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THE SHAPE OF GLOBAL HIGHER EDUCATION: THE AMERICAS

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Countries with higher levels of national support for international engagement have higher inbound student mobility, and greater wealth.

Contents

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The views expressed in this research do not necessarily represent those of the British Council and are the researcher's own, developed through co-commissioned research.

1. Report overview

1.1 Background to the report

The British Council started the 'Shape of Global Higher Education' series in 2016 with an in-depth analysis of global trends in international student mobility, transnational education and research collaborations. This research was informed by earlier British Council studies from 2010, when an attempt was made to measure countries' environments for international student recruitment.

The British Council commissioned this update to the series and engaged support from NAFSA: Association of International Educators in the form of their intellectual input, expertise and guidance. This report focuses on national support for international higher education across six countries in the Americas: Brazil, Canada, Chile, Colombia, Mexico and the United States of America. Parallel to this publication is a study that evaluates a wider group of countries and focuses on Europe.[1] An additional comparative perspective is brought by the inclusion of China, India and Australia.

1.2 Report structure

This report opens with an introduction to the research objectives and methodology, followed by the key findings for the Americas. The report outlines countries' international education strategies, their regulatory frameworks for transnational education[2] engagement and research environment for international collaborations. In addition to updating the assessment of national policies relating to international engagement in higher education, this report draws some findings from the sister publication *The shape of global higher education: International comparisons with Europe*. It presents international comparisons with selected European and Asian countries, and also looks at additional data on international student mobility, and international collaboration in research output. A summary of the key findings from the overall study concludes the report.

1. https://www.britishcouncil.org/education/ihe/knowledge-centre/global-landscape/shape-global-higher-education-vol-4
2. Transnational education (TNE), also known as cross-border provision, is broadly defined as the education provision in a country different to where the awarding institution is based. The term international programme and provider mobility (IPPM) has also been coined by Jane Knight. See Knight, J and McNamara, J (2016) *Transnational Education: A Classification Framework and Data Collection Guidelines for International Programme and Provider Mobility (IPPM)*. Available online at: https://www.britishcouncil.org/sites/default/files/tne_classification_framework-final.pdf

2. Aims, objectives and methodology

2.1 Research background

The British Council developed the initial research framework for this study in 2010. However, it was updated in 2016 when detailed metrics were developed, with 37 indicators which are grouped in the following broad categories:

- *The openness of education systems* measures government-level commitment to internationalisation and support for international mobility of students, researchers, academic programmes and university research. It considers immigration policies facilitating the movement of students and academics, along with regulatory environments facilitating the mobility across national borders of academic programmes and institutions.
- *Quality assurance and degree recognition* studies countries' regulatory frameworks to maintain standards in education provision and facilitate the international mobility of students, education providers and academic programmes, and the rules for education agents. This category examines quality assurance practices for higher education provision at home and overseas, recognition of prior degrees obtained abroad and recognition of international qualifications by the local labour market.
- *Equitable access and sustainable development policies* draw on government funding schemes for student and academic mobility, and participation in global research. This category considers the unintended consequences of internationalisation, such as brain drain and displacement of marginalised students by international students.

2.2 Aims and objectives

This research builds on the studies outlined above, and aims to address the following objectives:

1. To **collect** and consistently evaluate national-level policy data in order to provide a means for researchers, policymakers and higher education (HE) professionals to assess and benchmark the openness of national HE systems.
2. To **develop** and populate data for an additional set of metrics that indicates **the extent to which national governments are investing in** (or facilitating investment in) international relations through HE.
3. To **analyse** the policy and regulatory environment, together with national-level investment data, and to provide a commentary on the development of international engagement through HE.

2.3 Research methodology

This research uses an index-based methodology. The three categories above use a set of qualitative indicators – 37 indicators in total – and contribute equally to an overall National Policies Framework. The information collected against each indicator draws on policy documents sourced from government departments, HE agencies and regulatory bodies. All data is factual and reflects the political will of the national governments to support international engagement. In instances where no adequate policy documents were found, the academic literature was consulted, and interviews with locally based experts have taken place.

British Council staff and their access to experts on the ground across the countries studied were a critical part of this study.

Each indicator is assessed as to whether the criteria are fully met, partially met or not met, with scores assigned between 0 and 1. The respective scores are 1 when the criterion is fully met, 0.5 when the criterion is partly met and 0 when the criterion is not fulfilled. As such, the higher the score for a country (maximum value of 1), the higher the government support for internationalisation of higher education (IHE).

National governments use policy documents and strategies to signal their will to attract international students and academic staff; to invite transnational education/international programme and provider mobility (TNE/IPPM) into the country; and to support research collaborations. It is not within the scope of this research to assess the implementation of respective policies and whether activities on the ground deviate from the published policies.

Table 1 shows the structure of the National Policies Framework. A detailed outline of the index and description of the 37 indicators is provided in the Appendix.

Table 1: Structure of the National Policies Framework

Overview of categories and indicators	Weight
1. Openness and mobility	0.33
1.1 IHE strategy	0.25
1.2 Student mobility policies	0.25
1.3 Academic mobility and research policies	0.25
1.4 TNE: mobility of programmes and education providers (international branch campuses)	0.25
2. Quality assurance and degree recognition	0.33
2.1 International students' quality assurance and admissions	0.33
2.2 Quality assurance of academic programmes	0.33
2.3 Recognition of overseas qualifications	0.33
3. Access and sustainability	0.33
3.1 Student mobility funding	0.33
3.2 Academic mobility and research funding	0.33
3.3 Sustainable development policies	0.33
Total	**1.0**

Source: Ilieva, J and Peak, M (2016) *The shape of global higher education: National Policies Framework for International Development*. Available online at: www.britishcouncil.org/education/ihe/knowledge-centre/global-landscape/report-shape-global-higher-education

3. National Policies Framework: overall findings

Table 2 summarises the overall assessments of all 20 of the present study countries' international education policies in terms of their (i) openness, (ii) quality assurance frameworks and overseas degree recognition, and (iii) access and sustainable development. Table 3 gives the overall scores.

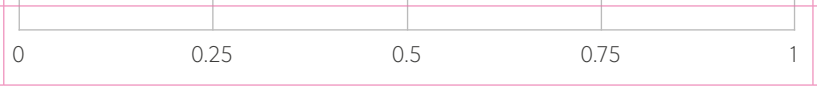
Table 2: National Policies Framework – summary of national support for international HE engagement

Countries	Openness	Quality assurance and recognition	Access and sustainability	Overall score
Australia	Very high	Very high	High	Very high
Brazil	High	Low	High	High
Bulgaria	High	Very high	High	High
Canada	Very high	High	Very high	High
Chile	High	Very low	High	High
China	Very high	Low	Very high	High
Colombia	High	Low	High	High
France	Very high	High	Very high	Very high
Germany	Very high	Very high	Very high	Very high
Greece	High	Low	Very high	High
India	High	Low	High	High
Ireland	Very high	Very high	Very high	Very high
Italy	High	High	Very high	High
Mexico	Low	Very low	High	Low
Poland	Very high	Very high	Very high	Very high
Netherlands	Very high	Very high	Very high	Very high
Russia	High	High	Very high	High
Spain	Very high	High	High	High
UK	Very high	Very high	High	Very high
USA	High	High	Very high	High

Legend: National Policies Framework assessment scores	
0–0.24	Very low
0.25–0.49	Low
0.50–0.74	High
0.75–1.00	Very high

Note: Countries in the Americas are shaded in pink.

Table 3: Overall scores by country

Countries	Score	Rating
Netherlands		0.92
Germany		0.89
Ireland		0.88
Australia		0.88
Poland		0.87
France		0.82
UK		0.79
Spain		0.74
China		0.73
Canada		0.71
Russia		0.69
Italy		0.69
USA		0.69
Bulgaria		0.67
Greece		0.62
India		0.54
Colombia		0.52
Chile		0.50
Brazil		0.50
Mexico		0.41
		

4. Background to the Americas

For the purposes of thinking about IHE, for this study we decided to present our findings in two groups – namely Canada and the US in one group, and four Latin American countries in another.

Canada and the US are among the richest countries in the world, having been industrialised in the late 19th and early 20th centuries, and are both part of the global anglosphere. Both countries have a federal structure; institutions have high degrees of autonomy and have structural incentives to pursue incoming international students. As a result of a combination of these factors, these countries are both major education exporters in terms of IHE.

Brazil, Chile, Colombia and Mexico make up the Latin American countries in our study. Though two of these countries are OECD members (Mexico and Chile) and another is a member of a much-discussed worldwide club of rising economies (Brazil, as part of the so-called BRICS group of nations – Brazil, Russia, India, China and South Africa), none of these countries is a net education exporter in IHE terms. In all four cases, the number of outbound students exceeds the number of inbound students by a factor of at least two to one.

Based on these differences, we will address these two sets of countries separately.

4.1 Canada and the United States

There are a number of structural factors that unite the US and Canadian HE systems. These include:

- *Origins and system design*: the historic origins of the two countries' HE system lie mostly in the UK (though the mix of Scottish and English influences differs). Partly for this reason, and partly because Canadian institutions have been importing scholars from the US for nearly a century, the overall form of universities, in terms of both internal and external governance, is very similar. HE in both countries mainly uses a four-year undergraduate degree with a significant amount of 'general education' (i.e. courses designed to give breadth to an education as well as depth in a particular field), followed by graduate studies.
- *Views on competition:* in both countries, private universities arrived before public institutions, and existed mainly to satisfy the needs of specific religious communities. What this has meant is that even after the creation of public universities, there is still an understanding that individual universities are in competition with one another and that they should maintain significant operational autonomy separate from the national government.
- *Wealth:* by any measure, these are the two most prosperous countries in the Americas, and among the wealthiest in the world. They are thus capable of supporting high-quality universities.
- *Isolation:* apart from one another, the two countries are not proximate to any other major international economies or centres of academic activity. This means that short-term mobility plays a relatively smaller role in these countries than, for instance, in Europe. Inbound students tend to come for entire degrees rather than a semester at a time and moreover do so with immigration in mind. With respect to the circulation of professors, there is a significant amount of cross-border hiring (though in Canada this often means graduates of US research universities), but the notion of short-term faculty mobility is relatively absent.
- *Federalism:* both countries are federal democracies in nature, with the federal government playing no role in core funding of public institutions or in influencing core institutional policies. However, in both countries, the federal government does have a decisive (though not exclusive) role in funding *research*, which does give it leverage over institutional policies in related areas, and also in terms of student financial assistance.
- *Public support:* in both countries, public financial support through the provinces or states for HE has fallen significantly in real terms over the past decades.
- *Language:* both countries are predominantly English-speaking (though Canada is officially bilingual), and have significant numbers of highly ranked research universities, which makes them attractive destination countries especially for graduate students and scholars.
- *Openness to immigration:* historically at least, both countries have welcomed immigration, and inbound student mobility has, in part, been seen as a facilitator for immigration. This makes both countries (again, historically) attractive destinations for students at all levels.

- *Institutional fee policies:* in both countries, institutions have a great deal of freedom – in some cases, total freedom – over what to charge international students in terms of tuition. There are some notable differences: in Canada, many institutions have the freedom to charge higher fees for international students but still charge a rate below the average cost because they do not think they have the market position to charge more; in the US, there are not usually differential fees for international students: at private institutions, all students pay the same fee regardless of origin, whereas at public institutions all students not from that particular state (including US students) pay an identical higher rate.
- *Demographics:* many regions in both countries are undergoing a demographic shift, reducing the number of college-aged students and creating downward pressure on domestic aggregate demand for HE. This shift is increasing the number of spaces available to international students. In neither country is the phenomenon uniform (in the US, for instance, it is a strong phenomenon in the north-east but is not at all a factor in the west and south-west), and the timing of the demographic wave is slightly different in the two countries (earlier in Canada than in the US), but the demographic shifts are affecting institutional decision-making in at least parts of both countries.

These conditions create some common frameworks that govern IHE. The first is that HE institutions, far more than national governments, are the key actors in IHE. Governments may have their own goals in the area (such as the 100,000 Strong in the Americas initiative in the USA),[3] but the scale of their financial commitments to internationalisation compare to what institutions themselves spend collectively on internationalisation, and institutions' efforts lie more substantially in recruiting inbound students than anywhere else. The overall 'national logics' of internationalisation are therefore much more related to inbound student mobility than any other kind, and the internationalisation metrics in common use reflect this logic.

At the same time, there is high demand from international students to attend good institutions in these countries, and institutions have a great deal to gain financially by satisfying that demand, given that they by and large have freedom to set their own fees. Thus, not only are institutions naturally in the driver's seat where internationalisation is concerned, they have every reason to push as hard as they can to enrol large numbers of international students. To the extent international students are seen as subsidising local institutions, governments are happy to abet this. There have been cases where international enrolment has been seen as a threat to the ability of local students to enter top schools. Generally, when institutions respond to these concerns and slow the growth of international students, they are responding to community pressures more than those from provincial or state governments.

All this said, there are some significant differences between Canada and the US that are also worth noting. Among the most important are:

- *Institutional types:* a large part of the US higher education sector is made up of what are called four-year private non-profit institutions. Nearly all liberal arts schools come under this definition, as do many of the most important research universities. This sector is almost entirely absent in Canada, where four-year privates tend to be very small religious colleges with little to no international profile. Conversely, Canada's tertiary education sector has a very large 'college' sector, which offers some degrees but mostly grants credentials called diplomas, which are two to three years in length and tend to be more professionally oriented compared to university degrees (they are in some respects closer to the European model of 'universities of applied sciences' than they are to US community colleges).
- *Accreditation:* in the US, institutional accreditation is undertaken mainly by one of six regional accreditation agencies (there are 'national' accreditors as well, but mainly for lower-prestige private institutions). In Canada, institutional accreditation is essentially non-existent for institutions that were in existence prior to about 2000.

3. www.100kstrongamericas.org

- *Outbound mobility and foreign policy:* in both countries, outbound mobility is largely seen as a private good and therefore something students will pay for on their own because of its educational value. However, because the US has an active global foreign policy, it does have an interest in training students to have knowledge of specific languages and regions and so pays for programmes in this area. Canada, which has a more limited set of foreign policy goals than the US, does not.

4.2 The Latin American countries

The study examined four countries from Latin America: Brazil, Chile, Colombia and Mexico. Apart from geography and similar levels of economic development, these four countries are less cohesive as a group than Canada and the US. Nevertheless, they still do share some important features with respect to HE and internationalisation.

The four countries examined here share one important feature in their HE systems: a very large and important role for private HE institutions, with enrolments in private institutions making up the majority of total enrolments in Brazil, Chile and Colombia. In all countries, the private sector is a mix of high- and low-prestige institutions (though in Chile most of the high-prestige universities also receive considerable public funding). In three of the four countries – Mexico is the exception – the core of the prestigious privates includes Catholic institutions.

All four countries have degree-granting institutions called 'universities'. Brazil and Colombia also have specific terms for teaching-only universities: ('centros universitários' and 'instituciones universitarias', respectively). In all countries, these institutions provide undergraduate degrees, which are called either *licenciado/licenciatura* or *bachilerado* (Brazil's *bachilerado* is the equivalent of the *licenciado* elsewhere in the region, while the *licenciatura* is a certification that allows one to become a teacher). The time to completion differs in each country. Mexico is on a fixed four-year system (based on the US model), while the others have degrees that can last anywhere from three to six years.

Brazil also has other degree-granting HE institutions outside the universities. For instance, it has 'faculdades', which are free-standing institutions that only cover a narrow set of disciplines (as is common in parts of Asia and eastern Europe). It also has a series of non-university institutions called 'Instituto Federal de Educação, Ciência e Tecnologia' (usually shortened to IF), which provide technical education mostly at the sub-baccalaureat level, but which also award bachelor's degrees. Colombia's 'Escuelas Tecnológicas' provide a similar mix of bachelor's and sub-bachelor's degrees.

Beyond degree-granting institutions, two of the countries have short-cycle tertiary institutions for more applied/professional programmes of shorter durations (usually two to three years). In Colombia, these are 'Instituciones Técnicas Profesionales' and 'Instituciones Tecnológicas', and in Chile they are known as 'Centros de Formación Técnica' and 'Institutos Profesionales', with the latter in some respects resembling the Brazilian IFs or Colombian Instituciones Tecnológicas except they do not provide degrees. Neither Mexico nor Brazil has purely non-degree-granting tertiary institutions.

Though the institutional forms of HE differ in Latin America from one country to another, many aspects of these countries' HE systems and their contexts are nevertheless similar, particularly with respect to internationalisation. For example:

- *Lower levels of affluence:* all four countries have much lower average incomes than Canada and the US, even though two of them (Chile and Mexico) are considered sufficiently affluent to have acceded to the OECD, which is often described as a 'rich countries' club'.
- *Lower prestige universities:* in consequence of being less affluent, there is less public money for research, and fewer private sector partners with whom to engage in advanced research. As a result, institutional activities are more heavily weighted towards teaching than they are in other countries in our study and consequently fewer 'prestige' or 'world-class' universities are able to attract international students or faculty. It also means governments may not view knowledge and advanced skills as being quite as central to economic growth as their counterparts do in richer countries, which means they do not see HE institutions as economic resources in quite the same way as, for instance, countries in Europe, and Canada and the US.

- *Lower demand for inbound mobility:* as a consequence of having fewer prestigious institutions, there is lower demand for inbound mobility for academic reasons, and lower levels of affluence result in these countries being less desirable for international students. Further, the prospect of immigration to these countries may not be as enticing to prospective mobile students. As a result, all four countries have quite low inbound mobility rates, and all four are net exporters of students. In fact, in all four countries, the number of outbound students exceeds the inbound students by a factor of at least 2.5 and in some cases much more.
- *Lower levels of skilled immigration:* for a similar set of reasons as noted regarding inbound mobility, inbound migration of skilled labour is relatively low, which means that issues around credential recognition are not seen as particularly urgent (though in recent months the situation in Venezuela has prompted a significant flow of talent into Colombia and the issue of credential recognition has gained in priority as a result).
- *Language:* within the Spanish-speaking and Portuguese-speaking worlds, student flows tend to be focused more towards Europe than within other Latin American countries. And while English-taught programmes are not unknown in the region, they are not common either. Weak command of English among Latin American academics is also seen as a barrier to more international research co-operation, and mastery of the language is a significant aim of most of the regions' international mobility strategies.

For all of these reasons, internationalisation is a lower-priority policy area in the Latin American countries than it is in the US and Canada. Many countries would like to invest more in research, and in international collaborations, but this is not a huge priority with scarce monetary resources. Inbound mobility is not growing and so attracts no government investment; inbound movement of skilled professionals and academics is quite low as well, for similar reasons.

Outbound, full degree, student mobility is increasing but not due to any government intervention. To the extent that governments show significant interest in outbound mobility, it is to send graduate students or post-docs abroad to give them exposure to high-quality research environments and environments requiring other languages (mainly, but not exclusively, English). Such programmes are justified on the grounds that it will raise the quality of the academic workforce at home when they return from their studies. As a result, those funded outbound mobility arrangements that do exist are overwhelmingly concentrated on young academic staff, with opportunities for mid-career staff being correspondingly limited.

5. International education strategies

National strategies for IHE in the countries studied within the Americas are notable mostly for their absence or for being relatively weak on substance. Among the four Latin American countries, all of which are education exporters, there are no strong whole-of-government strategies. The government of Colombia, for instance, does not have an internationalisation strategy, though its accreditation council does (it deals mostly with improving quality assurance so Colombian institutions can be attractive international partners). The Brazilian and Mexican governments do not have independent internationalisation strategies, though internationalisation does rate at least a passing mention in their most recent sectoral strategic plans. The Chilean government does not have an internationalisation strategy, though it does contribute funds to institutional internationalisation plans. It also contributes to *LearnChile*, which is a joint effort of several universities to raise the country's profile as an education destination, but which is not a 'national strategy' per se.

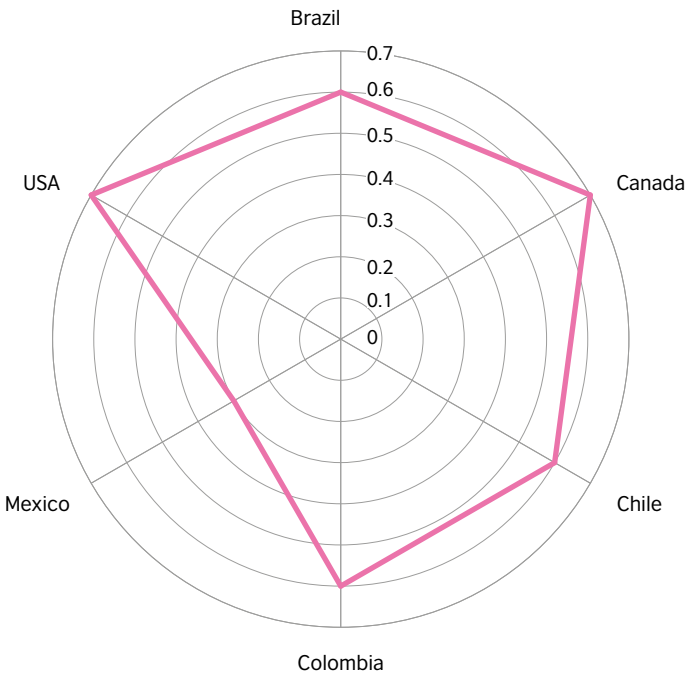
Canada and the US both have documents labelled as strategies, but they differ significantly from those seen in Europe or Australia, mainly because of the weak position of the two countries' central governments. The US strategy, as enunciated by the US Department of State (not the Department of Education) in 2012 and 2018, *Succeeding Globally Through International Education and Engagement* is notable in that it is one of only a few national strategies from all of the countries we have studied with no actual targets. The goals are phrased in exceedingly vague terms (e.g. 'increase global and cultural competencies of all US students') and do not provide any specific tasks or reference to activities in a way that represents an actual strategy.

The Canadian strategy is perhaps the closest thing to a strategic document in the region of the Americas, in the sense that it contains both goals ('double the number of international students') and a set of theoretically related tasks. However, even here, the strategy is *uniquely* a federal document and does not involve co-ordination for either provinces or HE institutions. Thus, while the small investments made under this strategy (less than $5 million/year) were no doubt of assistance in marketing the national education brand, they remain a very small drop in a large body of water.

Note that at the time of writing the government of Canada is currently drafting a new international strategy. While the details of the strategy are not available, the March 2019 budget included a pledge of $8 million/year for inbound mobility and up to $50 million/year for some kind of outbound mobility, although no details are available and the plan is described as a 'pilot' scheme rather than being permanent.

Figure 1 highlights countries' scores on comprehensive international education strategies. A more detailed analysis and comparison with European nations is expanded on in Section 8.1.

Figure 1: International education strategies in the Americas



6. Transnational education

The ability to engage in transnational *exports* – that is, setting up international campuses or programmes abroad – is to a large degree related to the prestige of the institutions doing the exporting, or at least to the prestige of the national brand under which the exporting is being done.

Within the region, the leader is clearly the US, where many institutions have global brands that they use to create TNE/IPPM institutions and partnerships around the globe. Some of these are particularly spectacular – NYU Abu Dhabi and Yale-NUS come to mind, as do the various US institutions with campuses in Doha's Education City. US universities also have a number of national centres and offices around the world, which may not in themselves deliver TNE/IPPM, but certainly facilitate various forms of international co-operation and establish a brand presence for US schools in a number of countries. These ventures are not always successful; for example, a couple of dozen institutions had to withdraw from Japanese campus ventures after a particularly enthusiastic bout of expansion there during the early 1990s, but the failure rate is no worse than, for instance, Australia's. And relative to the overall size of the country's HE sector, TNE/IPPM efforts in the US are perhaps less important than their equivalents in Australia and the UK. That said, in terms of absolute size, American universities remain among the world's most important – if not *the* most important – players globally in TNE/IPPM.

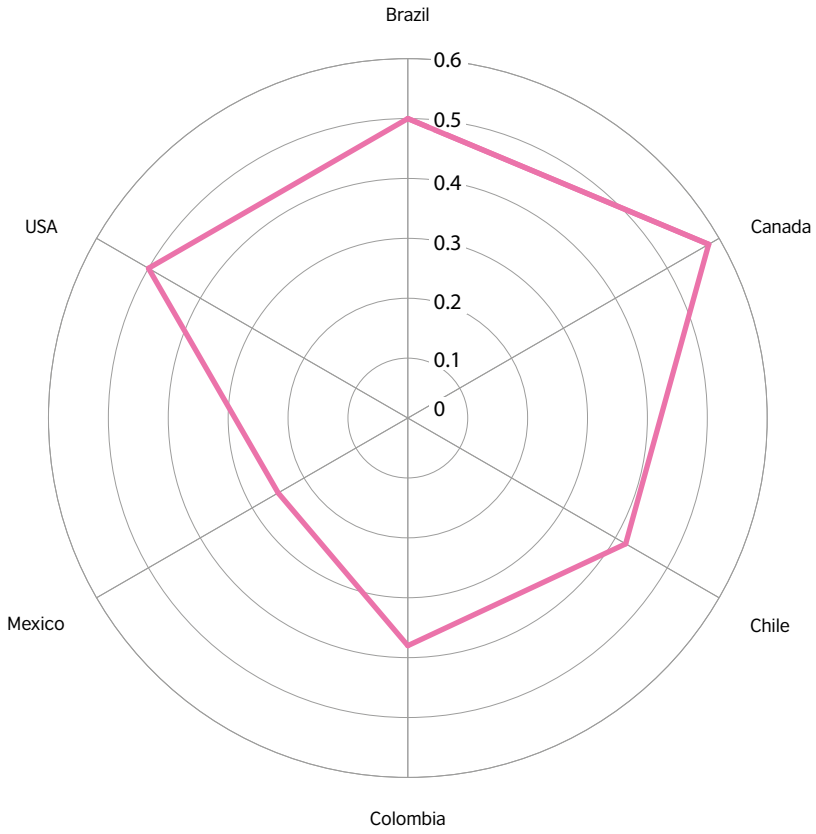
In contrast, the Canadian effort in TNE/IPPM is much more modest. Canadian institutions do operate a number of TNE/IPPM efforts abroad, particularly in the Gulf, though often this is done very quietly. The University of Calgary and the College of the North Atlantic both manage HE institutions in the Qatari education system, and other colleges have managed HE institutions in Saudi Arabia and Kuwait. The Higher Colleges of Technology in Abu Dhabi was set up via a technical assistance contract by a Canadian college. In a sense, TNE/IPPM for Canadian institutions is done via management rather than by brand-name entry into foreign markets. The reason for this more distant approach appears to be a combination of institutional risk aversion and a level of base funding high enough that institutions do not need to take on the risk of opening foreign campuses to expand their funding.

Because the ability to promote transnational exports abroad are to a considerable degree a function of the amount of global prestige possessed by the exporting university in question, the relative lack of prestigious 'world-class' universities in our four Latin American countries negatively affects their ability to engage in this kind of activity. TNE/IPPM exporting is thus much more limited than it is in the US and Canada, though Mexico's Universidad Nacional Autónoma de Mexico (UNAM) has several satellite campuses abroad in the US and Canada, and operates 'Centres for Mexican Studies' in Beijing, Madrid and Costa Rica.

With respect to transnational *imports*, we see very little in the way of foreign institutions setting up campuses in any of these six countries in the Americas, even though no country's laws specifically forbid it and five of the six countries have significant private tertiary education sectors. It is unclear why this is the case in Latin America, though perhaps there is a sense that extensive local private sector institutions leave little in the way of niche education markets for foreign providers to exploit. In the US, there are a couple of examples of high-profile partnerships with foreign universities (e.g. Cornell Tech in New York, the new joint Tsinghua University–University of Washington campus in Bellevue, Washington State), but these are infinitesimal in terms of the overall system. In Canada, the phenomenon is limited to a very small number of US institutions (e.g. Northeastern University) setting up small programmes to deliver in Toronto and Vancouver.

Figure 2 highlights countries' scores regarding national policy support for TNE/IPPM. A more detailed analysis and comparison with European nations is expanded on in Section 8.5.

Figure 2: Policy framework for TNE/IPPM – focus on the Americas



7. Research collaboration

International research collaborations are important throughout the Americas. However, the way this is expressed in policy terms differs significantly between Canada and the US compared to the four Latin American countries and from much of the rest of the world.

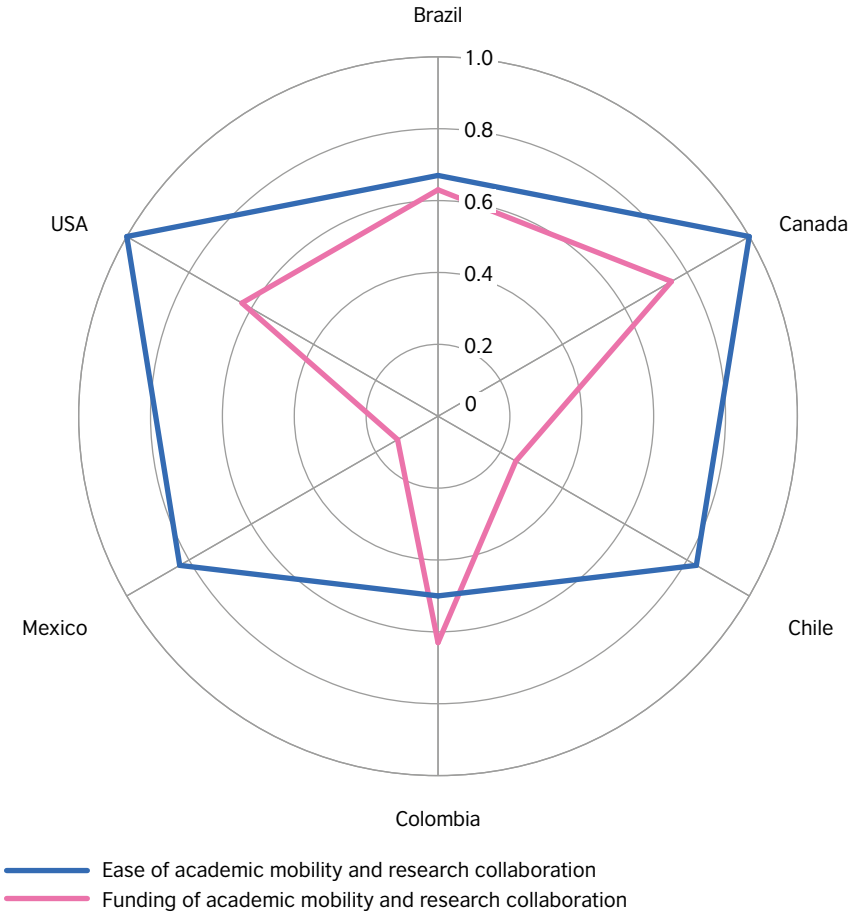
None of the countries in the region has a UK-style national research review, nor are there separate research-related block payments to HE institutions. The dominant model throughout the region sees institutions covering base costs through a mix of general-purpose government grants and tuition fees, and governments supporting individual researchers through competitive project funding. As a result, what matters is not institutional research links, but those of individual researchers. This means there is no particular need for governments to systemically measure international co-operation levels.

All of the countries in our survey do have some funding specifically to support international collaborations (though in Canada this kind of earmarked funding is quite new). That said, research expenditures are very low in the four Latin American countries and so the amounts devoted to these kinds of funds are very small. Only the US puts major investments into these kinds of collaborative arrangements.

It's worth noting that the dynamic of international research collaboration is different in the US than anywhere else in the world. Because its top research universities attract talent from all over the world, many of the best researchers have their formative research experiences in US universities, are mentored by US professors, and develop research affinities with other US-trained scholars. Some of these international researchers remain in the US but retain scholarly links and interests with colleagues in their home countries. Others return to their home countries but retain scholarly links with friends and colleagues in US institutions. In either case, the doctoral programmes of top US research universities with scholars from around the world also measure their early scholarly progression by the publications they have in US-based journals. As a result, the US does not rely on targeted international research funding in order to promote international research co-operation. Rather, some of the best researchers around the world are conditioned from the dawn of their research careers to work with US academics and institutions.

Figure 3 highlights countries' scores relating to national support for academic mobility and funding for research collaborations. A more detailed analysis and comparison with European nations is expanded on in Sections 8.3 and 8.4.

Figure 3: Ease of academic and research mobility and funding for academic and research collaborations – focus on the Americas



8. International comparisons

Based on our overall analysis of internationalisation policies, we can make two broad generalisations. The first is that within the Americas, internationalisation scores vary significantly between Canada and the US, which receive generally high scores, and the four Latin American countries, which receive lower scores. The second is that the region as a whole – including Canada and the US – receive lower scores across the board than countries studied in the rest of the world. For the Latin American countries, this mostly reflects the fact that they are still developing their HE systems and are less focused on internationalisation as a policy issue. In the US and Canada, however, the gap, to some degree, simply reflects different constitutional arrangements and the absence of national authorities in HE.

This section compares internationalisation policies in the Americas with those of 11 European countries (Bulgaria, France, Germany, Greece, Ireland, Italy, Poland, the Netherlands, Russia, Spain and the UK).

To broaden the international dimension of this research, three additional benchmark countries were included: Australia, China and India. Some of the following analysis was initially published in *The shape of global higher education: International comparisons with Europe*.

8.1 Comparisons of international education strategies

With respect to openness, Canada receives the highest marks in the region, followed closely by the US. To the extent that either of them loses marks, it tends to be on subjects related to the decentralised nature of HE in each country: the lack of national governments signing bilateral agreements, lack of national standards for foreign institutions, and lack of national research authorities with an interest in tracking levels of international research collaboration. Were it not for these factors, both countries would have scores comparable to the top countries included in the 20-country study.

Countries' international strategies are effectively signalling the excellence of their HE systems to prospective students. In practice, this must be backed by governments' commitment to education, manifested by their spending on it.

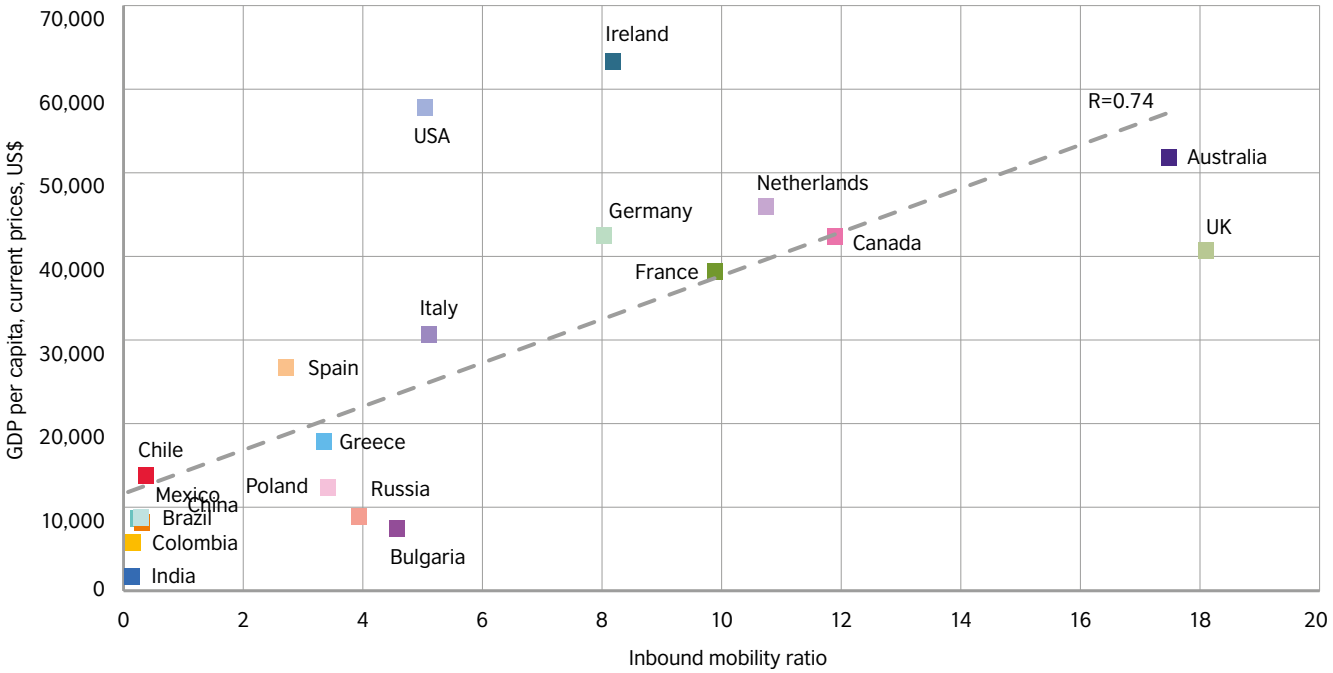
Student mobility continues to be the most popular component in national strategies for international engagement. It is particularly strong in countries with an established reputation as education exporters, for example, Australia, the UK, the Netherlands and Canada, followed by France and Germany.

Figure 4 shows the positive relationship between countries' inbound mobility ratios (i.e. the proportion of international students as a percentage of the total student population) and their gross domestic product (GDP) per capita. It draws on the latest available data from the United Nations Educational, Scientific and Cultural Organisation (UNESCO), which is for 2016.

The UK and Australia have the highest proportions of international students.

Figure 4 suggests that the USA and Ireland have a high potential to attract more international students. While Italy's GDP per capita is just under half that of the USA, it attracts a similar proportion of international students as the USA. Bulgaria presents an interesting comparison: its GDP per capita is almost seven and a half times lower than that of the USA; however, at 4.6 per cent its inbound mobility ratio is similar to that of the USA, which is five per cent. Similarly, Ireland enjoys significantly higher wealth per capita than Germany. However, the proportion of international students in the two countries is around eight per cent of the total student population.

Figure 4: GDP per capita and inbound student mobility ratio in 2016



Source: British Council analysis, gross domestic product per capita, current prices; US$; International Monetary Fund, World Economic Outlook Database, October 2018.

In addition to greater wealth, the countries with high inbound mobility ratios (except for Poland) also have high levels of national policy support for their international engagement. Figure 5 highlights countries' scores on comprehensive international education strategies. Indicators in this category include the following questions:

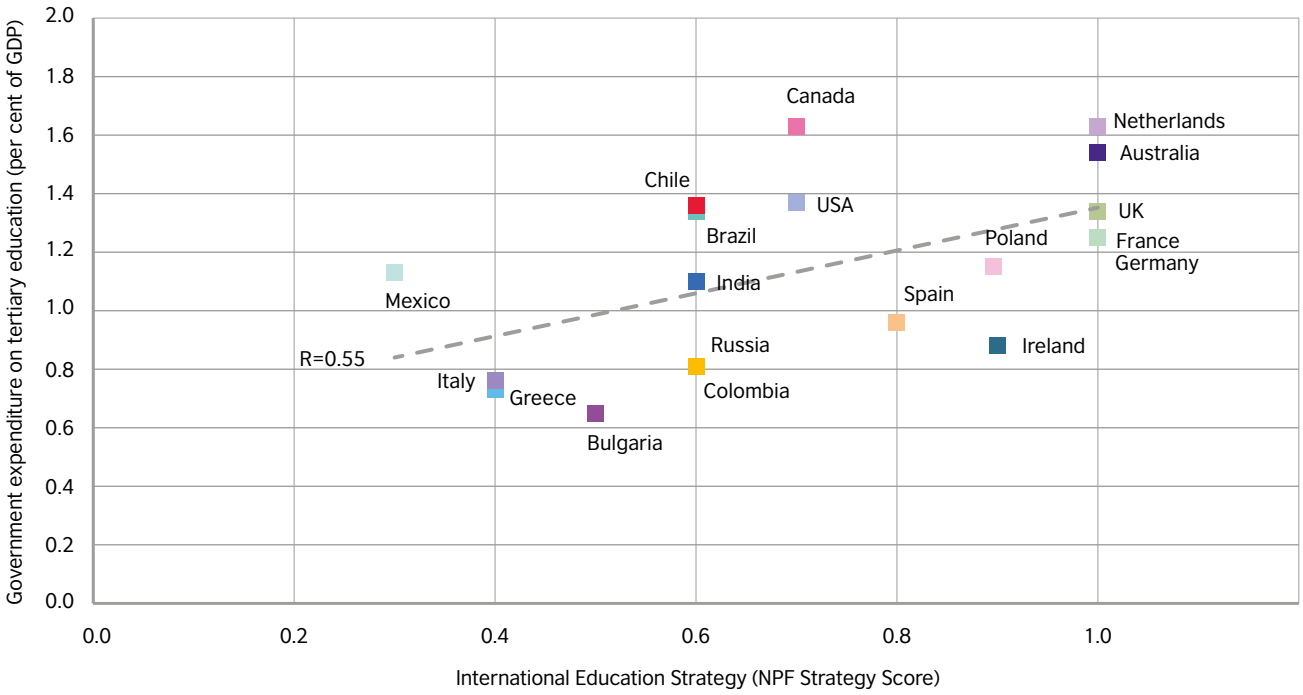
- Has the ministry of education (or equivalent) produced a detailed international HE strategy (e.g. covering student mobility, research collaboration, development goals)? Well-defined and measurable goals are an advantage.
- Is there a dedicated body (or bodies) promoting IHE? This is usually the body in charge of the implementation of the strategy.
- Does the dedicated internationalisation body have a significant overseas presence, for example, by way of overseas representative offices or participation in conferences, trade fairs and marketing events?
- Over the past five years, has the government made efforts to sustain or increase the number of bilateral agreements with foreign education ministries on the topic of collaboration in HE?
- Does the government monitor and produce data on the internationalisation of its HE system, for example, by producing data on international student and faculty mobility, programme and provider mobility, and research collaboration?

As already noted, most countries, except Bulgaria, Greece, Italy and Russia, have well-developed and comprehensive international education strategies. The Americas compare less favourably on this measure. The USA and Canada have devolved HE systems, whereas other countries in the region mainly import HE. Their policies on outbound mobility are, therefore, better developed than their policies relating to inbound mobility.

Figure 5: International education strategies in Europe and the Americas

There is clear evidence that government expenditure on tertiary education, as a percentage of GDP, and the concurrent existence of a well-developed international education strategy, is linked with higher ratios of inbound mobility. More specifically, the evidence suggests that countries that attract a substantial proportion of international students (more than eight international students for every 100 students) have a combination of (i) a developed international education strategy[4] (NPF score of NPF>0.90), and (ii) robust funding for tertiary education (>1.34 per cent of GDP).
This is illustrated in Figure 6.

Figure 6: International education strategy, government expenditure on tertiary education[5]



Source: British Council analysis, Euromonitor, UNESCO UIS.

Table 4: Inbound mobility ratios

Country	Inbound mobility ratio
UK	18.10
Australia	17.49
Canada	11.89
Netherlands	10.74
France	9.89
Ireland	8.19
Germany	8.04
Italy	5.10
USA	5.04
Bulgaria	4.57

Country	Inbound mobility ratio
Russia	3.94
Poland	3.42
Greece	3.35
Spain	2.71
Chile	0.37
China	0.31
Mexico	0.30
Brazil	0.24
Colombia	0.16
India	0.14

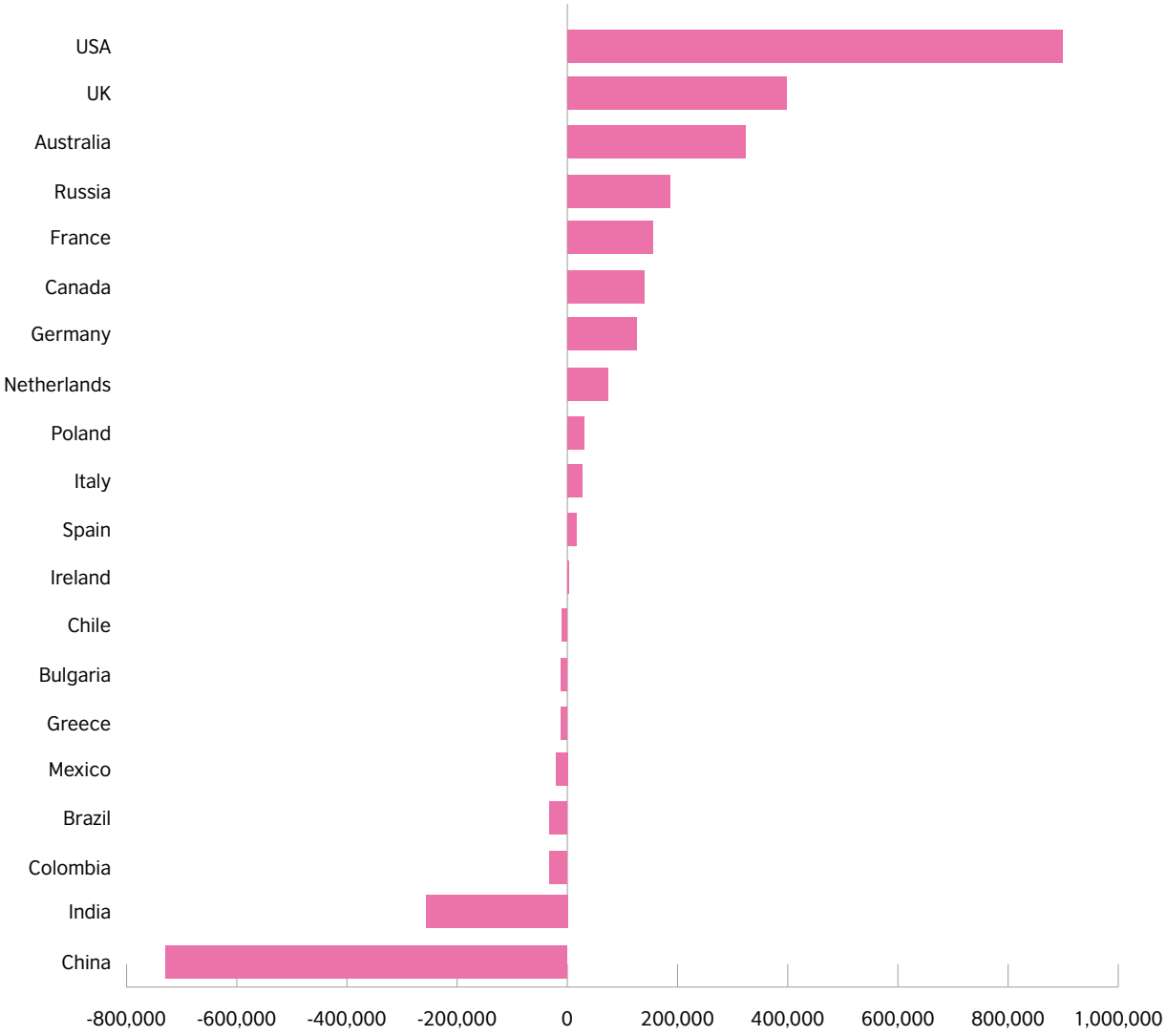
4. Measured against OPEN questions 11–15 in the NPF.
5. China does not report expenditure data, hence it is not included in this graph.

Inbound student mobility is a good indicator of strong education exports.

Figure 7 shows the net flows of international students. The divide between net exporters and net importers of HE is quite clear and is illustrated by the heavy inbound balance of the USA, the UK and Australia and outbound mobility of China, India, Colombia, Brazil and Mexico.

The UNESCO data shows Germany had 245,000 inbound students in 2016. The country's relatively smaller inbound balance shows that many German students pursue their HE overseas.

Figure 7: Net flows of international student mobility



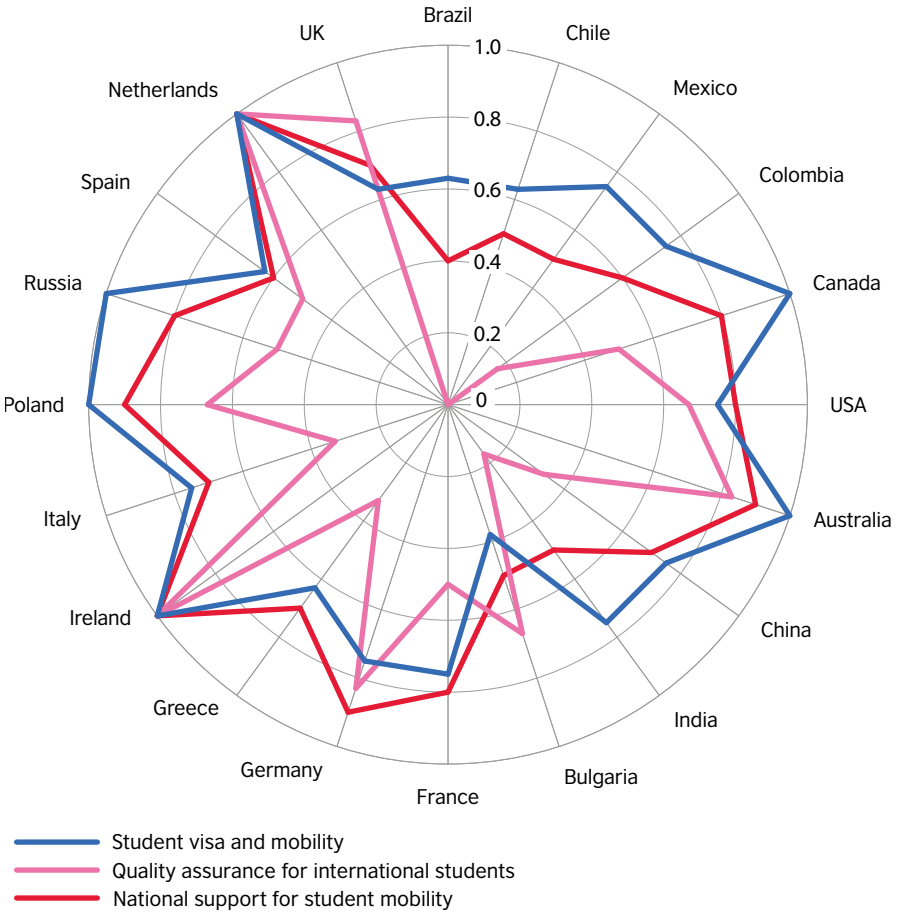
Source: British Council analysis, UNESCO Institute for Statistics; Data extracted on 2 April 2019 from UIS. Stat.

8.2 International student mobility

Generally speaking, across the majority of countries covered in this study, international student mobility is the most well-developed category of the National Policies Framework.

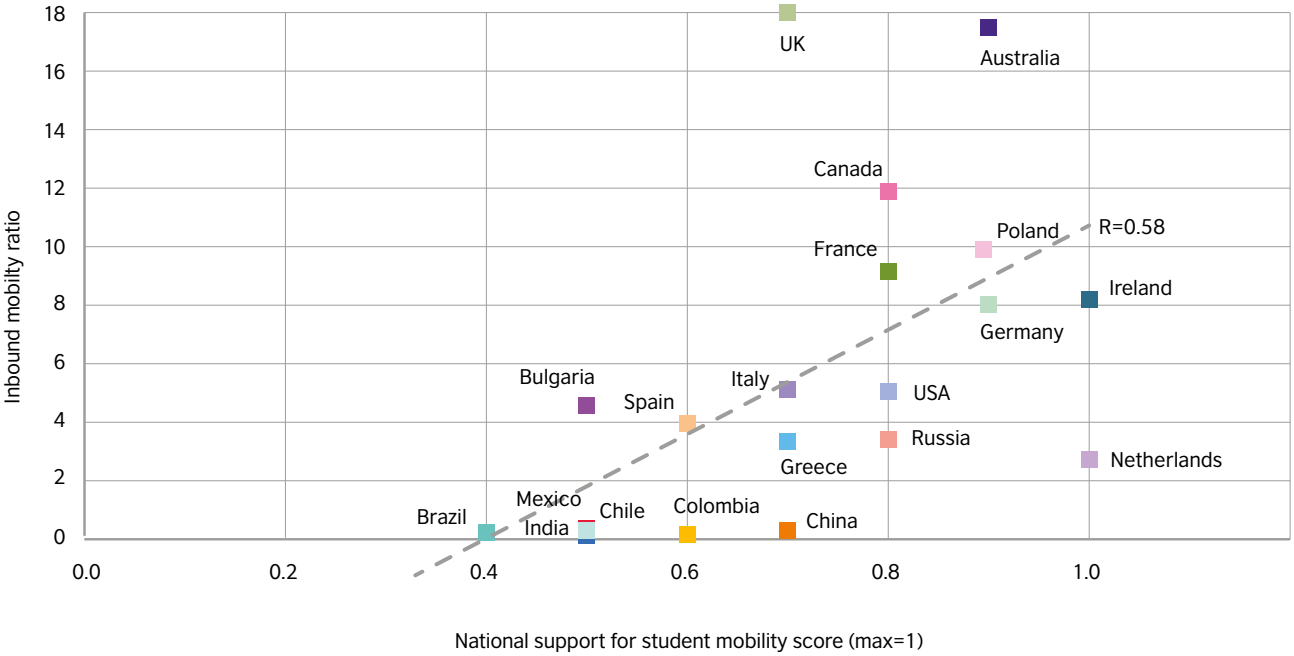
Quality assurance of students' enrolment, and maintenance of standards of education provision are best developed in countries with an established track record for hosting international students. This is illustrated by the contrast in the assessments of national systems in the Latin American countries compared to Canada and the USA, and especially to European countries such as Ireland and the Netherlands. Australia, China and India are included in Figure 8 for comparative purposes.

Figure 8: Policy support for international student mobility



There is a strong positive relationship between countries' supportive environment for inbound student mobility and the inbound student flows. To standardise the inbound mobility and control for the size of the domestic HE system, Figure 9 uses the inbound mobility ratio published by the UNESCO Institute for Statistics, which shows the proportion of international students among the total student population in each country. The countries with the highest inbound ratios are the UK and Australia, which also charge the highest levels of tuition fees. The Netherlands is one of the countries with the most substantial programme provision in the English language, with 375 English-taught bachelor courses.[6]

Figure 9: National support for international student mobility and inbound student flows



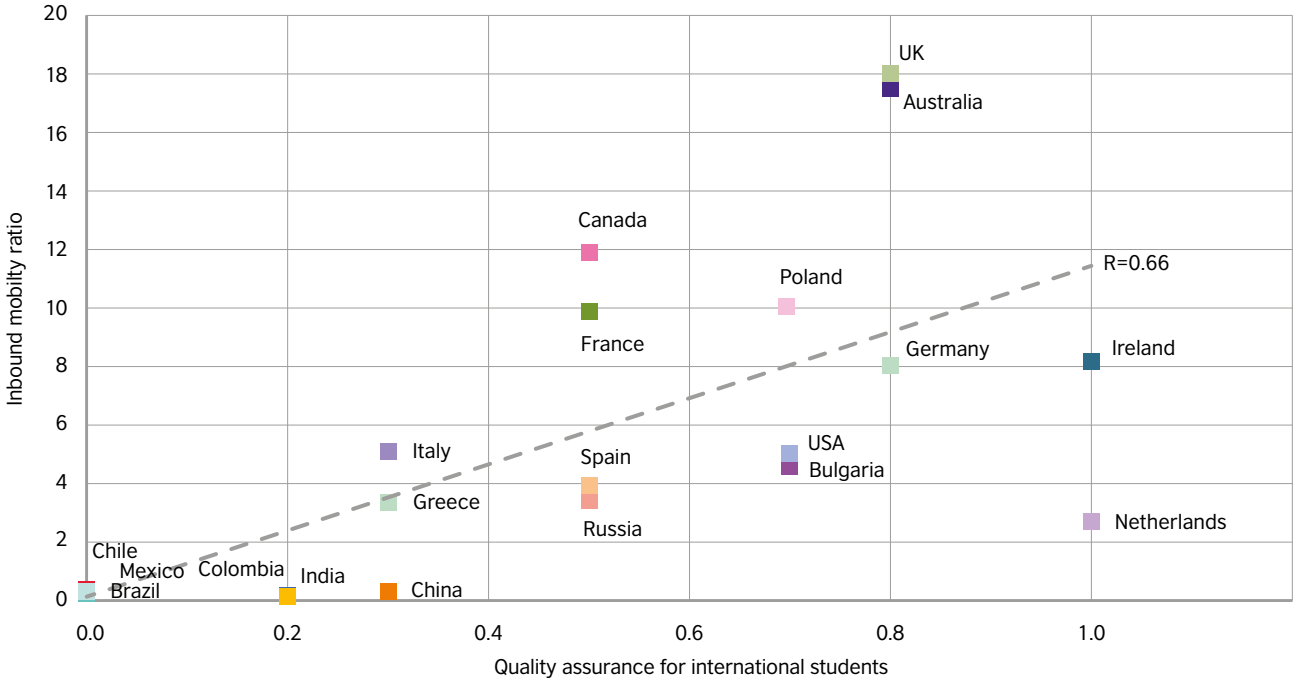
Source: British Council, UNESCO Institute for Statistics.

6. Times Higher Education (2017) 'Fifty-fold growth in English-taught bachelor's courses in Europe', www.timeshighereducation.com/news/fifty-fold-growth-english-taught-bachelors-courses-europe?utm_source=studyportals&utm_medium=project

Furthermore, there is a link between the presence of a substantial number of inbound students in a country and the existence of quality assurance policies. This explains why countries with low inbound mobility (e.g. the Latin American countries, as well as Greece, Italy, India and Spain) have a weaker quality assurance policy framework for international students, as shown in Figure 10. One exception is China, which has a high absolute number of international students (440,000),[7] but has a low inbound mobility ratio (around 0.3).

The low inbound mobility ratio of China is due to the large overall tertiary education population. That said, the country is still considered one of the main study destinations for international students.

Figure 10: Positive relationship between quality assurance for international students and inbound mobility



Source British Council, UNESCO Institute for Statistics.

7. https://www.insidehighered.com/quicktakes/2018/09/20/why-international-students-study-china

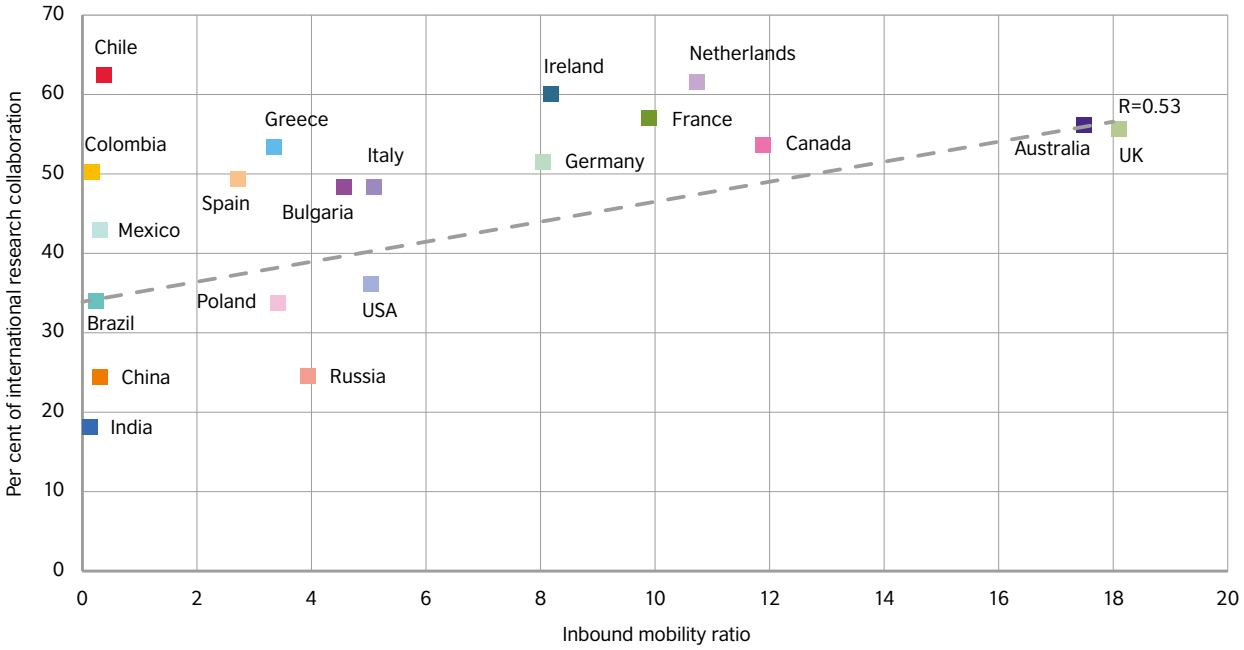
8.3. International research collaborations

International research collaboration is an area which enjoys a high degree of support in national policies (although there are variations between countries). 'Ease of academic mobility and research collaborations' studies the countries' visa policies for academic mobility and the presence of 'talent initiatives' aimed at attracting researchers. It also considers whether internationally produced research output is used in national research assessments for funding. The second category, 'Funding of academic mobility and research collaboration', looks at government funding for inbound and outbound academic mobility and funding for international research co-operation. Most countries are strong in this area, in particular Canada and the US. European countries score strongly – in addition to research funded by the EU's Horizon programme, all countries except Bulgaria have funds earmarked for international collaborations.

This analysis includes additional data on the impact of internationalisation on the quality of research output. There is a strong positive relationship between inbound international student mobility flows and internationally produced research output as a proportion of the total research output from the country.[8] Organisation for Economic Co-operation and Development (OECD) data shows that the proportion of international students across OECD countries is the highest at the PhD level.[9] One explanation for this relationship is the contribution of international PhD students to their host country in terms of research links they bring with them. Also, many of the countries with mature HE systems in this study (e.g. the Netherlands, Germany, France and Ireland) have talent-focused policies which aim to attract global students at the research level. Local and regional funding programmes also support non-mobility-related international research collaboration. This is more visible in the EHEA, with the existence of substantial research funding projects (e.g. Horizon 2020).

As shown in Figure 11, the analysis of Scopus data about the nature of research collaborations and inbound mobility suggests that most countries with substantial international research collaboration (>50 per cent of total research collaboration) have a high inbound mobility ratio (>seven per cent).

Figure 11: International research collaboration as percentage of total research collaboration versus inbound mobility ratio

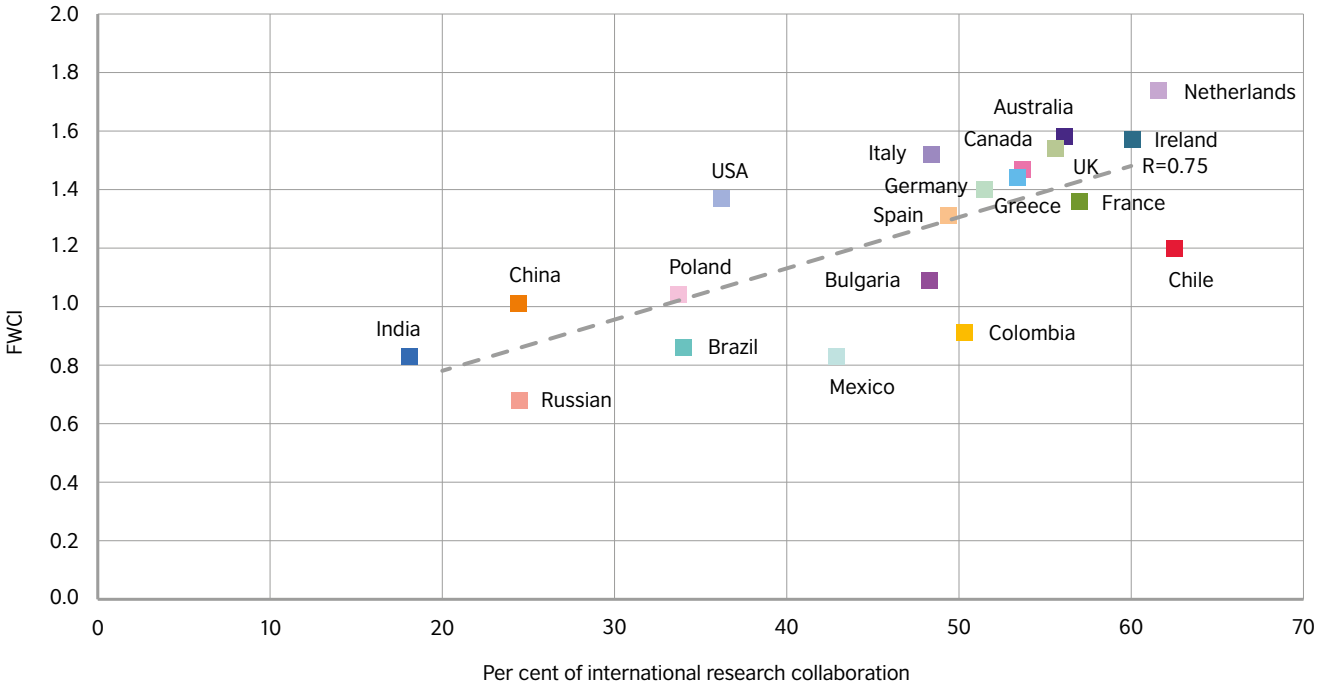


Source: British Council analysis, Scopus/Scival, UNESCO Institute of Statistics

8. We acknowledge that there may be some concerns regarding a bias in this analysis towards peer-review journals published in the English language; however, Scopus is the largest citation database with some 67 million records. About 22 per cent of the documents are in a language other than English. Their global coverage lists more than 700 journals in Latin America. See page 20: https://www.elsevier.com/__data/assets/pdf_file/0007/69451/0597-Scopus-Content-Coverage-Guide-US-LETTER-v4-HI-singles-no-ticks.pdf
9. OECD (2018) Education at a glance. Available online at: www.oecd-ilibrary.org/education/education-at-a-glance-2018_eag-2018-en

Additional analysis of Scopus data shows there is a strong positive relationship between international research collaborations and the quality of the produced research, in terms of field weighted citation impact (FWCI), as demonstrated in Figure 12. The more international the research, the higher its impact citation and, therefore, its quality.[10]

Figure 12: International research collaboration as percentage of total research collaboration versus FWCI



Source: British Council analysis, Scopus/Scival.

10. The link between field-weighted citation and quality and impact of research is used widely in the bibliometric literature and research evaluations for the UK government (see page 4 of this document: https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/660855/uk-research-base-international-comparison-2016.pdf). However, it has limitations as highlighted in the research literature (https://journals.sagepub.com/doi/full/10.1177/2158244019829575).

8.4 Relationship between policy support for research collaboration and quality of research output

Overall, countries are much more supportive of visa policies for global talent, and less so of funding research collaborations. The countries identified as having the most supportive funding for academic mobility and global research are Australia, Germany and Ireland. The countries with less supportive funding for academic mobility and global research are Mexico, Bulgaria, Chile and Russia.

When it comes to ease of academic mobility and research collaboration, most countries appear to have a strong (>0.50) policy framework to enable or facilitate academic mobility and research collaboration. The lowest scores are in Bulgaria, Colombia and India. See Figure 13 for details.

The analysis of Scopus data shows that research globally is increasingly international. International collaborations have contributed to a significant increase in the impact of collaborative research but, equally, the quality of the overall research output has improved (see Figure 12).

Countries with a positive policy framework (e.g. >0.6 total score in NPF) produce high-impact research, in terms of FWCI, which exceeds the world average (FWCI = 1). More specifically, as shown in Figure 14 (see highlighted area), with the exception of Russia, all countries with a total NPF score of 0.6 or above have an FWCI of more than 1. This means that the research produced in these countries generates citations above the world's average in the particular subject area.

Figure 13: Academic mobility and funding for research collaborations – global comparisons

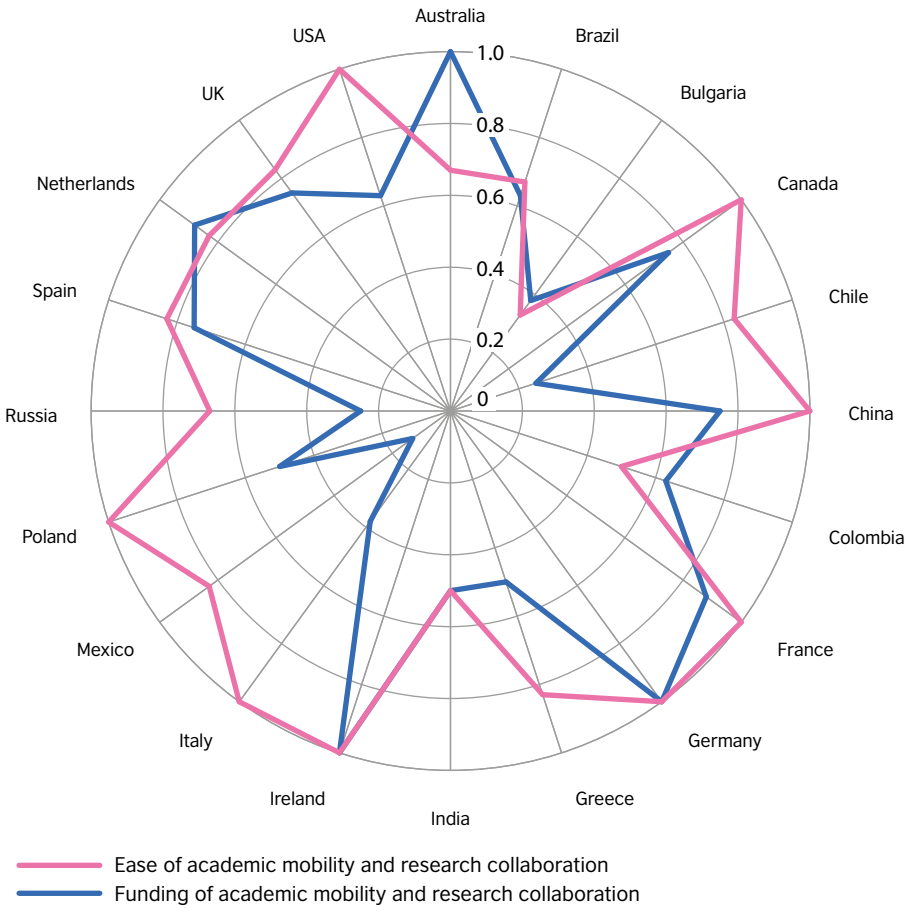
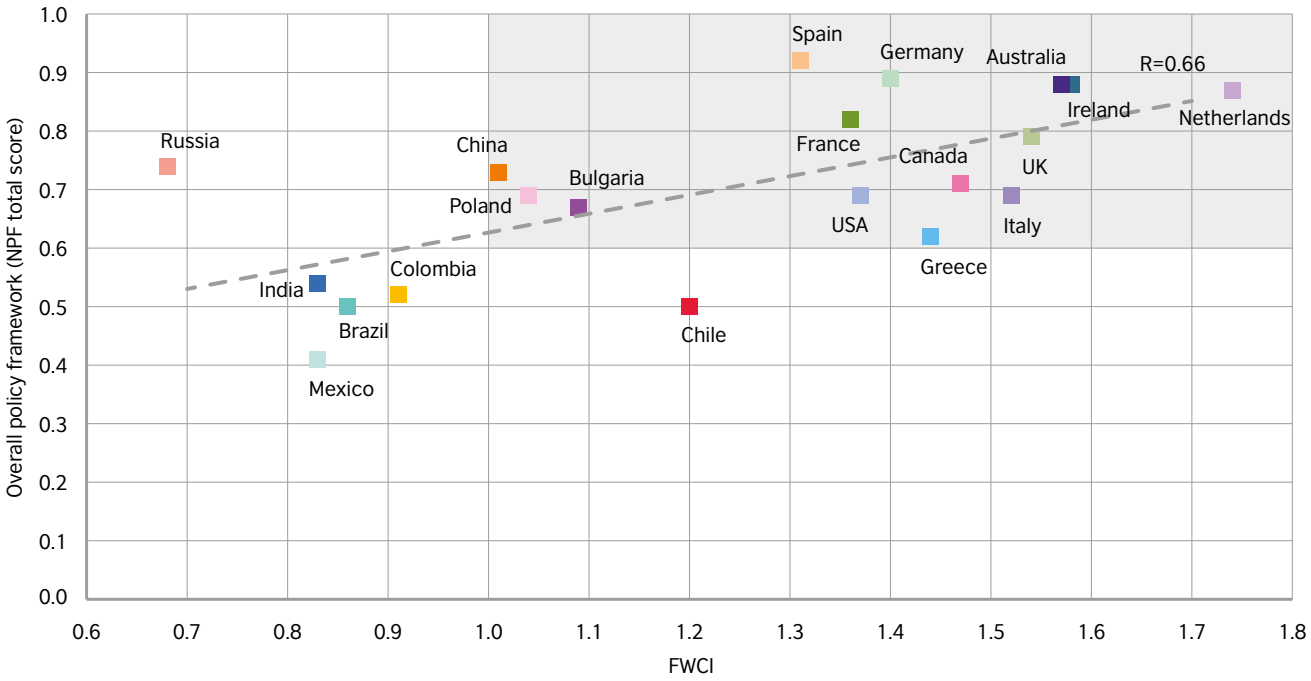


Figure 14: Overall policy framework and FWCI

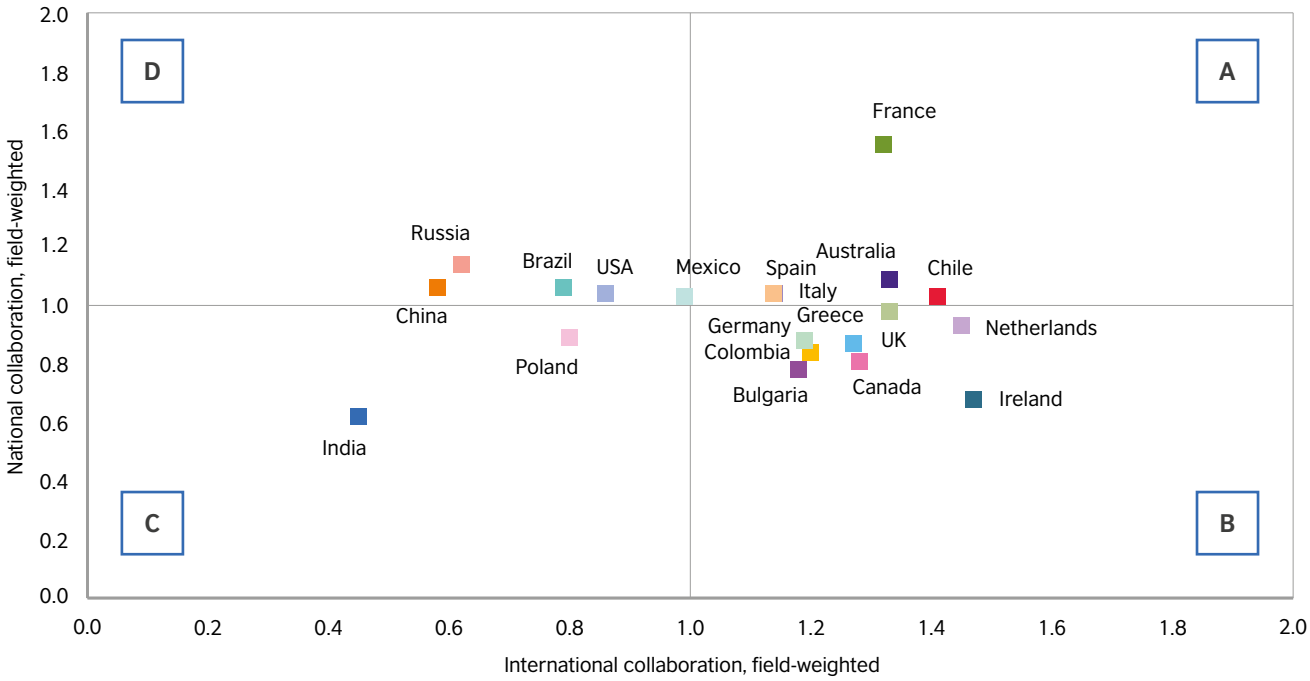


Source: British Council, Scopus/Scival.

Looking at the evolution of national and international collaboration across the countries of this research, the analysis of Scopus data for 22 years shows that seven countries have experienced a concurrent increase in their field-weighted[11] international and national research collaboration activity. This means that these countries have improved the volume of both international and national collaborative research in relation to the average collaboration in each subject or field. In some countries (e.g. the USA, the UK, Italy and France (see Figure 16)) there has been a slight decline in the field-weighted national research collaboration followed by an increase in the international research collaboration. This implies that the research produced in these countries, in comparison with the world average, relies more on international and less on national collaboration. This is primarily because these countries are leaders in international research collaboration activity.

11. Field-weighted collaboration of 1.00 indicates that the entity's collaboration is exactly as would be expected based on the global average for similar publications; the field-weighted collaboration of 'World', or the entire Scopus database, is 1.00.

Figure 15: National collaboration versus international collaboration (field-weighted collaboration, 2018)



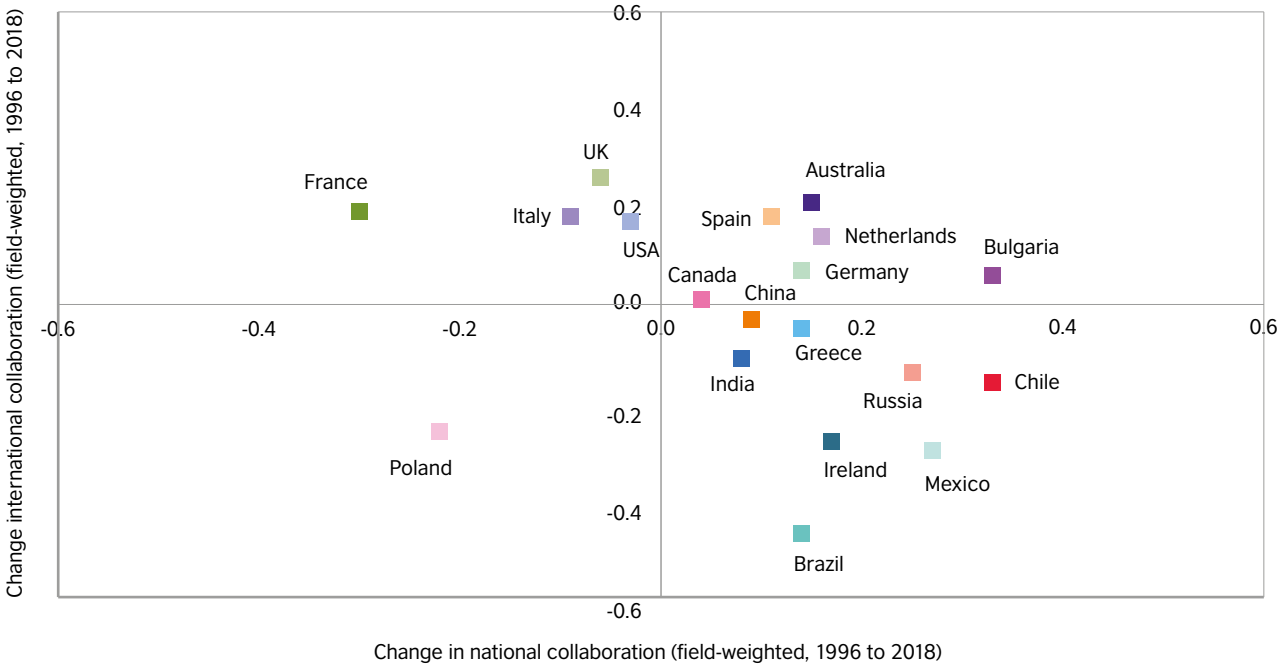
Source: Scopus/Scival.

Figure 15 shows that in 2018, France, Spain, Australia and Chile (see A) produced research-based national and international collaboration that exceeded the world's field-weighted average collaboration activity. Another group of countries (see B), including Germany, the UK, Canada and Bulgaria, produce research which relies more on international collaboration and less on national collaboration when compared with the world's field-weighted average. These countries seem to be less self-sufficient and depend more on international collaboration for their research outputs.

Poland and India (see C) appear to lag behind in both national and international collaboration, as they score below the world's field-weighted average. These can be classified as countries where there is scope for improving the capacity for both national and international research collaboration.

The final group of countries (see D) includes Brazil, China, Russia and the USA, where the national collaboration is above the world's field-weighted average, but international collaboration is below the world's field-weighted average. These countries appear to be more self-sufficient in research output. At the same time, for some countries (e.g. Russia, China and Brazil) this may indicate the prospect of introducing policies and actions that would improve the capacity for international research collaboration.

Figure 16: Change in national and international research collaboration (field-weighted, change 1996 to 2018)



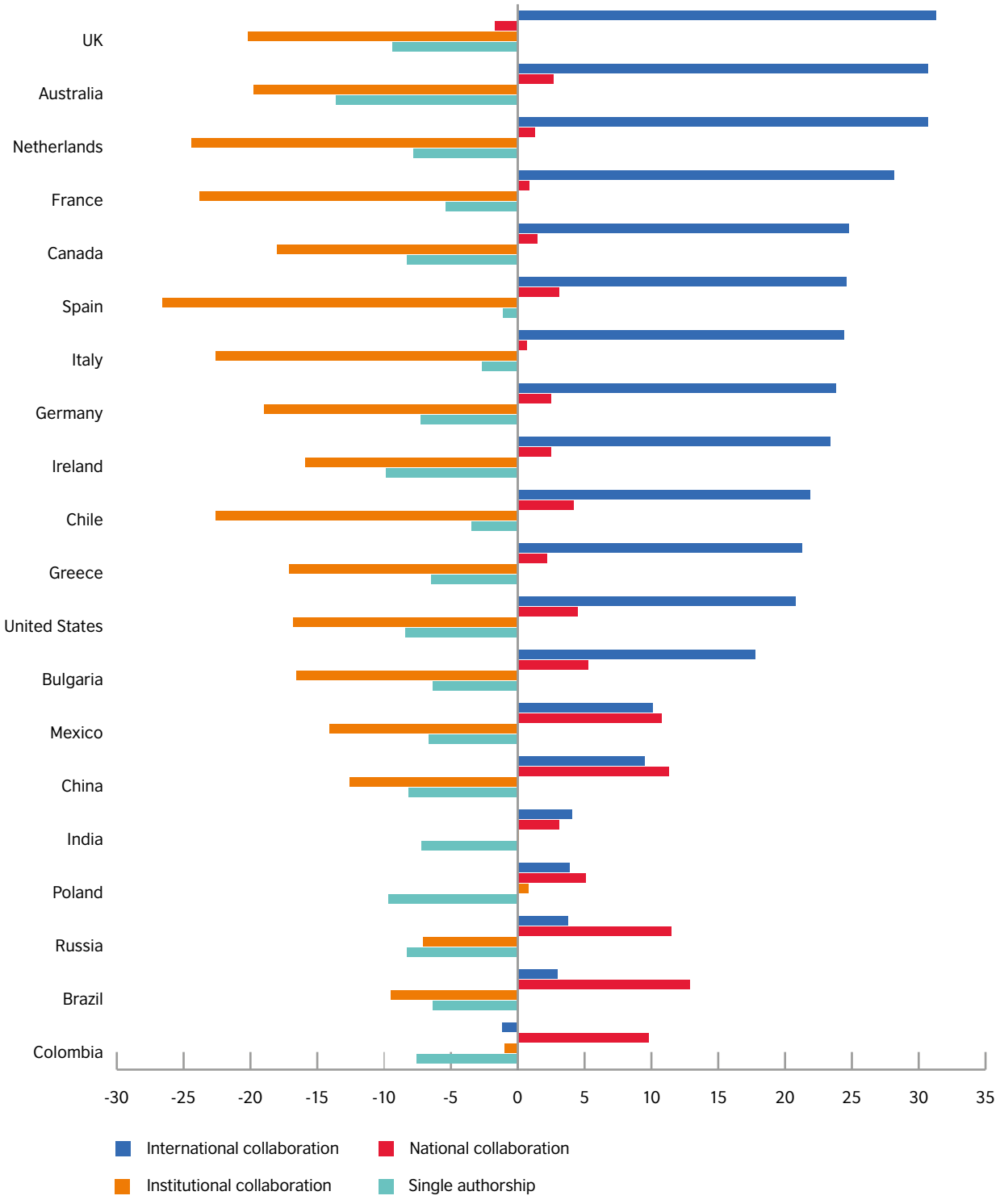
Source: Scopus/Scival.

Analysis of changes in research output over 22 years shows that the majority of studied countries increased their field-weighted collaboration either internationally, nationally or both.

The ten countries in the top half of Figure 16 increased international field-weighted collaboration, and the 14 countries on the right-hand side increased their national field-weighted collaboration.

Figure 17 illustrates that the most significant increases in research output were in the proportion of research produced in international collaboration. In all instances, this was at the expense of institutionally produced research and single authorship. Russia, Mexico, Colombia and China were the countries where most of the increases were in national co-operation.

Figure 17: Evolution of research collaboration by type (percentage change 1996 to 2018)



Source: Scopus/Scival.

8.5 Transnational education/ international programme and provider mobility (TNE/IPPM)

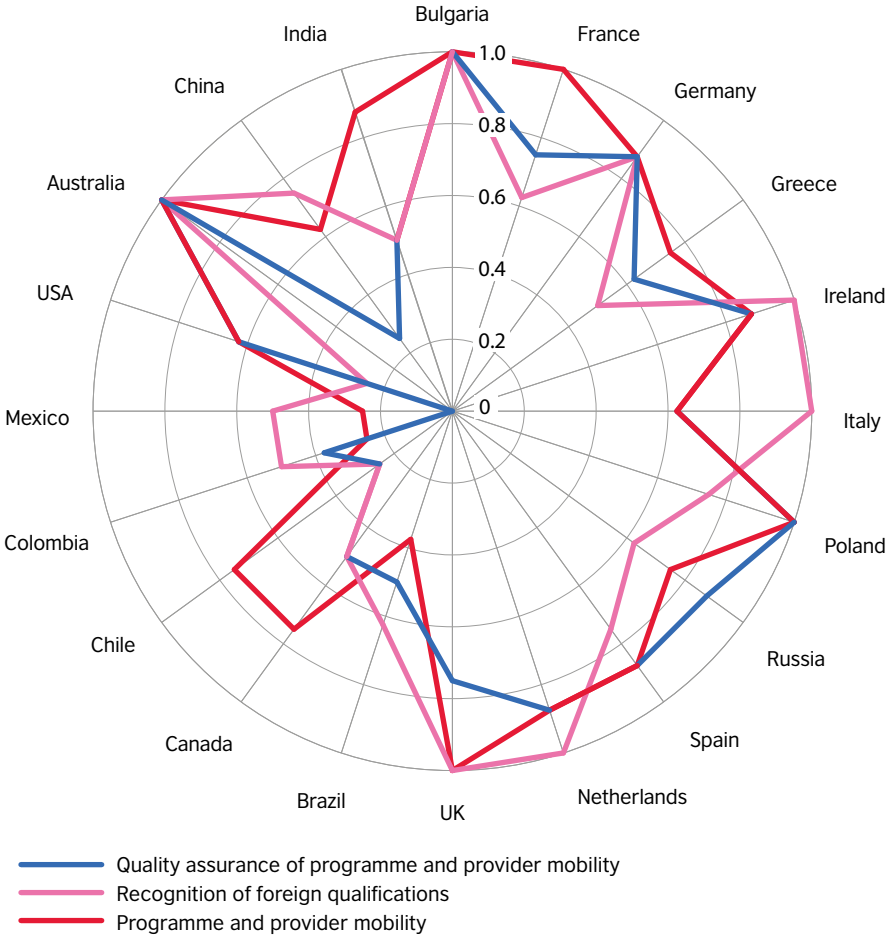
On the whole, the Americas region scores very low in the area of TNE/IPPM. As in the other areas, there is a big gap between Canada and the US and the Latin American countries, but all countries fare poorly in the light of international comparisons.

Compared to the Americas, the data shows that the 11 European countries have stronger regulatory frameworks for TNE/IPPM (see Figure 18). This can be explained by the harmonised HE policies across the EU and the EHEA (European Higher Education Area). In contrast, the Latin American countries in this study are mainly focused on outbound student mobility so, while some HE institutions engage in TNE/IPPM, there is no formal regulatory framework. The scores for the US and Canada may seem somewhat odd for countries with large numbers of high-quality universities, but the fact is that their conception of how to manage quality assurance and the recognition of foreign credentials is very different from the European one.

To some degree, it reflects both countries having federal and decentralised systems where institutions have significant autonomy (thus making national standards difficult). To a large extent, it has to do with a lack of national academic authorities or ENIC-NARIC equivalents, and foreign degree recognition is left to a patchwork of provincial or state regulatory bodies and market-based solutions.

Canada and the US have near-identical scores at levels similar to that of Greece.

Figure 18: Policy framework for TNE/IPPM



Mexico and Chile have the lowest scores in the region regarding national systems for quality assurance of programme and provider mobility, and recognition of foreign qualifications. However, it should be noted that these low scores reflect an absence of evidence of clear national structures and systems for international engagement (which was scored as a '0') rather than poor performance.[12] This study is not a reflection of the quality of HE provision.

8.6 Access and sustainability

The National Policies Framework looks at the unintended consequences of internationalisation, such as the displacement of vulnerable local students by international students and brain drain from countries. In terms of anti-displacement policies, the study shows that most of the countries seeking to improve the capacity of their HE systems do not have substantial inbound student mobility and, therefore, do not have specific policies in place. Conversely, mature HE systems do have policies in place to support marginalised students. Brain drain is mainly relevant to the countries with strong outbound student and academic flows.

The access and sustainability indicators are the one section where the Americas tend to perform at or close to the international comparators.

The US, Canada and Chile all merit 'very high' ratings when it comes to access and sustainability. In all three cases, the countries received maximum marks for the funding of students and academic mobility. Canada and the US mainly lost points for a lack of anti-displacement and anti-brain-drain policies, but one could argue that neither of these policies are truly necessary in those countries: their funding systems allows HE institutions to add places if international demand is high and both are net winners in terms of brain circulation (the US especially), and so the question does not often arise. Both Canada and the US also lost points on the dimension of providing aid to developing countries for the purpose of IHE.

Mexico, Colombia and Brazil did less well but still receive high scores in the access/sustainability domain, similar to the scores achieved by Australia or Bulgaria. There were a variety of factors lowering these countries' scores. One common factor was a lack of money for inbound student and academic mobility, while another was a lack of anti-displacement policies, which likely are seen as unnecessary in countries where outbound mobility exceeds inbound mobility by a factor of 2.5 or more, as they are in all of the Latin American countries studied.

Figure 19 shows the aggregate access/sustainability scores for all 20 countries in the study, with the results for the six countries from the Americas highlighted in pink.

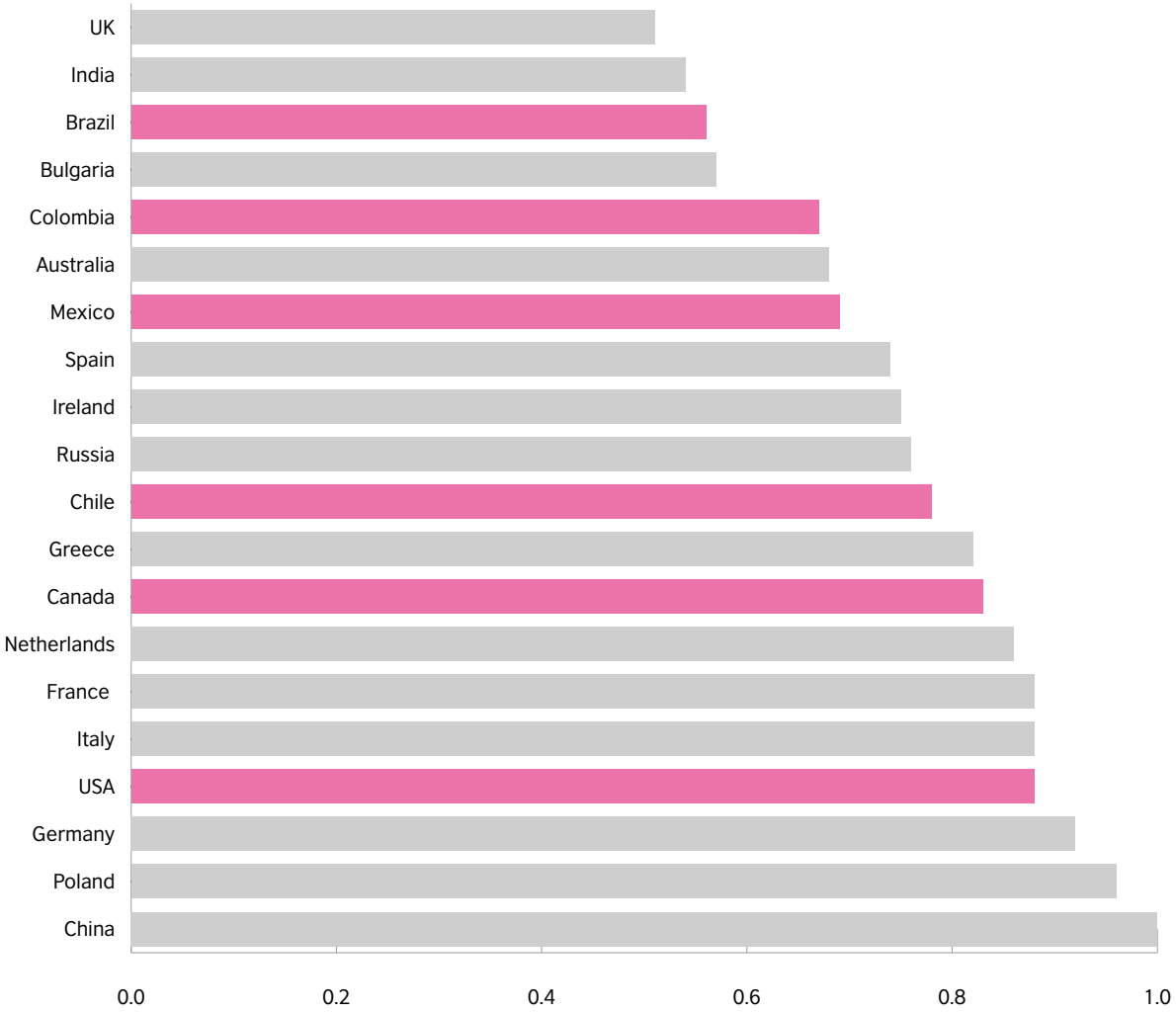
The National Policies Framework was developed in 2015, just before the United Nations Sustainable Development Goals were published. Given the strong focus on education, thought should be given to including measures of countries' commitment to supporting the Sustainable Development Goals and the development of HE globally in future National Policies Framework indicators.

One area with untapped potential is TNE/IPPM. Its ability to contribute to widening equitable access to quality tertiary education and support capacity building is yet to be explored. While tertiary education participation rates have improved over time, the divide between rural and urban access has widened.

Widening equitable access to quality HE is a policy preoccupation in many countries with unmet demand. TNE/IPPM has the means and technological advances to tackle that issue. Yet, while some international education strategies reference TNE/IPPM, a formal commitment to improving access to HE globally would be a welcome and timely development.

12. In conducting this study, the research team assessed national systems against 37 criteria, and has only been able to make an assessment on documented evidence. However, absence of a mention of such an activity does not necessarily mean that the activity does not take place, and practice may differ from the text of a website. Where no such text is found, this study could only score the indicator as zero; however, the researchers recognise the possibility that some such activities and practices may take place 'out of sight'.

Figure 19: Access/sustainability scores



Note: Countries in the Americas are shaded in pink.

9. Conclusion

In the main, this analysis finds the six countries in the Americas chosen for this study – Brazil, Canada, Chile, Colombia, Mexico and the United States – to all rate slightly lower on our measures of support for international engagement in HE than other national systems with comparable levels of national income (as measured by GDP). In Canada and the US, this may not be due to lesser interest in internationalisation so much as a different set of institutions and approaches: labour market institutions and credential evaluation are more market-driven, HE policy is more decentralised and the impetus for internationalisation lies more with colleges and universities than with governments. But in Canada and the US, the drive to attract more international students is strong, albeit mainly for financial reasons. There is therefore little reason to expect that either country will see its scores fall in the near future, though equally their different institutional structures may make it difficult to rise much, either.

In the less-wealthy Latin American countries, the story is slightly different. The ability of these countries to attract foreign students is diminished both by the lack of 'prestige' institutions and by the fact that very few courses are available in English. That said, any of the three Spanish-speaking countries could become a regional hub for IHE in Spanish because of the large Spanish-speaking Latin American market; Brazil's attractiveness is diminished further by being several thousand kilometres from any other Portuguese-speaking nations. However, as each of these countries moves closer to having services-based knowledge economies, the need for domestic universities to act as economic drivers will increase and, for that to happen, these institutions' research strength will need to be increased. One therefore suspects that the emphasis on internationalisation in these countries in the years to come will be with respect to international faculty co-operation, or on increased outbound mobility for graduate or post-doctoral students.

The international comparisons drawing on policies across 20 countries find that nations with high levels of national support for their international engagement also have high inbound student mobility. Equally, there is a strong positive relationship between student mobility and quality of research – an established research culture relies on competition for the best students. A supportive policy environment was found to be just as essential for research: countries with favourable policy frameworks tend to produce high-impact research. This report highlights the considerable untapped potential of TNE/IPPM to support HE development agendas in countries seeking to improve their capacity. Most of the developed countries' aid focuses on research only. Arguably this does little to ameliorate the inequality and lack of access to tertiary education that are real blocks to economic development in many countries. A better balance between capacity building through research and through teaching is likely to provide a much more effective and cost-efficient support to the diverse needs of HE systems, their learners and local communities.

Appendix

Table 5: Detailed structure of the National Policies Framework

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

Table 5: Detailed structure of the National Policies Framework (continued)

2. Quality assurance and degree recognition	
2.1 International students' quality assurance and admissions	
Entry/selection criteria for international students	Are education institutions provided with timely information, support and guidance by academic recognition bodies (or other bodies) to help select appropriately qualified foreign students for entry?
Code of practice for teaching/ assessing international students	Are there national bodies or other systems in place to monitor, revise and advise on institutions' procedures for teaching and assessing foreign students, e.g. by way of best practice surveys, advisory bodies or networks?
Policies/guidelines for engagement with recruitment agents: at home and overseas	Are there policies or procedures in place to advise local institutions on how best to engage with international agents for the recruitment of international students? This area includes framework of engagement, guidelines and code of conduct related to the country's HEI's engagement with agents based overseas and/or, equally, national-level oversight of education agents active in the respective country.
2.2 Quality assurance of academic programmes	
Monitoring of foreign institutions	Do national quality assurance agencies regularly monitor, and if appropriate, accredit the cross-border activities of foreign institutions (e.g. distance learning, programme collaboration, branch campuses) in the home country of the quality assurance agency?
Monitoring of domestic institutions overseas	Do national quality assurance agencies advise, monitor and accredit the cross-border activities of domestic institutions (e.g. distance learning, programme collaboration, branch campuses)?
Enforcement action	Are national quality assurance agencies active at enforcing their standards and requirements, either for foreign institutions, domestic institutions overseas, or both if appropriate?
Collaboration with regional/ international QA agencies	Do national quality assurance agencies take an active part in international collaboration on quality assurance standards, e.g. by adopting the UNESCO/Council of Europe Code of Good Practice in the Provision of Transnational Education and by taking part in regional and international networks?
2.3 Recognition of overseas qualifications	
Foreign degree recognition	Is the process taken by national academic recognition bodies in recognising foreign qualifications clear, transparent and consistent?
Recognition of TNE qualifications	Do national academic recognition bodies make efforts to recognise TNE qualifications, e.g. by way of guidelines or TNE code of good practice?
Communication with labour market	Do national academic recognition bodies work to provide clear and timely information to the labour market and other professional bodies on the comparability of foreign/TNE qualifications?
Collaboration with regional/ international recognition agencies	Do national academic recognition bodies take an active part in attempts to improve recognition procedures across borders, e.g. by signing up to UNESCO regional conventions; the Bologna Process, and, where appropriate, by establishing bilateral agreements on degree recognition?

Table 5: Detailed structure of the National Policies Framework (continued)

3. Access and sustainability	
3.1 Student mobility funding	
Outbound scholarships/access to student loans for study abroad	Do scholarship programmes for studying abroad exist, are they well publicised and are they available at all levels of study?
Inbound scholarships/access to student loans for international students	Do scholarship programmes for foreign students exist, are they well publicised and are they available at all levels of study?
3.2 Academic mobility and research funding	
Outbound academic programmes	Do funding programmes exist for teachers and researchers to undertake posts abroad?
Inbound academic programmes	Do funding programmes exist to allow foreign teachers and researchers to undertake posts in the home country?
Funding of international research collaboration	Do funding programmes exist to promote international collaboration in research … addressing issues of global importance … agreements between national and foreign funding bodies?
3.3 Sustainable development policies	
Anti-displacement policies	Does the state actively seek to avoid the displacement of low-income or marginalised domestic students by foreign students, e.g. by way of quotas, grants or scholarships?
Anti-brain-drain policies	Does the government actively seek to counteract brain drain by attracting outbound students and scholars to return home, e.g. by offering employment or by linking return to funding?
Aid to developing countries and regions	Does the government engage in development projects to support capacity building in international higher education either at home or abroad, e.g. by offering grants to students from low-income countries/regions or by investing in technical capacity-building projects?
Foreign language and intercultural competence policies	Does the government have policies in place to promote second-language competence and intercultural awareness?

Table 6: Thematic framework for analysis of national policies

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

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

Table 6: Thematic framework for analysis of national policies (continued)

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

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

Table 7: Government expenditures on education (as percentage of GDP), inbound mobility ratio and international education strategy

	Government expenditure on tertiary education as % of GDP (most recent available)	Inbound mobility ratio	International education strategy (strategy score)
Australia	1.54	17.49	1.00
Brazil	1.34	0.24	0.60
Bulgaria	0.65	4.57	0.50
Canada	1.63	11.89	0.70
Chile	1.36	0.37	0.60
China	No data	0.31	0.90
Colombia	0.81	0.16	0.60
France	1.25	9.89	1.00
Germany	1.25	8.04	1.00
Greece	0.73	3.35	0.40
India	1.10	0.14	0.60
Ireland	0.88	8.19	0.90
Italy	0.76	5.10	0.40
Mexico	1.13	0.30	0.30
Netherlands	1.63	10.74	1.00
Poland	1.22	3.42	0.90
Russia	0.81	3.94	0.60
Spain	0.96	2.71	0.80
UK	1.34	18.10	0.90
USA	1.37	5.04	0.70

Source: British Council analysis, Euromonitor; UNESCO Institute for Statistics.