

THE SHAPE OF GLOBAL HIGHER EDUCATION: EASTERN AND SOUTHERN EUROPE

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International
Higher Education

www.britishcouncil.org/research-policy-insight

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1. Report overview

The British Council's 'Shape of global higher education' series attempts to assess countries' levels of government support for international engagement. The framework evaluates national policies such as international promotion, bilateral agreements and support for the mobility of international students and academics; it studies the regulatory frameworks for transnational education such as the mobility of institutions and programmes; and it considers sustainable development policies aimed at the unintended consequences of internationalisation, for example the displacement of disadvantaged students, brain drain and participation in aid projects.

This report focuses on four countries – Croatia, Cyprus, Hungary and Romania – all of which are among the European Union's (EU) newer member states. Cyprus and Hungary joined the EU in 2004, Romania in 2007 and Croatia in

2013. However, the analysis is extended to include Bulgaria and Poland, which were studied in an earlier iteration of the 'Shape of global higher education' series. The study draws comparisons with the 'old' EU, also known as the EU-12, which was previously evaluated in Volume 4¹ (published in May 2019) and included Germany, Greece, France, Ireland, Italy, the Netherlands, Spain and the UK.

This introduction outlines the structure of the report. **Section 2** sets out the research aim and supporting objectives, and details the methodology, data collection and analytical steps.

Section 3 presents the main findings and details the strengths and weaknesses of the National Policies Framework in the selected countries.

Section 4 studies international inbound and outbound student mobility, student visa rules and policy

support in the shortlisted countries. National-level support for inbound and outbound research mobility is analysed in **Section 5**.

Section 6 analyses national frameworks for transnational education, with a focus on inbound and outbound programme and provider mobility, quality assurance and degree recognition.

1. See <https://www.britishcouncil.org/education/ihe/knowledge-centre/global-landscape/shape-global-higher-education-vol-4>

2. Aims, objectives and methodology

The research objectives are aligned with those detailed in the earlier series. They are:

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 indicating 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.

The data collection is consistent with the index methodology developed in the original study.² The index is constructed in the following three categories.

- *The openness of education systems* measures government-level commitment to internationalisation and support for international students and academics. It considers immigration policies facilitating the movement of students and academics.
- *Quality assurance and degree recognition* considers countries' regulatory frameworks to maintain quality assurance standards in education provision at home and overseas.
- *Equitable access and sustainable development policies* draws on government funding and financial support for students' and academics' mobility and participation in global research.

There are 37 indicators in total, which are grouped in these three categories. Each category contributes equally to an overall National Policies Framework composite index. All data is factual and attempts to reflect the legislative and regulatory provision in the shortlisted countries. The structure of the index and the weights allocated to each category and respective indicators are detailed in Appendix 1.

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


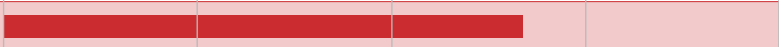
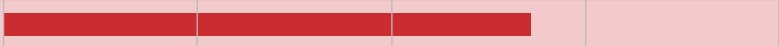

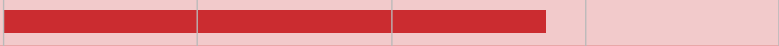
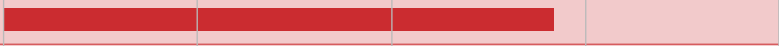
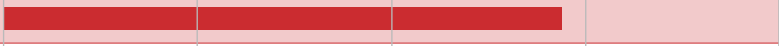

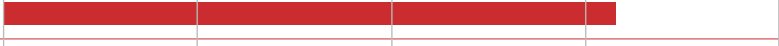

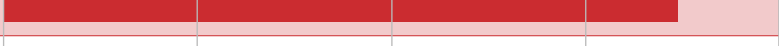



3. National Policies Framework across selected European countries

This section compares the new member states with the EU-12. Broader comparisons are drawn with other world regions to set the context for the National Policies Framework in Europe.³

3.1 Overall findings

Overall, the national policy support for international engagement across the new member states is strong, with all of them attaining high scores.

Table 1: Overall score in countries' National Policies Framework

Countries		Overall score
Greece		0.62
Bulgaria		0.67
Cyprus		0.68
Italy		0.69
Croatia		0.70
Romania		0.71
Hungary		0.72
Spain		0.74
UK		0.79
France		0.82
Poland		0.87
Ireland		0.88
Germany		0.89
Netherlands		0.92
	0 0.25 0.5 0.75 1.0	

Legend

0–0.24 = Very low level of national support for engagement in international HE

0.25–0.49 = Low

0.50–0.74 = High

0.75–1.00 = Very high level of national support for engagement in international HE

3. For more details, see <https://www.britishcouncil.org/education/ihe/knowledge-centre/global-landscape/shape-global-higher-education-vol-4>

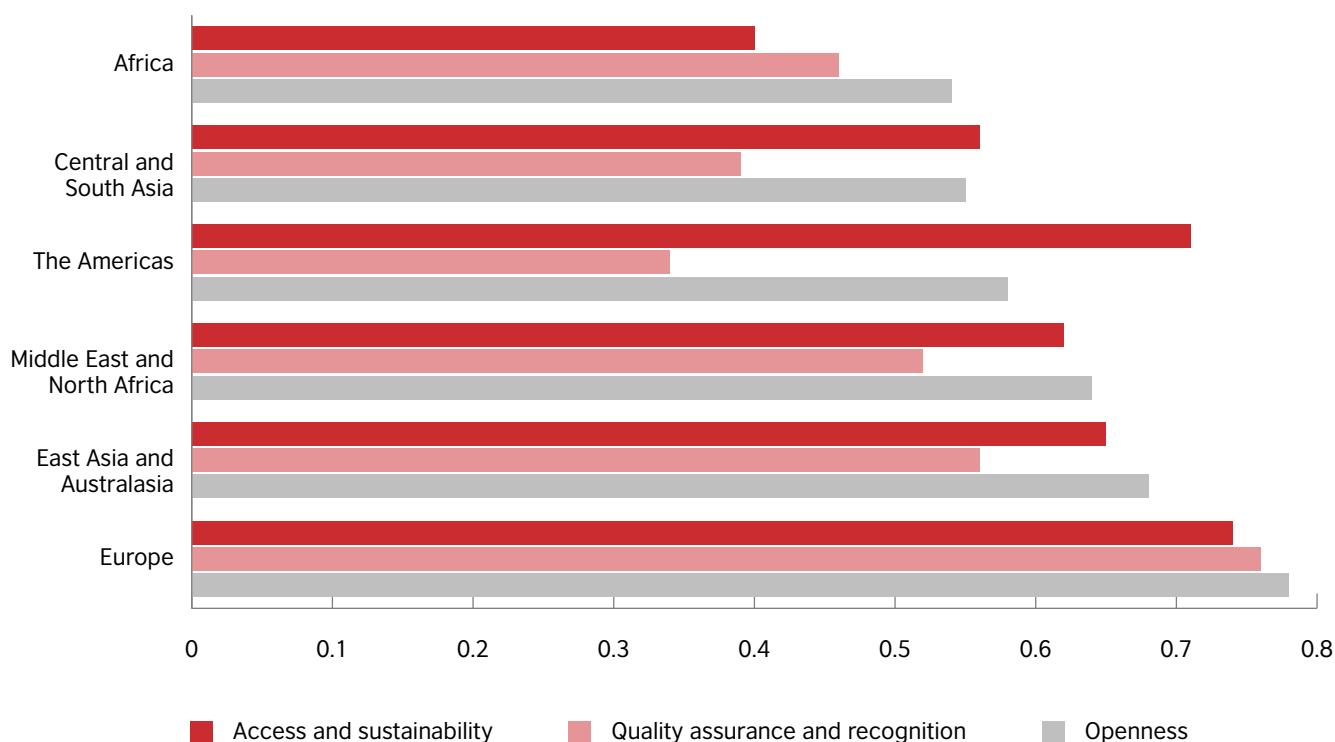
Global comparisons (Figure 1) show that the EU countries enjoy the greatest level of national support for international engagement, and that their regulatory frameworks are relatively aligned. Europe's 'regional' score is the highest across the world's six regions. The British Council's 'Shape of global higher education' series covers policy evaluations of 57 countries' national frameworks.

As argued by Ilieva et al.,⁴ Europe's high score and policy alignment are facilitated by the European Higher Education Area,⁵ which supports the mobility of students, researchers, programmes and institutions. Europe's ranking is particularly high in the area of quality assurance and recognition – an overall regional average score of 0.76. It is followed by East Asia and Australasia, with a regional average of 0.56. Overall, quality assurance and degree recognition is the weakest policy area internationally.

Europe's score in this category is attributed to the harmonisation of HE policies, with a particular reference to the European Qualifications Framework,⁶ standardised quality assurance rules and the European Credit Transfer and Accumulation System.⁷

There are significant variations within the regions. Countries' details are provided in Appendix 2.

Figure 1: Average National Policies Framework scores across the world's regions



4. Ilieva, J et al. (2019) *The shape of global higher education: International comparisons with Europe*. British Council. Available online at: <https://www.britishcouncil.org/education/ihe/knowledge-centre/global-landscape/shape-global-higher-education-vol-4>
 5. www.ehea.info
 6. <https://www.cedefop.europa.eu/en/events-and-projects/projects/european-qualifications-framework-eqf>
 7. https://ec.europa.eu/education/resources-and-tools/european-credit-transfer-and-accumulation-system-ects_en

3.2 Strengths and weaknesses

The areas where the new EU member states perform competitively are *Openness of education systems* and *Quality assurance and recognition*. All the newly included countries in this study (Croatia, Cyprus, Hungary and Romania) have high or very high scores.

All countries' HE acts (apart from Cyprus's) date from the mid-1990s and have been updated in the past decade. All the countries have aligned their HE legislative provision to reflect their EU membership, and, as such, there is no differentiation between the treatment of local higher education institutions (HEIs) and those from another EU country. Similarly, EU academics and students enjoy the same employment and study rights as if they were local.

The *Access and sustainability* section of the National Policies Framework evaluates countries' efforts in dealing with the unintended consequences of internationalisation. Displacement of disadvantaged students and securing their access to HE is an area where more can be done in the studied countries and across the broader EU countries. Overall, there is very little to address brain drain, except in Cyprus. This country has introduced support for the employment of expatriates returning home.

Table 2: National Policies Framework categories

Country	Openness		Quality assurance and recognition		Access and sustainability	
Bulgaria		High		Very high		High
Croatia		Very high		Very high		Low
Cyprus		High		High		High
France		Very high		High		Very high
Germany		Very high		Very high		Very high
Greece		High		Low		Very high
Hungary		Very high		Very high		High
Ireland		Very high		Very high		Very high
Italy		High		High		Very high
Netherlands		Very high		Very high		Very high
Poland		Very high		Very high		Very high
Romania		Very high		Very high		High
Spain		Very high		High		High
UK		Very high		Very high		High

Legend

0–0.24 = Very low

0.25–0.49 = Low

0.50–0.74 = High

0.75–1.00 = Very high

Fact sheet – Hungary

Country information

Population:

9.8 million

Joined the EU: 2004

Capital: Budapest

Main university cities: Budapest, Pécs, Miskolc, Szeged, Győr, Debrecen, Veszprém

Number of HE institutions:

65

28 state/public

11 non-state/private

26 non-state/church-funded universities and colleges

Number of people studying in HE:

280,000

Rate of foreign students:

10.5%

Number of Hungarian students studying abroad:

13,000
(growing)

Research institutions: Hungarian Academy of Sciences, Eötvös Lóránd Research Network

Key players in HE: Ministry of Innovation and Technology, Education Authority, Hungarian Higher Education Accreditation Committee, Hungarian Rectors' Conference, Tempus Public Foundation

Key measures and programmes

- HE has been supervised by the Ministry of Innovation and Technology since 1 September 2019.
- Internationalisation is a priority → the Study in Hungary programme was launched, funded by the Hungarian government and the European Social Fund.
- The main scholarship programme is Stipendium Hungaricum, supervised by the Ministry of Foreign Affairs. The programme is based on bilateral educational co-operation agreements; currently, around 70 sending partners are engaged in the programme across five different continents.
- Other mobility programmes include Erasmus+, Campus Mundi, bilateral state scholarships and the Scholarship Programme for Christian Young People – managed by Tempus Public Foundation.
- Five Hungarian universities participate in partnerships within the European University Alliance.
- The Eötvös Loránd Research Network was set up to be in charge of the 15 research institutes of the Hungarian Academy of Sciences.
- Tempus Public Foundation is responsible for supporting internationalisation, managing relevant mobility and strategic partnership programmes, and supporting institutions.

Opportunities for HE engagement

- Developing international partnerships and mobility projects – in the framework of Erasmus+ or bilateral agreements.
- Establishing joint programmes.
- Launching research projects, organising mobility of researchers.

4. International student mobility

Most countries in this study have education promotion brands, e.g. Study in Romania, Study in Croatia and Study in Hungary. International student recruitment is a well-developed area of the National Policies Framework across the new member states. Bulgaria was evaluated earlier in this research series; it is the only country in the comparator set without a national education brand.

Detailed international strategies with quantifiable targets have been produced in Croatia and Romania.⁸ While Hungary has not published international HE targets, its internationalisation efforts focus on strengthening the international competitiveness of its education

system and improving students' foreign language proficiency. Another strong strand is international co-operation with its neighbouring countries, which considers minority groups living across the borders (both ethnic minority populations in Hungary and the Hungarian diaspora). While Cyprus is a popular destination with international students, it is yet to publish a strategy. The country's commitment to internationalisation is shaped by formal announcements by ministry officials.

Cyprus, Croatia and Romania have negative net student flows. This means that the number of home students abroad is greater than the number of incoming international students.

Poland has made a significant shift in its net mobility: it moved away from negative net flows in 2012 to positive net mobility flows in the following years. The number of incoming international students in 2016 exceeded that of the home students studying overseas by more than 30,000.

Ireland has similarly flipped its student balance from negative mobility flows to positive flows. Recent data from the Higher Education Authority in Ireland indicates continued strong growth in incoming international students.

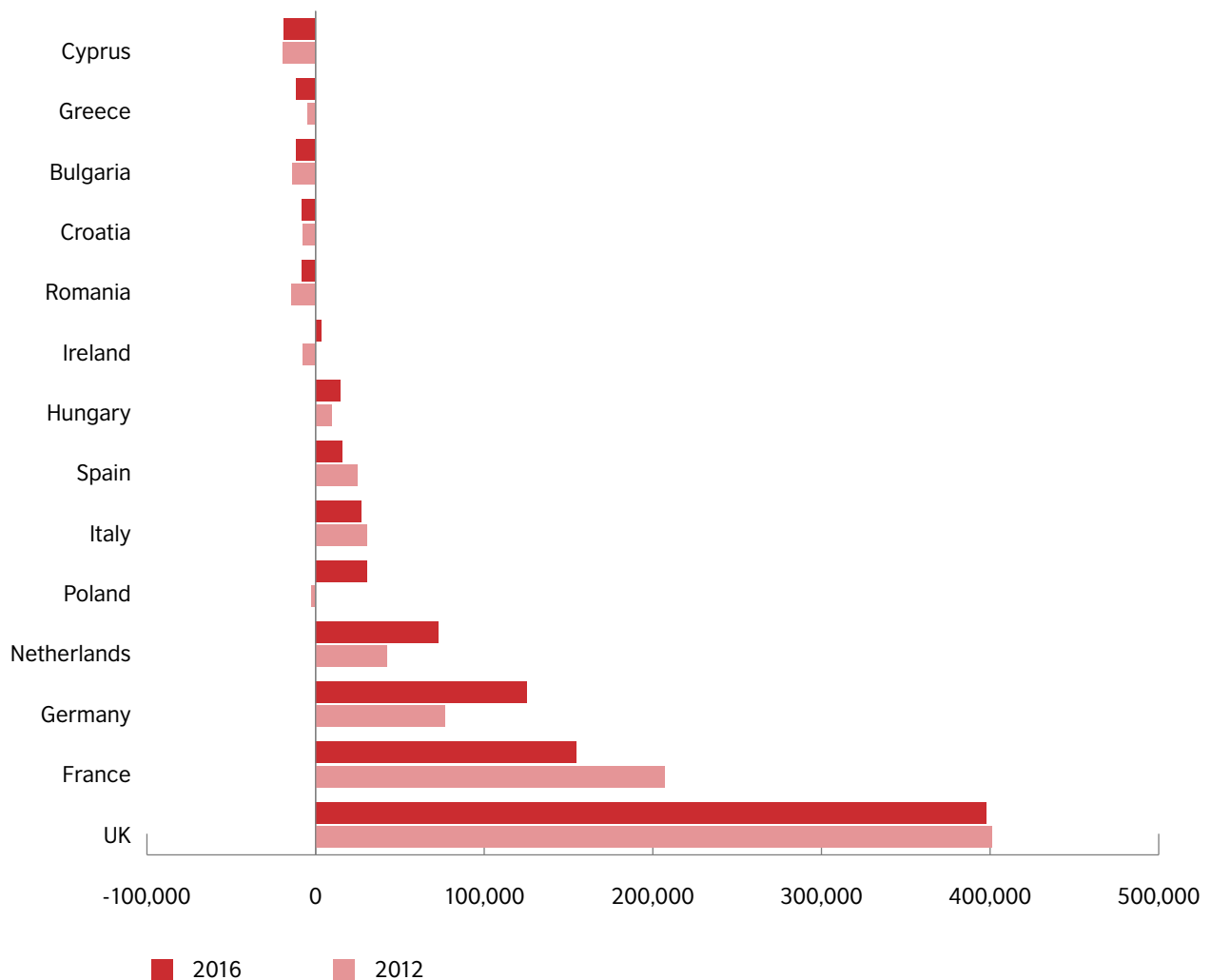
Greece is the only one of the EU-12 with negative student mobility flows.

Table 3: International education strategies and national education brands

Country	Presence of international strategy	National education brand
Bulgaria	No	N/A
Croatia	Yes	Study in Croatia: www.studyincroatia.hr/
Cyprus	No	Study in Cyprus: www.studyincyprus.org.cy/
Hungary	No	Study in Hungary: http://studyinhungary.hu/
Poland	Yes	Go Poland: http://go-poland.pl/
Romania	Yes	Study in Romania: https://www.studyinromania.gov.ro/

8. The consultation with HEIs on the international HE strategy is in the final stages and the final iteration of the strategy is imminent.

Figure 2: Net flow of internationally mobile students



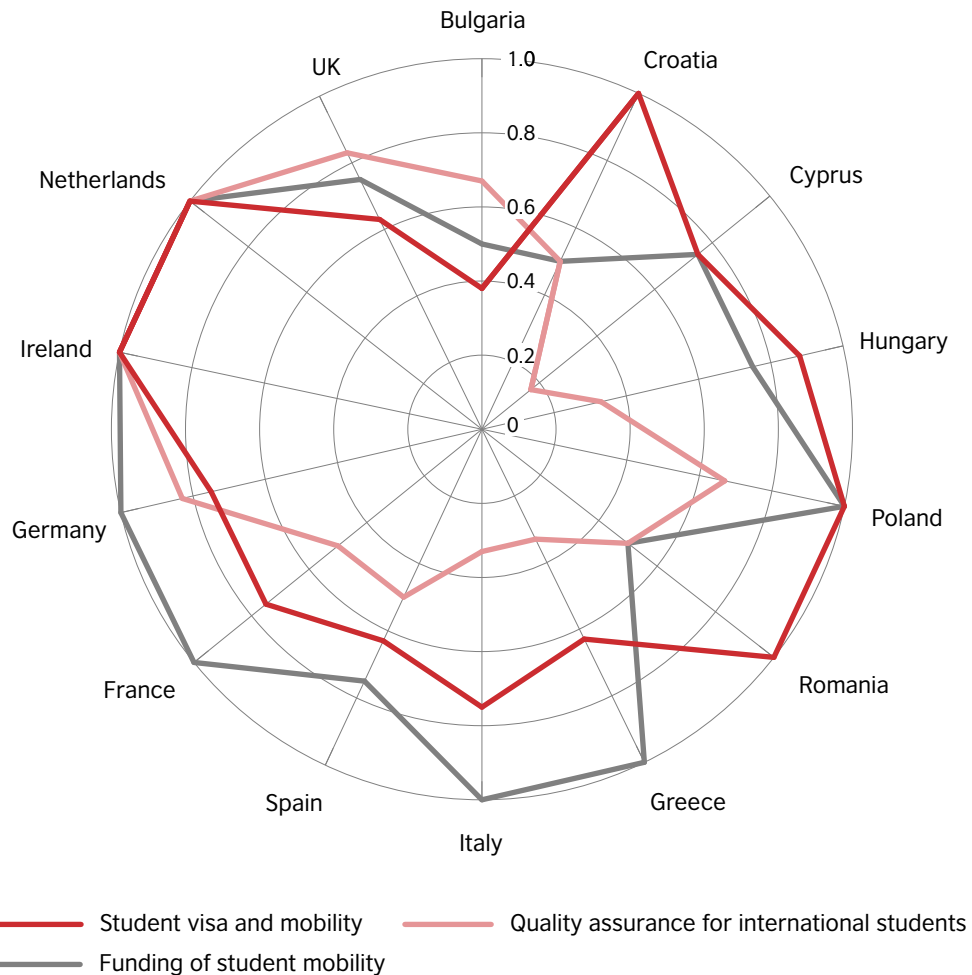
While Figure 2 presents the net balance between the countries' inbound and outbound students, most of the new member states have relatively high outbound student mobility rates.⁹ The highest rate is recorded in Cyprus, where more than half of the home students pursue HE overseas. Bulgaria has the second highest outbound

mobility rate, with nine per cent of home students studying abroad, followed by Romania (six per cent).¹⁰ A high outbound mobility rate typically indicates a propensity of the home students to obtain an international qualification. Conversely, such propensity also indicates strong brand recognition of foreign degrees.

9. The outbound student mobility rate shows the number of students from a given country studying abroad, expressed as a percentage of total tertiary enrolment in that country. Source: http://data.uis.unesco.org/OECDStat_Metadata/ShowMetadata.ashx?Dataset=EDULIT_DS&Coords=%5bEDULIT_IND%5d.%5bMOR_5T8_40510%5d&ShowOnWeb=true&Lang=en

10. Countries' outbound mobility rates are taken from the UNESCO Institute for Statistics. Source: <http://data.uis.unesco.org>

Figure 3: National support for student mobility



National support for student mobility is compared across three main areas.

1. *Student visas and tuition fees* covers clarity of the visa rules, work opportunities for students during and after study, HEIs' autonomy and whether they can set tuition fee levels.
2. *Quality assurance for international students* includes clarity of the student admission requirements, teaching and assessment of international students, and regulations for education agents.

3. *The funding of international students* considers national funding levels for inbound and outbound student mobility.

The new member states have well-developed student visa rules for international students. Those are standardised across the EU, with countries treating other EU students as home students. The differences in the countries' scores stem from how they treat non-EU students. Bulgaria and Greece compare less competitively with the rest of the study countries in this area.

Quality assurance is best developed in the countries with a tradition of recruiting international students, such as the UK, the Netherlands, Germany and Ireland. Except for Ireland, these are also the countries with strong inbound mobility flows. Over the past two years, Ireland has made significant gains in international student recruitment by capitalising on a growing market share in EU students and other international students, mainly from Asia. Part of Ireland's success can also be attributed to a supportive student visa system for non-EU students and opportunities to work after graduation.

Most of the countries aiming to grow their international student population have generous funds to support the mobility of both inbound and outbound students. In addition to traditional study destinations such as Germany, France, Ireland and the Netherlands, countries such as Italy, Greece and Poland are increasingly investing in student mobility, which is reflected in their scores.

Poland and Hungary are the only new member states to have shifted from being net exporters of students to net importers of globally mobile students. Poland made the switch in 2013, Hungary in the late 1990s.



The new member states have well-developed student visa rules for international students. These countries treat other EU students as home students.

Case study – Croatia

Croatia at a glance

Population:

4.2 million

Capital: Zagreb

Joined the EU: 2013

Currency: Croatian Kuna (kn, HRK)

Number of HEIs:

8 public and 4 private universities

4 public and 11 private polytechnics

3 public and 22 private colleges

Additionally, **68 university constituents** – faculties and academies – have legal personality, bringing the total number of HEIs to 121.

Number of students in HE:

160,000

Out of a total of **1,500 university and professional study programmes** carried out in three Bologna cycles, nine joint programmes and 50 study programmes are delivered in English.

There are **25 public research institutes**, and three institutions of particular interest to the Republic of Croatia.

The public research institutes and HEIs employ almost **12,000 staff** in teaching/research/artistic grades.

The official language is Croatian, and the majority of the population speak English.

Higher education legal framework (timeline)

- 2003: The Act on Scientific Activity and Higher Education implements the three-cycle structure and European Credit Transfer and Accumulation System in higher education; the Act on Recognition of Foreign Qualifications implements the principles of the Lisbon Recognition Convention.
- 2009: The Act on Quality Assurance in Science and Higher Education establishes a system of external quality assurance implemented by the Agency for Science and Higher Education, listed in the European Quality Assurance Register for Higher Education in 2011.
- 2013: The Act on Croatian Qualifications Framework introduces additional quality standards.

Opportunities for UK HEIs in Croatia

- Enhancing co-operation in the framework of the Erasmus+ programme.
- Establishing joint programmes and mobility windows with one of a number of HEIs delivering programmes in English.
- Establishing a possible branch campus by setting up a new HEI in Croatia and acting as a 'mentor HEI'.
- Launching research projects with public and private research institutes and universities, as well as polytechnics.
- In both research and HE co-operation, Croatian HEIs and research institutes can count on dedicated EU funding – with priorities including research co-operation with the private sector, launching joint programmes and summer schools in English, and aligning study programmes with labour market needs.
- Funding for improving participation in HE and a large national network of HEIs and student dormitories.
- The central portal for the promotion of HEIs in Croatia is Study in Croatia: www.studyincroatia.hr

Case study – Croatia (continued)

Key policy measures for enhancing internationalisation in Croatia

- The Strategy of Education, Science and Technology of the Republic of Croatia (2014) emphasises the importance of internationalising HE and enhancing its integration into the European and global higher education area.
- Key objectives are increasing inward and outward mobility of students and teachers; encouraging teaching in foreign languages; and the establishment of joint study programmes with HEIs in Europe and beyond.
- A dedicated call for increasing the quality and relevance of HE in Croatia through internationalisation in the framework of the European Social Funds resulted in 30 high-quality projects being carried out by HEIs in 2018–21.
- Project activities include 41 study programmes in English (and one in German) in science, technology, engineering and maths, including three joint study programmes. In addition, 15 new short programmes in English (summer schools) will be created, and an additional 208 courses will be offered in English.
- National support for the networks of European universities: two Croatian universities have been successful in the first Erasmus+ call aimed at shaping the next generation of creative and innovative European universities.

We are dedicated to boosting balanced mobility and brain circulation, in order to allow for an exchange of diverse ideas and approaches in teaching and learning and improving the quality of education, because diversity brings quality.

Brain circulation is very closely related to demographic challenges in Europe. It has both interdisciplinary and transversal character, and it is very much linked with the topic of investments in education.

We need to ensure a more balanced brain circulation and a level playing field for top talent.

Professor Blaženka Divjak, Minister of Science and Education,
Republic of Croatia

5. International research collaborations

National policy support for research collaboration has two components.

1. *Support for academic mobility and research* includes favourable and streamlined academic visas for visiting researchers and a friendly working environment. This measure considers the inclusion of international research in national assessments and reviews for funding purposes.
2. *Funding for academic mobility and research* includes support for outbound and inbound academic programmes and funding of international research collaborations.

Funding for academic mobility and research has attracted greater government support than academic visas for researchers. All the countries treat other EU researchers as home academics. Ireland and Germany have talent attraction policies. Hungary treats highly skilled non-EU talent favourably.

Funding for research from national sources is readily available across the EU-12 states. However, there is limited financial support from national sources across the new member states.

Figure 5 shows the international collaboration rates of the new member states over the past two decades. While the proportion of the research produced in international co-operation has fluctuated, there has been an overall increase in the research output produced with international co-authors. More than half of the research published in Bulgaria, Croatia, Cyprus and Hungary is produced through such collaborations.

Figure 4: National policy support for international research collaboration

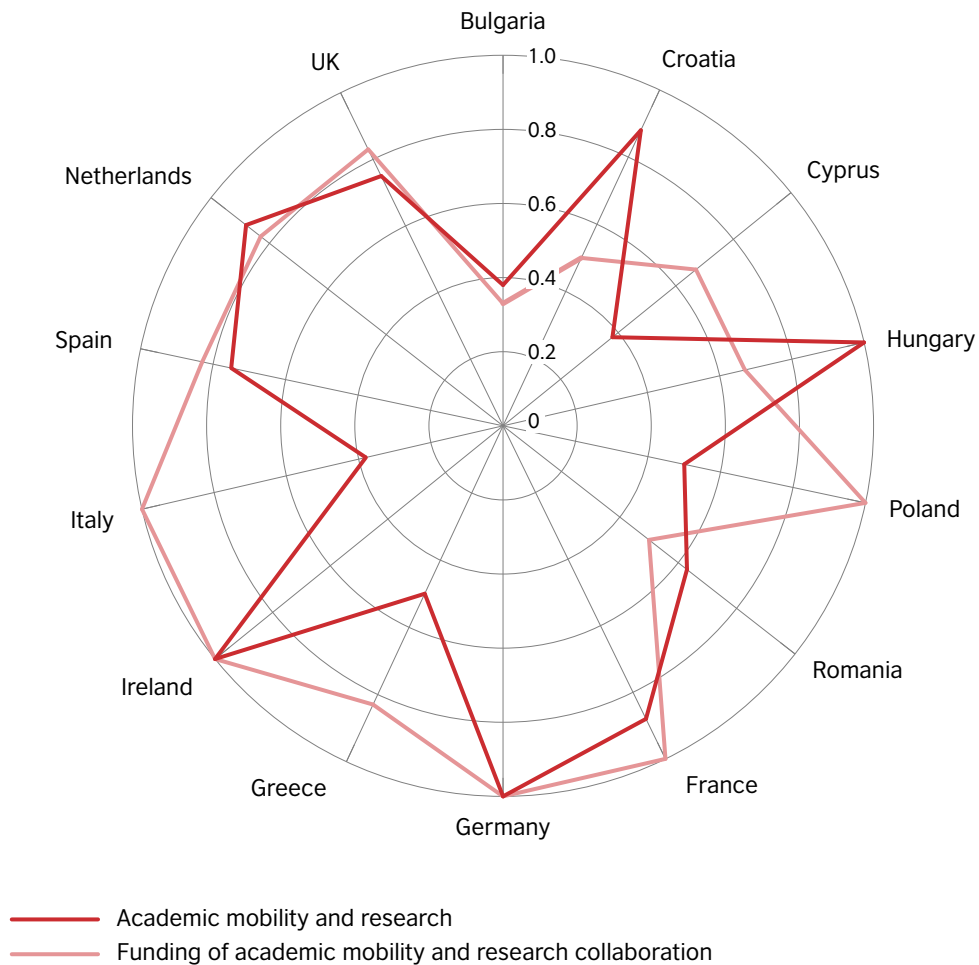
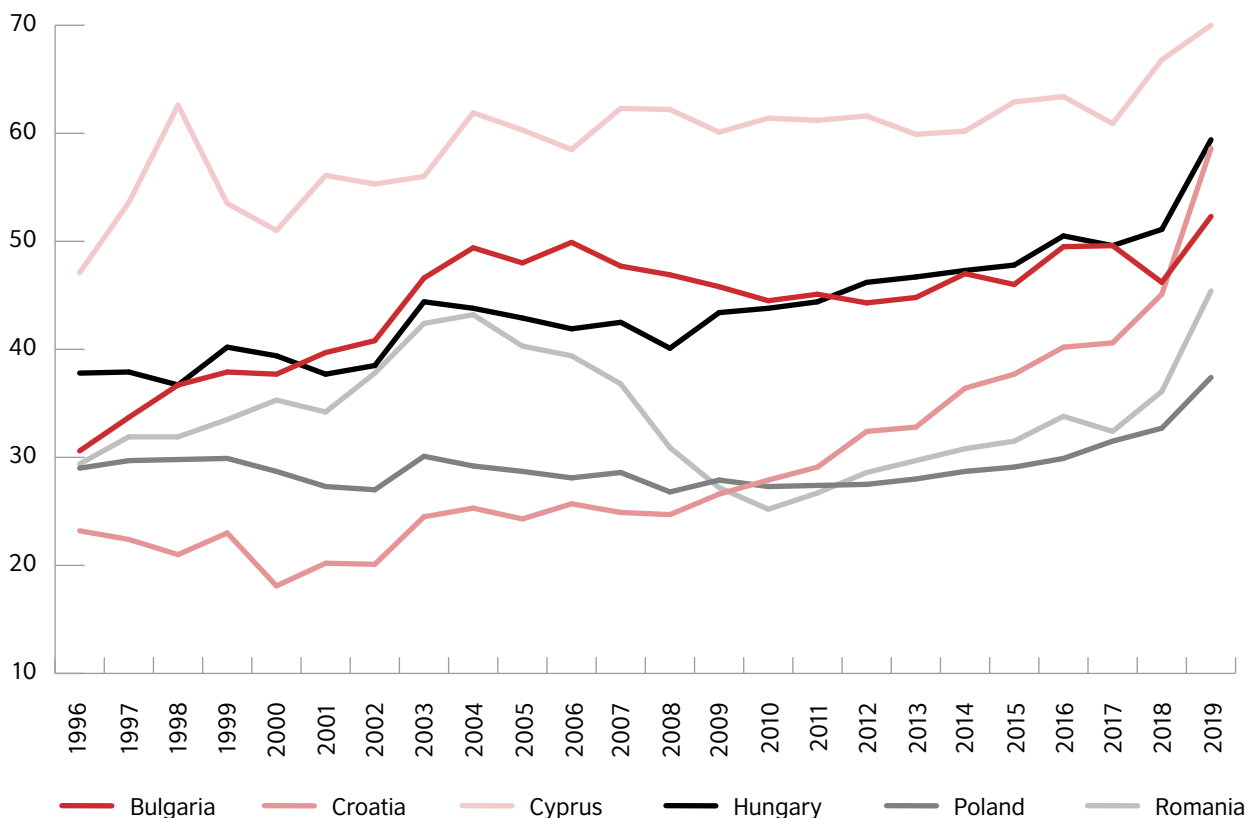


Figure 5: International collaboration rates in the new member states

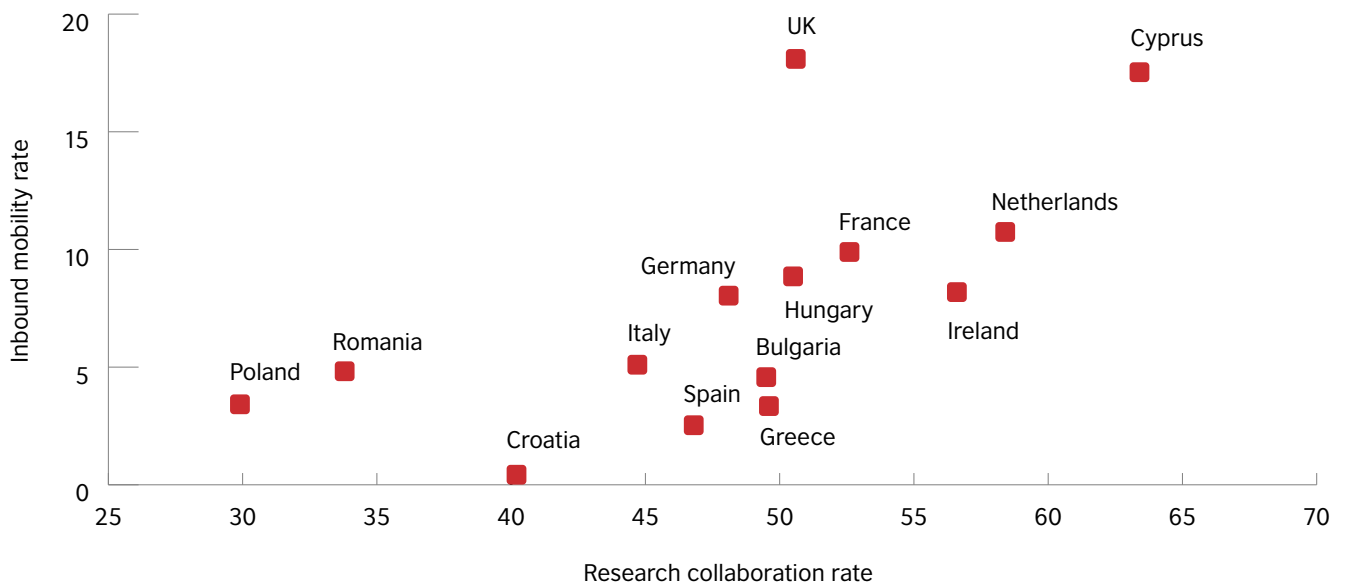


Among the comparator countries, Poland and Romania had the lowest collaboration rates between 1996 and 2019.

Figure 6 shows a positive relationship between countries' inbound student mobility rate and the rate of international research collaboration. It is worth pointing out that, with the exception of Hungary, the new member states have negative net balance between inbound and outbound students (see Figure 2), i.e. the number of home students who study abroad is

greater than the number of incoming international students. It is these students' networks and contacts with researchers at the host institutions that have most likely impacted the high research collaboration rate. 63 per cent of Cyprus's HE students study overseas. Cyprus also had the highest collaboration rate (70 per cent) in 2016 (the most recent year for which international student data has been published by the UNESCO Institute for Statistics).

Figure 6: International research collaboration and inbound student mobility rates in 2016



The role of the academies of science in Central and Eastern Europe

From the late 1940s, HE systems in Central and East European countries were reorganised to align with the Soviet-type state and centrally planned economy. Consequently, much of the HE teaching was carried out by universities and specialised schools, while research was concentrated in the academies of sciences and their institutes. There were also institutes operating under the auspices of the respective ministries in the countries.

The academies of sciences continue to be the leading scientific research centres in their respective countries. Typically, each country's academy of sciences has inherited the research function of its predecessor.

The Bulgarian Academy of Sciences succeeded the Bulgarian Learned Society, which was founded in 1869.

In 1992 the Bulgarian Academy of Sciences and all its research institutes became autonomous again.

Similarly, the Polish Academy of Sciences was founded in 1952. Its origins date back to 1800 when the Warsaw Learned Society was founded. The idea of a Polish scientific community was accepted in 1920 and was funded by the state. The governance of the current Polish Academy of Sciences was transferred to the Academy General Assembly; a parliamentary act of 25 April 1997 legislated the reform.

The Romanian Academy of Sciences was originally founded in 1866 as the Romanian Academic Society and was later renamed the Romanian Academy in 1879. During the socialist era, it was renamed the Academy of the Romanian People's Republic (1948–65) and later the Academy of the Socialist Republic of Romania (1965–89). The Romanian Academy

'returned to its original purpose' in 1990.

The Hungarian Learned Society of 1827 officially became the Hungarian National Academy in 1845. The academy's land and estate were nationalised between 1945 and 1948. As in the other Central and Eastern European countries, the Law of XXVII of 1949 transformed the academy into a Soviet-style institution which was accountable to the socialist state and the Communist party. In 1994 the statute of the academy regained its autonomy and became a 'public body working as a legal personality on a principle of self-government'. Hungary's National Assembly passed a law on 2 July 2019 to restructure the Academy of Sciences and place 40 of the academy research institutes under the government-run Eötvös Loránd Research Network.

Case study – Why are foreign students flocking to Cyprus universities?

Over the last few years, Cyprus has demonstrated a significant growth in foreign students and is steadily becoming one of the beneficiaries of the apparent leakage of academics and students from British universities amid uncertainty over the future relationship between the UK and the EU.

Since the UK announced it was leaving the EU, the number of foreign students studying in educational institutions in Cyprus has jumped to more than 27,000, an increase of 10,000 since 2016 and triple the figure of 2013, according to the latest data.

International students studying in Cyprus outnumber Cypriot students, with 53 per cent of students coming from the EU and other non-European countries. According to the latest figures for 2018–19 from the Ministry of Education, Culture, Sports and Youth, there are 51,086 students in Cyprus, of whom 17,959 (35 per cent) are European citizens, 9,255 (18 per cent) third-country nationals and 23,872 (47 per cent) Cypriot citizens.¹¹ By comparison, in 2013, just 8,000 foreign students chose to study in Cyprus.

The rise in foreign students has also increased demand for student housing. The total number of rooms in student housing is expected to reach 2,197 by the end of 2019, and a significant number of construction projects for student housing are under way, at an overall value of €27.2 million.

The new data demonstrates the success of Cyprus's drive to put the island on the map as an established educational and research hub in Europe. In October 2019, the government stepped up its efforts by introducing 'significant' tax incentives to attract private universities. The plans allow universities to claim an annual discount of 20 per cent on all machinery and facilities, as well as a seven per cent discount annually on buildings bought by tertiary-level institutions between 2019 and 2021. Practical training services in the fields of education and medicine will also be exempt from value added tax. Changes in the private universities law have also allowed institutions the freedom to determine their own tuition fees. Other developments include:

- a new fund to co-finance the transfer of top foreign researchers to the island and develop existing infrastructure, which is being offered by the Research and Innovation Foundation, the national body responsible for supporting and promoting research
- new scholarships to top students from other countries to study in Cyprus, and permission for students to work part-time for up to 20 hours
- a cabinet commitment to form a separate office in the Immigration Department to deal exclusively with university applications to speed up the admissions process for new students
- the launch of a new Cyprus Marine and Maritime Institute by the end of 2024, in Larnaca, to promote research, development and innovation to tackle key challenges in the global marine industry, including climate change and cybersecurity.

Several UK universities have developed research and academic partnerships in Cyprus, including University College London, Imperial College London, St George's, University of London, the University of Central Lancashire and a number of universities offering joint degrees or franchise programmes.

We are positive that the new incentives will have a great impact on the already blooming HE sector in Cyprus. The focus on research within our academic institutions, with Cyprus holding the highest absorption rate of EU research grants, combined with state-of-the-art infrastructure and English-taught programmes, makes Cyprus a compelling choice for foreign students and universities that are looking to expand.

George Campanellas, Director General, Invest Cyprus¹²

11. Note that these values are directly from a national source and refer to 2018–19. As such they are not necessarily contradictory to the values referred to in Figure 2 and Figure 6 above, which use data from UNESCO Institute for Statistics, reference year 2016.

12. For more information on Invest Cyprus, visit <https://www.investcyprus.org.cy/growth-sectors/education>

6. Transnational education

The regulatory environment for TNE studied three categories:

- countries' rules on inbound and outbound programme and provider mobility
- quality assurance of programme and provider mobility – inbound international programmes and international branch campuses (IBCs) and, equally, outbound programmes delivered overseas by home HEIs setting up IBCs abroad
- recognition of foreign qualifications acquired through TNE.

TNE is one of the strongest performing areas for the new member states. Many of the countries do not distinguish

between EU and home HEIs, meaning that setting up a physical presence is encouraged. However, the potential for TNE engagement has not been fully utilised. While Hungary has the largest number of IBCs, the rest of the shortlisted countries have very few – if any at all.

An evaluation of the policy environment signals strong local support for programme and provider mobility, and an equally strong quality assurance framework for TNE provision. This is further strengthened by the high outbound student mobility rates for the new member states. Typically, this indicates the popularity of foreign

degrees and a high propensity towards gaining an international qualification.

In the UK, while Brexit negotiations are still ongoing, a potential 'no deal' outcome for the UK could have a significant negative impact on EU student enrolment. Under such a scenario, EU students would lose access to UK student financial support and their tuition fees would likely align with those for non-EU students. Lower-income countries are expected to be most affected. In this context, high-quality TNE presents a cost-effective way to acquire a UK degree in the home country, with mobility options for study in the UK as part of the course.

Figure 7: Regulatory environment for TNE engagement



While the EU-12 countries are strong in the delivery of TNE, their support for inbound programme and provider mobility is weaker than that of the new member states. One explanation may be linked to the countries' strong track records in the recruitment of international students and education exports. The UK has more students on its TNE programmes overseas than international students enrolled in programmes delivered at home (about 60 per cent of international students on UK programmes are taught outside the UK).¹³ Research shows that the country's offshore provision is a major pathway for international student recruitment.¹⁴ In the case of Germany, outbound provider mobility is typically

government led and funded. Ireland is increasingly engaging in the provision of TNE. Recent research has established that most of the growth in recruitment of Chinese students to the institutes of technology can be attributed to TNE programmes for delivery in China.¹⁵

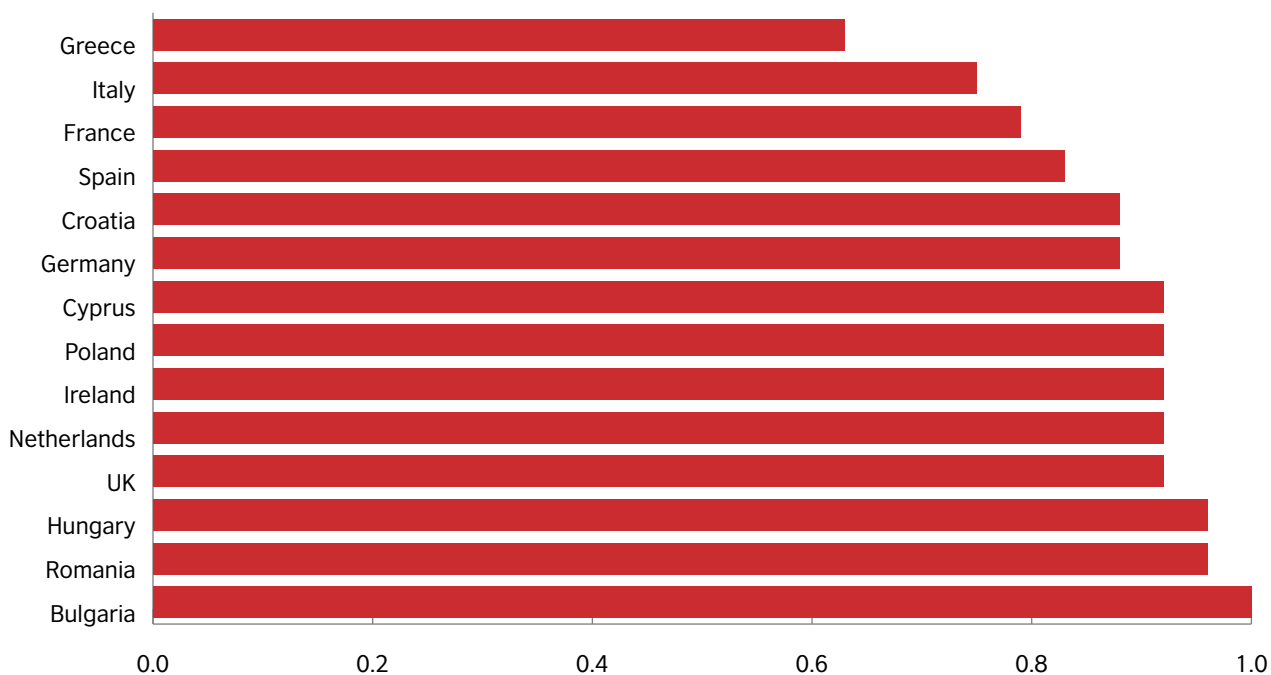
The overall TNE scores for the 14 countries are presented in Figure 8. The scores are ranked on a scale from 0 to 1, depending on how many criteria are met. The composite score is made up of 12 criteria grouped in the three categories described at the start of this section.

All EU countries assessed score over 0.6. Bulgaria (1.0), Romania (0.96) and

Hungary (0.96) top the list. They are also among the highest scorers across the 57 countries evaluated globally. Poland and Cyprus have relatively high scores (both 0.92) and are ahead of some of the EU-12 countries (Greece, Italy, France and Spain).

A common theme across the new member states is that their HE acts were revised after their accession to the EU. As such, policies, good practice and institutional design promoted across the EU are embedded in the respective legislations. The Higher Education Act in Bulgaria was updated in 2012; Romanian HE law dates from 2011; and Hungary's 2011 Law on National Higher Education was updated in 2017.

Figure 8: Overall TNE scores in Europe (max = 1)



13. Ilieva, J (2018) Five little-known facts about international student mobility to the UK. Available online at: <https://www.universitiesuk.ac.uk/policy-and-analysis/reports/Pages/five-little-known-facts-about-international-student-mobility-to-the-uk.aspx>

14. HEFCE (2014) Transnational pathways into English higher education. Available online at: https://dera.ioe.ac.uk/21497/1/HEFE2014_29.pdf

15. Ilieva, J, Roe, G and Killingley, P (2017) *Higher education engagement between the Republic of Ireland and China: Evidence and strategy to 2020*. Enterprise Ireland.

Case study – Romania

From student mobility to the emergence of a market for TNE partnerships

A substantial proportion of Romanian students study overseas, with the UK one of the top destination countries. The number of students going abroad for HE studies reached 33,236 in 2016. The latest figures from the UK's Higher Education Statistics Agency (HESA) show there were 8,655 Romania domiciled students at UK HEIs in 2017–18.¹⁶

Although enrolments by Romanian students in UK HE have increased by seven per cent since the UK referendum in 2016 (comparing 2016–17 enrolments to 2017–18), analysis of UCAS¹⁷ data shows a decline in applications from Romania between 2016 (3,580) and 2018 (2,920) followed by a nine per cent increase in 2019 (3,180).

Depending on the results of Brexit negotiations, there could be a significant negative effect on Romanian student mobility to the UK. The British Council's Market Introduction¹⁸ on Romania reads:

Brexit represents a significant risk to Romanian student mobility, although UK programmes will continue to be highly respected [...] As one stated government goal is to reduce brain drain and equalise incoming students with outbound numbers, meaning that potential in-country TNE will likely be well regarded.

This may form part of the reason for the increasing number of UK HEIs that see it as a priority to identify ways of mitigating the potential negative impact of Brexit on student mobility from Romania, and to maintain a market share in this country by exploring TNE collaborations with local universities.

The current landscape for TNE – national level between strategy and practice

The national strategy regarding the internationalisation of higher education in Romania has been in progress since 2013–14. By the end of 2015, the working group overseen by the Executive Agency for Higher Education, Research, Development and Innovation Funding (UEFISCDI) had developed the *Framework for a National Strategy for Internationalisation of Higher Education in Romania: Analysis and Recommendations*.¹⁹ The following actions have been recommended to be considered by key stakeholders in relation to achieving Objective 4.

- a. Ensure that the HE legal framework remains stable and provides sufficient institutional autonomy (in academic, financial and human resource management) to allow HEIs to implement internationalisation strategies and programmes.
- b. Provide transparent and diverse mechanisms of support for strategic collaboration and partnerships with HEIs.
- c. Facilitate dialogue and provide incentives for more collaboration among Romanian HEIs to develop networks, alliances and partnerships for internationalisation.

During 2016–18, the President of Romania co-ordinated a large public debate on the educational and research strategy for 2018–30. While Educated Romania, a strategy and vision document released as a result of this consultation in December 2018, signalled a broad interest in education internationalisation (i.e. both the development of double and joint degrees, and bringing more clarity with regard to the legal and organisational frameworks for these forms of TNE collaboration have been mentioned), it does not contain much in the way of specific tactics, programmes or funding. Although this is stated as one of the strategic objectives, the Romanian Quality Assurance Agency for Higher Education is still to design and conduct external quality assurance of double degree programmes. At present dual and joint degree programmes delivered in Romania follow the same accreditation rules as local programmes.

Number of Romanian students studying abroad in 2016:

33,236

16. In 2017–18 there were 128 UK universities with Romanian students, 21 of which had more than 100 students.

17. <https://www.ucas.com/file/243526/download?token=UxEK1Yap>

18. <https://education-services.britishcouncil.org/country/romania/market>

19. http://iemu.forhe.ro/wp-content/uploads/2015/12/IEMU_Framework-for-a-national-strategy-on-INTL_final_EN.pdf

Case study – Romania (continued)

Universities that develop study programmes incorporating teaching in foreign languages have also been supported. As per the latest statistics from the UEFISCDI Study in Romania,²⁰ there were 282 programmes provided in English only, alongside 100 programmes taught in some combination with other languages, 58 courses taught in French and 34 courses taught in German.

The number of students enrolled on UK TNE programmes remains relatively low. In 2017–18, 2,705 students studied for awards or courses with UK universities in Romania, with the majority enrolled on Oxford Brookes University's programme for a Bachelor of Science in Applied Accountancy (in collaboration with the Association of Chartered Certified Accountants). In Romania, 450 students have pursued a UK qualification with providers other than Oxford Brookes, with around 160 following a distance learning programme (HESA Aggregate offshore record [2019]).

More than 12 joint and dual degree programmes are offered by Romania's leading public university.

The British Council is conducting research to map existing TNE provision by the UK's and other countries' HEIs. Examples of the best-known TNE partnerships run in collaboration with Romanian universities include the following.

In 2016, Transilvania Executive Education launched the Executive Master of Business Administration (EMBA) programme at the University of Hull in collaboration with Babes-Bolyai University of Cluj and the Technical University of Cluj-Napoca (Central Transylvania).²¹ Since its beginning three years ago, this Hull–Cluj MBA has received strong support from business, with a number of places funded partly or fully by sponsors.

CITY College, International Faculty of the University of Sheffield and the National University of Political Studies and Public Administration, as a partner institution, offer two unique joint master's programmes in Bucharest leading to two degrees: a Master of Arts in Marketing, Advertising and Public Relations and a Master of Science in Management of Business, Innovation and Technology.²² Market research undertaken in 2018 with a focus group of students on this specific programme showed that for early-career professionals, and for owners of small businesses, a TNE offer for postgraduate study is particularly attractive, enabling students to continue to develop their skills while holding down a job with a prestigious international employer.

Based on its long-lasting collaboration with local universities, the British Council in Romania has been developing the capacity to offer partnership brokering services for UK HEIs interested in exploring TNE collaborations in the country. In addition, the Ministry of Education website reads: 'Higher education institutions abroad, legally recognised as such in the country of origin may hold subsidiaries in Romania, alone or in partnership with higher education institutions accredited in Romania'.

282

**English-only programmes
at Romanian HEIs**

2,705

**Romanian students enrolled
on UK TNE programmes
(2017–18)**

20. <https://www.studyinromania.gov.ro/fp/index.php?>

21. <https://teecluj.ro/en/>

22. <https://citycollege.sheffield.eu/rf/Romania-Masters/>

7. Conclusion

This paper shows that the shortlisted subset of EU countries enjoys a high level of national support for international engagement, and that their regulatory frameworks are relatively aligned. The EU regional score is the highest across the policy evaluations of 57 national frameworks globally.

The new member states of Bulgaria, Croatia, Cyprus, Hungary, Poland and Romania do not differentiate between home and EU HEIs, or between home and international programmes; EU researchers and students enjoy the same employment and study rights as if they were local.

Except for Bulgaria, the new member states have developed national education brands aimed at attracting international students. The national brand is promoted through a web portal with detailed information on study requirements and life in the host country. Such brands include Study in Croatia, Study in Cyprus, Study in Hungary, Study in Romania and Go Poland.

There has been an overall increase since 1999 in the research output produced with international co-authors across all the shortlisted countries (Romania saw a decline in this proportion from 2004 to 2010, but the current value is at a record high). More than half of the published research in Bulgaria, Croatia, Cyprus and Hungary is produced through such collaborations.

TNE is one of the strongest areas of the National Policies Framework for the new member states. Given these countries do not distinguish between EU and home HEIs, setting up a physical presence and the delivery of international programmes is encouraged. The scores for TNE rules across the shortlisted countries are the highest globally. While this signals great potential for collaborative HE provision in the countries, the conditions have not yet been fully utilised and TNE provision remains limited.

Overall, there is a high level of policy alignment across the EU. The region leads the National Policies Framework globally. Many member states rank

highly in the evaluations of 57 countries across all categories for international education engagement. The political will and support for a shared commitment in HE over the past two decades through the EHEA has led to harmonised HE policies, standardised quality assurance rules, and recognition of credits and qualifications. These have impacted HE policies across the region and beyond, and shaped the design of institutions and regulatory frameworks. Also, the EU's flagship programmes Erasmus+²³ and Horizon 2020²⁴ have made a critical contribution to the state of mobility and research across the region.

As a result, most internationally mobile European students now choose to study in another European country, and many international collaborations are with partners within the region. Europe's strong foundations for international engagement have taken decades to develop, and while this is a continuing process, it is built on shared vision and values.

23. https://ec.europa.eu/programmes/erasmus-plus/about_en

24. <https://ec.europa.eu/programmes/horizon2020/what-horizon-2020>

Appendix 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 Engagement*. British Council. Available online at: <https://www.britishcouncil.org/education/ihe/knowledge-centre/global-landscape/report-shape-global-higher-education>

Appendix 2: National Policies Framework by country and region

Europe	Openness	Quality assurance and recognition	Access and sustainability	Total
Netherlands	0.94	0.96	0.86	0.92
Germany	0.91	0.86	0.92	0.89
Ireland	0.94	0.96	0.75	0.88
Poland	0.85	0.81	0.96	0.87
France	0.91	0.63	0.92	0.82
UK	0.84	0.86	0.65	0.79
Malta	0.83	0.65	0.75	0.74
Spain	0.76	0.71	0.74	0.74
Hungary	0.84	0.78	0.56	0.72
Romania	0.83	0.79	0.50	0.71
Croatia	0.86	0.79	0.46	0.70
Russia	0.65	0.67	0.76	0.69
Italy	0.54	0.65	0.88	0.69
Cyprus	0.63	0.68	0.72	0.68
Bulgaria	0.56	0.89	0.57	0.67
Greece	0.57	0.49	0.82	0.62
Average	0.78	0.76	0.74	0.76

East Asia and Australasia	Openness	Quality assurance and recognition	Access and sustainability	Total
Hong Kong (SAR)	1.00	0.85	0.79	0.88
Australia	1.00	0.94	0.68	0.88
Malaysia	0.79	0.78	0.76	0.78
Vietnam	0.73	0.75	0.74	0.74
China	0.76	0.44	1.00	0.73
Thailand	0.79	0.50	0.83	0.71
Brunei	0.49	0.58	0.71	0.60
Indonesia	0.63	0.31	0.81	0.58
Philippines	0.59	0.56	0.54	0.56
Singapore	0.53	0.56	0.49	0.52
Cambodia	0.52	0.54	0.39	0.48
Lao PDR	0.55	0.29	0.44	0.43
Myanmar	0.41	0.17	0.22	0.26
Average	0.68	0.56	0.65	0.63

Middle East and North Africa	Openness	Quality assurance and recognition	Access and sustainability	Total
UAE	0.83	0.94	0.68	0.82
Oman	0.79	0.63	0.60	0.67
Israel	0.78	0.61	0.53	0.64
Turkey	0.68	0.36	0.81	0.61
Saudi Arabia	0.56	0.56	0.57	0.56
Egypt	0.43	0.35	0.54	0.44
Iran	0.41	0.18	0.64	0.41
Average	0.64	0.52	0.62	0.59

The Americas	Openness	Quality assurance and recognition	Access and sustainability	Total
Canada	0.80	0.50	0.83	0.71
US	0.68	0.51	0.88	0.69
Colombia	0.53	0.35	0.71	0.53
Brazil	0.56	0.38	0.56	0.50
Chile	0.53	0.17	0.78	0.49
Argentina	0.45	0.39	0.54	0.46
Peru	0.54	0.08	0.68	0.44
Mexico	0.36	0.17	0.69	0.41
Average	0.58	0.34	0.71	0.54

Central and South Asia	Openness	Quality assurance and recognition	Access and sustainability	Total
India	0.68	0.39	0.54	0.54
Pakistan	0.59	0.44	0.58	0.54
Sri Lanka	0.51	0.44	0.67	0.54
Kazakhstan	0.48	0.43	0.68	0.53
Bangladesh	0.46	0.25	0.35	0.35
Average	0.55	0.39	0.56	0.50

Africa	Openness	Quality assurance and recognition	Access and sustainability	Total
Mauritius	0.70	0.74	0.58	0.67
South Africa	0.64	0.58	0.63	0.62
Uganda	0.65	0.42	0.50	0.52
Kenya	0.54	0.57	0.42	0.51
Nigeria	0.47	0.54	0.36	0.46
Botswana	0.59	0.35	0.26	0.40
Ghana	0.43	0.31	0.29	0.34
Ethiopia	0.30	0.17	0.18	0.22
Average	0.54	0.46	0.40	0.47

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