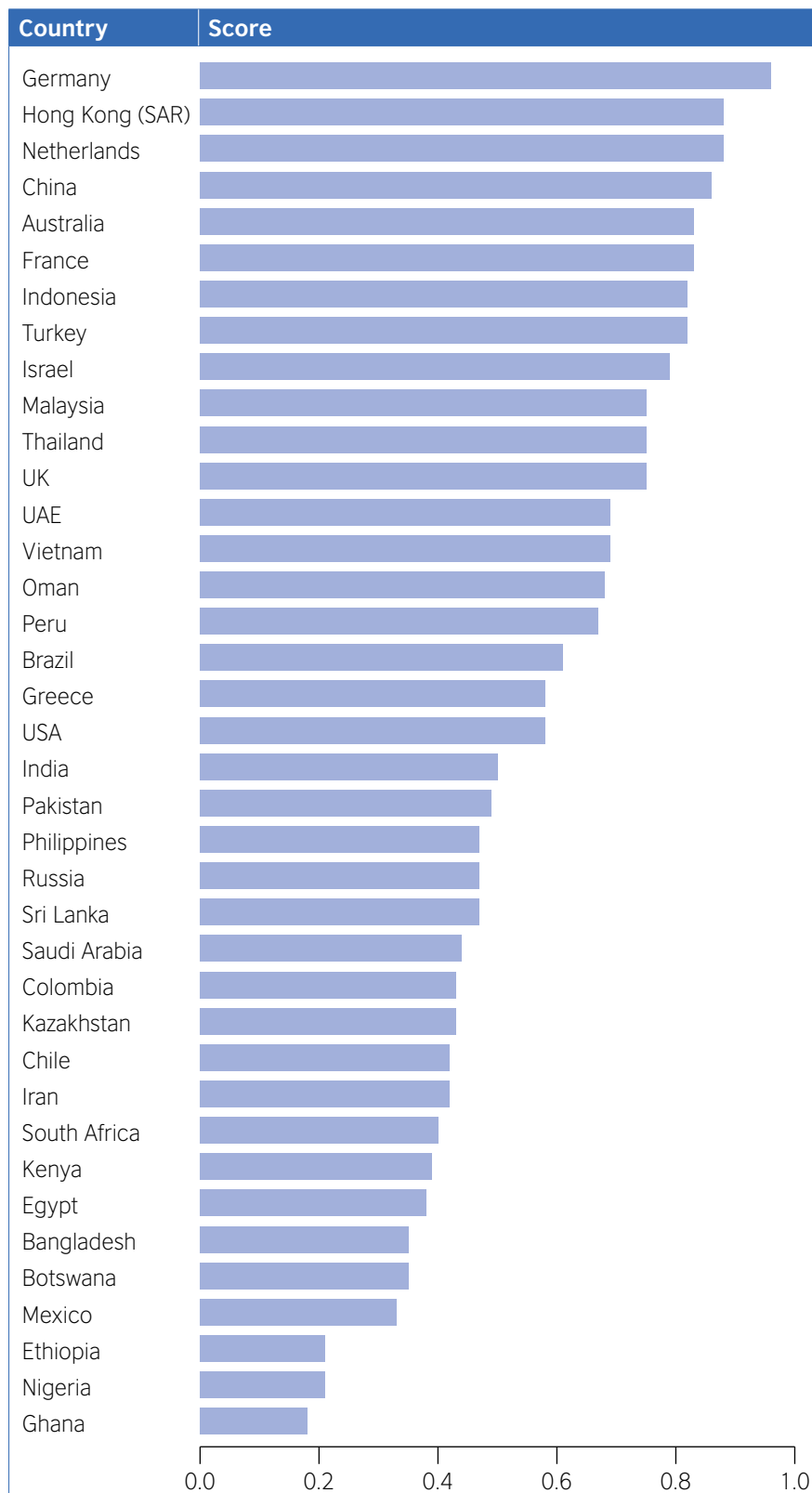
The *international research engagement* category draws on indicators grouped in the following sets:

- *visa policies for researchers and academics* assesses the availability of streamlined visa routes for academics and researchers, application procedures and opportunities to settle in the host country. The countries and territories with the most supportive research visa policies, which also allow individuals to settle in the country beyond the initial visit, are Australia, France, Germany, Israel, Hong Kong (SAR), Peru and the Netherlands. Peru was the most recent state to reform its visas to allow academics to undertake research in the country, including paid employment.[31] While many countries have not streamlined visas specifically for researchers, these are included within the 'highly skilled professionals' category where the application procedure appears straightforward

- *funding for academic/research mobility and sustainability* considers funding for inbound and outbound research schemes, research aid aimed at capacity building in Official Development Assistance countries and brain-drain policies in place with the aim of retaining domestic talent and considering the brain-drain effects on third-country nationals. The area which has the lowest support across the majority of countries is financial support for international researchers. Except for China and Thailand, the majority of the countries and territories with strong support in visiting researchers are mainly the advanced economies (Australia, France, Germany, Greece, Hong Kong (SAR), the Netherlands and the UK)

- *funding infrastructure for international research collaborations* assesses the inclusion of research produced in international co-operation in the national assessment reviews and whether the country actively funds international collaborations. The majority of the studied countries perform well on this measure. Almost all countries actively support international collaborations either through directly funding them, providing matched funding or specially developed schemes.

Figure 4 plots countries' national support for international research engagement. Volume of research funding is not included in this measure. However, any quantitative indicators can be used alongside the measure developed in this study for a comprehensive description of the research environment.

Figure 4: International research engagement*

Country	Score
Germany	
Hong Kong (SAR)	
Netherlands	
China	
Australia	
France	
Indonesia	
Turkey	
Israel	
Malaysia	
Thailand	
UK	
UAE	
Vietnam	
Oman	
Peru	
Brazil	
Greece	
USA	
India	
Pakistan	
Philippines	
Russia	
Sri Lanka	
Saudi Arabia	
Colombia	
Kazakhstan	
Chile	
Iran	
South Africa	
Kenya	
Egypt	
Bangladesh	
Botswana	
Mexico	
Ethiopia	
Nigeria	
Ghana	

0.0   0.2   0.4   0.6   0.8   1.0

This study shows a strong government support for international research collaborations. Official Development Assistance countries view research engagement as a means to develop research capacity, and they often co-fund research schemes initiated by other nations, such as the UK's Newton Fund.[32]

*As with all 26 countries included in the original study, the assessment for international research engagement for Turkey took place in winter/spring 2016. The political and education environment has changed significantly since then, which is not reflected in this volume of the study.

5.5 The regional dimension of IHE

The strongest support for international engagement is observed across the European countries, which reflects a high level of harmonisation of the education systems across the European Higher Education Area.[33] This is further strengthened by regional agencies such as the European Association for Quality Assurance in Higher Education[34] and streamlined degree recognition across the EU states. The EU flagship mobility programme Erasmus+ and its largest research and innovation programme, Horizon 2020, have given research collaborations, academic and student mobility significant stimuli. As such, they have affected all IHE categories in this research.

Table 8: Europe

	International student mobility	TNE	International research engagement
France	Very strong	Strong	Very strong
Germany	Very strong	Strong	Very strong
Greece	Strong	Strong	Strong
Netherlands	Very strong	Very strong	Very strong
UK	Very strong	Very strong	Very strong
Russia	Strong	Weak	Weak

Another region with strong support for international engagement is East Asia and Australasia. The region's top performers, Australia, Hong Kong (SAR) and Malaysia, have supportive policies across the main IHE categories: international student mobility, TNE and international research engagement.

The other countries studied here are part of ASEAN, where similar processes to the European Higher Education Area and the EU have started to take place. This is expected to improve the region's student and academic mobility further and strengthen TNE and research engagement.

Table 9: East Asia and Australasia

	International student mobility	TNE	International research engagement
Australia	Very strong	Very strong	Very strong
China	Very strong	Strong	Very strong
Hong Kong (SAR)	Very strong	Very strong	Very strong
Indonesia	Strong	Weak	Very strong
Malaysia	Very strong	Very strong	Very strong
Philippines	Strong	Strong	Weak
Thailand	Strong	Strong	Very strong
Vietnam	Very strong	Strong	Strong

In the Middle East and North Africa, the UAE offers comparatively strong support across all IHE areas in this study, followed by Israel and Oman. Support for TNE is particularly strong, followed by research engagement. The UAE has declared education hub aspirations and has become a preferred study destination at higher education level with students from neighbouring countries, South Asia and North Africa – mainly Egypt.

Table 10: The Middle East and North Africa

	International student mobility	**TNE**	**International research engagement**
Oman	Strong	Very strong	Strong
Saudi Arabia	Strong	Strong	Weak
UAE	Very strong	Very strong	Strong
Egypt	Weak	Weak	Weak
Iran	Weak	Very weak	Weak
Israel	Strong	Very strong	Very strong
Turkey	Strong	Weak	Very strong

In Central and South Asia, except for Bangladesh, where the higher education policy is currently being reviewed, the countries have strong policies which support international student mobility and TNE. Furthermore, Sri Lanka has announced education hub aspirations with a view to increasing student mobility to its universities.

Table 11: Central and South Asia

	International student mobility	**TNE**	**International research engagement**
Bangladesh	Weak	Weak	Weak
India	Strong	Strong	Strong
Kazakhstan	Strong	Strong	Weak
Pakistan	Strong	Strong	Weak
Sri Lanka	Strong	Strong	Weak

The Americas, including the USA, are mainly strong in student mobility and research engagement. The USA is the world's most popular destination with international students – more than a million students across the world chose the USA to pursue their higher education. The country's streamlined visa policies have extended graduate work opportunities for science, technology, engineering and maths students have stimulated postgraduate demand in these key subject areas. Any effects of the new administration remain to be seen.

The Latin American countries have strong regional mobility schemes. supported by national governments and backed by the region's trade blocs Mercosur[35] and the Pacific Alliance.[36] Brazil's Science without Borders was one of the world's largest student mobility schemes. While quite a few of the countries support research collaborations, there is limited evidence for supporting collaborative TNE engagement.

Table 12: The Americas

	International student mobility	TNE	International research engagement
Brazil	Strong	Weak	Strong
Chile	Weak	Very weak	Weak
Colombia	Strong	Very weak	Weak
Mexico	Weak	Very weak	Weak
Peru	Weak	Very weak	Strong
USA	Strong	Weak	Strong

The Sub-Saharan African countries studied in this research appear to have less co-ordinated government support for IHE. South Africa is the region's top destination for students from across the region. While the government is reluctant to be seen to pursue IHE, the country's universities compensate by running IHE activities, such as the ones organised by the International Education Association of South Africa.[37] Kenya is the only country in our sample which is part of the East African Community. Here, increased harmonisation of higher education policies are sought across the member states, such as degree recognition and credit transfers, local tuition fees for students from the region and greater collaboration between the universities.

Table 13: Sub-Saharan Africa

	International student mobility	TNE	International research engagement
Botswana	Weak	Weak	Weak
Ethiopia	Very weak	Very weak	Very weak
Ghana	Weak	Weak	Very weak
Kenya	Strong	Weak	Weak
Nigeria	Very weak	Very weak	Very weak
South Africa	Strong	Strong	Weak

Regional blocs, depending on how comprehensive and advanced they are, can support all strands of IHE engagement. It is likely that regional collaboration initiatives, such as the Association of South East Asian Nations (ASEAN)[38] and the East African Community, which aim at increased harmonisation of national higher education systems,[39] will facilitate, if not encourage, growth in South-to-South TNE collaborations.

6. Implications for higher education institutions

This section attempts to better identify the implications of this research for HEIs by providing further data analysis.

6.1 International student mobility and transnational education

Our data analysis shows that the countries and territories which have strong international student mobility policies are also strong on TNE. Figure 5 shows a strong positive relationship between the 'International student mobility' category and 'Transnational education' category (R=0.76). This may be partly explained by the fact that the mobility of students is an integral part of many types of TNE. Previous research has shown that a third of the international bachelor entrants to higher education programmes in England start their course overseas through a UK TNE programme.[40] Turkey is an example of one of the few countries with strong policies on international student mobility only and little support for TNE at the policy level (however, note that data for Turkey was collected as part of volume 1 of this study (March 2016)).

Figure 5: International student mobility and transnational education (with selected countries highlighted)
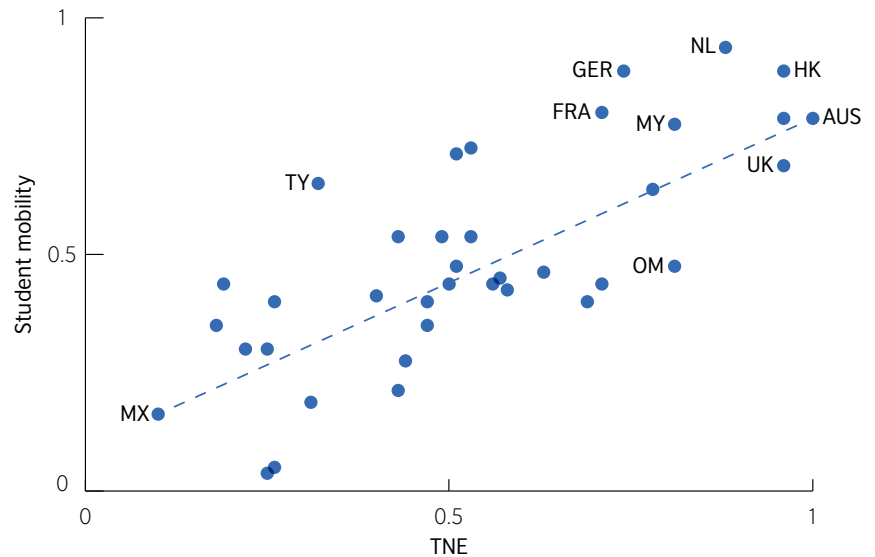
## 6.2 TNE provision, quality assurance and degree recognition

While most of the shortlisted states (71 per cent – 27 countries out of 38) have policies in place to support TNE provision, only a third have strong quality assurance for these programmes (34 per cent – 13 countries out of 38) and formally recognise TNE qualifications.

Overall, all countries and territories with strong quality assurance and degree recognition have policies which allow TNE provision. However, not all countries allowing TNE provision have adequate quality assurance and degree recognition in place. This implies that in these countries there is policy-level support for TNE provision, which is not backed by quality assurance frameworks.

There are examples where certain countries and territories start by allowing overseas TNE delivery, and at a later stage tighten the quality standards, this was the case in both Hong Kong (SAR) and Malaysia. This is described more extensively under the 'TNE life cycle' model by Tsiligiris (2014).[41]

Where TNE provision is encouraged but where there is no backing of quality standards, this may, potentially, cause problems to providers, leading, for example, to delays in licensing, lack of recognition of qualifications and potential reputational risks for HEIs.

Figure 6: Whether TNE is permitted vs quality assurance and recognition of TNE: (countries highlighted which allow TNE and support quality assurance of TNE)
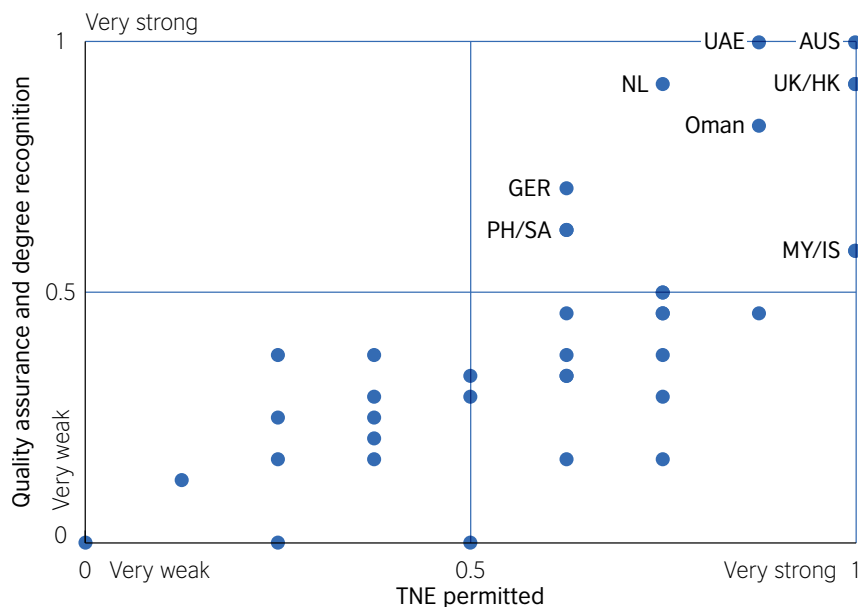
6.3 International research engagement

Overall, most of the shortlisted countries have policies which support international research engagement. Our data, however, shows that while there is a strong national push towards funding international research and structures which encourage greater international collaborations (82 per cent – 31 countries out of 38) there is less support for streamlined visa processes which allow researchers and academics to pursue their research interest beyond national borders (68 per cent – 26 countries out of 38). This may be explained by the fact that immigration issues are usually dealt with by departments other than ministries for higher education. This also suggests that lack of co-ordination between national government departments may have an adverse impact on IHE in the country.

7. Concluding thoughts and further research

International student mobility continues to be governments' most prominent initiative for higher education engagement. Increasingly, countries are declaring education hub aspiration with the ambition of signalling the excellence of their education systems to international students. This has contributed to streamlined student visas across most of the studied countries. An area where the majority of countries can improve is by allowing students to apply their newly acquired learning and skills in the local labour market for a limited period.

Research engagement is another area which has enjoyed a popularity and high level of national support. It is widely accepted that international collaborations contribute to high-impact research. Universities' league tables might have contributed to this development: research outputs primarily drive the global race to the top of the various ranking tables. This has had a positive impact on more research funds being unlocked to promote and support research partnerships. Many countries which are building their research capacity have funding earmarked for research produced with international co-authors (such as Malaysia and Indonesia).

Transnational education has seen a significant shift in its regulatory frameworks. Countries on both sides of TNE – inbound and outbound TNE activities – are adjusting their rules of engagement to better respond to changes in the global education landscape. An area which appears to lack alignment is TNE provision supported by strong quality assurance and degree recognition frameworks. Most of the shortlisted countries (27 out of 38) and territories support TNE provision, however, just over a third quality assure this provision (34 per cent – 13 countries) and formally recognise the respective TNE qualifications.

This research shows a strong positive relationship between national support for international student mobility and that for TNE. One explanation may be that mobility of students is increasingly featuring in TNE. More robust TNE data is needed to establish whether in addition to the above, TNE is increasingly used as a student recruitment vehicle for HEIs.

As well as countries, regional education blocs such as the EU, ASEAN and the East African Community are also playing an important role in facilitating TNE, student mobility and collaborative research.

This study has focused on identifying the existence of a range of national policies relating to IHE. We have not, at this stage, sought to investigate the extent to which these have been effectively implemented. Consequently, while the study identifies meaningful ways to engage across a wide range of countries, it does not measure practical barriers on the ground which HEIs may face when engaging in IHE. Further research is needed into the ease of operation across the studied countries and to explore any gaps between national IHE policies and their implementation.

8. End notes

1. The scope of this study includes Hong Kong, special administrative region of China. Although the authors recognise that Hong Kong is not formally a 'country', the report uses the term 'country' to include Hong Kong (SAR). The full list of countries and territories included in the study can be found in Table 3.

2. The Global Gauge of higher education policy: https://www.britishcouncil.org/education/ihe/knowledge-centre/global-landscape/global-gauge

3. Details of the steering group member institutions are listed on page 34.

4. McBurnie, G and Ziguras, C (2007) *Transnational Education: Issues and Trends in Offshore Higher Education.* New York: Routledge.

5. www.policyaddress.gov.hk/2017/eng/p57.html

6. Aziz, MIA and Abdullah, D (2014) 'Malaysia: Becoming an Education Hub to Serve National Development', in Knight, J (ed.) *International Education Hubs: Student, Talent, Knowledge-Innovation Models.* Springer. Available online at: www.springer.com/gp/book/9789400770249

7. Ministry of Education Malaysia (2015) *Malaysia Education Blueprint 2015–2025 (Higher Education).* Available online at: https://hea.uitm.edu.my/v1/index.php?option=com_content&view=article&id=246&Itemid=242

8. Mok, KH and Bodycott, P (2014) 'Hong Kong: The Quest for Regional Education Hub Status', in Knight, J (ed.) *International Education Hubs: Student, Talent, Knowledge-Innovation Models.* Springer. Available online at: www.springer.com/gp/book/9789400770249

9. The Ministry of Education and Science of the Russian Federation: Project 5-100: Russian Academic Excellence Project. Available online at: www.5top100.com/universities/

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12. Dou, L and Knight, J (2014) 'Emerging Hubs: South Korea, Sri Lanka, Mauritius, and Bahrain', in Knight, J (ed.) *International Education Hubs: Student, Talent, Knowledge-Innovation Models.* Springer. Available online at: www.springer.com/gp/book/9789400770249

13. Royal Thai Embassy. *Thailand to become a hub for international education.* Available online at: https://www.thaiembassy.sg/press_media/news-highlights/thailand-to-become-a-hub-for-international-education

14. Announcement made by the Foreign Economic Relations Board in 2014 and published by Study in Turkey: www.studyinturkey.com/content/sub/the_target_is_150_thousand_international_students.aspx

15. For further details on student visas for Peru, see: https://www.migraciones.gob.pe/informacion/DL1350_migraciones.pdf

16. https://www.caa.ae/caa/images/Requirements%20for%20Licensure%20-%20SRO.pdf

17. https://www.caa.ae/caa/DesktopModules/ServiceProviders.aspx

18. McBurnie, G and Ziguras, C (2007) *Transnational Education: Issues and Trends in Offshore Higher Education.* New York: Routledge.

19. www.educouncil.gov.om/en/page.php?scrollto=start&id=17

20. See HESA Aggregate Offshore Record 2015–16 (https://www.hesa.ac.uk/data-and-analysis/students/international-study) and UUKi (forthcoming) *State of the relationship: UK higher education engagement with the Cooperation Council for the Arab States of the Gulf.*

21. Based on interviews with British Council members of staff in Oman.

22. Forestier, K, Ilieva, J, Course, S and Cheung, J (2014) Transnational education in Hong Kong: Undergraduate student perceptions. *International Journal of Continuing Education and Lifelong Learning* 6/1: 57–82.

23. UUKi (forthcoming) *State of the relationship: UK higher education engagement with the Cooperation Council for the Arab States of the Gulf.*

24. CHED–British Council Joint Development of Niche Program through PH-UK Linkage: https://www.britishcouncil.ph/tne/about/the-project

25. Becker, R (2017) *Perspectives and Prospects as long-awaited TNE Bill is approved in the Netherlands.* Available online at: www.obhe.ac.uk/documents/view_details?id=1060

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27. *Ibid.*

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31. For details see: https://www.migraciones.gob.pe/informacion/DL1350_migraciones.pdf

32. For details see: www.newtonfund.ac.uk

33. www.ehea.info/pid35146/work-programme-2015-2018.html

34. www.enqa.eu/index.php/about-enqa

35. www.mercosur.int/

36. https://alianzapacifico.net/en/#becas

37. www.ieasa.studysa.org

38. www.rihed.seameo.org/about-us/

39. https://thepienews.com/news/east-african-community-become-harmonised-he-region/

40. HEFCE (2014) *Directions of travel: Transnational pathways into English higher education* (www.hefce.ac.uk/pubs/year/2014/201429/) and HEFCE (2015) *Transnational pathways to higher education in England* (www.hefce.ac.uk/pubs/year/2015/201508/)

41. Tsiligiris, V (2014) *Transnational education vs international student mobility: Substitutes or distinct markets?*, Observatory on Borderless Higher Education. Available online at: www.obhe.ac.uk/documents/view_details?id=952

9. Appendix

Table 1 (extended): Structure of the National Policies Framework

1 Openness and mobility	
1.1 IHE strategy	
Internationalisation strategy	Has the ministry of education (or equivalent) produced a detailed international higher education strategy (e.g. covering student mobility, research collaboration, development goals)?
Dedicated body	Is there a dedicated body (or bodies) promoting the internationalisation of higher education?
Overseas presence	Does the ministry of education or dedicated internationalisation body have a significant overseas presence, e.g. by way of overseas representative offices or participation in conferences, trade fairs and marketing events?
Bilateral agreements	Over the past five years, has the government made efforts to sustain or increase the number of bilateral agreements/memoranda of understanding signed between itself and foreign education ministries on the topic of collaboration in higher education?
Data collection and monitoring of internationalisation	Does the government monitor and produce data on the internationalisation of its higher education system, e.g. by producing data on international student and faculty mobility, programme and provider mobility, and research collaboration?
1.2 Student mobility policies	
Student visas	Do restrictions exist on foreign students and researchers to obtaining entry visas, e.g. depending on country of origin?
Visa procedures for international students	Are procedures for foreign students to obtain visas clear, transparent and consistent?
Living/working environment for international students	Do policies exist to make it easier for foreign students to come and live in the country, such as concerning employment (including post-study employment opportunities) or bringing spouses?
Fees for foreign students	Do public institutions have the authority to charge different fees to foreign students?
1.3 Academic mobility and research policies	
Academic visas	Are there any special regulations in place to make it easier for foreign teaching faculty and researchers to gain employment?
Visa procedures for academics	Are procedures for foreign teaching faculty and researchers to obtain visas clear, transparent and consistent?
Living/working environment for academics	Do policies exist to make it easier for foreign faculty and researchers to come and live in the country, such as concerning employment or bringing spouses?
Inclusion of international research in national assessment/review	Is research produced via international collaboration included in the national research assessment/review?
1.4 Programme and provider mobility	
Setting up operations by foreign institutions	Can foreign institutions set up their own legally recognised teaching/research entities?
Cross-border programme provision	Do regulations exist to allow for the provision of cross-border programmes by foreign providers, e.g. by way of twinning, programme articulations and distance learning?
Clarity and application of regulations for foreign institutions	Are legal regulations for foreign institutions clear, transparent and evenly enforced?
Domestic institutions abroad	Are public domestic institutions permitted to set up legally recognised teaching/ research entities abroad?

2. Quality assurance and degree recognition

2.1 International students' quality assurance and admissions

Entry/selection criteria for international students	Are education institutions provided with timely information, support and guidance by academic recognition bodies (or other bodies) to help select appropriately qualified foreign students for entry?
Code of practice for teaching/ assessing international students	Are there national bodies or other systems in place to monitor, revise and advise on institutions' procedures for teaching and assessing foreign students, e.g. by way of best practice surveys, advisory bodies or networks?
Policies/guidelines for engagement with recruitment agents: at home and overseas	Are there policies or procedures in place to advise local institutions on how best to engage with international agents for the recruitment of international students? This area includes framework of engagement, guidelines and code of conduct related to the country's HEI's engagement with agents based overseas and/or, equally, national-level oversight of education agents active in the respective country.

2.2 Quality assurance of academic programmes

Monitoring of foreign institutions	Do national quality assurance agencies regularly monitor, and if appropriate, accredit the cross-border activities of foreign institutions (e.g. distance learning, programme collaboration, branch campuses) in the home country of the quality assurance agency?
Monitoring of domestic institutions overseas	Do national quality assurance agencies advise, monitor and accredit the cross-border activities of domestic institutions (e.g. distance learning, programme collaboration, branch campuses)?
Enforcement action	Are national quality assurance agencies active at enforcing their standards and requirements, either for foreign institutions, domestic institutions overseas, or both if appropriate?
Collaboration with regional/ international QA agencies	Do national quality assurance agencies take an active part in international collaboration on quality assurance standards, e g. by adopting the UNESCO/Council of Europe Code of Good Practice in the Provision of Transnational Education and by taking part in regional and international networks?

2.3 Recognition of overseas qualifications

Foreign degree recognition	Is the process taken by national academic recognition bodies in recognising foreign qualifications clear, transparent and consistent?
Recognition of TNE qualifications	Do national academic recognition bodies make efforts to recognise TNE qualifications, e.g. by way of guidelines or TNE code of good practice?
Communication with labour market	Do national academic recognition bodies work to provide clear and timely information to the labour market and other professional bodies on the comparability of foreign/TNE qualifications?
Collaboration with regional/ international recognition agencies	Do national academic recognition bodies take an active part in attempts to improve recognition procedures across borders, e.g. by signing up to UNESCO regional conventions; the Bologna Process, and, where appropriate, by establishing bilateral agreements on degree recognition?

3. Access and sustainability

3.1 Student mobility funding

Outbound scholarships/access to student loans for study abroad	Do scholarship programmes for studying abroad exist, are they well publicised and are they available at all levels of study?
Inbound scholarships/access to student loans for international students	Do scholarship programmes for foreign students exist, are they well publicised and are they available at all levels of study?

3.2 Academic mobility and research funding	
Outbound academic programmes	Do funding programmes exist for teachers and researchers to undertake posts abroad?
Inbound academic programmes	Do funding programmes exist to allow foreign teachers and researchers to undertake posts in the home country?
Funding of international research collaboration	Do funding programmes exist to promote international collaboration in research … addressing issues of global importance … agreements between national and foreign funding bodies?

3.3 Sustainable development policies	
Anti-displacement policies	Does the state actively seek to avoid the displacement of low-income or marginalised domestic students by foreign students, e.g. by way of quotas, grants or scholarships?
Anti-brain-drain policies	Does the government actively seek to counteract brain drain by attracting outbound students and scholars to return home, e.g. by offering employment or by linking return to funding?
Aid to developing countries and regions	Does the government engage in development projects to support capacity building in international higher education either at home or abroad, e.g. by offering grants to students from low-income countries/regions or by investing in technical capacity-building projects?
Foreign language and intercultural competence policies	Does the government have policies in place to promote second-language competence and intercultural awareness?

Table 2 (extended): Thematic framework for analysis of national policies

This table outlines how the measures (detailed in Table 1) have been re-configured to create a thematic framework more aligned to the activities of HE institutions.

International student mobility	Contribution to overall score
1. Policy environment and support for international student mobility	**1/4*(0.33)**
Internationalisation strategy	
Dedicated body	
Overseas presence	
Bilateral agreements	
Fees for foreign students	
Data collection and monitoring of internationalisation	
2. Student visas	**1/4*(0.33)**
Student visas	
Visa procedures for international students	
Living/working environment for international students	
Fees for foreign students	
3. Quality assurance, selection of international students and degree recognition	**1/4*(0.33)**
Entry/selection criteria for international students	
Code of practice for teaching/assessing international students	
Foreign degree recognition	
4. Student mobility scholarships and sustainability policies	**1/4*(0.33)**
Outbound scholarships/access to student loans for study abroad	
Inbound scholarships/access to student loans for international students	
Policies/guidelines for engagement with recruitment agents	
Anti-displacement policies	
Foreign language provision	
Overall international student mobility total	**0.33**

Transnational education	Contribution to overall score
1. International mobility of academic programmes and HEIs	1/3*(0.33)
Setting up operations by foreign institutions	
Cross-border programme provision	
Clarity and application of regulations for foreign institutions	
Domestic institutions abroad	
2. Quality assurance of programme and provider mobility	1/3*(0.33)
Monitoring of foreign institutions	
Monitoring of domestic institutions overseas	
Enforcement action	
Collaboration with regional/international QA agencies	
3. Recognition of TNE qualifications	1/3*(0.33)
Recognition of TNE qualifications	
Communication with labour market	
Collaboration with regional/international recognition agencies	
Overall transnational education total	**0.33**

International research engagement	
1. Visa policies for researchers and academics	1/3*(0.33)
Academic visas	
Visa procedures for academics	
Living/working environment for academics	
2. Funding for academic/research mobility and sustainability	1/3*(0.33)
Outbound academic programmes	
Inbound academic programmes	
Anti-brain-drain policies	
Government engagement in IHE capacity-building	
3. International research engagement	1/3*(0.33)
Inclusion of international research in national assessment/review	
Funding of international research collaboration	
Overall international research engagement total	**0.33**
Overall total	**1.00**

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This study is of use to government departments, higher education agencies and stakeholders, HEI leaders and education professionals with an interest in international higher education.