

International programme and provider mobility (IPPM) in selected African countries

A mapping study of IPPM national policies,
regulations and activities

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Acknowledgements

This British Council study was conducted in association with the Ali Mazrui Centre for Higher Education, University of Johannesburg as part of my ongoing work as a Distinguished Visiting Professor at the centre. The report is the result of a strong team of collaborators who worked on reviewing the relevant policy documents and data sources for the six case study countries. I want to thank Diane Simpson from the University of Toronto for her expertise and extensive review of policy documents, and the group of post-doctorate fellows from the University of Johannesburg for their tireless research efforts and advice on national regulatory issues. They included Dr Sylvestre Nzahabwanayo, Dr Epimaque Niyibizi, Dr Linet Imbosa Muhati-Nyakundi and Dr Beatrice Akala. Special thanks are due to Dr James Jowi of the African Network for Internationalization of Education for his help in identifying the key people to interview during the country field visits and accompanying me on the meetings in Nairobi. Thanks also to Pius Achanga, Chritianne Badoo, Arunen Valaydon, Shaheen Motala Timol and John McNamara for their input and feedback on the draft report. Appreciation is extended to the individuals from all six countries who kindly agreed to be interviewed. They provided important insights and information.

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March 2019

Foreword

Between 2013 and 2017 the British Council and the German Academic exchange service (DAAD) collaborated to support research on different aspects of TNE. The executive summaries of each of these reports are included as appendices to this report. *Impacts of transnational education on host countries* (2014) clearly demonstrated that TNE host countries believed there were academic, skills development and social/cultural benefits to TNE. However, there was very little hard data to support these perceptions. A follow-up study, *Transnational education data collection systems: awareness, analysis, action* (2015) examined the TNE data collection systems in both host and sending countries and found that very few host countries had robust data on TNE provision even though it represented an important part of their higher education system. A key finding was that there is a multitude of different terms used to describe the same type of programme and provider mobility (IPPM). These insights led to a project in 2017 which focused on developing a common TNE Classification Framework for IPPM and TNE data collection guidelines. These tools were designed to support TNE active countries to gather relevant data for the development of appropriate policies and regulations, and help with overall higher education enrolment planning.

This report on IPPM in selected African countries, commissioned by the British Council, builds on this collaboration with a focus on understanding IPPM from the perspective of six African countries. While international student and staff mobility has been an area of some research in Africa, very little attention has been given to studying the mobility of international providers. This study has focused on mapping foreign higher education providers and programmes which are currently operating in the six countries of East Africa, and identifying which national/regional policies exist to establish and regulate these foreign programmes and providers.

The result is a fascinating insight into IPPM policy and practice in the region and how different models can benefit host countries in different ways, and I have no doubt it will provide very valuable analysis to those considering setting up new IPPM operations in the region. The report also suggests a very important link between IPPM and potential to build capacity at HE system level – something which warrants further study and analysis.

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Executive summary

Purpose of report and mapping study

This report aims to increase awareness of the current status of international programme and provider mobility (IPPM) in selected African countries and to reflect on its potential to increase access to higher education, diversify programme offer and expand the range of foreign providers and partnerships. The report presents the results from the British Council's IPPM mapping study in selected African countries, which focused on analysing national policy and regulations pertaining to different modes of IPPM and identifying foreign higher education providers and programmes. The six country case studies included in the study were Ghana, Kenya, Mauritius, Rwanda, South Africa and Uganda.

IPPM Classification Framework

The term *IPPM* is used in this report to emphasise that the focus is solely on higher providers and programmes that cross borders to offer higher education opportunities to students in their home country and region. This differs from students who move to foreign countries for their higher education studies. Using the term IPPM also clarifies the confusion about the meaning of related terms such as *transnational*, *cross-border* and *offshore education*, which often include IPPM activities as well as international student and scholar mobility (ISSM).

Around the world, international academic mobility is increasing in scale and scope. Africa is no exception. It is no longer just students who are moving – so are programmes and providers. To date, very little attention has been given to studying the mobility of international providers and programmes within Africa. The modes of IPPM are varied and include international branch campuses, foreign private universities, foreign joint distance education institutions and international joint universities. Programme mobility includes franchise arrangements, and collaborative programmes such as double/joint degree and distance education with local partners.

To fully understand the analysis of the IPPM policies and activities in the country case studies, the IPPM Classification Framework is discussed. It highlights the differences between the *independent approach*, including franchise arrangements, international branch campuses and self-study distance education, from the *collaborative approach*, which includes partnership programmes like double and joint degrees, international joint universities and distance education with a local academic partner.

Importance of national context

To provide important contextual information for the country case studies, key indicators such as population, literacy rates, GDP per capita and the gross enrolment ratio (GER – percentage of eligible students enrolled in tertiary education) are presented. A comparison across the six country case studies clearly demonstrates that Mauritius has the highest proportion of eligible students enrolled in tertiary education, with Rwanda and Uganda having the least. This leads to the questions as to what role IPPM has or could have in increasing access to higher education for domestic students in countries with low GERs.

Country case studies

A common outline for the six case studies was used, which included the following topics:

- national context
- overview of the higher education system
- national regulatory bodies for higher education
- a review of the national laws, policies and regulations pertaining to IPPM
- a description of the known IPPM activities both incoming and outgoing
- national sources of data on IPPM.

While information was not available for each topic, the case studies provide further insight into the status of IPPM policies and activities in each country. The two most popular modes of IPPM were international branch campuses and franchise programmes. Self-study distance education is common but there is no hard data on enrolment rates. Of interest is that these three modes represent the independent approach to IPPM. It was challenging to get reliable data on international partnership programmes, but anecdotal evidence indicates that collaborative programmes exist and are usually funded by foreign donors, putting the sustainability of these initiatives in question.

Overall, there was a significant difference across the countries in terms of available information and the dates of policy documents and reports. This made comparison across the six countries rather tenuous. However, a number of important cross-cutting themes and issues were identified.

Cross-cutting themes and issues

Transformation of international branch campuses into national private universities. In many cases, the first universities established in these six countries were done in co-operation with international partners who provided the curriculum and qualification. Eventually these universities became nationalised into domestic public institutions offering their own qualifications, not those of the original parent institution. The same transformation is happening today. The implications of foreign private institutions and branch campuses becoming nationalised is an interesting trend and warrants further investigation.

Lack of differentiation between national private institutions and foreign private institutions.

When a country lists the registered/accredited higher education institutions they are usually divided into two categories: public universities (meaning publicly funded) and private institutions (not publicly funded). The list of private institutions does not differentiate a domestic private institution from a foreign private one. Even if a foreign university is identified, it is challenging to determine whether it is a foreign-owned institution, a branch campus of a foreign parent university or a local institution that has franchise arrangements with a foreign institution. Furthermore, there is also not enough information available to determine whose qualification is offered. National policies need to be updated and elaborated in order to have the appropriate policies in place for the different modes of IPPM and to differentiate between local and foreign private institutions, especially in terms of whose qualification is offered.

Registered, licensed and accredited. These terms are used very differently across countries within Africa and also among foreign partners. The local context has to be respected and one cannot expect a standardised use of terms. However, in the definitions set out for national laws and regulations regarding the establishment of international partnerships and foreign institutions, more attention needs to be paid to how these terms are used and differentiated from each other.

Double and joint degrees. Collaborative academic programmes between a local and international university are growing in number and diversity of arrangements. The majority of countries, South Africa being the exception, have not yet analysed the arrangements and implications of joint and double degrees and have not addressed them in their policies and regulations. This needs to change. The growing number of double degree programmes based on double counting of the same credits for two different degree certificates is jeopardising the recognition and integrity of the degrees offered through IPPM.

International institutional partnerships. In many cases there is a blurred distinction as to whether the collaboration is between two partner universities or whether it is a franchise agreement between a foreign institution that is partnering with a local host country private company. It is important that national regulations and policies pay more attention to the different regulatory requirements for the six modes of IPPM, especially in terms of registration, quality assurance and qualification recognition.

Incoming versus outgoing IPPM activities.

In general, more attention is being given to incoming IPPM activities than outgoing IPPM provision. The difference in emphasis on incoming versus outgoing IPPM appropriately reflects the current priorities of each country. But, as IPPM activities increase in Africa, there is an imperative to ensure that both incoming and outgoing IPPM activities are included in national policies and that data is collected and analysed on both.

Mutual recognition of accreditation. National policies that cover incoming IPPM activities acknowledge the importance of quality assurance and accreditation. This has been an important step forward in the last decade and helps to ensure the quality and sustainability of IPPM-delivered education. In the future, more attention needs to be given to how arrangements can be made for mutual recognition of accreditation processes of IPPM programmes and collaborations between sending and host countries. This will help to preserve the high standards of quality but perhaps decrease some of the duplication and bureaucracy now growing around accreditation of IPPM. Hopefully, it will mean that the accreditation regulations will retain a focus on quality as the goal, not mere compliance.

Agreements and communication between host and sending countries. Both IPPM host and sending countries need to be better informed about the national regulations of the partner country in terms of institutional and programme accreditation, financial arrangements, MOUs and recognition of qualifications. There are instances when international branch closures by the sending country were not communicated to the host government. This may have significant implications for enrolment planning and programme offer of the host country, and thus it needs to be aware of closures of any and all types of IPPM activities.

Collection and management of IPPM data.

It is becoming increasingly important to distinguish between IPPM activities that are collaborative in nature, such as partnership programmes and international joint universities, and those that are independent, such as franchise arrangements and international branch campuses. This distinction is fundamental for both the collection of data on these activities and for the development of appropriate policies and regulations. Awareness of the importance and capacity to collect enrolment and programme data is a matter of increasing urgency in IPPM-active African countries.

Reactive versus strategic approach. With the exception of Mauritius, few countries have given serious consideration of how to strategically use IPPM as a tool to increase access to higher education, diversify programme offer or introduce new higher education policies and pedagogies. Yet, two of the country case studies (Rwanda and Uganda) have GERs of less than five per cent, and two more (Ghana and Kenya) have less than 20 per cent. Most of the analysis on the role and benefits of IPPM has been done by sending countries. Host countries have to start doing the same. African host countries that want to increase access to higher education but do not have the financial or human resources to establish new tertiary education institutions may benefit from considering how to develop a new strategy to attract foreign universities to establish branch campuses, franchise arrangements and partnership programmes. All in all, it requires countries to move from a reactive approach to IPPM to being more proactive and strategic. This necessitates having a five-year assessment on the higher education and labour needs of the country and the potential role that foreign partners and providers can play.

Awareness and capacity building

There are a broad range of issues related to IPPM policy development that require further examination in the African context. These include, but are not limited to, registration and licensing, quality assurance and accreditation procedures, availability of domestic scholarships for local students registered in foreign programmes, joint and double degree qualifications, funding mechanisms, recognition of qualifications, and governance of joint institutions and programmes. Important to note is that the different modes of IPPM often require that specific aspects and issues be addressed in the regulations. One size does not fit all.

Macro issues that merit further investigation include the rationales and expected outcomes driving host and sending countries/institutions to pursue IPPM opportunities. Because IPPM focuses primarily on the design and delivery of academic programmes across borders there is an enormous amount of research to do on issues related to curriculum design and the teaching-learning process.

Research on IPPM, whether it is applied, conceptual or theoretical, requires reliable and robust data. To date, there are but a handful of countries in Africa that have managed to collect IPPM data on enrolments, programme level and discipline, sending/foreign partner country, and qualifications offered for each mode of IPPM delivery. Capacity building is important to help countries develop standalone or integrated IPPM data collection systems. African countries are currently facing major challenges and opportunities to modernise their higher education management information systems, and it is timely to start including IPPM data.

Finally, in other parts of the world IPPM has been used in a development co-operation context to help developing nations or countries recovering from a period of economic or political instability to rebuild their higher education sector. While sending students to foreign countries for their higher education in an effort to increase human resource capacity is a worthwhile endeavour, there is always the risk of non-returnees. IPPM can offer opportunities to provide access to local students as well as undertake capacity-building partnerships and initiatives with local higher education institutions. The potential role that IPPM can play in helping African countries that are emerging from a period of political unrest and economic instability to rebuild and strengthen their tertiary education sector warrants serious consideration.

The next generation of international education policy analysts, researchers and scholars, especially from Africa, need to be convinced of the need for closer scrutiny of IPPM developments in Africa. Policy development, data collection and management, and research on IPPM need to be a higher priority in order to ensure that Africa benefits from the growing IPPM phenomenon.

Key messages

1. IPPM is growing at a moderate rate but expected to significantly increase. It has been demonstrated that IPPM has the potential to increase access to higher education. Greater attention and capacity building is needed to develop appropriate policy and regulatory frameworks for IPPM regarding:
 - the different modes of IPPM activities: branch campuses, partnership programmes, distance education and franchising arrangements have both common and different aspects that need to be addressed in national and institutional policies
 - incoming and outgoing IPPM: as more African countries are engaged in both incoming and outgoing IPPM activities, a sharper focus is needed to understand the differing rationales, intended outcomes and regulatory processes of host and receiving countries.
2. To take advantage of the benefits of IPPM for broadening access to higher education, host governments need to take a more strategic and informed approach to using the different modes of IPPM to their advantage, especially in relation to access for specific target groups, needed academic programmes and requirements of the labour market.
3. Quality assurance and accreditation of IPPM are fundamental to its success. Major progress has been made but further development is needed in terms of the QAA policies and processes for the different IPPM modes and the potential for mutual recognition of accreditation.
4. The rationales as well as the academic, economic, sociocultural and political impacts of IPPM for both host and sending countries merit further investigation. Research on benefits, risks and unintended consequences for all actors and beneficiaries of IPPM is required.
5. Capacity building would benefit African governments and institutions to plan more proactively in terms of using IPPM to increase enrolments, improve IPPM policy development and establish IPPM data collection/management systems.

1 Introduction

Purpose of report

This report aims to increase awareness of the current status of international programme and provider mobility (IPPM) in selected African countries and to reflect on its potential to increase access to higher education, diversify programme offer and expand the range of providers offering international programmes and qualifications. The report presents the results from the British Council's IPPM mapping study in selected African countries, which focused on analysing national policy and regulations pertaining to different aspects of IPPM and to identifying, to the extent possible, foreign higher education providers and programmes.

The term *IPPM* is intentionally used in this report to clearly differentiate it from international scholar and student mobility (ISSM) and to avoid the confusion surrounding the use of the terms *transnational*, *cross-border* and *offshore education*, which often include both IPPM and ISSM.

Objectives of IPPM mapping study

The IPPM mapping study in selected African countries builds on past studies on different aspects of IPPM (TNE) completed by Knight and McNamara (2015, 2016, 2017)¹ for the British Council and DAAD. This report is the first report that focuses solely on the status of IPPM in Africa.

While there has been some research on international student mobility in Africa, no work has been done to systematically review African national policies and data collection systems for IPPM. Given that there is increasing IPPM activity in Africa, it was timely to undertake a preliminary mapping study so that policies (e.g. licensing, quality assurance, awarding of qualifications and recognition of qualifications) and eventually appropriate data collection systems can be established in order to monitor new developments, analyse trends, enhance benefits, minimise risks and avoid negative unintended consequences.

The current study focused on two major aspects: mapping foreign higher education providers and programmes that are currently operating in six countries of Sub-Saharan Africa, and identifying which national/regional policies exist to establish and regulate these foreign programmes and providers. The objectives of the study were to:

- review national higher education policies to determine whether there are enabling or regulating policies in effect for the establishment, licensing, monitoring and quality assurance of foreign providers or programmes operating in the selected African countries
- identify which foreign providers/universities/branch campuses (both African and International) are operating in six African countries and, where possible, to determine the source country, what programmes and qualifications are offered, and what mode of delivery is being using
- identify which foreign programmes are being provided on a franchise basis or in collaboration with a local university
- determine whether the national data collection agencies/systems in each country capture and analyse information about IPPM in their country.

The countries chosen for this study represent diversity in terms of experience and status of IPPM activities, existence of national-level policies to enable and regulate IPPM activities, and maturity of national higher education data gathering systems. Thus, this group of countries do not necessarily represent the countries with the bulk of IPPM activity in Africa but instead aim to represent different levels of involvement and development. The six selected countries are Ghana, Kenya, Mauritius, Rwanda, South Africa and Uganda.

¹ See the appendices for the executive summaries of these studies.

Challenges in collecting IPPM data

There are systemic challenges to studying IPPM activities and policies in Africa. First, many countries do not have a robust higher education data collection and management system, and second, for those countries that do, IPPM is not included. There are some exceptions to this, for example Mauritius, which is why it has been included in the study. Nevertheless, it is important to start with a preliminary mapping study in order to get a set of benchmarks that can be used to assess needs and opportunities for IPPM, track and plan for future IPPM developments, assess what kind of data systems exist or need to be enhanced at the national and regional levels, and build capacity to develop appropriate enabling and regulatory policies.

While IPPM is not new to Africa, as evidenced by the fact that several of the first African universities were established by colonial powers 50 or 60 years ago, the landscape of IPPM has changed dramatically in the last two decades.

The changing landscape of international academic mobility

International academic mobility is increasing in scale and scope. It is no longer just students who are moving – so are programmes and providers. To date, very little attention has been given to studying the mobility of international providers in Africa. The modes of IPPM are varied and include international branch campuses, foreign private universities, foreign distance education institutions and international joint universities. Programme mobility includes franchise arrangements, double/joint degree partnerships, and distance education such as massive open online courses (MOOCs).

The significant role that IPPM can play in terms of increasing access of local students to higher education is demonstrated by the statistics coming from African countries such as Mauritius, where in 2016 approximately 43 per cent of all local students were registered with some type of foreign provider for their academic study and qualification. In Botswana, there are approximately 30 per cent of local students studying in IPPM programmes. IPPM can also help to increase access and diversify programme offer in a host country, as well as demonstrate different teaching and learning practices and policies.

In terms of IPPM sending countries, the growth in enrolments and the diversity of IPPM modes of delivery is vividly illustrated by the UK example. According to a 2016² report by Universities UK and the British Council entitled *The Scale and Scope of UK Higher Education Transnational Education*, 52 per cent of all international students who are enrolled in a UK qualification awarding programme take some or all their programme through programmes delivered to the students. That means that just over half of total registered international students are not moving to a UK-based institution for their full programme; instead they are enrolled in an IPPM-type programme offered by the UK higher education institution (HEI)/provider in another country, usually their home or nearby neighbouring country. Thus, there are more UK international students studying in higher education programmes outside the UK than in UK-based universities, and many of these students are African.

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

In spite of the fact that IPPM is increasing exponentially, there is a significant lack of reliable information regarding IPPM enrolments and the characteristics of different IPPM modes. This means that for many countries there is insufficient information to effectively include IPPM in their higher education planning, policy and regulatory processes. This can limit the potential benefits of IPPM and cause unnecessary risks.

Terminology chaos

Recent studies indicate that there are over 40 different terms being used around the world to describe the different modes of IPPM. In sub-Saharan Africa for example, the term *foreign private institution* is used more than *international branch campus*. To add to the confusion, the same term, such as *franchise programme*, is used to denote very different modes of IPPM, while different terms are being used to describe the same mode of IPPM. The result is terminology chaos.

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

To provide some structure and logic to understanding the different modes of IPPM and how they relate to each other, an IPPM Classification Framework³ has been developed and is discussed in the next section.

³ The IPPM Classification Framework is an updated version of the TNE Common Classification Framework for IPPM. See Knight, J and McNamara (2017) *Transnational education: A classification framework and data collection guidelines for international programme and provider mobility (IPPM)*. British Council and DAAD. Available online at: www.britishcouncil.org/sites/default/files/tne_classification_framework-final.pdf

2 The IPPM Classification Framework⁴

Objectives

The objectives of the framework are to:

- provide some clarity and common interpretations of the different modes and categories of IPPM. This requires the framework to be robust enough to ensure that the characteristics of each IPPM model are clearly defined, but flexible enough to reflect the realities and different contexts
- provide a foundation to help systematise data collection and management within and across countries through IPPM data collection guidelines.

Users of the framework include HEIs, higher education agencies, government departments and quality assurance agencies.

Two organising principles of the Classification Framework

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

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

Table 1: Independent versus collaborative programme and provider mobility

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

The distinction between academic *collaborative* provision and *independent* provision is central to the framework. It has important implications for both host country and sending country regulations and policies related to registration, external quality assurance, awarding of qualifications, degree recognition, responsibility for the curriculum and data management. Each type of IPPM also provides different benefits, as well as risks.

The collaborative IPPM programmes offer a number of benefits such as:

- opportunities for joint curriculum development and delivery to ensure that programmes are relevant to the local context
- possibilities for joint research on locally relevant topics
- the potential for capacity building and internationalisation of both the local host and foreign sending institutions.

⁴ This chapter is an edited version of Chapter 2 of the Knight and McNamara (2017) report on the Classification Framework.

Independent IPPM provision normally provides:

- a curriculum designed, delivered and quality-assured according to the regulations and standards of the sending country and the qualification offered is from the foreign provider
- for many students in host countries having a foreign-based curriculum, pedagogy and qualification is the most attractive and sought-after feature because it is more affordable than travelling abroad, yet offers a foreign qualification often attractive to employers.

The second principle relates to six distinct categories or modes of IPPM as identified in Table 2. The six categories represent different modes of international programme and provider delivery, and are carefully aligned with the independent or collaborative approaches.

Table 2: Six categories of modes of programme and provider mobility

Independent	Collaborative
Franchise programmes	Partnership programmes
International branch campus	International joint universities
Self-study distance education	Distance education with a local academic partner

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

The structure of the IPPM Classification Framework

Table 3 integrates the two organising principles into one framework and provides a short description and set of commonly used terms for each of the six categories. To ensure that the differences (or similarities) among the six categories are clear and understood, there are three key criteria or questions that are used to help to delineate and differentiate the characteristics of each mode or category. The three fundamental questions are:

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

While there are always exceptions, the overall logic is that for *independent IPPM provision* the sending country has primary responsibility for the curriculum, the qualification awarded and external quality assurance. For *collaborative IPPM provision* both the host and sending countries share or have joint responsibility for one or all of these three aspects of IPPM programmes.

Table 3: The IPPM Classification Framework

Two major approaches to IPPM provision	
<p>Independent provision</p> <p>A foreign sending HEI/provider is primarily responsible for the design, delivery and external quality assurance of their academic programmes and qualifications being offered in another country.</p>	<p>Collaborative provision</p> <p>A foreign sending HEI/provider and host country HEI/provider work together on the design, delivery and/or external quality assurance of the academic programmes.</p>
Six categories of IPPM	
<p>1. Franchise programmes</p> <p>Description: A foreign sending HEI/provider has primary responsibility for the design, delivery and external quality assurance of academic programmes offered in the host country. The qualification is awarded by the sending HEI. Face-to-face, distance and blended education can be used.</p> <p>Commonly used terms: import/export, validation, foreign, non-local, international private programmes</p>	<p>4. Partnership programmes</p> <p>Description: Academic programmes in host country/ies are jointly designed, delivered and quality assured through collaboration between host and sending country partners. The qualification/s can be awarded by either or both host and sending country HEIs in the form of single, joint or double/multiple degrees. Face-to-face, distance and blended education can be used.</p> <p>Commonly used terms: joint/double/multiple degrees, twinning programmes</p>
<p>2. International branch campus</p> <p>Description: A satellite bricks-and-mortar campus established by the foreign sending HEI in host country. The sending parent institution provides the curriculum and external quality assurance, and awards the qualification. Face-to-face, distance and blended education can be used.</p> <p>Commonly used terms: satellite, private foreign institution, offshore campus, portal campus</p>	<p>5. International joint university</p> <p>Description: An HEI co-founded and established in the host country involving both local and foreign sending HEI/providers, who collaborate on academic programme development and delivery. Qualifications can be awarded by either or both host and sending country HEIs. Face-to-face, distance and blended education can be used.</p> <p>Commonly used terms: co-developed, binational, co-founded, multinational, joint-venture universities</p>
<p>3. Self-study distance education</p> <p>Description: A foreign sending distance education provider offers academic programmes directly to host country students. No local academic support is available. Qualification, curriculum and external quality assurance are offered by the foreign sending HEI.</p> <p>Commonly used terms: fully online education, open university, MOOCs, pure distance education</p>	<p>6. Distance education with a local academic partner</p> <p>Description: A foreign distance education HEI/provider offers programmes to host country students in collaboration with a local academic partner. The curriculum can be jointly developed and the qualification awarded by the foreign HEI or by both partners. External quality assurance provided by the foreign sending HEI/provider or both partners.</p> <p>Commonly used terms: online or distance education with reference to local academic partner</p>
Source: Knight, J and McNamara (2017) <i>op. cit.</i>	

Elaboration of the six categories of IPPM

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

Franchise programmes

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

In Africa, there is no systematic data on the scope and scale of franchise programmes, with the exception of Mauritius. With respect to national policies licensing and regulating these programmes, there are few countries in Africa that have up-to-date policies to regulate incoming and outgoing franchise programmes. This can result in higher risks with respect to quality assurance and qualification recognition. Furthermore, questions arise about how relevant the imported courses are to the local context and labour market.

On the other hand, it is important to look at the potential benefits of franchise programmes when the appropriate policies and regulations are in place. Franchise programmes can offer specialised academic programmes not offered by domestic HEIs; they are often offered on a part-time basis and are thus very attractive and beneficial for professionals who want to upgrade their skills and knowledge and gain a foreign qualification. For countries with an underdeveloped higher education system due to political or economic upheaval, franchise programmes could be a useful tool to help increase access as well as build higher education capacity when framed as an international co-operation and development project.

International branch campus

An international branch campus is described as ‘A satellite bricks-and-mortar campus established by the foreign sending HEI in a host country. The sending country parent institution provides curriculum, ensures external quality assurance, and awards the qualification’. In an international branch campus, face-to-face, distance and/or blended learning pedagogies can be used.

There are a myriad of definitions of an international branch campus because they are customised to the local host or sending country context, especially in terms of ownership, registration and quality assurance policies and regulations. In most African countries, the term *international branch campus* is not used very often in the national laws and regulations. The term *foreign private institution* is more common but fails to identify whether the foreign private institution is an international branch campus or an independent foreign-owned institution.

Self-study distance education

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

Partnership programmes

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

The policies and regulations of the partner countries dictate the nature of the partnership programme and how many qualifications are offered. There are countries where a joint degree is illegal because two badges are not allowed on the same degree certificate and thus either a single or double/multiple qualifications are awarded depending on the number of partners. Conversely, there are countries that are starting to make double/multiple degrees illegal because of the double counting of the same workload/credits for two or more degrees, thereby jeopardising the integrity of the qualification. In many double degree awarding programmes it has been asked which degree is the real one and which one is the fake degree.

In Africa, it is extremely challenging to get any data on these types of partnership programmes. The list of accredited programmes provided by the national quality assurance and accreditation agency or the national council for higher education do not indicate whether the programme is in partnership with a foreign university and whose qualification is offered. Another worrisome trend is that partnership programmes are often funded by foreign donors, which can put the sustainability of the programme in question.

International joint university

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

It is worth repeating that a joint university is a newly established entity in the host country. It is not an international branch campus of a sending HEI/provider. The newly created joint university can be a public or private university depending on the degree of public financing, but both are guided and regulated by host country policies and regulations.

In Africa, there are two international joint universities in Egypt. Others are in the planning stage in Tunisia, Kenya and another one in Egypt. To date, there are no international joint universities in the six countries involved in this IPPM mapping study.

Distance education with a local academic partner

Distance education with local partner academic collaboration can be described as 'a foreign distance education HEI/provider which offers programmes to host country students in partnership with a local academic HEI partner. The curriculum can be jointly developed and the qualification awarded by the foreign HEI or by both partners. External quality assurance is provided by the foreign sending HEI/provider or both partners.

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

3 Country case studies

Understanding national contexts

Fundamental to understanding the status and potential of IPPM in any country is an understanding of the national context. Table 4 provides a comparative analysis of some key socio-economic indicators for the six countries in the study.

Common to all countries is a fairly high literacy rate and a similar age structure, plus similar dates of gaining independence, with South Africa being the exception.

There is, however, a striking difference in terms of the population numbers and rate of unemployment. The percentage of expenditures of GDP on education provides useful contextual information but because the expenditures cannot be broken down by level of education, it is not possible to link government investment in higher education to the percentage of eligible students enrolled in tertiary education programmes commonly known as the gross enrolment ratio (GER).

Table 4: Comparative analysis of key socio-indicators

	Ghana	Kenya	Mauritius	Rwanda	South Africa	Uganda
Date of independence	1957	1963	1968	1962	1931	1962
Former colony of	UK	UK	UK (formerly French and Dutch)	Belgium	UK (formerly Dutch)	UK
Official language/s	English	English, Kiswahili	English	Kinyarwanda, French	isiZulu, isiXhosa, Afrikaans, Sepedi, Setswana, English, Sesotho, Xitsonga, siSwati, Tshivenda, isiNdebele	English
Population (2018)	28,102,471	48,397,527	1,364,283	12,187,400	55,380,210	40,853,749
Percentage of population aged 15–24 (2018)	18.61%	19.61%	14.52%	19.45%	17.24%	21.04%
Youth unemployment rate (aged 15–24)	15.2% (2015)	Data unavailable	23.9% (2016)	1.9% (2014)	53.5% (2017)	2.6% (2013)
Literacy rate	76.6% (2015)	78% (2015)	92.7% (2015)	70.5% (2015)	94.4% (2015)	78.4% (2015)
GDP per capita	\$4,700 (2017)	\$3,500 (2017)	\$22,300 (2017)	\$2,100 (2017)	\$13,600 (2017)	\$2,400 (2017)
Education expenditure as percentage of GDP	6.2% (2014)	5.3% (2015)	5.1% (2017)	3.5% (2016)	5.9% (2016)	2.3% (2014)
Percentage of eligible students = GER	16.16% (2017)	11% (2016)	47% (2016)	7.64% (2017)	20.48% (2016)	4.62% (2014)

Source: Knight (2019). All statistics are from the CIA World Factbook (<https://www.cia.gov/library/publications/the-world-factbook/docs/profileguide.html>) with the exception of the GER, which is sourced from UNESCO (<http://uis.unesco.org/>)

In terms of access to higher education, it is revealing to compare two key indicators – the GER, which measures the percentage of eligible students enrolled in tertiary education, and the gross domestic product (GDP) per capita. It is clear that Mauritius stands out as having the highest percentage of eligible students in tertiary education, as indicated by the 47 per cent GER. As the Mauritius case study shows, this is directly attributable to their strategic use of IPPM. Important to note is that Mauritius also has the highest GDP per capita, which is a significant factor in affordability of IPPM options. Yet South Africa, which also has a relatively high GDP per capita, has a significantly lower percentage of eligible students registered in higher education programmes. South Africa does not generally encourage incoming IPPM activities in the form of foreign franchise or branch campuses, and it is interesting to question whether this has an impact on the GER.

Rwanda is an interesting case study because it has a relatively high percentage of eligible students enrolled in higher education at 7.6 per cent in relation to a low GDP of \$2,100. This differs from Uganda, which has a slightly higher GDP of \$2,400 but a lower GER of 4.6 per cent. Rwanda is definitely interested in increasing its enrolments in higher education and is looking at how IPPM, in the form of foreign private institutions, international branch campuses and franchise arrangements, can help achieve this goal.

The following sections present the results of the IPPM mapping studies for the African countries included in the study. Table 4 provides comparable indicator information for the six countries using common data sources; however, the availability of information on IPPM national policies and regulations, IPPM activities and national data sources on IPPM enrolments varies greatly by country both in availability and reliability. This precludes any robust comparisons on specific issues and factors across the six countries, but general trends can be noted. However, it does provide clear evidence that there is an urgent need for more attention being given to data collection on IPPM activities and development of IPPM policies and regulations.

4 Ghana

Introduction

The population of Ghana is approximately 28 million, of which 77 per cent are literate. The education system is made up of six years of primary education, six years of secondary and four years of tertiary education.⁵ Compulsory education lasts for 11 years, from four to 14 years. The estimated GDP per capita is \$4,700. Ghana's percentage of GDP on education expenditures is 6.2 per cent, which is the highest in the study; however, the percentage of eligible students in tertiary education is 16 per cent, which ranks third among the countries included in the mapping project. Ghana has expressed a need for increased access to higher education, but a strategic plan to develop IPPM has not been developed even though there are foreign institutions already operating in Ghana.⁶

Overview of the higher education system

International higher education is not new to Ghana as evidenced by the founding of the first university, the University College of the Gold Coast (now the University of Ghana), in conjunction with the University of London in 1948. The university achieved full university status as a public Ghanaian university in 1961 shortly after independence.

Through the 1960s and 1970s a number of HEIs were established with a focus on the link between higher education and socio-economic development of the country. This movement slowed in the 1980s as resource investment shifted from higher education to primary and pre-primary education. Despite this shift, tertiary education in the country grew steadily, and by 1999 Ghana had seven universities, 38 teacher-training colleges, eight polytechnics and 61 technical colleges.⁷

By 2018, these numbers increased to include ten public universities, 57 public specialised/professional colleges, 81 private universities/university colleges, two public and one private polytechnics, one regionally owned university and five foreign institutions.⁸

The financing of higher education in Ghana is primarily through the Ministry of Education, which in 2008 accounted for 72 per cent of all funding for higher education. Other sources of funding included 9.5 per cent from the Ghana Education Trust Fund, nine per cent from internally generated funds by institutions and 9.5 per cent from multilateral and bilateral donors. However, this percentage has gradually decreased.

In 2011, expenditures by the government of Ghana for all levels of education was at 25.8 per cent of total government expenditures, making it the largest government expenditure.⁹ A large percentage of this funding, however was directed to primary and secondary education.

In 2016 there was a national summit on tertiary education in Ghana, *Crafting a National Vision and Plan for The 21st Century for Higher Education in Ghana*. This led to an action plan which articulated a vision for the 21st century with a focus on fostering an entrepreneurial and internationally competitive nation through the development of a 'skilled workforce, research, innovation and knowledge transfer to meet the needs of the economy and enhance the welfare of all Ghanaians, as well as contribute to nation building and forging of democratic citizenship'.¹⁰ Using global partnerships and encouraging greater engagement with foreign institutions, regulatory bodies and multilateral organisations were highlighted as key objectives to achieving the overall goals. HEIs were encouraged to develop joint programming with other institutions within Ghana and abroad.¹¹

5 UNESCO (2017).

6 Data taken from Table 4 of this report.

7 *The Europa World of Learning 2014*, page 808.

8 www.nab.gov.gh

9 <https://www.oecd.org/sti/Governance%20of%20higher%20education%20research%20and%20innovation%20in%20Ghana%20Kenya%20and%20Uganda.pdf>

10 www.ncte.edu.gh/images/pdf/declaration%20and%20action%20plan.pdf

11 NCTE (2016).

National regulatory bodies

Higher education in Ghana is governed by the Ministry of Education, which oversees primary through to tertiary education in the country. It has responsibility for all policies on education, including apprenticeships and wider skills acquisition in Ghana. The two primary regulatory bodies for higher education include:

- the National Council for Tertiary Education: a state agency that is responsible for the policy, planning and management of the higher education system and advising the ministry. It also assesses the financial needs of tertiary institutions and prepares the annual education budget for the sector and long-term fiscal and resource planning
- the National Accreditation Board (NAB) was established with a mandate to accredit both public and private (tertiary) institutions with regard to the contents and standards of their programmes; determine the programme and requirements for the proper operation of that institution and the maintenance of acceptable levels of academic or professional standards; and determine the equivalences of diplomas, certificates and other qualifications awarded by institutions in Ghana or elsewhere.

National regulations and policies related to IPPM

In Ghana all tertiary education provision is monitored and accredited by the NAB. Section 13 of the 2007 National Accreditation Board Act¹² stipulates that any foreign institutions wishing to establish a presence in Ghana must be registered and accredited by the NAB. Overseas institutions must issue a memorandum of understanding to any Ghanaian university they wish to partner with, clearly stipulating roles and responsibilities for each partner institution. For partner-support delivery the NAB ensures that the foreign institution provides access facilities for students in Ghana, and a local personal representative.

The NAB does not have the capacity to monitor internet-based distance learning provided remotely by foreign institutions. In respect of such distance learning it instead advises on the equivalence of the qualifications that may be earned by prospective students.¹³

IPPM activities in Ghana

According to the NAB there are three different categories of IPPM activities operating in Ghana through foreign institutions/programmes. The first group consists of seven foreign institutions that offer foreign qualification for programmes which have been accredited. The second group includes five licensed and accredited foreign institutions operating in Ghana and offering foreign programmes and qualifications. The third group involves two foreign institutions, which are not accredited.

A list of the institutions in each category can be found below.

Private licensed Ghanaian universities offering foreign programmes and qualifications:

- Blue Crest College (formerly NIIT Ghana College) is a private institution registered in Ghana in 2016, offering a number of programmes across disciplines from certificate through to postgraduate programmes. Degree and master's programmes are offered through affiliation with other universities including the University of Sunderland.¹⁴
- China Europe International Business School (Africa Campus): this project was launched in 2008 with a mission to prepare highly competent innovation-oriented managers and executives. It was accredited in Ghana to run an MBA programme in 2016.¹⁵
- Data Link Institute is a private registered institution offering credentials from Jiangsu University of Science and Technology, China. It was accredited in 2016.
- CSIR College of Science and Technology is a research institute offering master's programmes through affiliation with the University of Eastern Finland in a number of disciplines, first accredited on 1 September 2015.¹⁶

¹² <https://schoolgh.com/wp-content/uploads/2018/05/NATIONAL-ACCREDITATION-BOARDACT2007.pdf>

¹³ www.nab.gov.gh/about-us/q-and-a-about-nab

¹⁴ <https://bluecrest.edu.gh/>

¹⁵ www.ceibs.edu/africa

¹⁶ www.csir.org.gh

- Lancaster University, Ghana Campus is a branch campus of Lancaster, established in 2013. Offering a number of bachelor's and master's programmes in country, students also have the option of transferring to the UK campus after a foundation programme. Exchange semesters are also available to students wishing to spend a semester in the UK.¹⁷
- Spiritan University College was established in 1990, as a private HEI. It offers a number of programmes, with some in partnership with the Duquesne University, Pittsburgh, USA.
- Webster University, Ghana is a branch campus of Webster University in the USA, with international campuses in Switzerland, Austria, Netherlands, Ghana, Thailand, China and Greece. They offer a number of undergraduate and graduate degree programmes, and provide students with the opportunity to complete their degrees at any of their global campuses.¹⁸
- The University of Sunderland offers two master's programmes through Blue Crest College in Ghana. Both programmes are offered on a part-time basis over an 18 month period, one in Computer Science and the other in IT Management. The institution was registered as a foreign licensed private institution in 2016.
- Swiss Management Center is a distance education provider. It was accredited to run programmes from 2015 to 2018, with its last intake in 2016. The institution is a business school which specialises in online delivery to over 130 countries globally.¹⁹

Unaccredited foreign universities:

- Two foreign universities are listed on the NAB website as unaccredited. The first, a distance education provider, is the Atlantic International University, based in Hawaii, USA. The second institution listed is California University, though it is unclear how it is operating in Ghana.

Foreign licensed private universities offering programmes and qualifications:

- Business University of Costa Rica was established and approved by the Consejo Nacional de Enseñanza Superior Universitaria Privada of the Costa Rican Ministry of Public Education and registered with the Ghana National Accreditation Board. It offers a number of credentials from the National Higher Diploma level through to PhDs. The mode of delivery is through distance learning and research dissertation. It operates in partnership with OAA Consulting Ltd, a private company in Ghana. It was registered in Ghana in 2015 and has a licence to operate until 2020.
- IPE Management School, France positions itself as 'a unique French Institution of Higher Learning reaching out to an International audience'. It offers online programmes in multiple locations worldwide. In Ghana it offers two programmes, a BBA in International Trade and Law, and an MSc in Productivity and Industrial Human Capital Management, both of which are offered through a blended model with support from Strabsnet Group.
- Edinburgh Business School is the Graduate School of Business of Heriot-Watt University, a leading UK university accredited by Royal Charter with campuses around the world. It was accredited in Ghana from December 2015 to December 2018.

It is challenging to try to align these programmes and providers with the IPPM Classification Framework, demonstrating once again the need for some kind of common understanding of different types of IPPM activities. One option for categorising these IPPM activities is that all of them could be classified as franchise arrangements, with the exception of Lancaster University and Heriot-Watt, which appear to be an international branch campus and two distance education providers.

In terms of other IPPM activities, the University of Ghana has a number of international co-operation programmes with universities in the USA, Russia, Japan, Canada, Hong Kong, Europe, South Africa and Swaziland.

Data collection on IPPM activities

The higher education enrolments in Ghana are aggregated by category of institution, and thus IPPM institutional or programme-specific information is not available.

¹⁷ <https://lancaster.edu.gh>

¹⁸ www.webster.edu.gh/about/

¹⁹ <https://www.smcuniversity.com/about/about-smc/>

5 Kenya

Introduction

Kenya has a population of 48.4 million people, making it the second largest country in the study after South Africa. The literacy rate is estimated at 78 per cent and the GDP per capita is \$3,500. The education system is made up of six years of primary, six years of secondary and up to four years of tertiary education, with compulsory education lasting 12 years from the age of six to 17. The gross enrolment rate in tertiary education is 11 per cent in spite of the stark rise in the number of universities and colleges in the last decade.

Overview of the higher education system

Kenya gained independence from the UK in 1963. During colonial rule three colleges were established, all of which have since become national public universities and are still operational. The first university in Kenya – the University of Nairobi – was established in 1970. Previously it was a constituent college of the University of East Africa. Leading up to and following independence the focus was on the ‘developmental university’ model, based on the premise that human resource development is strongly linked to economic growth. At that time the emphasis was on strengthening all levels of education, especially publicly provided education.

Since 2008, there has been a significant expansion in post-secondary education with a growth in the number of private and public universities. As of 2017, there are 31 public universities, six public constituent colleges, 18 private universities, five private constituent colleges and 14 institutions with letters of interim authority, making a total of 74 accredited HEIs in Kenya. As of 2019, none of these accredited institutions are international branch campuses or foreign private universities.

While there is no specific national strategy on the internationalisation of higher education, recognition of both the benefits and challenges are highlighted in the 2014–18 strategic plan developed by the Commission for University Education. The strategic plan for university education sets out to, ‘regulate and assure quality university education by setting standards’ and notes that ‘the system is both challenged and provided opportunities through internationalisation and

*cross-border/transnational provision of education calling for both greater scrutiny of cross-border activity and a focus on increasing transnational activity’.*²⁰ The importance attributed to increasing transnational activity (IPPM) is acknowledged while recognising that there are benefits and challenges.

National regulatory bodies

- The Ministry of Education, Science and Technology is the ministry responsible for higher education. Its mandate is to provide, promote and co-ordinate quality education, training and research, and enhance integration of science, technology and innovation into national production systems for sustainable development.²¹
- The Commission for University Education (CUE) plays a significant role in overseeing planning budgeting and financing of public universities, providing accreditation and equivalencies.²² Its primary mandate is to regulate and assure quality university education by setting standards and monitoring compliance.
- The National Commission for Science, Technology and Innovation sees internationalisation as a key part of its mandate. This is reflected in its role to lead inter-agency efforts to implement sound policies and budgets, working in collaboration with the county governments, and organisations involved in science and technology and innovation within Kenya and outside Kenya.

National policies and regulations related to IPPM

The University Act of 2012 is the national law which has direct implications and regulations for the provision of IPPM education in Kenya. The 2016 updated version of the University Act of 2012²³ provides the following definitions: *A foreign university means a university established outside Kenya, which intends to offer university education in Kenya. A foreign university campus means an extension of a foreign university set up by the university pursuant to its statutes and established in accordance with the University Act.* This clearly differentiates a foreign university from a branch campus of a foreign university.

20 http://cue.or.ke/images/docs/CUE_strategic_Plan.pdf

21 www.education.go.ke/index.php/about-us/mission

22 International Association of Universities (2010) *Guide to Higher Education in Africa*. 5th Edition. Palgrave Macmillan.

23 www.cue.or.ke/index.php/the-universities-act-2012#

The same law (University Act of 2012, updated 2016) includes Section 28, which addresses the accreditation of foreign universities. It states that *a university located outside of Kenya and which intends to offer university education in Kenya must apply to the Commission for University Education (CUE) for accreditation.* Furthermore, it permits a foreign university to enter into an arrangement with an institution in Kenya for purposes of offering its programmes or joint programmes of instruction in Kenya with prior approval of the CUE. However, any foreign university approved by CUE must first submit proof of accreditation from its country of origin to undertake university education in Kenya.²⁴

The consequences for not gaining permission and accreditation from CUE are substantial. Subsection 5 states that *'if any person who purports to offer a degree through a university that is not accredited commits an offence and shall be liable upon conviction, to a fine of not less than ten million shillings, or imprisonment for a term of not less than three years, or both.'*²⁵

The CUE is responsible for approving all applications from foreign HEIs to collaborate with Kenyan universities or to establish their own institution or campus offering their own programmes and qualifications. In 2014 Legislative Supplement 31 to the Universities Act of 2012 presents the Universities Regulations document.²⁶ It specifically addresses Foreign University Collaboration with a Local University in Part VIII and with a local Tertiary Institution in Part VIII. The articles of the law address collaboration at the programme level and include detailed regulations about eligibility requirements for foreign university, the memorandum of agreement between the local and foreign partners, admission requirements for students, financial arrangements, accreditation and qualifications conferred, among others. These are detailed and comprehensive requirements. Part XI addresses the Recognition and Equation of Qualifications Awarded by Foreign Universities and Institutions.

It was not possible to locate any policies or guidelines that regulated Kenyan universities' activities in foreign countries. In 2018, the branch campuses of Kenyan public universities, e.g. Jomo Kenyatta's campus in Rwanda, were closed by the Commission on University Education. However, private institutions in Kenya were allowed to continue their operation of branch campuses in nearby countries. No national information is available on regulations, opening or closures of Kenyan universities' IPPM activities outside Kenya.

IPPM activities

Kenya has had a history of private foreign institutions operating in the country and offering programmes and qualifications that were not approved by the Commission for University Education. This situation has been addressed and, as mentioned in the section on national laws, policies and regulations, there is now a rigorous approval and accreditation process in place.

As of 2019, there are not any international branch campuses or foreign private institutions operating in Kenya given the stringency of the current regulations and the general attitude to IPPM higher education provision. While it is mandatory to have these regulations in place it is worth questioning whether the potential of increasing access to higher education through increased accredited IPPM provision is being discouraged by the burdensome application and approval process.

There are two franchise arrangements operating in Kenya. The first is INtel College, which has had a partnership with the University of Sunderland since 2000 and offers degree programmes in Business and Computing. The second is Edulink International College, a private institution in Kenya, which was approved in 2016 to deliver an international foundation programme and four honours BA programmes in different aspects of business study through a franchise arrangement with the University of Northampton.

There is no national source of information on which international programmes and providers are operating in Kenya, making it especially challenging to identify franchise arrangements and partnership programmes. Thus, there could be other IPPM activities operational, but it was difficult to obtain the information.

National sources of IPPM data

The higher education enrolments in Kenya are aggregated by category of institution, and so IPPM institutional or programme-specific information is not available.

²⁴ *Ibid.*

²⁵ *Ibid.*

²⁶ www.kisiiuniversity.ac.ke/sites/default/files/UNIVERSITIES_STANDARDS_AND_GUIDELINES_June_2014.pdf

6 Mauritius

Introduction

Mauritius is an island state with a small population of 1.36 million people. The literacy rate is 92.7 per cent, and the GDP per capita is the third highest in Sub-Saharan Africa, at \$22,000. In 2016 the percentage of eligible students in higher education was very high at 47 per cent, in fact more than double or triple the other countries in the study. The education expenditures for all levels of education as a percentage of all government expenditures is 5.1 per cent, which is lower than Ghana, Kenya and South Africa, yet the GER for tertiary education in Mauritius is significantly higher than these same countries. Compulsory education is ten years, from age six to 16, with primary education lasting five years and secondary school consisting of seven years.²⁷

Mauritius has effectively used IPPM activities for the last two decades to increase access to tertiary education for local students. Over this period, they have developed and refined their regulations for licensing and accrediting foreign higher education providers, the majority of whom have developed franchise arrangements with local private companies in Mauritius. There is also a rigorous system in place to ensure quality of the programmes and integrity of the foreign qualifications that are being offered.

Overview of the higher education system

The University of Mauritius was the country's first university, founded in 1965. The focus was on capacity and human resource development to support economic and social enhancement. Interesting to note is that the Mahatma Gandhi Institute was established in 1970 as a joint initiative of the governments of India and Mauritius, and a second Indian institute, the Rabindranath Tagore Institute, was set up in 2002. They are now considered to be publicly funded local tertiary education institutions offering associate degrees, certificates and diplomas.

In 2005, the Ministry of Education, Culture and Human Resources set out a bold agenda to open up the country to private provision of education by both local and foreign providers. Incentives were available to foreign HEIs to offer their programmes and qualifications. This strategy also included the establishment of a robust regulatory framework for tertiary education to ensure that all domestic and foreign HEIs were licensed and accredited, and offered quality higher education.

In 2018, there were ten publicly funded tertiary institutions in Mauritius and 45 private institutions. The majority of these private institutions have franchise agreements with foreign universities and in some cases they have multiple international partners offering different types of programmes and qualifications ranging from undergraduate to postgraduate ones.²⁸ Mauritius is aspiring to become a high-income economy and education hub using higher education as a key driver in order to meet the increasing and changing labour needs.

National regulatory bodies

Responsible authorities for higher education in Mauritius are the Ministry of Education, Culture and Human Resources, and the Tertiary Education Commission (TEC).

The mission of the Ministry of Education, Culture and Human Resources includes the following four mandates:

- re-engineer the education and skills development system to construct a cohesive, inclusive and productive society
- foster a holistic education that help learners be resilient, globally minded citizens
- create an enabling environment for a higher education system that both generates and equips learners with innovative, cutting-edge knowledge and skills for increased competence in a dynamic work environment
- sustain existing and motivational conditions towards the recognition of Mauritius as a major regional and continental education hub.²⁹

²⁷ <http://uis.unesco.org/en/country/mu>

²⁸ www.tec.mu/private_institutions

²⁹ <http://ministry-education.govmu.org/English/Pages/default.aspx>

The TEC has the responsibility to plan, develop and co-ordinate post-secondary education; and to implement an overarching regulatory framework to ensure the quality of higher education provision in Mauritius. It also allocates funds to all the tertiary institutions under its purview to ensure accountability and optimal use of resources. The TEC also houses the national tertiary database on which the annual reports on enrolments are based.

National laws, regulations and policies related to IPPM

No foreign post-secondary educational institution wanting to establish a branch campus or centre can operate without the appropriate approval, registration and accreditation of their programmes by the TEC. The *Guidelines for the submission of project proposals for the establishment of private institutions, or branches, centres or campuses of overseas institutions, offering postsecondary education in the republic of Mauritius* have been prepared by the TEC.³⁰ These guidelines have been developed and improved over years of experience of regulating IPPM activities. They are detailed and comprehensive, and ensure the quality, sustainability and integrity of the foreign programmes and qualifications offered.

The TEC has a separate set of guidelines for those private institutions that wish to be a separate entity from the parent institution. They are called the *Guidelines for post-secondary overseas recognised accredited institutions wishing to set up post-secondary educational institutions in Mauritius as a separate entity from the parent institutions, with degree awarding powers at the start of activities* and provide detailed and comprehensive information.³¹ These guidelines differ from the first set of guidelines as the applicants plan to offer a local qualification, not the foreign qualification from their international partner. This is an interesting arrangement as foreign-owned private universities can be accredited to offer a local qualification.

IPPM activities

Mauritius is the leading country in Sub-Saharan Africa in terms of the number of arrangements it has with foreign institutions. The numerous franchise arrangements as well as three international branch campuses are major contributors to the higher gross enrolment ratio of 47 per cent in Mauritius. In terms of 2016 enrolments, about 43 per cent of local students are doing it through foreign providers located in Mauritius or through distance education. This clearly demonstrates how Mauritius has been able to increase access to tertiary education through IPPM activities.

As of 2018, it has 45 private institutions approved to be offering courses and qualification in Mauritius. However, of these 45 institutions, three have the power to award their own degrees and are considered to be local private institutes. They are the Amity Institute of Higher Education, the Charles Telfair Institute and Rushmore Business School. Interesting to note is that each of these institutions has direct links with foreign universities even though they are now independent and offer their own qualifications. They were approved using the second set of guidelines described above.

All the other 42 private institutions have arrangements with international partners and are offering programmes that lead to a foreign qualification of the parent university. Of these 42 institutions, three are recognised as branch campuses: Middlesex University Mauritius from the UK, Greenwich University from Pakistan, and Curtin Mauritius from Australia.

- Middlesex University Mauritius has been operating in Mauritius since 2010. It offers 15 undergraduate programmes and eight postgraduate programmes through its six different schools, including: Business, Health and Education, Media and Performing Arts, Science and Technology, and Law. The Middlesex campus is part of the global Middlesex network, which has campuses in London, Malta and Dubai. If students meet the requirements and are able to obtain a visa, they are able to transfer to another campus.³²

30 www.tec.mu/pdf_downloads/reg&guid/Guidelines%20for%20the%20submission%20of%20Project%20Proposals.pdf

31 www.tec.mu/pdf_downloads/reg&guid/Guidelines%20set%20up%20Post%20Secondary%20Educational%20Institutions%20in%20Mauritius.pdf

32 www.middlesex.mu

- Greenwich University Pakistan Mauritius Campus is recognised by the Higher Education Commission in Pakistan as well as the TEC in Mauritius. It offers two undergraduate programmes in Business Administration and Information Sciences, and one MBA programme. In addition, the university offers several certificate- and diploma-level professional development programmes, and has an international language centre which teaches six different languages.³³
- Curtin Mauritius is part of a network of international branch campuses that the parent Curtin University in Australia has developed. Other branch campuses are located in Malaysia, Singapore and Dubai. At the Mauritius campus there are 20 different programmes offered including two Bachelor of Arts, 19 Bachelor of Commerce and three Bachelor of Science. Two graduate programmes are offered: an MBA and a master's in International Business.³⁴

The remaining 39 private institutions in Mauritius have all established franchise arrangements with foreign institutions. This means that there are more than 180 different academic programmes which are offered to students in Mauritius by private institutions through franchise arrangements. All have been approved by the TEC and offer the programmes and qualifications of their foreign partner institutions.

An interesting development in Mauritius has been the establishment of smart cities. One such city is called Unicity. The Medine Group, the private company responsible for the development of the smart city, has decided to make higher education a core feature by establishing the Unicity Education Hub.³⁵ As of 2019, it has seven different foreign institutions, primarily from France, offering a wide variety of programmes, some of which are offered in French, all with foreign qualifications.

National sources of data on IPPM activities

Mauritius is one of very few countries that provides detailed information on the programmes and qualifications offered through a branch campus or franchise agreement. Information on enrolments, part-time and full-time status, as well as by gender is included in the *Participation in Tertiary Education* annual reports prepared by the Tertiary Education Commission.³⁶

33 <http://greenwich.ac.mux>

34 <http://curtinmauritius.ac.mu/about-us/>

35 <https://www.unicityeducationhub.com/>

36 www.tec.mu/pdf_downloads/pubrep/AnnualReport2016-2017.pdf

7

Rwanda

Rwanda has a population of approximately 12 million people and a literacy rate of 70 per cent. Primary school is six years, as is secondary school, with up to four years of tertiary education. Compulsory education only goes up to primary school, lasting from the age of six to 13. School life expectancy is 11 years, which is expected to increase. The per capita GDP is \$2,100 and the percentage of eligible students in tertiary education in 2017 was 7.64 per cent. Rwanda shows great potential as a host country of IPPM activities in order to boost access rates and also diversify programme offer. It has made important strides towards developing the appropriate national policies, regulations and codes of practice to promote IPPM while ensuring quality.³⁷

Overview of the higher education system

In 1962 Rwanda gained independence from Belgium, and in the following year its first institution of higher education was founded – the National University of Rwanda. This was the primary university until the 1990s, when three additional institutions were established: the Kigali Institute of Science and Technology, the Kigali Health Institute and the Kigali Institute of Education. By 2010 there were 17 public and 14 private higher education providers. A proposal was put forth in 2011 to merge all public universities into one institution, the University of Rwanda, which became operational in 2013.³⁸

As of 2018 there is one public university, the University of Rwanda, which consists of six different colleges. In addition, there is a total of 34 private HEIs, of which five are foreign.³⁹ All programmes in both public and private, local and foreign HEIs are reviewed and accredited by the Higher Education Council.

The national laws that govern higher education emerged as part of national rebuilding efforts in Rwanda after the devastation of civil war in the early 1990s. The government of Rwanda is supporting the transformation of higher education so that it is fit for purpose and internationally credible. HEIs are required to deliver graduates, research, consultancy services and community engagement to support the social and economic development of Rwanda.

National regulatory bodies

There are two primary national higher education governing bodies in Rwanda.

- The Ministry of Education bears the responsibility of developing, reviewing and guiding the implementation of education sector policies and programmes for all levels of education.
- The Higher Education Council, as a regulatory agency, advises the minister on the granting of operating agreements to private sector HEIs. It developed and monitors the National Qualification Framework and is responsible for the recognition and equivalency of foreign degrees, diplomas and certificates. The council serves as the quality assurance agency of the ministry and has produced key guidelines and regulations for foreign higher education provision in Rwanda.

National regulations and policies related to IPPM

The *2017 Law Governing the Organization and Function of Higher Education N°01/31/01/2017* has the most relevance to IPPM.⁴⁰ In Rwanda, all foreign institutions operating in the country are categorised as private institutions of higher learning, and this law has jurisdiction over these foreign entities. Within this law there are specific articles (12–16, 19, 27) which detail the requirements for the establishment, accreditation and awarding of qualifications, and also the reasons for closing the operations of the private foreign institutions. This law provides the requisite regulatory information for foreign providers who wish to set up operations in Rwanda.

The *Ministerial Order N°001/MINEDUC/2013 OF 15/11/2013 determining the conditions for granting accreditation to a private institution of higher learning, upgrading the level of teaching, opening a college, a school or a faculty of an affiliated research institutions* includes Article 6, which directly addresses the 'Conditions for a foreign institution of higher learning to establish a campus in Rwanda'.⁴¹ Together these two documents highlight the importance that Rwanda is giving to both encouraging the establishment and ensuring the quality of foreign higher education provision.

³⁷ Data taken from Table 4 of this report.

³⁸ *The Europa World of Learning 2014*.

³⁹ Ministry of Education: <http://mineduc.gov.rw/shortcut/links/kk0/>

⁴⁰ <http://mineduc.gov.rw/resource/laws/education-laws/>

⁴¹ http://mineduc.gov.rw/fileadmin/user_upload/pdf_files/Laws-New-Uploads/Education_Orders/N_001_2013_ryo_kuwa_15_11_2013.pdf

In addition, the Higher Education Council has produced a Code of Practice for Distance Learning as well as a Code of Practice for Transnational Education, indicating the importance given to these two modes of programme delivery.

The Education Strategic Plan 2013–2018 made multiple references to the need for *'partnerships with international universities to strengthen the Rwandan institutions of higher learning in the area of quality, joint research projects and sharing of latest educational technology, resources and innovative best practice.'* This is further evidence that Rwanda sees international university partnerships playing a critical role as Rwanda reforms and expands their higher education sector.⁴²

All in all, Rwanda has worked decisively in building the requisite regulatory framework to permit foreign universities to establish institutions and programmes in Rwanda. However, there is no question that the litmus test for the effectiveness of policies and regulations is their implementation and application, and in that area Rwanda is still building capacity.

IPPM activities – foreign universities in Rwanda

The labelling of IPPM activities in Rwanda is challenging. The term *foreign private institution* is the legal term and most commonly used. The terms *international branch campus* and *franchise programmes* are not used. There is no national information database on IPPM partnership programmes at the institutional level and thus it is impossible to provide this data. In reviewing the list of private institutions in Rwanda, it is difficult to determine whether the IPPM activity in question is actually a foreign or domestic institution as the criteria are not clear. The key factors appear to be whether it is accredited to offer a domestic qualification even if it is foreign-owned. The Africa Leadership University is one example of this confusion, as is the African Institute for Mathematical Sciences. As of 2018, there were five seemingly foreign universities operating in Rwanda. They include:

- **African Institute for Mathematical Sciences, Rwanda (AIMS Rwanda).** This institute was established in Rwanda in 2016 and is part of a pan-African Network of Centres of Excellence that offers postgraduate education, research innovation and public engagement/outreach programmes for the advancement of STEM in Africa. It offers a master's programme in Mathematical Sciences and promotes research innovation among Africa's top scientists.
- **Carnegie Mellon University Rwanda.** Established in 2011, this US-based university offers an MSc in Electrical Engineering and a second MSc in Information Technology. The labelling of this initiative is unclear. It has been designated by different authorities as an international branch campus, but this is questionable. Located in a business telecom tower in Kigali and only offering two programmes can lead one to label this initiative as franchising of two programmes from the parent university rather than a branch campus. However, plans are under way to build a campus in Innovation City in the future, and perhaps this will involve expansion of the number of programmes offered.
- **Vatel Rwanda.** The Vatel Group is an international corporation with 50 schools located in all regions of the world. Vatel Rwanda was established in 2012 in Kigali and is operated as a franchise operation from the parent organisation. It offers one undergraduate programme in Hotel and Tourism Management, which is an accredited foreign qualification.
- **Mount Kenya University, Kigali Campus.** This international branch campus was established in 2010 and offers a wide variety of undergraduate and graduate programmes. In October 2018 it was announced that Mount Kenya University, Kigali Campus will be granted a charter by the government of Rwanda to operate as a fully fledged national private tertiary institution. The goal is to make it autonomous from its parent campus in Kenya, and it will be renamed the Mount Kenya International University of Technology. When the charter is granted the students will receive an approved degree using this new name. This morphing of international branch campuses of foreign universities into nationally accredited institutions of the African host country is an interesting and important trend which merits further investigation.

- **African Leadership University (ALU).** The ALU is a pan-African initiative and aims to offer distinctive graduate and undergraduate degree programmes in selected African countries. As of 2019, there are two African Leadership Universities – one in Mauritius and the other in Rwanda. The ALU Rwanda was founded in Kigali in 2017 and is accredited by the Higher Education Council. The ALU offers an MBA programme, an MSc in Computer Science and a BA in three other programmes: Entrepreneurship, Global Challenges, and International Business and Trade. The ALU believes that it has created a new model for education to develop the next generation of African leaders across the continent. The Higher Education Council has accredited this university to offer its own degrees so there may be a question as to whether it should be labelled a foreign provider. Interestingly, the ALU has another university in Mauritius but there it is not yet approved to offer its own degree and so it offers the University of Glasgow qualification for its 'made in Africa' programmes.

These five initiatives show the range of IPPM activities in Rwanda (except institutional-level academic programme partnerships) and are evidence of the challenges in how to align these activities to the IPPM Classification Framework. Important to note is the trend in African countries to have internationally founded and established universities eventually become national universities offering accredited domestic qualifications. Mount Kenya University is a good example of this.

Rwanda appears to be in the early stages of developing IPPM partnerships and franchise arrangements as well as hosting international branch campuses. It will be important to monitor the IPPM developments in Rwanda as they are committed to increasing access to quality higher education and have developed the appropriate policy and regulatory frameworks to do so. However, a national-level strategy to increase access, diversify programmes, attract foreign providers and partners, and build capacity to promote IPPM appears to be in the early stage.

No data is available on other IPPM activities such as franchise arrangements, partnership programmes and distance education. There are numerous individual projects, such as a distance education degree programme, being offered by an Indian institute at the University of Rwanda, but there is no systematic source of international collaborative programmes available.

Closures of foreign providers

Since 2015 there have been several closures of foreign private institutions and international branch campuses initiated by either the Higher Education Council in Rwanda or the foreign sending country. These include the Jomo Kenyatta University of Agriculture and Technology, which was closed by the Council of University Education in Kenya, and the Mahatma Gandhi University, which appears to have been closed by the University Grants Commission of India. In addition, the licences to operate for Rusizi International University, the Open University of Tanzania and the Sinhgad Technical Education Society were not renewed by the Higher Education Council in Rwanda. These closures are a sign that Rwanda's licensing, accreditation and quality-assurance regulations are active in their evaluation of foreign programmes and providers operating in Rwanda and that their QAA system is maturing with more years of experience with IPPM.

Data collection

The higher education enrolments in Rwanda are aggregated by category of institution, and thus IPPM institutional or programme-specific information is not available.

8

South Africa

Introduction

South Africa is by far the largest country in the study, with a population of about 55 million, of which 94 per cent are literate. The unemployment rate among youth aged 15–24 is a staggering 53 per cent. The education system consists of six years of primary education, five years of secondary and up to four years of tertiary. Compulsory education lasts nine years, from age seven to 15, but the average length of time in school for South Africans is 13 years.⁴³ The GDP per capita is \$13,600. The percentage of eligible students enrolled in higher education is 20.5 per cent, which seems low compared to Ghana, which has a GDP per capita of \$4,700 and a GER of 16 per cent.⁴⁴

Overview of the higher education system

In 1999 there were 21 universities and 15 universities of technology operating in South Africa. Through a merger process in the early 2000s the number was reduced to 11 public universities, six universities of technology, four comprehensive institutions and two national HEIs. However, the number of HEIs in South Africa increased again post-2005, particularly in the private sector. By 2016 there were 26 public and 123 private HEIs, of which only three were branch campuses of foreign universities.⁴⁵

Higher education in South Africa is primarily funded by the government and administered through the Department of Higher Education and Training. The federal funding for the Department of Higher Education and Training has remained constant at two per cent of the national budget since 2013,⁴⁶ and is projected to remain at this level through to 2020. Higher education receives about 62 per cent of the Department of Higher Education and Training budget.

National regulatory bodies

Similar to the other countries in the study, there are two national bodies that assume the primary responsibility for the oversight of higher education.

- The Department of Higher Education and Training bears responsibility for all levels of post-schooling education. Within the department, the Directorate for Universities provides the strategic direction and regulations of the higher education system.
- The Council of Higher Education (CHE) is an independent statutory body and holds responsibility for quality assurance in higher education and training through the accreditation of private institutions and programmes. Within the CHE, the Higher Education Quality Committee sets the quality-assurance criteria that both public and private institutions must adhere to.⁴⁷

National policies and regulations related to IPPM activities

In South Africa there is one law that addresses the registration and accreditation of foreign private institutions coming into the country. To complement this law, a 2017 *Draft Policy Framework for the Internationalisation of Higher Education* was proposed to regulate the IPPM activities of public and private South African HEIs. Both the law and proposed policy framework are detailed and rather strict, thereby ensuring the quality of programmes as well as the integrity of the qualifications. A more detailed description follows.

43 <http://uis.unesco.org/en/country/za>

44 Data taken from Table 4 of this report.

45 www.dhet.gov.za/Research%20Coordination%20Monitoring%20and%20Evaluation/6_DHET%20Stats%20Report_04%20April%202018.pdf

46 <https://nationalgovernment.co.za/departments/annual/192/2017-department-national-treasury-annual-report.pdf>

47 *The Europa World of Learning 2014*.

The *Registration of Private Higher Education Institutions of March 2016 regulations* are part of the Higher Education Act of 1997. Article 13 includes regulations for foreign applicants applying for registration as a private HEI. It states that a foreign applicant must submit proof that its parent institution operates lawfully as an HEI and is accredited by the appropriate accrediting body in its country of origin; a qualification awarded in its name will be fully recognised by its parent institution and by the appropriate state authorities in its country of origin; and a student who is awarded its qualification will suffer no disadvantage if he or she applies to enrol for an appropriate advanced qualification in the parent institution.⁴⁸

In April 2017 the Department of Higher Education and Training released the *Draft Policy Framework for the Internationalisation of Higher Education in South Africa* for consultation.⁴⁹ The purpose of the internationalisation framework is to ‘provide high-level principles and guidelines; to set broad parameters; and to provide a national framework for internationalisation of higher education within which higher education institutions can develop and align their institutional internationalisation policies and strategies’.

This is positive proof of the importance attributed to internationalisation. However, as of early 2019 the policy framework is still in draft form.

Chapter 6 of the draft policy framework focuses on *Cross-Border and Collaborative Provision of Higher Education*. In Section 6 it addresses many different aspects of branch campuses and franchise agreements. The primary message is that ‘South African public higher education institutions are not permitted to set up branch or satellite campuses outside South Africa or to enter into franchise arrangements with institutions outside the border of South Africa.’⁵⁰ However, South African institutions are permitted to offer institutionally approved short learning programmes in foreign countries provided that such offerings are approved by the relevant authorities and partners in the foreign countries.

In contrast, registered private HEIs are permitted to set up branch campuses outside South Africa to offer programmes already accredited by the CHE. They must seek accreditation of their institution and programmes by the relevant authorities in the foreign country hosting the branch campus.

To date, South Africa is the only country in the study, and perhaps in Sub-Saharan Africa, that has proposed regulations about international collaborative qualifications, of which they identify four types: co-badged, consecutive, joint and double degrees. Article 6 of the draft policy framework outlines detailed requirements for the awarding of these four types of qualifications. In short, co-badged (one degree from the institution of enrolment with recognition on the partner institution on the degree certificate) and consecutive degrees are permitted. Joint degrees (one certificate with two badges) are also allowed for both private and public South Africa universities. The conditions to do so are strict and the requirements are very detailed, including information about memorandums of understanding between partners, accreditation conditions, National Qualifications Framework registration, required student mobility and degree supplement/transcript notation. Double degrees by both private and public universities in South Africa are not allowed. They are considered illegal because the double counting of earned credits for one degree is used as the basis to offer two degrees by different institutions – one domestic and one foreign.

IPPM activities

There is a very limited number of foreign private institutions currently operating in South Africa.

- Monash South Africa, which was established in 2001 and jointly owned by Monash University in Australia and Laureate, was sold in 2018 to a South African private provider.
- Stenden South Africa is a branch campus of the NHL Stenden University of Applied Sciences in the Netherlands, and was established in 2002. It has four branch campuses outside of the Netherlands, and in South Africa it offers two bachelor’s courses in business-related subjects.

48 www.dhet.gov.za/Private%20Higher%20Education%20Institutions/Regulations%20for%20the%20Registration%20of%20Private%20Higher%20Education%20Institution,%202016.pdf

49 www.dhet.gov.za/Policy%20and%20Development%20Support/Draft%20Policy%20framework%20for%20the%20internalisation%20of%20Higher%20Education%20in%20Suth%20Africa.pdf

50 *Ibid.*

As of 2019, Stenden South Africa appears to be the only foreign private institution operating in Africa while more than a decade ago there were six in total – four have been closed and one sold.

Several foreign private institutions (international branch campuses) have been deregistered and closed by the Department of Higher Education and Training. They include Bond South Africa from Australia, the Business School Netherlands, and the Global School of Theology from the USA.⁵¹

In terms of distance education, the University of South Africa is the largest university system in all of Africa by enrolment. It attracts a third of all higher education students in South Africa. As of 2018, it has about 385,000 students, including international students from 130 countries worldwide, the majority of whom are from other African countries.⁵²

There is no national source of information available on international collaborative partnerships between South African and international universities where a programme is being jointly developed and delivered.

National IPPM data sources

The higher education enrolments in South Africa are aggregated at the institutional level for public universities, therefore IPPM institutional or programme-specific information is not available.

51 <https://cach.dhet.gov.za/files/RegisterOfPrivateHigherEducationInstitutions.pdf>

52 <https://www.unisa.ac.za/sites/corporate/default/About/Facts-&-figures/Student-enrolments>

9 Uganda

Uganda, a former colony of the UK, gained its independence in 1962, and as of 2018 the population is 40.8 million. The GDP per capita is \$2,400. The education expenditure, at 2.3 per cent for all levels of education, is the lowest of the six countries in this study. The literacy rate is 78 per cent. The education system consists of seven years of primary, six years of secondary education and a minimum of two years for diploma programmes or minimum of three years for degree programmes.⁵³ However, the average length of time in school is ten years. In 2014 the percentage of eligible students in tertiary education is 4.6 per cent, the second lowest in the study, indicating that access to higher education is a steep challenge for Uganda.⁵⁴

Overview of the higher education system

The history of higher education in Uganda dates back to 1922, with the establishment of Makerere as a technical college for students from British East Africa. In 1949, it transformed into a constituent college of the University of London – an early form of IPPM. By 1963, Makerere had become the University of East Africa offering courses leading to degrees of the University of London. In 1970, it became a full-fledged national university offering and awarding its own undergraduate and postgraduate degrees.

Universities in Uganda are categorised into public and private. Public or state funded universities are established by an Act of parliament. Private universities are treated differently as they are chartered and licensed by the National Council for Higher Education (NCHE).

In 2009 there were 28 universities – five public, 13 chartered and licensed private, and ten unlicensed private universities. By 2019, there were nine public universities, ten universities with a charter, 33 provisionally licensed universities, eight other degree awarding institutions and over 200 other tertiary education institutions.⁵⁵ The significant increase in less than a decade indicates the massive growth in access to higher education in the country.

Education reforms in Uganda have led to three sources of financing for higher education including the government (public), private (tuition and other fees) and donor funding. In general the higher education sector depends more and more on tuition fees and donor funding. This has important implications for the potential of IPPM as students are already having to pay their own tuition fees. Yet it is important to recognise that the lack of affordability for IPPM tuition can also trigger high attrition rates.

National regulatory bodies

There are two primary bodies with oversight for the higher education sector in Uganda.

- The Ministry of Education and Sports oversees all levels of education including the creation of plans and monitoring of standards for university education.
- The National Council for Higher Education (NCHE) is responsible for accreditation and quality assurance and was established as a result of the Universities and Other Tertiary Institutions Act in 2001. The NCHE advises the Minister of Education on higher education policy issues and licenses HEIs.

National policies and regulations related to IPPM

While there are no specific regulations or policies that apply solely to foreign institutions operating in Uganda, all institutions must adhere to the Universities and Other Tertiary Institutions Act of 2001. Foreign universities must adhere to the regulations stipulated under Statutory Instruments No. 80 A (2008) on the establishment and operations of private universities and private tertiary institutions.⁵⁶

All universities and every tertiary institution must also comply with the standards set out in Parts II to V of the Statutory Instruments No. 85, which set out in detail requirements around teaching, learning, curriculum and support services. Statutory Instruments No. 62 puts forth guidelines for the equating of degrees,

53 <http://uis.unesco.org/en/uganda>

54 Data taken from Table 4 of this report.

55 www.unche.or.ug/institutions

56 www.unche.or.ug/wp-content/uploads/2014/03/Statutory-Instruments-No.62-2007-Equating-of-Degrees-Dipolmas-and-Certificates.pdf

diplomas and certificates obtained outside of Uganda, which provides a credential framework for foreign institutions.⁵⁷ These requirements apply to both local and foreign, private and public universities, and do not include any specific references to the special needs of IPPM provision. There is also no mention of rules regarding joint and double degrees.

IPPM activities

In Uganda, the National Council of Higher Education lists one fully licensed and accredited foreign private university, the Aga Khan University, and two provisionally licensed and accredited private other degree-awarding institutions, the ESLSCA Business School and the India Institute of Hardware Technology. The Edinburgh Business School is the Graduate School of Business of Heriot-Watt University, though not listed on the National Council of Higher Education's website, it has a centre in Uganda providing support to students registered in their online MBA programme.⁵⁸

- The Aga Khan University's School of Nursing and Midwifery is one of three campuses in East Africa. Since its inception in the region in 2000, the school has seen 2,388 graduates join the ranks of qualified, working nurses and midwives.⁵⁹ It has a provisional licence and still needs to acquire charter status to be considered a local provider in Uganda.
- ESLSCA International Business School Uganda was founded in June 2013, having a strategic partnership with the Paris ESLSCA Business School. Students earn a double degree with their degree validated by Paris ESLSCA, constituting a European accredited degree along with a Ugandan degree.
- India Institute of Hardware Technology is an institute originating in India with franchised locations globally. In Uganda it offers a number of certificate programmes and a BSc in Infrastructure Management Systems, along with individual and professional training.⁶⁰ The qualifications are granted by the parent institution in India.

Ugandan international branch campuses

Uganda and Kenya are the only countries in this study that have established branch campuses in other African countries. Kampala International University, a private university in Uganda, set up a branch campus in Nairobi, Kenya in 2008, offering undergraduate through to doctoral studies in Business and Information Technology. The university was closed during the 2017–18 academic year. It also established a campus in Dar es Salaam in Tanzania in 2010, which is fully operational.⁶¹

Data collection on IPPM activities

At the current time, there is no enrolment or programme data available for IPPM activities in Uganda.

57 www.unche.or.ug/wp-content/uploads/2014/03/Statutory-Instruments-No.62-2007-Equating-of-Degrees-Diplomas-and-Certificates.pdf

58 <https://www.ebsglobal.net/locations/africa>

59 <https://www.aku.edu/sonamea/Pages/home.aspx>

60 <https://iiht.com/>

61 <http://kiu.ac.ug/>

10

Cross-cutting themes and issues

An analysis of the six country case studies reveals some very interesting trends and raises issues which require further attention. They include:

- the need for clarification regarding terminology
- differentiation between the independent and collaborative modes of IPPM in policy development
- the transformation of international branch campuses into national private universities
- mutual recognition of quality assurance and accreditation processes
- recognition and integrity of qualifications awarded, especially joint and double degrees
- data collection and management of IPPM activities
- moving from a reactive approach to planning and policies of IPPM to a more strategic approach for host African countries.

Transformation of international branch campuses into national private universities. In many cases, the first universities that were established in these countries, such as the University of Ghana (formerly the University College of the Gold Coast) or Makerere University in Uganda, were done in collaboration with a foreign institution such as the University of London. The curriculum and qualification was provided by the foreign partner. Eventually these universities became nationalised as domestic public institutions offering their own qualifications. The same is happening today. For example, in 2018 Mount Kenya University, which had operated a branch campus in Rwanda, received accreditation and permission to operate as a national private university. It will be renamed as Mount Kenya International University of Technology and the qualification will no longer be awarded by the parent university located in Kenya. The same situation exists in Mauritius, where branch campuses of three parent universities located in India, the UK and Australia are now approved to offer their own national qualification, not those of their former parent university.

Lack of differentiation between national private institutions and foreign private institutions. When a country is listing its registered/accredited HEIs they are usually divided into two categories: public universities (meaning publicly funded) and private institutions (not publicly funded). The list of private institutions does not differentiate as to whether it is domestic or foreign. Furthermore, many universities use the term *international* or a name of a foreign country in their title for marketing and branding purposes, but there is no international partner or owner involved.

Even when a foreign university is identified the challenge is to determine whether it is a foreign owned institution, a branch campus of a foreign parent university, or a local institution which has franchise arrangements with a foreign institution. There is not enough information available to determine whose qualification is offered.

While it is important and expected that the terminology is used in a way that is appropriate for the local context, it may be timely for countries to start to differentiate private universities that are domestic offering a local qualification from those institutions which are either international branch campuses or franchise programmes offering foreign qualifications. Whether the private institutions is local or foreign has major implications for policies and regulations. This reality is often overlooked, and the regulations and policies do not differ for domestic private and foreign private institutions.

Mutual recognition of accreditation. National IPPM policies that deal with incoming IPPM activities now acknowledge the importance of quality assurance and accreditation. This has been an important step forward in the last decade for assuring the quality and sustainability of IPPM-delivered education. In the future, more attention needs to be given to how arrangements can be made for mutual recognition of accreditation processes of IPPM programmes and collaborations between sending and host countries. This will help to preserve the high standards of quality but perhaps decrease some of the duplication and bureaucracy now growing around accreditation of IPPM while retaining the focus on quality as the goal and not just regulatory compliance.

International institutional partnerships. In a few countries, more attention is paid to regulating the institutional programme collaborative arrangements than to foreign institutions and programmes operating in the country. However, there is often a blurred distinction between whether the collaboration is between two partner universities or whether it is a franchise agreement between a foreign institution that is partnering with a local host country private company. It is important that national regulations and policies pay more attention to the specifics of the six different modes of IPPM and the different regulations required for each mode, especially partnership programmes versus franchised programmes.

Double and joint degrees. Collaborative academic programmes between a local and international university are growing in number and diversity of arrangements. Offering a double degree (one certificate from each partner based on double counting the majority of credits earned) is being introduced to African countries from European and Australian universities. Joint degrees are not as popular with institutions and students as only one certificate is offered with the badges of both institutions on a single degree certificate. South Africa is the only country that is keenly aware of this trend and has addressed this issue. They have made joint degrees legal and double degrees (based on double counting of credits earned for one degree) illegal in their 2017 draft Policy Framework for Internationalisation of Higher Education. However, the majority of countries have not yet analysed the arrangements and implications of joint and double degrees and have not addressed them in their policies and regulations. This needs to change to ensure the recognition and integrity of the qualifications offered through IPPM.

Registered, licensed and accredited. These terms are used very differently across countries within Africa and also with foreign partners. Once again, the local context has to be respected and one cannot expect a standardised use of terms. However, the definitions set out for the laws and regulations regarding the establishment of international partnerships and foreign institutions need to be more specific in how these terms are used and differentiated from each other.

Incoming versus outgoing IPPM activities. Countries stress different issues in their policies and regulations. For instance, Mauritius has well-developed comprehensive guidelines for incoming IPPM activities but has hardly addressed the matter of Mauritian universities wanting to establish programmes or branch campuses outside of the country. South Africa is the opposite. The 2017 Draft Policy Framework for the Internationalisation of Higher Education is oriented to South African international activities only. While there is one regulation that deals with foreign institutions operating in South Africa, there seems to be less attention given to this matter. In other countries, there are more generic types of regulations about incoming higher education providers but very little attention paid to outgoing IPPM activities of local universities. In 2018, Kenya closed several of the branch campuses of public universities operating in nearby African countries. It was appropriately

done by the Commission for University Education, but more attention needs to be given to identifying the regulations about outgoing IPPM activities in African countries.

Agreements and communication between host and sending countries. IPPM active countries need to be better informed about the national regulations of the partner country in terms of institutional and programme accreditation, financial arrangements, memorandums of understanding and recognition of qualifications, among other issues. Furthermore, communication from sending countries about impending or completed closures of branch campuses, franchise arrangements, foreign institutions and international partnerships would be useful information to exchange at the government level as it may have significant implications for enrolment planning and programme offer of the host country. Recently, the University Grants Commission of India closed several branch campuses of their public universities in African countries without providing any information or explanation to the host country.

Collection and management of IPPM data. As previously discussed, it is becoming increasingly important to distinguish between IPPM activities which are collaborative in nature, such as partnership programmes and international joint universities, and those which are independent, such as franchise arrangements and international branch campuses. This distinction is as important for collecting data as it is for developing appropriate policies and regulations. The importance and capacity to collect IPPM enrolment and programme data is becoming more urgent for enrolment planning and for developing a strategic plan as to how to use IPPM as a tool for increased access and meeting the needs of the local labour market.

Implementation of policy. While the development of appropriate policies is mandatory, the application of the policies and regulations is extremely important and determines the eventual success and sustainability of the IPPM initiatives. Thus, attention to the implementation of the policies and regulations requires continual monitoring by both the host and sending country. Closure of branch campuses, partnership programmes and franchise arrangements can put students in jeopardy and need to be avoided. At the same time, the quality of the programmes and recognition of the certificates need to be maintained and this requires vigilance in the implementation and monitoring of the regulations.

Reactive versus strategic approach. With the exception of Mauritius, few countries have given serious consideration of how to use IPPM as a tool to increase access to higher education, diversify programme offer, introduce new higher education policies and pedagogies, or meet the needs of the labour market for skilled workers. Yet, two of the country case studies (Rwanda and Uganda) have GERs of less than eight per cent, and two more (Ghana and Kenya) of less than 20 per cent. The question must be asked whether it would behave Africa countries with low GERs to carefully analyse the potential of IPPM and to move towards a more strategic approach to planning for incoming or outgoing IPPM activities.

In the early days of international branch campuses, franchise arrangements and even distance education, there were major concerns about the quality of the higher education provision, recognition of the qualifications, and even sustainability of the foreign providers, programmes and other international collaborations. As of 2019, there is greater awareness of these issues, which has resulted in more vigilance and improved policies and regulations for registering/licensing, and accreditation of IPPM. But, more has to be done to update these policies to respond to the changing landscape of IPPM.

Most of the research and analysis on IPPM and its potential benefits has been done by sending countries. Host countries have to start doing the same. Host countries that want to increase access to higher education, but do not have the financial or human resources to establish new tertiary education institutions, might want to consider how to develop a strategy to attract foreign universities to establish branch campuses, franchise arrangements and partnership programmes. This will require an analysis of which students need more access, what level and types of programmes are required, and an identification of the future requirements of the labour market. All in all, it requires countries to move from a reactive approach to IPPM to a proactive and strategic approach.

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Awareness and capacity-building initiatives

According to the *State of Education in Africa Report 2015* by the Africa–America Institute,⁶² only six per cent of young people in Sub-Saharan Africa are enrolled in tertiary education institutions compared to the global average of 26 per cent. However the promising news is that universities in many African countries are experiencing a surge in their enrolments and more universities and colleges are being established. Yet access to relevant and affordable education remains a high priority. Can IPPM play a strategic role in helping African countries to increase access to tertiary education?

This section identifies areas of further research, policy development and capacity building which could contribute to the African higher education sector's ability to harness the benefits of IPPM and avoid potential risks. The possible benefits of IPPM for host countries are many and diverse, and include the potential to:

- increase access to higher education
- diversify programme offer
- internationalise the curriculum and teaching/learning process
- offer new pedagogical approaches
- share graduate supervision
- exchange students and staff
- decrease brain drain
- assist politically unstable and failing states to rebuild higher education programmes and institutions.

But there are also potential risks and unintended consequences for host countries that must be considered, especially if the necessary policies and regulations are not in place. They can include:

- low-quality provision
- inappropriate curriculum and pedagogy
- lack of sustainability
- competition with local HEIs
- duplication of programme offers
- qualifications not being recognised
- commercialisation.

As with all new developments there are twists and turns in the road and many pitfalls to avoid. However, there are also new opportunities and prospective benefits. It is critical that IPPM developments in Africa be informed by research and analysis.

There are many aspects of IPPM that require further examination in the African context. Each country will need to determine its own priorities for its level of engagement in IPPM, either as a host or sending country. To underpin this decision, there are common topics, issues and challenges to be investigated. This includes a broad range of issues related to policy development including registration and licensing, quality assurance and accreditation procedures, availability of domestic scholarships for local students registered in foreign programmes, joint and double degree qualifications, funding mechanisms, governance of joint institutions/programmes, and the recognition and integrity of qualifications.

In comparison to student and scholar mobility, IPPM is a relatively new area of study in international education. A rough estimate would suggest that there is 20 times more research on student mobility than IPPM and even higher for research on IPPM in Africa. This needs to change. Macro issues that merit further investigation include the rationales and expected outcomes driving host and sending countries/institutions to pursue IPPM opportunities. What are the academic, social, cultural, political and economic impacts of IPPM? Which higher education actors and stakeholders have the most to gain or lose from the growth in IPPM? Are there certain disciplines that are more appropriate for IPPM than others? How does IPPM contribute to shaping students' identities? Will independent IPPM provision become commercialised and affordable only by the elite? Will quality standards fall? What sort of governance and partnership models are more appropriate for collaborative IPPM provision in Africa? What are the advantages and disadvantages of being a sending IPPM country in Africa?

Because IPPM focuses primarily on the design and delivery of academic programmes across borders there is an enormous amount of research to do on issues related to curriculum design and the teaching-learning process. Can the academic sector be confident that imported/exported or jointly designed programmes are relevant to the needs, context and labour market of the host country? What are the implications, both positive and negative, of foreign faculty teaching or co-teaching classes? In partnership programmes, how are credits counted, qualifications awarded and foreign, joint or double degrees recognised? What procedures are in place for co-supervision of students? How do learning outcomes address students' local and global competencies? These are but a few questions. Studies exist on these issues from a European or Asian perspective, but there is very little research done for the African context. The next generation of international education policy analysts, researchers and scholars, especially from Africa, need to be convinced of the need for closer scrutiny of IPPM developments in Africa.

Finally, research on IPPM requires reliable and robust data. To date, there are but a handful of countries in Africa which have managed to collect IPPM data on enrolments, programme level and discipline, sending/foreign partner country, and qualifications offered for each mode of IPPM delivery. Capacity building is important to help countries (and institutions) develop standalone or integrated IPPM data-collection systems. African countries are currently facing major challenges and opportunities to update and modernise their higher education management information systems, and it is prudent to think about including IPPM data. For years, information on international students and internationally mobile students has been included in OECD and UNESCO databases, and though there are challenges with the completeness and robustness of this data, progress is being made. It is timely to start planning how IPPM data can be included in these international databases, but it is imperative to capture this data at the institutional and national levels first.

Finally, in other parts of the world IPPM has been used in a development co-operation context to help developing countries or countries recovering from a period of economic or political instability to rebuild or strengthen their higher education sector. While sending students to foreign countries for their higher education in an effort to increase human resource capacity is a worthwhile endeavour, there is always the risk of non-returnees. Can IPPM help to provide access to local students as well as undertake capacity-building partnerships and initiatives with local HEIs? The potential role that IPPM can play in helping post-conflict African countries which are emerging from a period of political unrest and economic instability to rebuild and reinforce their tertiary education sector warrants serious consideration.

As of 2019, IPPM is increasing at a moderate pace across Africa, but this is expected to accelerate. As discussed there are possible benefits, risks and unintended consequences attached to this growth. But the necessary policy and regulations to enable, monitor, regulate and guide IPPM expansion are generally not in place or up to date with the requirements of different IPPM modes. This applies to foreign institutions planning to offer programmes in a host African country as well as African institutions who want to offer programmes and qualifications in other countries. IPPM policy development, data collection/management, research and capacity building need to be a higher priority in order to ensure that Africa benefits from the growing IPPM phenomenon.

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Key messages

1. IPPM is growing at a moderate rate but expected to significantly increase. It has been demonstrated that IPPM has the potential to increase access to higher education. Greater attention and capacity building are needed to develop appropriate policy and regulatory frameworks for IPPM regarding:
 - different modes of IPPM activities. Branch campuses, partnership programmes, distance education and franchising arrangements have both common and different aspects which need to be addressed in national and institutional policies
 - incoming and outgoing IPPM. As more African countries are engaged in both incoming and outgoing IPPM activities, a sharper focus is needed to understand the differing rationales, intended outcomes and regulatory processes of host and receiving countries.
2. To take advantage of the benefits of IPPM for broadening access to higher education, host governments need to take a more strategic and informed approach to using the different modes of IPPM to their advantage, especially in relation to access for specific target groups, needed academic programmes and requirements of the labour market.
3. Quality assurance and accreditation of IPPM are fundamental to its success. Major progress has been made but further development is needed in terms of the QAA policies and processes for the different IPPM modes and the potential for mutual recognition of accreditation.
4. The rationales as well as the academic, economic, sociocultural and political impacts of IPPM for both host and sending countries merit further investigation. Research on benefits, risks and unintended consequences for all actors and beneficiaries of IPPM is required.
5. Capacity building would benefit African governments and institutions to plan more proactively in terms of using IPPM to increase enrolments, improve IPPM policy development and establish IPPM data collection/management systems.

Appendix A

Impacts of transnational education on host countries: academic, cultural, economic and skills impacts and implications of programme and provider mobility

British Council and the German Academic Exchange Service (DAAD) (2014)

Background

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

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

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

Country selection

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

1. Botswana	6. Mauritius
2. Egypt	7. Mexico
3. Hong Kong (SAR)	8. Turkey
4. Jordan	9. UAE
5. Malaysia	10. Vietnam

Online survey of TNE stakeholder groups

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

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

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

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

Main findings

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

1. TNE reaching a different profile of student

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

2. Career development the main motivation for choosing TNE

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

3. Importance of international outlook and intercultural competence for students

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

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

4. Cost of TNE – both a positive and negative

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

On the other hand, all of the groups surveyed – including TNE and non-TNE students – were of the view that the high cost of TNE compared with local programmes represents the main negative attribute of TNE. The level of consistency in views on this issue across all survey groups is striking. Issues about pricing, affordability and how TNE tuition fees compare with alternative education options are clearly very important and require further investigation. In studying the costs and benefits of TNE, more attention needs to be given to the differentiation between the various modes of TNE, such as branch campuses, franchise/ twinning, distance education (including MOOCs) and joint/double degree programmes.

5. Academic impacts of TNE predominate at the national level

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

6. Lack of awareness of TNE

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

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

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

While TNE graduates are perceived as relatively skilled, the research suggests that TNE may be only moderately addressing skills gaps in the local labour market, depending on the type of programmes being offered.

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

8. Studying abroad and internships – important components of TNE

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

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

9. Benefits outweigh the risks

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

10. Outlook for TNE

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

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

Appendix B

Transnational education data collection systems: awareness, analysis, action

British Council and the German Academic Exchange Service (DAAD) (2015)

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 year¹ 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			

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*. Available online at: 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 guidance provided in the full 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.

Appendix C

Transnational education: a classification framework and data collection guidelines for international programme and provider mobility (IPPM)

British Council and the German Academic Exchange Service (DAAD) (2017)

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

Growth in scope, scale and importance of transnational education

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

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

TNE terminology chaos

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

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

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

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

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

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

Objectives and use of Common TNE Classification Framework

The objectives of the framework are 1) to provide some clarity and common interpretations of the different modes and categories of TNE. This requires the framework to be robust enough to ensure that the characteristics of each IPPM model are clearly defined, but flexible enough to reflect the realities and different contexts of more than 120 countries involved in TNE; 2) to provide a foundation to help systematise data collection and management within and across countries through TNE data collection guidelines. Users of the framework include higher education institutions, higher

education agencies and government departments, quality assurance agencies and others; 3) to provide common IPPM terms and categories so that eventually this data can be included in the UNESCO, OECD and Eurostat (UOE) database on higher education. This will allow trends and enrolments in IPPM to be monitored in the same way that student mobility and international student data and trends are monitored both nationally and internationally.

Meaning of Common TNE Classification Framework for IPPM

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

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

Two organising principles of the framework

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

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

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

Descriptions of TNE modes and commonly used terms

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

Use of the classification framework

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

The use of the Common TNE Classification Framework for policy development and data collection will vary from country to country, depending on the prevalent

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

TNE data collection guidelines

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

National level agencies collecting the data

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

A modular approach to collecting TNE data

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

Core data modules

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

Additional data modules

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

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

Emerging trends and issues in IPPM

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

Articulation/pathway programmes

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

Distance education

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

Quality assurance of TNE

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

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

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

Awarding and recognition of qualifications

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

double degrees are problematic in distinguishing host from sending country, and can result in double counting of the students.

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

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

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