

**Impacts of transnational education
on host countries:**

academic, cultural, economic and skills
impacts and implications of programme
and provider mobility



Going Global 2014

Foreword

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

In May 2013, the British Council convened the 'Higher Education Summit in the year of the UK's G8 presidency.' The summit brought together more than 30 higher education leaders from 17 countries, including heads of national agencies and representatives of Ministries of Education. This summit followed similar events held alongside the G8 in Washington DC in 2012 (hosted by the Institute of International Education), and in Paris in 2011 (hosted by Campus France).

The discussion of the 2013 Higher Education Summit focused on the local impact of transnational education (TNE) in supporting economic empowerment and the development of global knowledge societies. The British Council commissioned a pilot study for discussion at this summit.

Recognising the need for further investigation to understand the local impact of TNE, the British Council and DAAD agreed to join forces to extend and deepen this study, and we are delighted with the partnership our organisations have forged, together with crucial support from Australian Education International (AEI), the Institute of International Education (IIE) and Campus France to produce the study we are presenting here.

TNE (or programme and provider mobility) is a critical aspect of the internationalisation of higher education, and therefore fundamental to what the British Council and DAAD do. So to combine our expertise and networks to investigate this area was a natural fit.

Research on TNE has become quite extensive but it has tended to focus on providers and to reflect the provider

perspective. Very little work has been done thus far to assess the impact of TNE from a host country's point of view. As cultural relations and education organisations, we see the value and importance of filling these gaps in the literature.

To this end, this study has gathered data from students, graduates, practitioners, HE leaders and a range of other sources – both those involved in TNE and those not directly involved. This enabled us to elicit both TNE and non-TNE perspectives on the academic, cultural, economic and skills impacts of transnational education across ten host countries.

The findings and implications presented here will be of value to higher education leaders and policy makers in TNE host countries, can help inform practice, and will provide a greater holistic understanding of TNE and the impact that it can have.

This report is only the beginning of the journey, and British Council and DAAD, together with our supporting agencies, are committed to developing and piloting a data-collection mechanism to enable host countries to capture data on students studying through TNE programmes locally. This will be a beneficial capacity-building tool and will further help to build information and understanding of TNE and its role in the global higher education landscape.

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Executive summary

Background

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

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

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

Country selection

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

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

Online survey of TNE stakeholder groups

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

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

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

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

Main findings

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

1. TNE reaching a different profile of student

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

2. Career development the main motivation for choosing TNE

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

3. Importance of international outlook and intercultural competence for students

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

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

4. Cost of TNE – both a positive and negative

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

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

5. Academic impacts of TNE predominate at the national level

The study sought to engage with TNE stakeholders who could provide some insight on the impacts of TNE at the national level in the host country. Feedback received from groups such as senior TNE leaders, higher education experts, government agencies and employers, suggests that TNE is having the greatest impact by providing increased access to higher education for local students and improving the overall quality of higher education provision. However, it also appears that TNE, in general, is not providing different programmes to those offered locally, which somewhat dispels

the myth that TNE is about offering specialised niche programmes not available in the host country. For the most part, TNE programmes appear to be responding to student demand. Further work is needed on TNE enrolment data to ascertain whether the perception of increased access is borne out by actual increased numbers registered in higher education in host countries.

6. Lack of awareness of TNE

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

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

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

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

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

8. Studying abroad and internships – important components of TNE

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

Some 42 per cent of TNE students and graduates reported having an internship or work-experience opportunity as part of their TNE programme, sometimes overlapping with study abroad. Many of these internships appear to have been core or mandatory components of the TNE programme, with a noticeable link between teaching and engineering programmes, and placements in academia and industry. The connections between TNE programmes and the labour market are more significant than expected and

dovetail well with students' career development aspirations and employers' demands for graduates with work experience. Further research is required to evaluate the lasting outcomes of studying abroad and internships for students, and how these opportunities differ depending on the mode of TNE and the subject area.

9. Benefits outweigh the risks

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

10. Outlook for TNE

Respondents were generally optimistic about the outlook for TNE and it appears likely that both the number of new programmes and the capacity of existing programmes will expand over

the medium term. In academic areas such as developing the local knowledge economy and producing collaborative research output, TNE looks well placed to play an increasing role in the host country. Economic considerations, such as the capacity of TNE to attract foreign direct investment and improve local infrastructure, appear less pronounced and will largely depend on host-country government policy and country-specific circumstances.

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

Acknowledgements

The British Council, in partnership with the German Academic Exchange Service (DAAD), conceived this research project and co-funded it together with support from the German Federal Ministry of Education and Research (BMBF). They contracted McNamara Economic Research (MCER) to deliver this research project. MCER analysts involved in the project were John McNamara and Chiara Pittalis. Ian Clifford, statistician and former survey manager at Trinity College Dublin, assisted with designing the surveys and statistical interpretation of the data. The MCER project team included Dr Jane Knight, University of Toronto, Canada, who provided expert insight and analysis throughout the project. Kevin Van-Cauter and Michael Peak managed the project from the British Council side. Susanne Kammüller and Roman Luckscheiter managed the project from the DAAD side.

The project is supported by the Australian government through the Australian government Department of Education. For further information, please visit: www.education.gov.au or www.aei.gov.au

Throughout the study, the advice, guidance and international networks of a panel of experts were utilised. In addition to the principal authors and leading partner organisations, the advisory panel comprised:

Anne Benoit, Campus France.

Rajika Bhandari, Institute of International Education (IIE), USA.

Steve Nerlich, Australian government Department of Education.



Federal Ministry
of Education
and Research

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1. Introduction

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1.1 Background

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

At the national policy level there are many drivers and rationales to explain the growth in TNE and these can differ markedly from country to country, particularly depending on whether the country is a net sender or host of international higher education. Thus far, research on TNE has generally been from the perspective of sending/awarding countries. Relatively little research has been conducted to investigate the impacts of TNE on the host country.

The British Council began a process of addressing this gap in the literature by producing case studies on the impacts of TNE in three host countries: China, Malaysia and UAE, published in a British Council report¹. The case studies were informed by interviews with host-country higher education experts and senior leaders of foreign institutions located in the three host countries. The research found that the impacts of TNE on host countries are diverse, and can have both positive and negative consequences. The research also

noted the difficulty of understanding the impacts of TNE given the confusion about the essential features and differences among the various TNE modes, the lack of comparable enrolment data and the shortage of empirical evidence.

Following the case studies, the British Council commissioned a pilot study to further explore the impacts of TNE on host countries across four impact categories: academic, socio-cultural, economic and skills impacts. The findings of the research, published in a British Council report², suggested that TNE is having a significant impact in host countries, particularly in relation to the exchange of knowledge between foreign and local universities/colleges in terms of teaching and assessment methods, programme management and quality-assurance processes. Building on the findings and lessons of the pilot study, the current research project was jointly commissioned in October 2013 by the British Council and DAAD with the participation of Australian International Education, Campus France and the Institute for International Education.

1.2 Objectives

The objective of the research was to produce robust findings on the impacts of TNE in host countries and to promote awareness and understanding of these implications from the host country perspective. In particular, the research was designed to assess the impacts of TNE in the host country across four impact categories:

- academic impacts – focusing on issues relating to capacity building in host-country institutions, access to higher education and new programme availability
- cultural/social impacts – focusing on issues relating to intercultural and inter-institutional relations within the host country and sensitivity of TNE to local culture and context
- economic impacts – focusing on issues relating to cost and value of TNE programmes, sources of funding for tuition fees and impacts on the local economy

- skills impacts – focusing on specific skills-related impacts of TNE and how this compares between local and non-TNE students.

The findings of the research are presented in this report. The main purpose of the report is to:

- 1 Broaden the frontiers of knowledge on this topic so that the impacts of TNE are better understood by policy makers and TNE practitioners. This hopefully continues to address the dearth of information and data in this area.
- 2 Synthesise and present the opinion data gathered from the various TNE stakeholders groups, which may be used to inform further research on this topic.

1.3 Terminology

Exactly defining TNE has always been difficult, but the basic principle involves the delivery of higher education programmes in a different country from the one where the awarding/overseeing institution is based. This means that students can study towards a foreign qualification without leaving their country of residence – although TNE often does involve some short-term study in the awarding country. TNE involves the mobility of academic programmes and providers/institutions across jurisdictional borders to offer education and training opportunities. In some cases, there is collaboration with a local institution or provider (twinning, franchise, validation, joint and double degree programmes), and in other cases it can involve setting up a satellite operation (branch campus). The development of bi-national universities involves the establishment of a new institution through collaboration between higher education partners in two countries.

To enable a deeper understanding of TNE, a brief description/explanation of a number of terms frequently used in the report are explained below.

1. The shape of things to come – the evolution of transnational education: data, definitions opportunities and impacts analysis (September 2013) www.britishcouncil.org/sites/britishcouncil.uk2/files/the_shape_of_things_to_come_2.pdf

2. Exploring the impacts of TNE on host countries (March 2014) www.britishcouncil.org/education/ihe/knowledge-centre/policy-thought-leadership/report-exploring-impacts-tne-host-countries.

- International programme mobility includes: twinning, joint/double degree programmes, franchise and distance-learning programmes. A useful description of these various modes of programme mobility may be found in Chapter 2 of the British Council report *The shape of things to come – the evolution of transnational education: data, definitions, opportunities and impacts analysis*, referenced in Section 1.1 above.
- International provider mobility includes: international branch campuses and bi-national universities. Again, a useful description of these modes of provider mobility may be found in Chapter 2 of *The shape of things to come*.
- Host/receiving country: the country receiving the international programme. For the purposes of this study, host country refers to any of the following ten countries/administrative regions: Botswana, Egypt, Hong Kong, Jordan, Malaysia, Mauritius, Mexico, Turkey, UAE and Vietnam.
- Sending/awarding country: the country awarding or providing academic oversight for the international programme. Among the most active sending countries are Australia, Germany, the UK and the USA.
- Host-country survey groups, for the purposes of this report, include TNE students, non-TNE students, TNE faculty, non-TNE faculty, senior TNE leaders, higher education experts, employers and government agencies.

1.4 Report structure

The report has nine chapters. This introductory chapter provides background and context to the research with reference to the pilot study that preceded the current research. The research design is discussed in the following chapter and outlines the reasons for the selection of participating countries, the identification of the eight different target respondent groups, the implementation of the survey and the challenges in getting responses from national-level actors. Chapter 3 provides a profile of the TNE students and the TNE programmes they studied. Of special note is the age, gender, method of financing, level of study, current employment status and TNE delivery mode. Chapter 4 (see page 15) discusses a number of contextual issues relating to awareness, rationales, and positive and negative features of TNE as evidenced from the feedback received across the various survey groups. The main findings of the research are presented under four impact categories: academic impacts, cultural impacts economic impacts and skills impacts, discussed from chapters five to eight. These chapters synthesise and discuss the considerable body of opinion data sourced as part of the research. The report ends with some forward-looking perspectives about the capacity for further growth in the provision of TNE in host countries, an assessment of views in relation to the balance of benefits and risks of TNE, a brief summary of the main findings and some concluding remarks.

2. Design of research project

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2.1 Background: the pilot study

In March 2013, the British Council commissioned a pilot study on the impacts of TNE in ten selected host countries: Botswana, China, Malaysia, Mexico, Pakistan, Russia, Singapore, South Africa, UAE and Vietnam. Specifically, the aim was to explore the role that this innovative mode of education plays in the receiving countries by looking at its contribution to economic growth, skills/knowledge development, capacity building and the socio-cultural environment. This was done by collecting and analysing the views of two of the main players in the TNE sector, namely students/graduates and TNE experts. In addition to extensive desk research, the pilot study included an applied research component based on a mixed approach, where students/graduates were targeted through an online survey, while the opinions of TNE experts were gathered through telephone interviews.

The findings of the pilot study offered some valuable insights on the impacts of TNE across a diverse mix of host countries. However, it was evident that as the numbers and types of TNE programmes have increased over time, little national data have been collected by the host countries, leaving a significant gap in the stock of knowledge in this area. In particular, the pilot study highlighted that, for the most part, only anecdotal impact evidence was available, primarily at the institutional level. A more systematic collection of data at institutional and national levels was necessary.

In this context, the current project was launched to further explore and expand on a number of themes that emerged from the pilot-study findings. The objectives of this study were similar to the pilot study but special efforts were made to increase the reliability of the research findings by increasing the survey sample size, searching for additional enrolment data, targeting different countries from all regions of the world, and broadening the group of TNE actors whose opinion is important for assessing the impact of programme and provider mobility at both institutional and national levels.

2.2 Desk research for current study

A programme of desk research was undertaken to review available literature on the subject of the impacts of TNE in host countries. Sources included publications and data produced by government agencies and higher education institutions in the selected host countries, as well as the main sending countries (notably Australia, Germany and the UK). Previous research and data produced by the British Council and other national agencies on the subject of transnational education was reviewed and used to inform the current study. In general, however, there is a dearth of information available on the topic of the impacts of TNE on host countries and the overall lack of enrolment data continues to be a major handicap and concern.

2.3 Country selection

The selection of countries was partly informed by the pilot study research experience, where generating sufficient survey response numbers was very challenging in a number of host countries. There were various reasons for this, including cultural aversion to completing surveys, language barriers, the relatively limited scale of TNE activity in several countries and in some countries a lack of awareness and understanding of what TNE meant and involved. As a consequence, China, Pakistan, Russia, Singapore and South Africa, which were included in the pilot study, were replaced by Egypt, Hong Kong (special administrative region of China), Jordan, Mauritius and Turkey in the current study. This provided for better representation of the different regions of the world. Criteria for selecting the final list of host countries included maturity of TNE location, diversity of TNE delivery modes and geographical mix. The following table presents the final country/region selection.

Table 2.1: Countries and SAR included in study

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

Qatar was originally included in the list of target countries but failure to secure the appropriate permissions to conduct research in the country, as well as a lack of an appropriate and informed in-country researcher resulted in Qatar reluctantly being dropped from the study.

2.4 Online survey of TNE stakeholder groups

The current study involved a broad group of TNE stakeholders in order ensure that both institutional- and national-level actors were included, that both non-TNE and TNE students and faculty were surveyed, and that employers and representatives from government agencies were consulted. A specific survey was prepared for eight target groups. These surveys were piloted on a limited basis to ensure that the questions were clearly understood and deemed relevant. The eight target groups for the research study were:

- 1 TNE students
- 2 non-TNE students
- 3 TNE faculty
- 4 non-TNE faculty
- 5 senior TNE leaders
- 6 higher education experts
- 7 government agencies
- 8 employers.

• Survey of students – TNE and non-TNE

The TNE student survey included profiling questions about the respondent, a section on their TNE educational experience, a series of questions focusing on skills, knowledge and cultural awareness gained, and a final section related to employment before, during and after the TNE experience. Many of the questions were refined, compared with the pilot study, and a number of generic questions were introduced to allow comparison with other survey groups.

The non-TNE survey sought to provide balance by including the views of students who studied local programmes, not TNE programmes. Where possible, TNE students and non-TNE students were targeted in the same institution. This was based on the assumption that students attending the same university are more

likely to be from similar socio-economic backgrounds. However, non-TNE students from the top public universities in each country were also targeted, so that TNE students could be benchmarked against the best alternative.

- **Survey of faculty – TNE and non-TNE**

TNE faculty in a range of institutions were targeted, including: international branch campuses, bi-national universities, and local institutions delivering TNE programmes in partnership with a foreign university. Non-TNE faculty were targeted in the same institutions as TNE faculty, and also in some of the top public universities in each country. In addition to questions about the perceived positives and negatives of TNE, a number of pedagogical and profiling questions were asked to compare the teaching approaches and teaching experience of the two faculty groups.

- **Survey of groups with system-level views**

Very few system-level views about the impacts of TNE were sourced as part of the pilot study. Therefore, a concerted effort was made in the current study to engage with TNE stakeholders that could provide some insight into the impacts of TNE at the national level. The following groups were asked about the positives, negatives and impacts of TNE at both the student/institution and national level.

- Senior TNE leader (e.g. vice-chancellors, faculty deans, heads of international departments, associate professors, etc.).
- Higher education experts (e.g. national and international academics and researchers).
- Government agencies (e.g. senior officials in the Ministry of Education and quality-assurance agencies).
- Employers (multinational companies and local employers based in the host country).

A number of common questions were designed and included in the surveys for multiple target groups. This allowed for comparison of the same question across different respondent groups and provided a more macro view of specific issues. These questions dealt with generic issues such as positive and negative attributes of TNE, skills enhanced by TNE, and the balance between risks and benefits of TNE.

2.5 Conducting the surveys

All eight surveys were administered via an online platform over a seven-week period from 20 December 2013 to 7 February 2014. Great efforts were made to maximise the number of respondents in each target group. Responses to the survey were collected using three main approaches:

- 1 Contacts and distribution lists provided by project sponsors and partners (British Council, DAAD, Australian Education International, Institute of International Education and Campus France)
- 2 Social networking sites to reach the TNE and non-TNE students
- 3 Use of in-country researchers who were familiar with the higher education sector in general and TNE in particular. These researchers were instrumental in encouraging the different target groups to respond, but it was a major challenge in most countries to get national-level respondents in particular to complete the survey.

In-country research contributors were hired for each of the ten study countries. All, with the exception of the Mexico contributor, were based in the host country for the duration of the data-collection phase. Their role was to assist with the logistics of administering the online surveys, including identifying and contacting target institutions and people, directing respondents to the online survey, and following up with respondents to encourage completion of surveys.

2.6 Summary of response data

The total number of responses was 1,906 across the ten countries. Table 2.2 provides the breakdown by target group. There were definite challenges for specific target groups. Three of the groups that had a national perspective (HE experts, government agencies and employers) were especially difficult to reach and to gather relevant data from. There were many reasons for this, but lack of awareness of TNE was a critical one.

Table 2.2: Summary of survey responses by target group

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

2.7 Research challenges

Even though the country selection changed from the pilot study and response rates were significantly improved, the response rate from some countries was still weak. Turkey and Egypt in particular were difficult to reach, mostly due to the relative novelty of TNE activity in the country and perhaps to language barriers as the surveys were available in English only. This was not expected to be detrimental given that the most common language of instruction for TNE is English and also, English is often the language of choice for international higher-education co-operation.

As mentioned, some stakeholder groups were more difficult to reach than others. This was the case, for example, with government agencies, where there is a possible cultural aversion towards answering surveys and where communication is easily lost in lengthy bureaucratic processes. Another challenging group was employers of TNE graduates. In this case the issue seemed to be a general lack of awareness of TNE. As explicitly answered by some of the respondents, they simply did not have sufficient knowledge about the topic to complete the questionnaire. This is an important finding unto itself.

A summary of the TNE student and programme profile data sourced as part of the project is provided in the following table.

It should be stated that the proportion of survey respondents based in international branch campuses is likely to overstate the importance of this TNE delivery mode at the

global level. TNE programme data produced by sending and host countries suggest that collaborative forms of TNE are far more numerous³. Therefore, the TNE student views sourced as part of this research are partially skewed in favour of students enrolled in branch campuses. Further research in this area should attempt to

focus more specifically on the individual TNE delivery modes, particularly newly evolving modes associated with online technologies, such as MOOCs (Massive Open Online Courses). Research at the individual country level should have particular regard to the predominant modes of TNE offered in each host country.

Table 3.1: TNE student survey: profile of students and programmes

Category	Indicator	Criteria	%
Student profile (912 responses)	Gender	Female	52
		Male	48
	Age	Under 24	58
		25–35	33
		Over 35	9
	Graduate versus current student	Still studying TNE programme in 2014	64
		Graduated 2013	12
		Graduated 2012	11
		Graduated 2011	5
		Graduated before 2010	8
Programme profile (912 responses)	Level of study	PhD/post-doctoral study	5
		MA/MSc/MBA	26
		Bachelor's	57
		Undergraduate Diploma	5
		Professional	2
		Others	5
	TNE programme study format	Full time⁴	86
		Part time	11
		Flexible	3
	Institutional mode of TNE study	International branch campus	54
		Bi-national university	18
		Local college/university	12
		Double degree	8
		Joint degree	4
		Distance/online	4

3. The shape of things to come – the evolution of transnational education: data, definitions opportunities and impacts analysis (September 2013). Chapter 2, 'Data and definitions' www.britishcouncil.org/sites/britishcouncil.uk2/files/the_shape_of_things_to_come_2.pdf

4. There is a lack of definitional consistency regarding what constitutes a full-time versus part-time programme. A significant proportion of full-time students also reported themselves as being full-time employed. Students undertaking periodic intensive blocks of study at weekends and evenings are often categorised as full-time students while maintaining a full-time job.

Category	Indicator	Criteria	%
	Top five awarding countries	UK	50
		Germany	20
		Australia	6
		Malaysia	6
		India	3
	Top five study subjects	1. Business and finance 2. Engineering and technology 3. Languages 4. Biological sciences 5. Social sciences (including Economics)	

A summary of the survey data provided by TNE student respondents that relates to their personal economic circumstances is provided in the following table.

Table 3.2: TNE student survey: economic profile of students

Category	Indicator	Criteria	%
Economic profile (838 responses)	Funding source ⁵ (838 responses)	Personal/family	71
		Scholarship	39
		Student loan	14
		Employer	4
	Current economic status (792 responses)	Studying only	55
		Full-time employed	27
		Unemployed	6
		Part-time employed	10
	Length of time to find a job after graduation (310 responses)	Continued in existing role	44
		Within three months	27
		Between three and six months	16
		More than six months	13
	Top five industry employers of TNE graduates (310 responses)	1. Teaching and education 2. Business and management 3. Engineering and manufacturing 4. Banking and finance 5. Marketing, advertising and PR	

5. Note: since students could select more than one funding source, the total percentage exceeds 100 per cent.

4. Awareness of TNE among local students and teachers

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This chapter addresses the findings that focus on three issues central to understanding the overall impact and implications of TNE on the host country. The first issue relates to the general awareness level of TNE among students and faculty that are not actually engaged in TNE activities. The second issue explores TNE students' views on their rationales for enrolling in TNE programmes. The third issue is both complex and fascinating as it addresses how different respondent groups perceived the positive and negative features of TNE in relation to its impact on the host country.

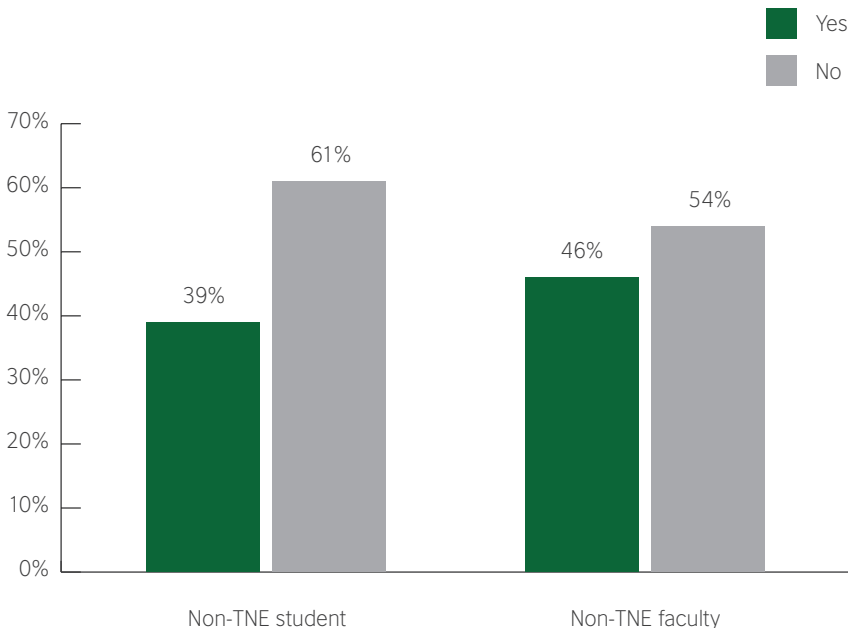
In many cases, students and faculty members in institutions that offered twinning, franchise, double/joint degree programmes were not aware of these opportunities. This indicates the low profile that TNE programmes have, and/or the lack of understanding or confusion of what constitutes a TNE experience and the benefits it can offer.

4.1 Awareness of TNE among local students and teachers

Awareness of TNE among students and educators in host countries is key to understanding the level and type of impact that programme and provider mobility has on a host country. Students and faculty that were not actively engaged in TNE were surveyed for their views on programme and provider mobility. It was startling to find out how many were not aware of TNE opportunities in their country and often in their own institution.

Chart 4.1: Non-TNE student and non-TNE faculty awareness of TNE

Are you aware of TNE (transnational education) programmes in your country?



Response numbers: non-TNE student 473; non-TNE faculty 130.

4.2 Student rationales for enrolment in TNE programmes

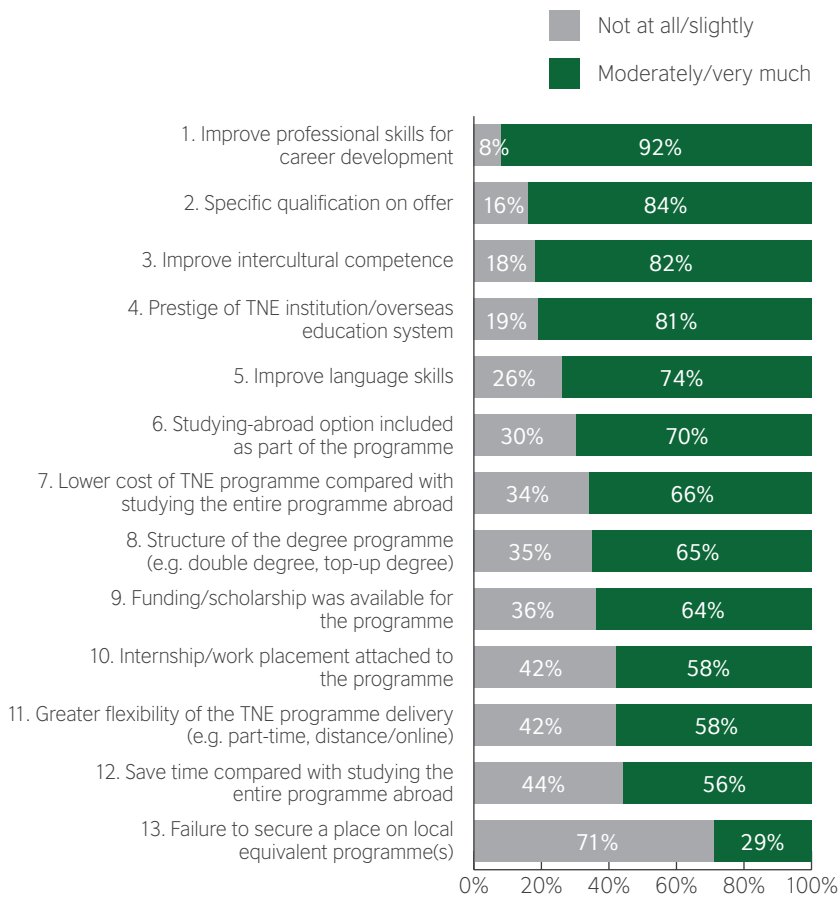
A review of why TNE students want to enrol in TNE programmes is critical to understanding both the attraction and impact of programme and provider mobility. TNE students were asked for their views on the primary reasons they chose to enrol in TNE programmes.

The responses to the question about what motivates a student to enrol in a TNE programme raises many key issues and also contradicts many of the prevalent assumptions about why TNE is popular among students.

The number-one rationale firmly links TNE to the students' current or future career development. The potential to develop the prerequisite skills of employment is clearly stronger than the academic related benefits of greater programme flexibility, saving time by not studying abroad and non-admission to local equivalent programme, which were ranked as the three least important rationales.

Chart 4.2: TNE students' rationale for choosing their TNE programme

Please rate the extent to which the following reasons influenced your decision to choose your TNE programme.



The second and fourth rationales address the perceived importance of the qualification received and the status of the awarding institution. It is convincing evidence that the branding and profile of the foreign partner/parent institution has an influence on a student's decision to enrol in a TNE programme.

The opportunity to develop intercultural competence ranks third in importance as a driving rationale. While this finding is encouraging in terms of the overall goal of TNE to increase intercultural understanding and skills, the finding merits further investigation as to whether the expectation of developing intercultural competence is actually met and perceived as a tangible outcome of TNE programmes. This also applies to the strong motivation to improve language skills. See Chapter 8 for a discussion on TNE students' views on what skills are improved as a result of TNE programmes.

While TNE students have decided not to do a full degree abroad, it is interesting to note that the option for a short-term experience of studying overseas is still an important priority as it ranks in sixth place. The next question addresses full-time study abroad from another angle.

Response number: TNE students/graduates 859.

4.3 TNE student preferences regarding studying abroad versus TNE

Students that want to have an international education programme and the accompanying credentials face the decision as to whether they go to the foreign institution in another country for a full degree programme or participate in a TNE programme that is offered in their own country or a neighbouring one. TNE students were therefore asked how likely they would have been to travel to the awarding country if their TNE programme had not been available to them in their own country.

There is convincing evidence that TNE meets the needs of students who, for a variety of reasons, are not able to study abroad full time, as only 32 per cent of the respondents would be likely to go abroad if the TNE option was not available. However, having an experience of studying abroad within a TNE programme is very attractive and the survey findings show that 49 per cent of TNE students completed a component of their programme abroad (see Chart 5.10). These findings confirm the attractiveness and importance of studying abroad as part of TNE and as an alternative to taking a full degree abroad.

However, it is important to note that about one third of the respondents did indicate they would be likely travel to the country of the awarding institution, which illustrates how the lines between TNE and traditional international student mobility are in reality quite blurred.

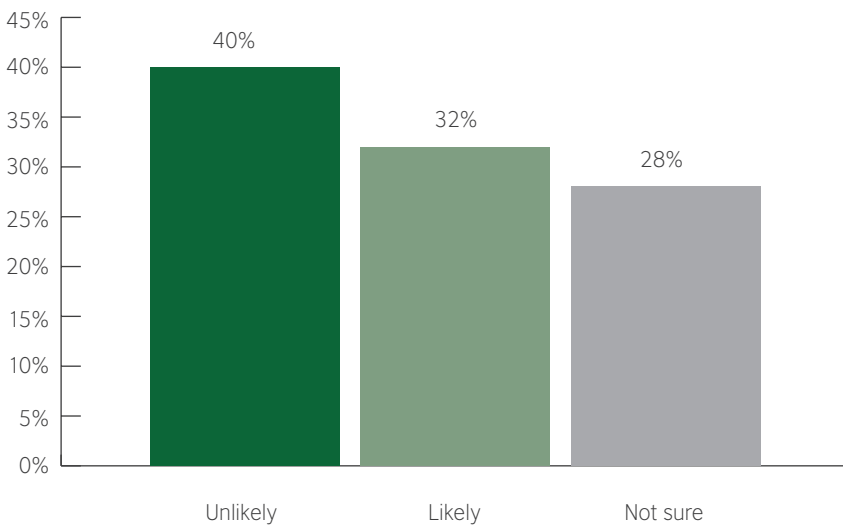
4.4 Positive and negative impacts of TNE

As discussed in Chapter 2 of this report, an important objective of the study was to get feedback from different target groups as to the impact of TNE in their country. To this end, a set of generic questions about the positive (benefits) and negative (risks) features of TNE was asked of the relevant target groups. Impacts at the national or country level differ from those at the institutional and student level and thus the generic questions distinguished between these two levels.

One of the most striking finding in the study is the consistency across the different target groups in terms of the ranking of positive and negative attributes of programme and provider mobility. This unexpected result provides increased confidence in the analysis of the key risks and benefits of TNE. The second surprising finding is that, overall, respondents did not believe that the negative features or potential risks of TNE were important or applicable. Both of these findings are elaborated upon in the following sections.

Chart 4.3: Likelihood that TNE students would have studied abroad

How likely would you have been to travel to undertake study in the awarding country (or country providing academic oversight) if it had not been available via TNE?



Response number: TNE students/graduates 838.

4.4.1 Positive attributes at student or institutional level

Table 4.4: Positives of TNE at student or institution level

Please rate the extent to which you believe the following are 'positive' attributes of TNE at the 'student or institution' level in your country.

Positive attributes/benefits	TNE students/graduates	Non-TNE students	TNE faculty	TNE senior leaders	Non-TNE faculty	HE experts	Government agencies
1. Affordable alternative to studying abroad	3	2	1	1	1	1	1
2. Strengthens international outlook for students/staff	1	1	2	2	1	2	2
3. Promotes intercultural understanding/competence	2	4	3	4	3	6	5
4. Enhances English language skills	5	5	4	3	6	3	3
5. Enhances capacity for collaborative research	4	3	6	6	4	5	7
6. Wider range of programmes available	6	6	5	5	5	7	6
7. Generates income for local HEI/supports local economy	7	7	7	7	7	4	4

Response numbers: TNE students 810; non-TNE students 136; TNE faculty 144; TNE senior leaders 57; non-TNE faculty 46; HE experts 52; government agencies 30.

The above survey groups were asked to rate each of the seven potential positive attributes of TNE using the following scale (1 = Not at all; 2 = Slightly; 3 = Moderately; 4 = Very much). These ratings were then ranked as presented in the above chart. Important to note is that all seven attributes were rated sufficiently highly as to be considered significant.

Worthy of serious reflection is that an affordable alternative to studying abroad ranks as the most positive benefit of TNE at the student/institutional level. This is a key finding for two reasons. First, respondents indicate that they believe that studying abroad is important and second, that TNE is a positive and affordable alternative to taking the full foreign degree programme abroad. This is solid evidence that the increasing interest and demand for international education can be partially met through programme and provider mobility – not only through student mobility.

From the student (TNE and non-TNE) perspective, the most positive attribute of TNE is the opportunity to gain a more international outlook. The message about the importance of increased awareness and knowledge about international issues and events has been clearly understood by students and they believe that TNE can help them gain this international understanding.

The benefit of intercultural understanding/competence ranks third overall but actually has the most varied levels of priority. It is interesting to note that TNE students rank it as the second priority, while the HE expert group rank it as sixth in importance. This requires further study to better understand the different perceptions.

The attribute/benefit that focuses on income generation for local HEI/supports local economy reveals a major difference between those target groups at the institutional level (students and faculty) and national-level actors (HE experts and government agencies).

The institutional-level respondents believe that income generation is least important as a benefit while the national-level actors rank income generation as fourth out of seven. This divergence of opinion merits further exploration and reflection.

A wider range of programme available ranks low in importance as a benefit of TNE and is corroborated by the findings in Chart 5.1, which shows that 72 per cent of respondents were of the view that similar programmes are also offered by local HEIs. Thus, having TNE increase the diversity of programmes available in the host country is not seen to be important or a reality.

A brief comment about enhancing the capacity for collaborative research is necessary, as these findings show that research remains of secondary importance in programme and provider mobility at present. The focus remains on education and teaching but as TNE programmes, branch campuses and bi-national universities mature it will be important to monitor the role of collaborative research.

4.4.2 Negative attributes at student or institutional level

The same seven respondent groups were asked to rate the negative or potential risk aspects of TNE.

The surveys groups were asked to rate each of the seven potential positive attributes of TNE using the following scale (1 = Not at all; 2 = Slightly; 3 = Moderately; 4 = Very much). Overall, with the exception of high cost compared with local programmes,

respondents indicated that the negative attributes were not important or applicable to TNE as the majority of the responses indicated 'slightly' or 'not at all' when rating the attributes. Thus the findings related to negative attributes are not significant. That being said, it is still informative to understand which negatives were seen as being of greater concern. Table 4.5 shows the aggregate level of ranking of negative attributes.

Table 4.5: Negatives of TNE at student or institution level

Please rate the extent to which you believe the following are negative attributes of your TNE programme at the student or institutional level in your country.

Negative attribute	TNE students/ graduates	Non-TNE students	TNE faculty	TNE senior leaders	Non-TNE faculty	HE experts	Government agencies
1. High cost for student compared with local programmes	1	1	1	1	1	1	1
2. Limited campus student experience	3	2	3	2	3	2	2
3. Low commitment of fly-in faculty	2	3	2	5	2	4	3
4. TNE programme is Western-centric/ curriculum content not locally sensitive	5	5	4	3	4	3	4
5. Lack of official local recognition/ accreditation	4	4	6	6	5	5	6
6. Overuse of English as language of instruction	6	6	5	4	6	6	5

Response numbers: TNE students 810; non-TNE students 136; TNE faculty 144; TNE senior leaders 57; non-TNE faculty 46; HE experts 52; government agencies 30.

Across all target groups, the number-one ranked negative attribute about TNE programmes is that they are more costly than the locally offered programmes. It is interesting to compare the number-one positive and negative attributes of TNE at the institutional/student level, as both address the issue of costs. The number-one positive attribute of TNE is that costs are lower than full-time study abroad, but in relation to locally offered programmes they are more expensive and this is seen as a negative attribute. This dilemma will likely not be resolved as there is no doubt that the involvement of a foreign partner in designing, delivering and monitoring TNE programmes does involve extra expenses.

The number-three concern or perceived negative attribute about TNE is the low

commitment and availability of fly-in faculty. Open comments by TNE students indicate that while the students are pleased to have the expertise provided by fly-in faculty, the intensive format of one or two week blocks of classes is not conducive to effective learning and the faculty are not around or available for follow-up consultation.

An often-quoted concern about TNE programmes is that the curriculum is not sensitive to local context and culture. Overall, the survey respondents ranked this negative attribute as fourth out of six in importance, which was lower than expected given the debate and concern expressed about this issue. Interestingly, the TNE students ranked it even lower, in fifth place, indicating that it was not a major concern for them either.

The two least important negative attributes were lack of official recognition/accreditation and overuse of English as a medium of instruction. It is encouraging to see that these two key issues did not appear as concerns across the different target groups.

4.4.3 Positive attributes of TNE at the national level

The questions that focus on the positive and negative aspects of TNE at the national or country level were addressed to the four target groups who were considered to have a national perspective. However, the overall low response rates need to be kept in mind when reviewing the data in the following two tables.

Table 4.6: Positives of TNE at the national level

Please rate the extent to which you believe the following are positive attributes of TNE at the national level in your country.

Positive attributes/benefits	TNE senior leaders	HE experts	Government agencies	Employers
1. Increased access to higher education for local students	2	1	1	1
2. Improves the overall quality of higher education provision	1	2	2	3
3. Builds international relations and mutual understanding between countries	3	3	3	2
4. Addresses skills gaps in the labour market	4	4	4	4
5. Improves infrastructure such as transport routes, buildings/campuses, research and IT facilities	5	5	5	5

Response numbers: TNE senior leaders 57; HE experts 52; government agencies 30; employers 42.

Increased access to higher education for local students and improving the overall quality of higher education ranked number one and two respectively as positive attributes of TNE. This put academic factors as the most important attributes and impacts of TNE. Political aspects in terms of building international relations and mutual understanding between countries was ranked in third place. Interestingly, the labour market and economic-related attributes of TNE – skills gaps in labour market and infrastructure improvement – ranked lowest at the national level, which is consistent with the ranking of income generation being ranked lowest at the institutional level. Respondents consistently ranked economically related aspects of TNE as being of lowest priority. This finding is extremely important and warrants further research as it differs significantly from what is commonly perceived as an attribute of TNE and conflicts with the sending countries perception of TNE for income-generation potential.

4.4.4 Negative attributes of TNE at the national level

Overall, respondents indicated that the negative attributes at the national level were not important or applicable to TNE, as the majority of the responses indicated 'slightly' or 'not at all' when rating the attributes. Thus the findings related to negative attributes are not significant. That being said, it is still informative to understand which negatives were seen as being of greater concern. Table 4.7 shows the aggregate level of ranking of the negative attributes at the national level.

Table 4.7: Negatives of TNE at the national level

Please rate the extent to which you believe the following are negative attributes of TNE at the national level in your country.

Negative attributes/risks	TNE senior leaders	HE experts	Government agencies	Employers
1. Creates competition for students and staff with local institutions	1	2	1	1
2. Employers are not aware of TNE or are sceptical of new TNE programmes	2	1	2	2
3. Increases brain drain	3	4	3	3
4. TNE programmes are not sustainable/are short-term focused	4	3	4	4
5. Reduces the overall quality of higher education provision	5	5	5	5

Response numbers: TNE senior leaders 57; HE experts 52; government agencies 30; employers 42.

The number-one negative attribute of TNE from a national level perspective is the competition for students and staff between TNE programmes/providers and local institutions. This competition for students contrasts somewhat with the finding that providing greater access for students is seen as the number-one positive of TNE at the institutional level. While competition can exist at the same time that greater access is being provided, this issue of competition for local staff and students is definitely worthy of further investigation and reflection.

The awareness of employers of the existence of TNE programmes and the difference between local programmes and full degrees abroad is a topic that also needs further examination. Students' number-one rationale (see Table 4.2) relates to their career prospects and yet it is not known what level of awareness and understanding employers have about the nature and benefits of TNE programmes. This issue ranks as number two in importance in terms of negatives of TNE.

Overall, the controversial issue of brain drain is ranked in third place as a negative aspect of TNE. While the potential for brain drain or brain gain varies from country to country it is revealing that it did not rank higher given the hot debate about this potential risk.

Finally, little concern was expressed about the fact that TNE can also be seen to be short term in focus and be of questionable quality. Respondents indicated that these two issues were of least importance in terms of potential risks or negative features of TNE.

4.5. Summary of key findings

- 61 per cent of non-TNE students and 54 per cent of non-TNE faculty respondents did not know about the TNE opportunities in their country, which suggests that the full potential of collaborative education programmes is not being realised and that more work needs to be done to publicise TNE opportunities.
- The number-one rationale driving students to enrol in TNE is to improve professional skills for career development. The potential to develop the prerequisite skills of employment is clearly stronger than the academic related benefits of greater programme flexibility, saving time by not studying abroad and non-admission to local equivalent programme, which were ranked as the three least important rationales for TNE.
- The opportunity to develop intercultural competence ranks third in importance as a driving rationale. This is an encouraging sign, but whether or not students' expectations of developing intercultural competence are actually realised through TNE programmes needs verification.
- Branding and profile of the foreign partner/parent institution has an influence on a student's decision to enrol in a TNE programme, as the perceived importance of the qualification and the status of the awarding institution ranked in second and fourth place respectively as key motivations for TNE students.
- Overall, the number-one positive benefit of TNE at the institutional and student level is that TNE provides an affordable alternative to full-time studying abroad for an international qualification. This is solid evidence that the increasing interest and demand for international education can be partially met through programme and provider mobility, not only through student mobility.
- From the student (TNE and non-TNE) perspective more specifically, the most positive attribute of TNE is the opportunity to gain a more international outlook. The message about the importance of increased awareness and knowledge about international issues and events has been clearly understood by students and they believe that TNE can help them gain this international understanding.
- The potential risk of TNE related to the programme being Western-centric and the curriculum not sensitive to local culture ranked fourth overall in importance as a negative attribute to TNE. Interestingly, the TNE students ranked it even lower – in fifth place – indicating that it was not a major concern for them.
- It is encouraging to see that lack of official recognition/accreditation and overuse of English as a medium of instruction were not considered to be major concerns across the different target groups.
- At the national level, increased access to higher education for local students and improving the overall quality of higher education ranked number one and two respectively as positive attributes of TNE. This put academic factors as the most important attributes and impacts of TNE.
- Political aspects in terms of building international relations and mutual understanding between countries was ranked in third place as a benefit of TNE at the national level. Interestingly, the labour market and economic-related attributes of TNE – meeting the skills gaps in the labour market and infrastructure improvement – ranked lowest.
- Keeping in mind that respondents did not rate the negative attributes or TNE as very important and thus insignificant, it is revealing to see that the number-one negative attribute of TNE from a national-level perspective is the competition for students and staff between TNE programmes/providers and local institutions. This competition for students contrasts with the finding that providing greater access for students is seen as the number-one positive of TNE at the institutional level. Clearly, competition for students and providing greater access are not mutually exclusive.
- The risk of brain drain is ranked in third place as a negative aspect of TNE. While the potential for brain drain or brain gain varies from country to country, it is revealing that it did not rank higher given the hot debate about this potential risk.
- Little concern was expressed about the fact that TNE can also be seen to be short term in focus and be of questionable quality. Respondents indicated that these two issues were of least importance in terms of potential risks or negative features of TNE.

5. Academic implications and impacts

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The purpose of this chapter is to present and analyse the findings that relate to the nature of TNE programmes and their academic impact and implications for the host country. Much of the discussion on TNE academic impacts stems from assumptions and observations from sending countries, not on evidence or views from host countries. This chapter aims to change that by providing data on the views of a variety of stakeholder groups in host countries. Of particular interest are the questions relating to whether TNE programmes provide niche-level programmes or are similar to programmes that are already offered locally. Another highly debated issue is whether the teaching methods used in TNE are similar to or differ from locally offered programmes. Who the teaching staff are and what methods of quality assurance are used are other topics addressed in this chapter.

5.1 Academic impacts as positive aspects of TNE at national level

When asked about the positive aspects of TNE at the national level, it is revealing to see that respondents ranked academic

aspects higher than economic, skills and political aspects. Interestingly, increased access to higher education for local students ranked in first place, and improvement of the overall quality of higher education provision ranked in second place (see Table 4.6). In terms of negative aspects of TNE, the two academic-related risks (TNE programmes are not sustainable/short-term focused and TNE programmes reduce the quality of higher education provision) ranked lowest. These findings demonstrate clearly that academic impacts are seen as the most important benefits of programme and provider mobility at the national level.

However, there is a different story at the institutional and student levels. The top two positive attributes are providing a more affordable alternative to studying abroad and strengthening the international outlook for students/staff. These address economic benefits and cultural/social benefit respectively. The academic benefits such as enhancing capacity for collaborative research and wider range of programmes available ranked in fifth and sixth place out of seven options (see Table 4.4).

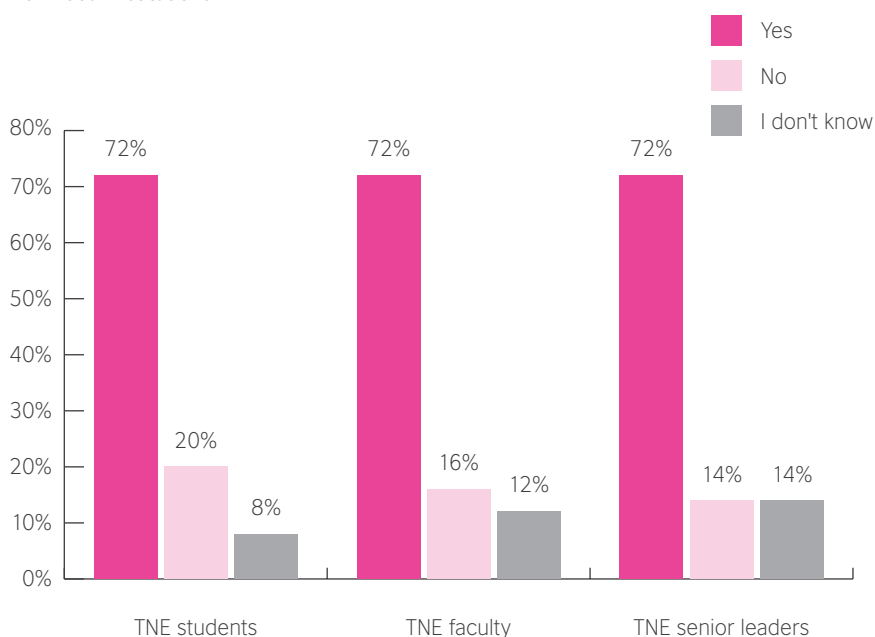
This divergence in perception between the national and institutional levels about the most important positive benefits and negative attributes is worthy of further analysis, especially when looked at in terms of the other academic impacts and implications as described in the following sections.

5.2 Availability of similar programmes locally

An often-cited rationale for providing TNE programmes is the lack of comparable programmes in the host country. This section addresses this issue and shows that the majority of respondents believe that most TNE programmes are also available locally, thus putting into question the belief that an important impact of TNE for the host country is increasing the diversity of available higher education programmes.

Chart 5.1: Availability of similar programmes locally

Are similar academic subject offerings to your TNE programme(s) available from local institutions?



Response numbers: TNE students 912; TNE faculty 168; TNE senior leaders 58.

The majority of respondents (72 per cent) reported that similar programmes are available from local institutions, which supports the finding that the benefit of provider mobility relates more to providing increased access to programmes rather than diversifying the types of programmes offered. It is particularly interesting to see the consistency in opinion across the three response groups making it a robust finding and conclusion.

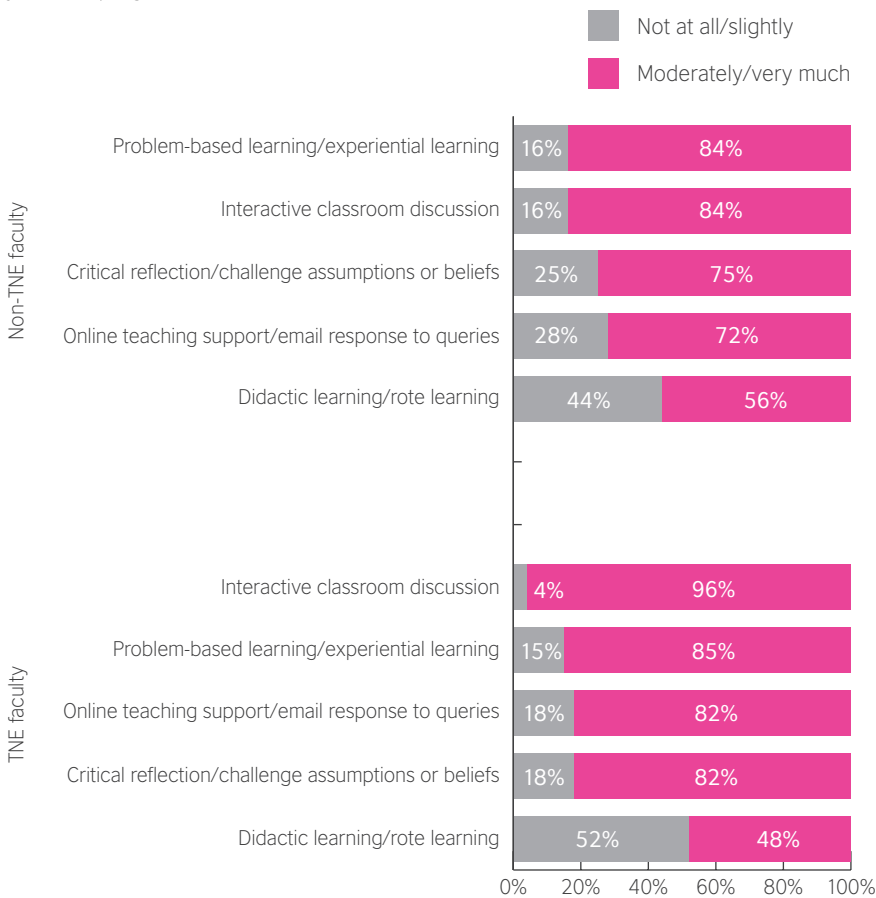
The open comments by senior leaders in TNE institutions noted that similarities or differences between TNE and local programmes 'varies according to field of study' and 'Whilst we generally look to offer niche programmes not otherwise available, we also offer programmes in popular disciplines where demand is high.'

5.3 Modes of pedagogy between TNE and local programmes

The question as to whether teaching practices differ between TNE programmes and local programmes is both interesting and complex. TNE and non-TNE faculty were asked to rank the use of different teaching methods and the results showed little difference. Yet when TNE students were asked about the differences between TNE and local programmes, the vast majority reported a significant difference. This section addresses this apparent contradiction.

Chart 5.2: TNE faculty and non-TNE faculty views on modes of pedagogy

Please rate the extent to which you use the following modes of pedagogy when teaching your TNE programme(s).



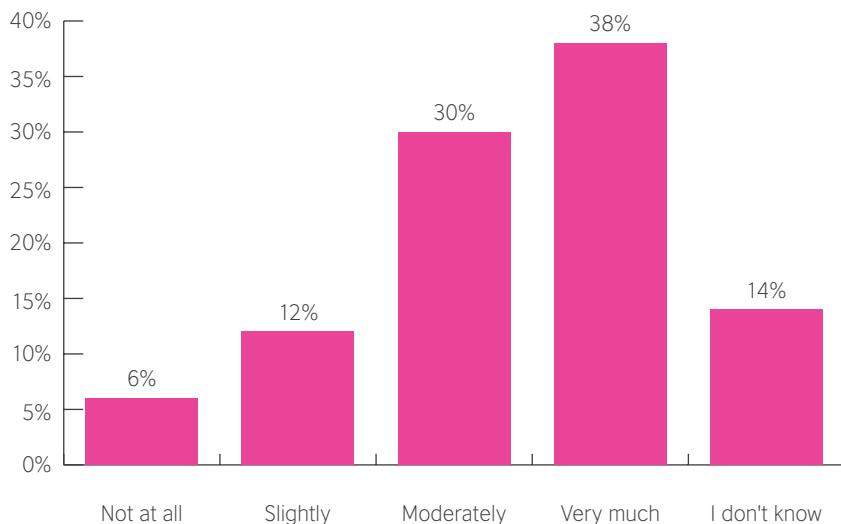
Response numbers: TNE faculty 168; non-TNE faculty 131.

The findings reveal that there are no major differences between the pedagogical strategies used by TNE faculty and non-TNE faculty with the exception that a higher proportion of TNE faculty reported using interactive classroom discussion than non-TNE faculty. Not surprisingly, TNE teachers tend to use more online teaching support, which involves the parent/partner institution. One higher education respondent from Turkey commented that more ICT was required in higher education and that TNE via online learning was having a positive impact in this regard. Didactic or rote learning ranks last for both groups.

Through open comments, TNE faculty provided an interesting list of teaching/learning strategies that they often use to promote interactive and applied learning. They included film screenings, social-media platform for communication, case studies, group work and field visits. The pedagogy examples provided by non-TNE faculty included case studies, group work and modular teaching.

Chart 5.3: TNE student views on mode of pedagogy

Do you think that the methods of teaching and learning are different for TNE programmes compared with local programmes?



Response number: TNE students 838.

It is both fascinating and puzzling to examine the responses of the TNE students to the question of differences in modes of pedagogy between TNE and locally offered programmes. TNE students overwhelmingly believe that the TNE teaching style is different, which contrasts directly with faculty opinions.

Below is an overview of the main differences highlighted by the TNE students' open comments. Both positive and negative features of TNE programmes are discussed and provide more details on what makes TNE programmes and teaching strategies different.

With regards to course content and format, students wrote: 'TNE programme is slightly more current in its research and in terms of exposure in career related fields'. 'More practical skills were gained through the

actual execution of real projects, for instance programme evaluation during an internship'. One respondent wrote: 'The TNE programme involves concentrated teaching time delivered in four block weekends, supported by distance communications (Skype, email, blackboard). Local programmes require regular participation one evening and Saturday each week. Teaching has strong international perspective and is participative in approach, as one would expect at doctoral level. Some lecturers could have done more to understand the local context and draw on local literature for their courses', while others noted that the TNE programme involved 'Congested learning, which was overwhelming at times. But good practical experience'. 'Locally the lecturing is good but TNE it was only three days and fully packed with material usually covered in a month.'

Several open comments addressed the teaching approach of TNE programmes versus local ones. 'Local programmes are more about spoon-feeding compared to TNE programme. TNE programme teaches students to be more independent'. 'More critical thinking processes are involved as compared to local programmes'. 'Students are more encouraged to voice their opinion and students' critical thinking has higher importance compared to other local programmes'. 'TNE programme are almost 100 per cent on independent learning. However, the disadvantage is that it seems that most lecturers in TNE programme are not dedicated to teaching because of this independent learning. They are more dedicated to their research.'

The interaction between lecturers and students was frequently noted in the open comments. 'Well, here we have active learning. Students have to work in groups, research, etc. In local schools, lecturers just giving information to students, and students learn by heart.' 'Classes and lectures have less number of students, which means more interaction between the teacher and the students' and 'The use of state-of-the-art facilities by lecturers makes the learning experience more interactive. These facilities are not made use of in my local country.'

TNE encouraging an international outlook was noted by several respondents: 'We are taught internationally and there are no boundaries to it.' 'The methods in teaching and grading are very different. Staffs have higher standards and give constructive feedback in terms of grading. As for teaching, students are expected to be independent and we are encouraged to think critically and are less restricted by cultural taboos regarding topics that are deemed sensitive to be debated on. Local universities are under the pressure to abide by the norms and taboos of the local culture whereas TNE institutions are a lot less restricted by it.'

Comments about the registration process and scheduling of the classes indicate room for improvement in this important area. 'The registration process does not follow the same period designated for other Post graduate programmes. Students do not participate in university-wide orientation programme but instead have a special orientation. Teaching schedules change frequently to accommodate lecturers from normal teaching schedule.'

The quality and extent of the campus experience was a topic commented on by several respondents. 'Learning opportunities at TNE branch differs from standards of the awarding university. Branch campuses are much poorer as compared to those offered by local universities especially in terms of exposure and research equipment.' 'As TNE has more reputation to uphold, the standard is always undeniable slightly better than local programmes, but I always believe more improvement could be made, in terms of student's life on campus as well the quality of teaching and interaction.'

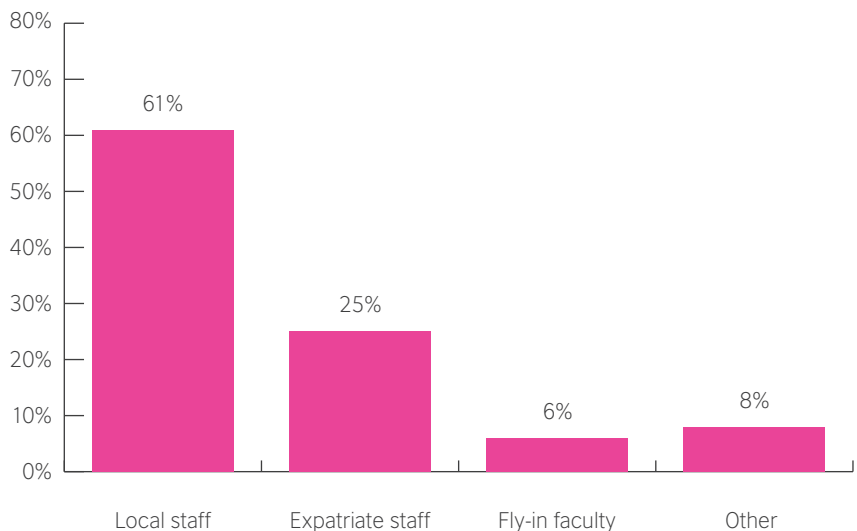
These comments provide more details on how the TNE programmes and teaching styles are different from local programmes. Both positive and negative aspects are highlighted but the positives seem to outweigh the negatives. The student views point out many key issues that require further improvements – but also further investigation.

5.4 Impacts and implications regarding staff teaching in TNE programmes

The staffing of TNE programmes is a challenging and complex topic and so a number of questions in the surveys focused on this issue and are discussed below.

Chart 5.4: TNE faculty respondents by staff category

Which of the following categories best describes your position in the institution?



Response number: TNE faculty 168.

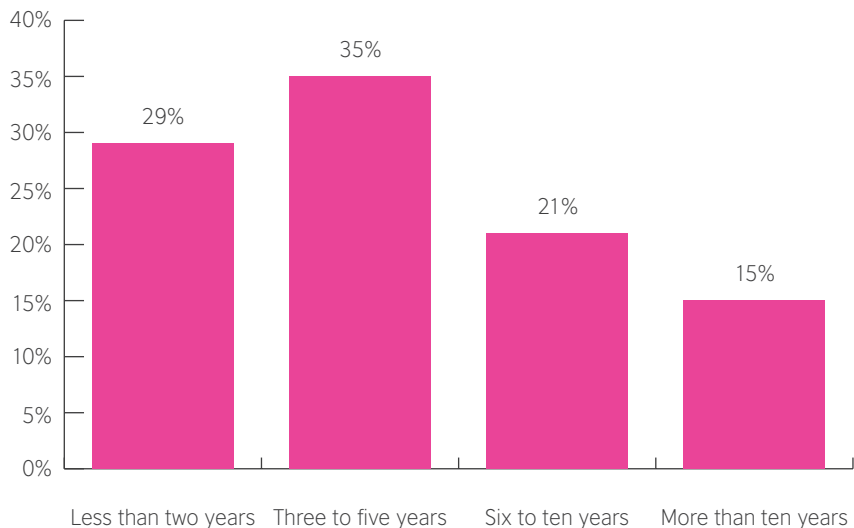
It may come as a surprise that fly-in faculty from the foreign partner institution only represent six per cent of all those teaching in TNE programmes. The data show that at least 86 per cent of the staff is locally based (61 per cent local staff and 25 per cent expatriate).

Using a cultural framework to analyse this data paints another picture as about one third of the teaching staff come from a different country, which can involve different pedagogy styles, different academic value systems and frequently different class-management systems. The intercultural classroom issue, which includes cultural diversity among the students and with the teacher, is an issue that warrants further examination in any future studies of programme and provider mobility.

Less than one third of the TNE faculty have been teaching less than two years. Overall, this indicates that relatively experienced teachers are involved in TNE programmes. This is an important and encouraging finding given the complexities involved in adapting a foreign-based curriculum to local context and learning styles.

Chart 5.5: TNE faculty teaching experience

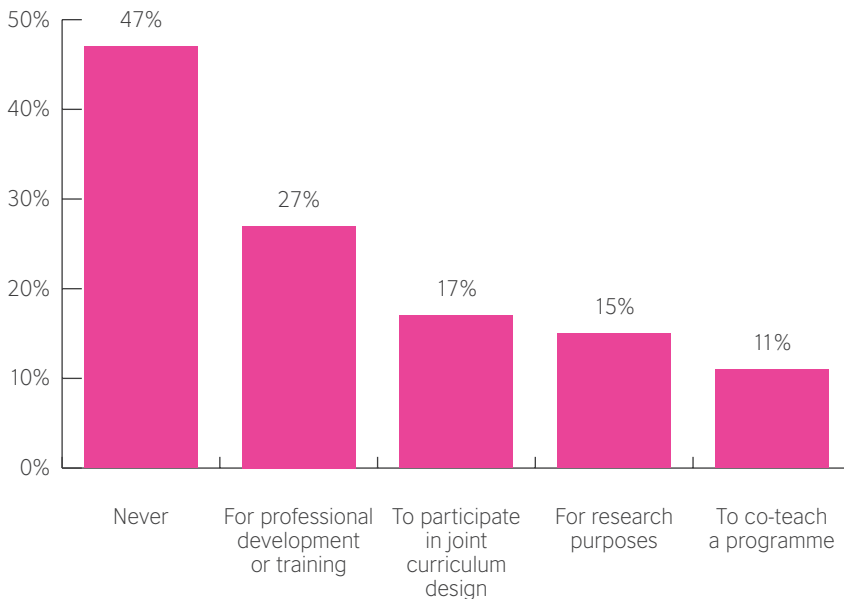
How long have you taught students in a TNE capacity?



Response number: TNE faculty 168.

Chart 5.6: Visit to partner/parent institution by TNE faculty

Have you ever visited your TNE partner or parent institution(s)?



Response number: TNE faculty 162.

Identification and familiarity with the partner/parent institution is often seen as a critical factor in TNE. The data shows that approximately half of the TNE faculty have had the opportunity to visit the partner/parent campus of the TNE programme. It is encouraging to note that 27 per cent visit for professional development or administrative reasons. Another 17 per cent engage in joint curriculum design, but it appears that the visits include only a small number (11 per cent) who co-teach in the partner/parent institutions' programmes. The fact that 15 per cent are involved in research is a positive sign that research is playing a greater role in TNE, which has been traditionally seen as being primarily education- and teaching-focused.

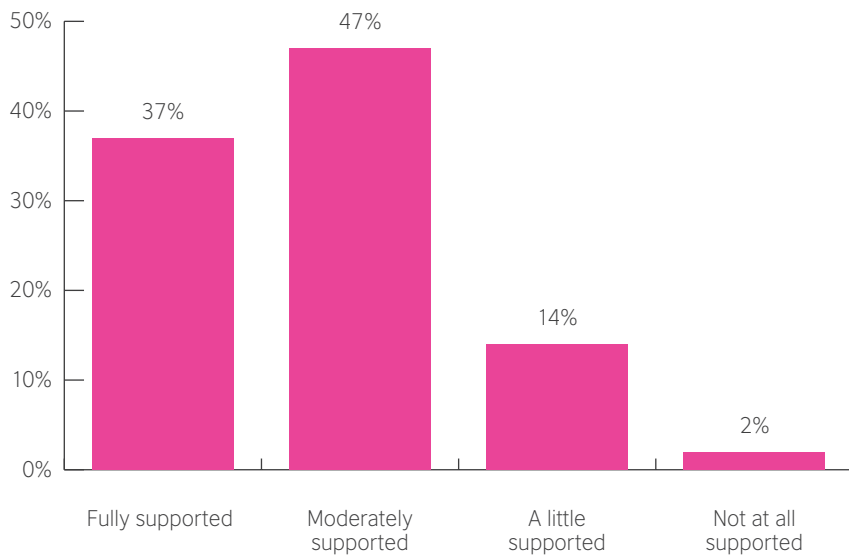
The open-ended comments show that many of the visits to the partner/parent university are for administration purposes such as 'at the beginning of the programme we visited to be introduced to students and other colleagues' or for the purpose of 'co-ordinating efforts in order to support students' or for 'QA related meetings and visits'.

5.5 Administration of TNE programmes

The relationship between the local and partner/parent institution is critical for the smooth and efficient operation of TNE programmes. This section addresses whether TNE faculty feel that they are adequately supported in their teaching responsibilities and whether TNE students believe that the TNE programmes are effectively organised and administered.

Chart 5.7: Administrative support for TNE faculty

As a faculty member, how well do you feel you are supported administratively in your pedagogical duties?



Response number: TNE faculty 162.

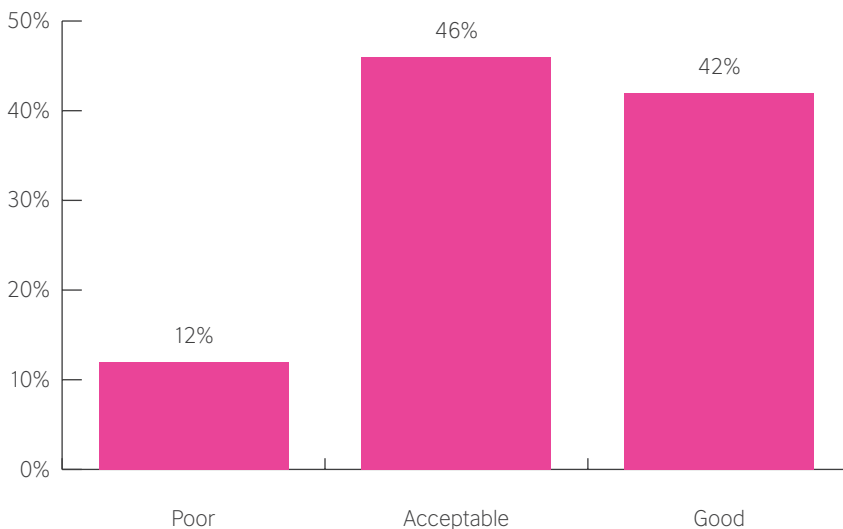
The majority (84 per cent) of TNE faculty indicate that they feel moderately or fully supported by the local and/or partner institutions. Their open comments provided further insights into the realities and practicalities of administrative support for TNE programmes.

On the positive side, some TNE faculty members reported that they are provided with easy and timely access to a number of supports, including access to free development seminars and courses for teaching staff, access to developed teaching material and constant communication with colleagues from the partner institute, and regular discussion with international counterparts to support the development of material and online delivery.

However, other respondents pointed out that improvement is needed in various administrative areas. Some of the issues raised include difficulties in the development of the course timetable and conditions of employment of faculty staff which affect motivation and quality of teaching.

Chart 5.8: TNE student views on the administration of TNE programmes

What was your experience of the governance and administration of your TNE programme?
(Consider issues such as: length of time for results to be released, alumni supports, teaching facilities/resources, etc.).



Response number: TNE students 838.

Overall, TNE students appear to be satisfied with the administration of their TNE programmes, yet the open comments provide more insights into some of the more important or sensitive issues, especially for TNE programmes and providers that are relatively new.

'The infrastructure was poor and we lacked resources like internet, we usually scrambled for LAN internet in computer labs as there was no wireless internet at all. The college was supplying us with books and they would usually deliver them very late.'

'The administration department needs more improvement. I often encounter mistakes in my invoice, outstanding fees and the admin officers are not really helpful.'

'Attitude of some admin, office workers are horrible and totally unhelpful. TNE should provide a department which allows students to make complaints about the incompetency of these officers, as they are not doing their job in the student's best interest or in any way helpful. This was based on personal experience.'

'Results, facilities and other supportive materials are provided in an appropriate time and way, but regarding the new government rules on student visa for international students, it's making the whole process very complicated and unorganized causing many students great loss.'

'Even though the bi-national programme has already various years, there are still many problems to solve regarding the different law systems, the accreditation of certificates etc., e.g. I still do not know when or how I will get my Mexican degree. But both universities make strong efforts to solve these problems, there is a great interest in reaching improvement for the coming generations and make this programme work better and better.'

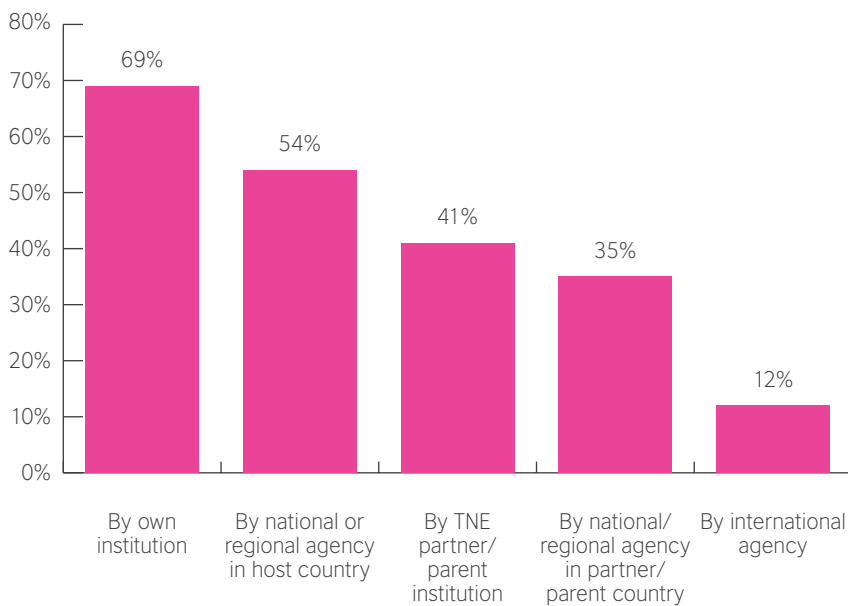
Overall, one of the most common administrative issues addressed in the open comments was lack of support with getting the necessary visas and the absence of ongoing contact and support for alumni.

5.6 Quality assurance of TNE programmes

Quality assurance and accreditation are two of the most hotly debated topics in TNE. Several survey questions related to which quality assurance systems are currently in place. The questions focused on the origin of the quality assurance procedures (local, partner/parent, international) and not on the robustness of the quality-monitoring systems.

Chart 5.9: Quality assurance of TNE programme

How are the programmes you teach Quality Assured (QA)? Please tick all options that apply.



Response number: TNE faculty 162.

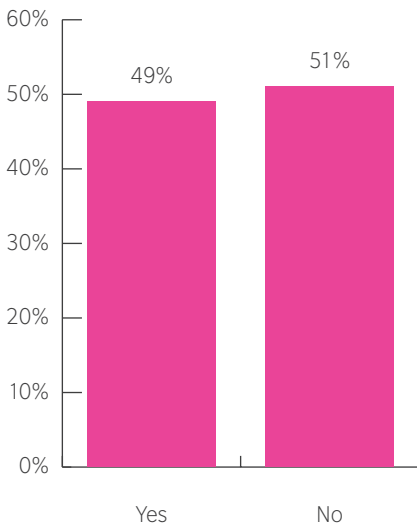
Overall, the results show that quality assurance of TNE appears to be taken seriously by both local and international partner/parent institutions. Worth noting is that local quality assurance by both the local institution as well as the national or regional agency is most prevalent. A positive aspect of this host country emphasis on quality assurance is that local context, policies and practices are taken into consideration. At the same time, 41 per cent of the TNE programmes are also quality assured by the partner/parent institution, which is equally important to

ensure that their standards are being met. The trend of having an international agency quality assure or accredit professional programmes, especially in business and engineering, appears to apply to some TNE provision as well, albeit only a small number (12 per cent). These findings indicate that most of the TNE programmes are undergoing two or more quality-assurance processes, which on the one hand can be seen as positive but on the other can lead to quality fatigue and perhaps more compliance than continuous improvement.

5.7 Studying abroad as part of TNE programme

Chart 5.10: Studying abroad as part of TNE programme

Did you study for one semester or more of your TNE programme in the awarding country (or in the country providing academic oversight)?



Response number: TNE students 912.

About half (49 per cent) of TNE students reported having a study-abroad experience as part of their TNE programme. This is a positive trend that hopefully will continue to increase. The opportunity to visit a foreign country and educational institution may be one of the important contributing factors to the finding that strengthening an international outlook and promoting intercultural awareness and competence are ranked as the two most important positive features of TNE. Section 4.2 reported that having a study abroad experience as part of the TNE programme ranked sixth of 13 rationales driving students to register in TNE programmes. It is encouraging to see that about half of them end up having the overseas experience, but there is room for improvement.

The students were eager to provide open comments. A review of the open comments reveals that several respondents studied in more than two countries – which is often characteristic of double/joint/multiple degree programme – and that experiences of studying abroad are often much longer than for one semester. Another interesting but not very common feature of the study-abroad programmes was an internship with a relevant organisation or company in the partner country. Germany appears to be the country that includes and supports a study-abroad experience in their programme, especially the bi-national universities.

5.8 Summary of key findings

- At the national level, academic impacts in the form of increased access to higher education and improvement in education quality are seen as the top two benefits of TNE and overall are reported as being more important than political, economic or skills benefits.
- In general, TNE does not appear to be providing different programmes to those offered locally, which dispels the myth that TNE is offering specialised niche programmes not available in the host country. For the most part, TNE programmes are responding to student demand.
- There are not major differences in teaching styles as reported by TNE and non-TNE faculty. However, students' views indicate otherwise. TNE students report a significant difference in TNE programme structure and teaching as compared to local programmes. The differences are both positive and negative, but the positive aspects seem to greatly outweigh the drawbacks.
- The majority of faculty teaching in TNE programmes are locals (62 per cent) and have more than three years teaching experience (81 per cent). Fly-in faculty appear to represent a small percentage (6 per cent) of teaching staff, but this group may be relatively difficult to reach via survey, given their mobility and busy schedule while based in the host country.
- About half (53 per cent) of the TNE teaching staff have visited the partner/parent institution primarily for administration, professional development and joint co-curricular design reasons.
- The majority (84 per cent) of TNE faculty feel moderately or fully supported administratively in their teaching duties. Students also report a high level of satisfaction/acceptability with the administration, but identify specific areas for improvement.
- The quality assurance of TNE programme is undertaken by local institutions (69 per cent), local QA bodies (54 per cent) and by partner/parent institutions (41 per cent) and their QA bodies (35 per cent) indicating that most TNE programmes and providers are undergoing some type of local- and partner-level quality-assurance process.
- About half (49 per cent) of the TNE students have a study-abroad experience during their TNE programme, which contributes to the high rankings that international outlook and intercultural awareness/competencies receive as both skills and overall benefits gained by TNE students.

The centrality of cultural competence, developing an international outlook and sensitivity to local culture and context, are gaining more prominence in discussions and reviews of TNE programmes. High on the list of topics being debated are whether curriculum content, teaching practices and academic management systems are recognising local values, context and practices. The pros and cons of English as the medium of instruction continue to be debated. Questions about the relationship between local and international HEIs, staff and students are also on the agenda. This section addresses many of these issues by looking at survey findings related to these topics.

6.1 International outlook

As discussed in Section 4.3, strengthening international outlook ranked number two overall in importance as a positive attribute or benefit of TNE at the institution/student level. Interestingly, if one looks only at the student response to this issue, both TNE and non-TNE students rank the international outlook at the most important benefit of TNE (see Chart 4.4). This is strong evidence supporting the perceived role and impact of TNE to increase students' understanding and knowledge about world issues and events. One respondent described and confirmed the development of an international outlook as follows 'Students are likely to dramatically improve their English, widen their social circle and understand global issues with a more international context.'

Further evidence of the perceived benefit of TNE programmes for developing international outlook is discussed in the Skills chapter below (see Chart 8.1), where TNE students rated international outlook as the second most enhanced skill, from a list of ten options.

6.2 Intercultural competence of TNE students

TNE students were asked their opinion about the rationales and motivations driving them to enrol in TNE programmes. The opportunity to strengthen their intercultural awareness and competence ranked as third priority out of a list of 13 options (see Chart 4.2). In addition to intercultural competence being a reason for TNE, it was also ranked number three out of seven as a positive benefit of TNE at the student level. These two findings are strong testimony to the perceived importance and benefits of developing intercultural skills by students enrolled or graduated from a TNE programme.

The open comments on this topic show the diversity of views on the subject. One faculty respondent commented that 'The option to take a UK or Australian degree whilst in Malaysia has proved a draw for foreign students as well as domestic students who can't or don't wish to study abroad. This has to enhance the ability to interact with different cultures. The challenge is to handle this cultural mix appropriately and I'm not convinced that this has always been done in a positive way either by government or institutions. Some international students have been viewed as source of revenue rather than an asset and opportunity to engage with another culture to enhance understanding.'

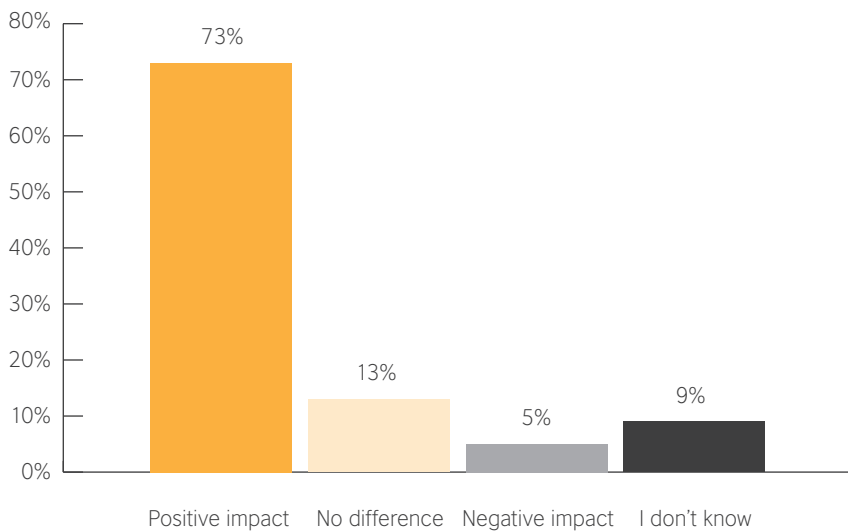
On the other hand, the fact that cross-cultural understanding was only rated as the seventh most enhanced skill by TNE student, from a list of ten (see Chart 8.1), may suggest that the cultural experience of studying a TNE programmes may fall somewhat short of student expectations. This differentiation by TNE students between enhancement of international outlook and cross-cultural understanding is interesting to note and may represent the difference between looking abroad and being abroad.

6.3 Intercultural relations within the country

The potential impact of TNE on intercultural relations within a country is as important as between countries. Higher education experts were asked to assess the impact of TNE on intercultural relations within their country.

Chart 6.1: TNE impact on intercultural relations

How is TNE impacting on intercultural relations within your country? (Consider students' ability to interact with different cultures or socio-economic groups and ability to understand different cultural perspectives).



Response number: HE experts 56.

The very low response rate puts the reliability of this question in jeopardy, but it is interesting to see the overwhelming perception that TNE does have a positive impact on students' ability to interact with different cultural and socio-economic groups within their own country. There is also an element of social desirability or political correctness about this question, and thus further work is necessary to drill down to the perceived and actual impact of TNE on developing intercultural awareness and competence at home and abroad.

The open comments from respondents provide deeper insights into the complexity of this issue. 'TNE graduates tend to see themselves as if they graduated from an actual overseas programme of the degree awarding university. However, in terms of intercultural experience, it is quite limited. In terms of ability to understand and interact with various cultures and socio-economic groups, most TNE students are usually at least middle class given the cost of these

TNE in Hong Kong, while the upper class does not take TNE as they opt for and can afford to take an entire programme overseas. As such, TNE negatively impacts intercultural relations in HK, as it limits real intercultural interaction while giving this false sense of elitism often associated with their TNE degree awarding institute.'

Other respondents commented that 'I see little evidence of positive interaction. I do see evidence of segregation and even tension between groups' and 'Our country is an institutionally racist country and the influx of other nationalities can often cause issues in terms of how they are viewed and treated.'

6.4 Relationship between local and international providers

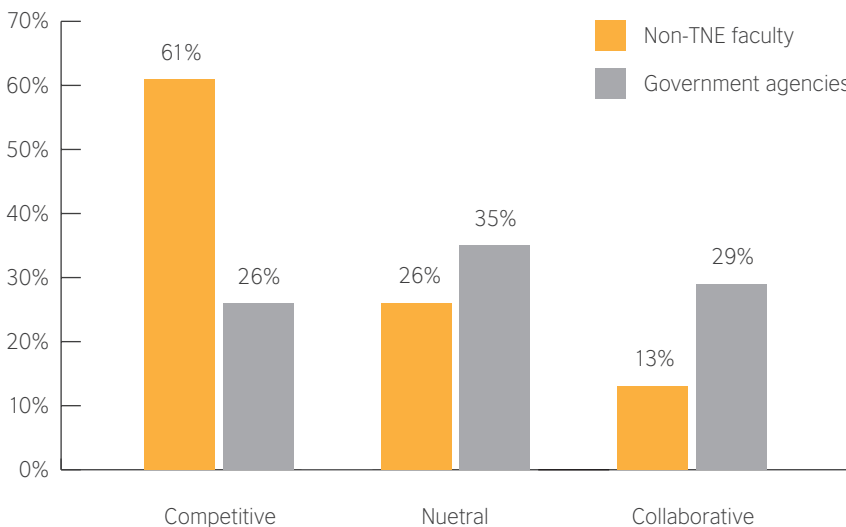
The relationship between TNE providers and local institutions, whether they be local institutions with twinning, franchise, joint/double degree programmes, of branch

campuses, bi-national universities is of interest as it does have implications for the overall higher education sector in the host country.

In section 4.4.4, which discussed the potential negative attributes or consequences of TNE at the national level, the respondents noted that the competition for students and staff between TNE providers and local institutions was a potential negative attribute or unintended consequence. This finding is confirmed by the answers to the following question, which was directed to non-TNE faculty and governmental agencies.

Chart 6.2: Relationship between TNE and non-TNE institutions

How would you describe the relationship between local institutions 'not' delivering TNE programmes and other institutions (local and foreign) that are delivering TNE programmes?



Response numbers: non-TNE faculty 46; government agencies 31.

The low response numbers again limit the reliability of this finding, but the data shows that government agencies, which essentially have an arm's-length relationship with TNE provision, see the relationship between local and TNE institutions to be pretty much equally distributed between competitive and collaborative and with a slightly larger group being neutral. The picture is decidedly different according to the non-TNE faculty responses, as they believe there is more of a competitive (61 per cent) than collaborative (29 per cent) relationship between TNE and local providers.

The open comments by non-TNE faculty point out that 'Competition varies between type of programme and mode of delivery. In general, TNE caters for different groups of the student population in Hong Kong than local programme, particularly at undergraduate level. But TNE faces growing competition from expanding private local provision, at undergraduate and post graduate levels. At the high end, the best TNE executive programmes actively

compete with the best local.' A respondent from Malaysia indicated that while competition for students does exist, 'Each TNE provider has its own niche, targeting different kind of student requirement.'

In terms of tuition fees, local institutions in a few countries (e.g. United Arab Emirates) provide undergraduate programmes for free, which puts tuition-based TNE providers at a disadvantage because most TNE institutions rely on student fees to exist.

The branding and profile of the TNE programme or institution was quoted as being important in terms of maintaining competitiveness. The impact of global league tables and branding is an issue influencing which institutions are accepted to offer TNE programmes in a host country and which foreign institutions' degrees are more attractive to students. This issue deserves more research and analysis given the current obsession with global rankings within the higher education sectors around the world and especially host countries.

6.5 Sensitivity to local culture and context

A concern often expressed about TNE programmes is that the curriculum is Western-centric and not sensitive to local context and culture. This issue was addressed in section 4.4.2, which discussed the negative attributes or potential consequences of TNE at the institutional or student level. Overall, the survey respondents ranked this negative attribute in fourth out of six in importance, which was lower than expected (see Chart 4.5). Interestingly, the TNE students ranked it even lower – in fifth place – indicating that it was a not a major concern for them.


Another potential negative of TNE that was tested for among survey groups was overuse of English as the language of instruction. Encouragingly, this was not a concern for any of the survey groups, and was ranked sixth of six options overall.

6.6 Summary of key findings

- The most important cultural impact of TNE is articulated clearly by TNE and non-TNE students through their ranking of international outlook as the number-one benefit or positive attribute of TNE. This is strong evidence that TNE is seen as a critical way to help students increase their understanding and knowledge about world issues and events.
- Developing intercultural awareness and competence is another high priority attributed to TNE programmes by TNE students, as they ranked it high as both a motivating factor and a direct benefit of TNE. However, with cross-cultural understanding only rated as the seventh most enhanced skill by TNE students, from a list of ten, this may suggest that the cultural experience of studying a TNE programme may fall somewhat short of student expectations.
- Overall, the vast majority of HE experts (73 per cent) believe that TNE has a positive impact on intercultural relations within the country, and more specifically on how students relate to different cultural and socio-economic groups.
- The relationship between local and TNE programmes and institutions addresses one of the social impacts of TNE. The majority of non-TNE faculty believe that there is more of a competitive than a collaborative relationship between local and TNE HEIs. In contrast, the governmental agencies' responses are more evenly distributed across competitive, neutral and collaborative relations.
- The issue of whether TNE programmes and curriculum were too Western-centric and not sensitive to local context and culture did not rank high as a potential negative consequence of TNE. It was ranked fourth out of six.
- The impact of world league tables and rankings on the attractiveness of foreign institutions in host countries is an issue that deserves more research and analysis.

7. Economic implications and impacts

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A major challenge in assessing impacts of TNE on the host country, particularly economic impacts, is the lack of hard data available in relation to the number of TNE programmes, number of students enrolled on these programmes, and tuition fees and staff salaries paid. This study relies almost exclusively on opinion data provided by respondents to the survey.

7.1 Main positive at institutional level – ‘More affordable than studying abroad’

As presented in Chapter 4 (see page 15), the main positive of TNE at the student/institution level is that TNE is more affordable than studying the entire programme abroad. This was the view of all five non-student groups (although non-TNE faculty tied this with strengthens international outlook). Non-TNE students and TNE students rated international outlook as the main positive, but also rated affordability highly as a positive, in second and third place respectively.

If TNE is considered an alternative for traditional student mobility, an increasing demand for international education can be met by TNE provision in the host country. This has implications for the retention of domestic students, the spending of tuition fees locally and the hiring of academic and administrative staff. In a separate question asked of TNE students, almost one third of respondents indicated they would have been likely to travel abroad for study had the TNE programme not been available. This blurring of lines between traditional student mobility and TNE is interesting to note and is worthy of further investigation.

However, the income-generating potential of TNE for the host country does not appear to be very pronounced. While survey respondents were of the view that income generation for the local economy is a positive attribute of TNE, it was rated last out of seven positives listed. Overall, the most favourable survey groups towards the impacts of TNE on the local economy were higher education experts and government agencies.

7.2 Main negative at institutional level – ‘High cost of TNE compared with local programmes’

Interestingly, the main negative of TNE at the student/institution level was also framed within an economic context, being the high cost of TNE compared with local programmes. In fact, this was the only negative option listed that respondents considered to represent a significantly negative attribute of TNE.

All seven survey groups were in agreement about the high cost of TNE representing the main negative attribute. This level of consistency in views across all survey groups is very striking. It also makes interpreting the feedback quite difficult, since the main positive was considered to be the low cost of TNE relative to studying abroad. The first thing to note is the important consideration given to costs for both the positives and negatives (at the institution/student level). Therefore, issues of pricing and how TNE tuition fees compare with alternative education options are clearly very important. If TNE programmes are considered to be expensive relative to local programmes, the extent to which

students want an international education appears to be critical. Furthermore, the benefits of an international qualification will need to be clearly understood for students to choose TNE ahead of local programmes, notwithstanding the extent to which students can actually afford to pay for TNE.

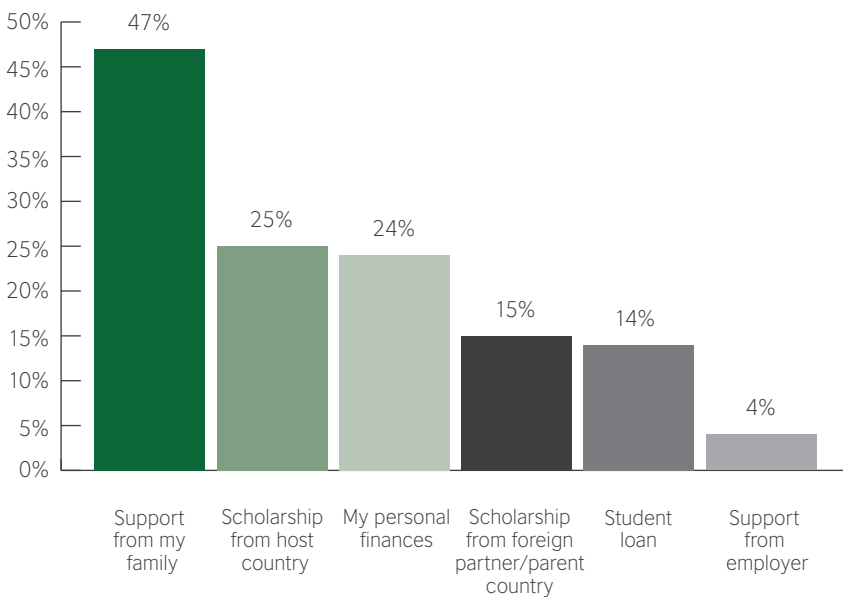
Another factor to consider is that in some host countries, local programmes can be offered at low cost or even free at the point of delivery, and thus the cost of TNE is probably being compared against a low cost base. Therefore, TNE programmes are likely to remain appreciably more expensive than local programmes. Perhaps a more valid benchmark is to compare the cost of TNE programmes between different TNE providers. If economic considerations do indeed predominate, one would expect a relatively competitive environment between TNE providers. Of course other considerations, such as diversity of programmes offered and reputation/status of the TNE provided, will come in to play.

The focus on cost also raises the importance of funding sources, discussed next.

7.3 Funding source(s) for TNE programmes

Chart 7.1: Funding source(s): TNE students

What was your main source of funding for this TNE programme? Please tick more than one if applicable.



Response number: TNE students 838.

Note: as respondents were invited to select more than one option, if applicable, sum of total responses exceeds 100 per cent.

The main source of funding for TNE programmes came from financial support provided by the family. Family members are therefore likely to play an important role in choosing the TNE programme.

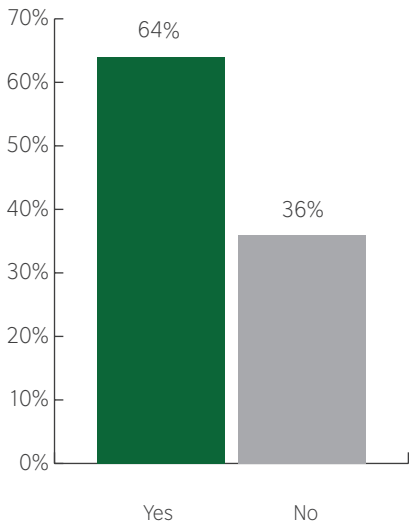
The most surprising finding is the important role that scholarships play in TNE. One quarter of all respondents reported being funded by a scholarship from the host country. In fact, this percentage is higher, since about 20 respondents – who didn't select any of the above options – provided comments to say their scholarship was provided by the host-country government or their local HEI, possibly not fully understanding the above options. Similarly, about ten respondents commented that their scholarship was provided by the sending country – without selecting that option – with funding agencies such as DAAD and UNDP being mentioned.

It is also interesting and informative to note that only four per cent of respondents reported receiving support from their employer. From other survey questions, it is possible to calculate that about 17 per cent of respondents continued in the same job after graduation. Therefore, the majority of TNE students who study while working would appear not to be supported by their employer.

This topic can be further explored via the following question asked of employers.

Chart 7.2: Employers' financial contribution to education programmes

Do you contribute financially to education and training programmes for your staff?



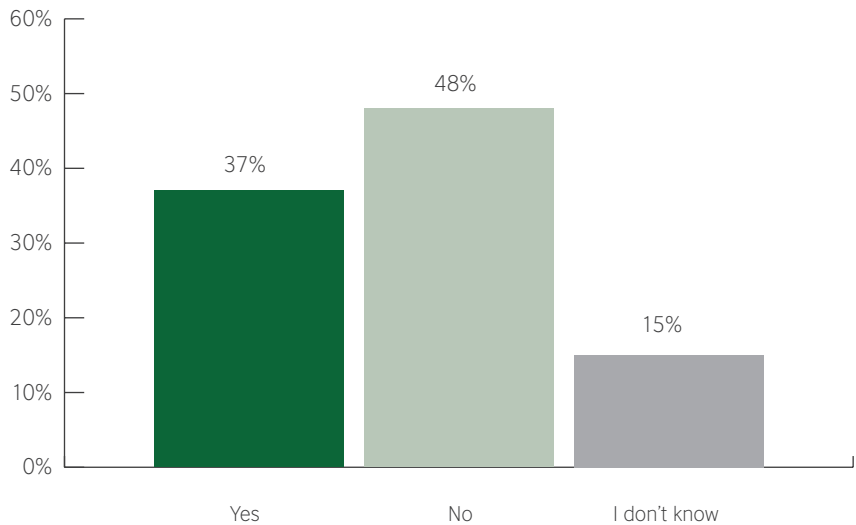
Response number: employers 52.

Almost two thirds of employers reported that they do contribute financially to education and training programmes for their staff, albeit the data are drawn from a small sample. From the comments provided, it is apparent that the financial contribution provided can take a number of forms, including contribution towards tuition fees, allowance for transport and accommodation costs, education loans up to a specified per cent of salary, the awarding of scholarships to employees, and time off for exams. One employer supported accounting qualifications and one respondent stated 'Being ourselves education providers, we tend to lead by example by providing training and access to further education for our staffs at a cheaper cost.'

To home in specifically on financial assistance provided to TNE students, the following question was asked of employers:

Chart 7.3: Employers' financial contribution to TNE programmes

Have you provided financial assistance to employees following TNE programmes while in your employment?



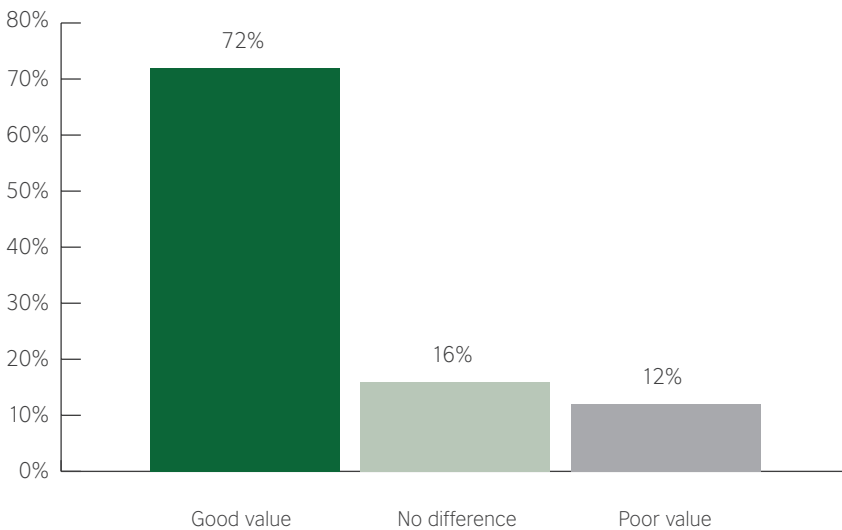
Response number: employers 52.

When asked specifically about financial assistance provided for employees following TNE programmes, just over one third of employers responded positively. Even this lower proportion appears favourable compared with the TNE student data, discussed earlier in this section, where only four per cent of respondents reported being supported by their employer. However, the low response rate by employers needs to be kept in mind. The few comments provided to this question suggest that support is mainly provided for financial analysis and accounting programmes.

7.4 Value of TNE programme

Chart 7.4: TNE students' perception about value of TNE programmes

Considering the tuition fees you paid compared with tuition fees for similar local programmes, do you believe your TNE programme represented value for money?



Response number: TNE students 838.

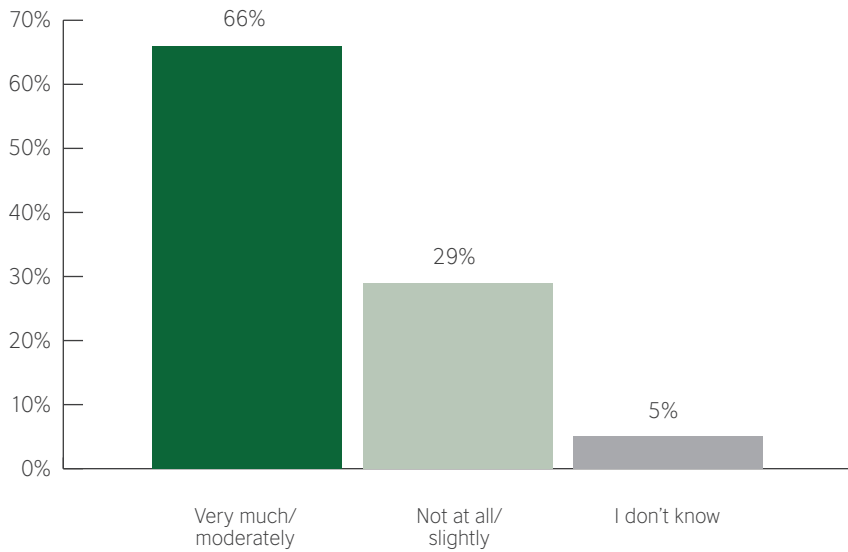
Some 7.2 per cent of TNE students were of the opinion that their TNE programme represented good value for money compared with similar local programmes. Yet as discussed earlier in this section, the high cost of TNE programmes compared with local programmes was considered the main negative of TNE. It would therefore appear that the concept of cost is considered differently to the concept of value for money. While TNE programmes may be considered relatively expensive, most TNE students consider the money well spent.

7.5 Local economy impacts

A number of questions were asked to gauge the economic impacts of TNE in terms of attracting international students, employing teaching faculty to deliver the TNE programmes, contributing towards the knowledge economy and developing infrastructure.

Chart 7.5: International student recruitment: HE experts

Do you think that international student recruitment into your country has increased as a result of TNE programmes?



Response number: HE experts 56.

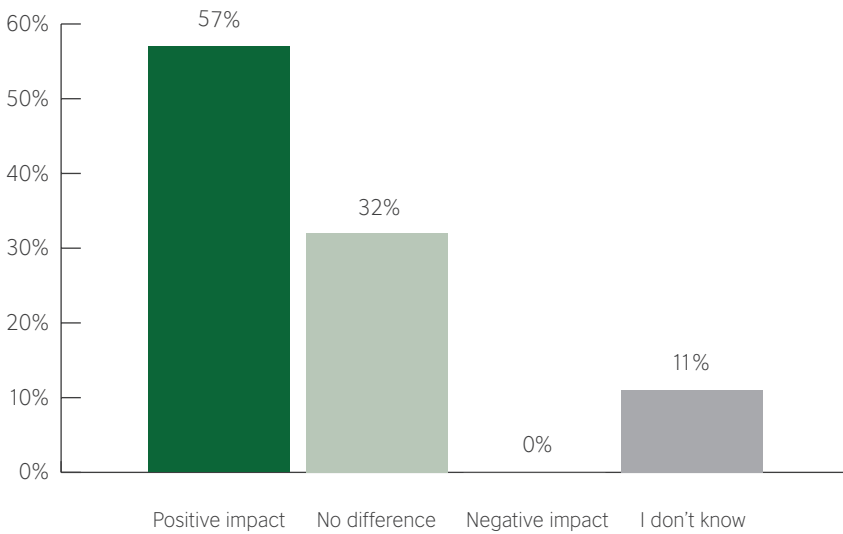
International students can have a direct impact on the host country local economy via tuition fees paid, as well as expenditure on accommodation, travel and subsistence. The majority (66 per cent) of higher-education experts believe that international student recruitment to the host country is enhanced by the presence of TNE programmes, but this depends on the types of programmes offered and the country-specific immigration systems in place. For example, visa restrictions on international students entering Malaysia were cited, as well as visa restrictions imposed by the Chinese government on mainland students studying TNE programmes in Hong Kong. One respondent from Hong Kong referred to government-imposed limits on the proportion of international undergraduate students per programme.

Examples provided of the type of TNE programmes that attract international students were: executive MBA programmes, transnational master's/PhD programmes, and programmes catering to working professionals. Generally, the sense is that TNE has the potential to attract international students, as evidenced by the following comments: 'I would have thought that the proportion of international students is higher on TNE programmes than local programmes', and 'Huge draw for international students.'

Higher education experts were also asked about the impacts of TNE on infrastructure in the host country.

Chart 7.6: TNE impacts on infrastructure: HE experts

To your knowledge, has infrastructure such as transport routes, buildings/campuses, research facilities, IT systems, etc., been affected as a result of TNE activity in your country?



Response number: HE experts 56.

The majority (57 per cent) of the higher-education experts surveyed believed that TNE has had a positive impact on infrastructure in their country; however 32 per cent believed it has made no difference. For those with a positive experience, the main sentiment expressed was that TNE forces local HEIs to upgrade to meet international standards: 'We assess ourselves based on the international standards.' 'Most local universities' support facilities have to be beefed up if they are heavily involved in TNE.'

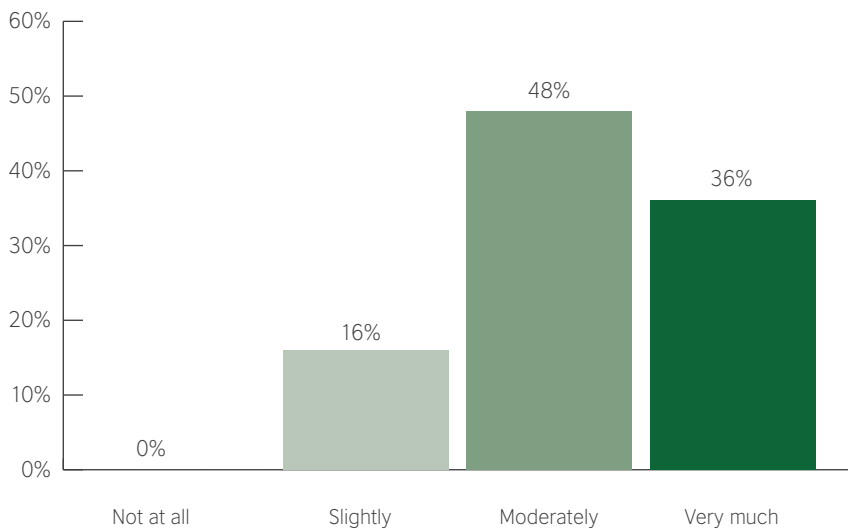
Examples provided of TNE-related infrastructure, especially for new branch campuses and bi-national universities, included new TNE campus buildings, new designs of buildings, intercultural rooms/centres, transport lines, accommodation and food services.

A few respondents pointed out that any changes are likely to be minor: 'in very, very small ways' – 'Minor impact – e.g. buildings used for teaching.' Others made the point that improvements in infrastructure are almost entirely driven by government policy, which may or may not be indirectly affected by the presence of TNE institutions. Where governments are attempting to become regional education hubs, the infrastructural impacts can be significant, according to one respondent from Mauritius.

Senior TNE leaders were asked about the impacts of TNE on the knowledge economy in the host country.

Chart 7.7: TNE impacts on the knowledge economy: senior TNE leaders

Do you think that your TNE programmes are supporting the knowledge-based economy in your country?



Response number: senior TNE leaders 58.

The senior TNE leaders surveyed are clearly of the view that TNE is supporting the knowledge-based economy in the host country; none of the respondents selected the 'Not at all' option. One respondent stated that TNE is expected to have a very positive impact on the knowledge economy over the next two years; another cited the knowledge exchange process from sending to host country as the main benefit. And one respondent stated that the ability of local students to access high-quality foreign curricula was the main benefit. Of course the propensity for senior TNE leaders to provide a socially desirable response to this question must also be considered.

7.6 Summary of main findings

- The main positive of TNE at the student/institution level is that TNE is a more affordable alternative than studying the entire programme abroad.
- The main negative of TNE at the student/institution level was also framed within an economic context, being the high cost of TNE compared with local programmes.
- The income-generating potential of TNE for the host country does not appear to be very pronounced. While survey respondents were of the view that income generation for the local economy is a positive attribute of TNE, it was ranked last out of seven options.
- Since local programmes can be low cost or even free at the point of delivery, the cost of TNE is probably being compared against a low cost base. Therefore, TNE programmes are likely to remain appreciably more expensive than local programmes.
- 72 per cent of TNE students were of the opinion that their TNE programme represented good value for money compared with similar local programmes. Therefore, while TNE programmes may be considered relatively expensive, most TNE students consider the money well spent.
- The main source of funding for TNE programmes came from financial support provided by the family. This infers that family members are likely to play an important role in choosing the TNE programme.
- Scholarships play an important funding role for TNE, with 25 per cent of all TNE students reporting being funded by a scholarship from the host country, and 15 per cent from the sending country.
- The majority (66 per cent) of higher-education experts believe that international student recruitment to the host country is enhanced by the presence of TNE programmes, but this depends on the types of programmes offered and the country-specific immigration systems in place.
- In general, the impacts of TNE on infrastructure in host countries appear to be quite limited. Respondents rated this as the least significant of the positives at national level. Examples provided by higher education experts were fairly minor in scale, the important exception being countries attempting to become regional higher education hubs.

8. Skills implications and impacts

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The extent to which TNE is addressing, or has the potential to address, skills gaps in the host country is a very important topic. One of the primary functions of an education system is to prepare graduates for the labour market and to meet the skills demanded of both domestic and foreign industry based in the country. Both host and sending countries are therefore keen to better understand the role that TNE can play in this regard. To investigate this topic, a number of skills-related questions were asked across a number of different TNE stakeholder groups based in the host country, to allow for different perspectives on the same topic.

8.1 Skills impact: TNE students

As discussed in section 4.2, the top rationale for students choosing their TNE programme was to improve professional skills for career development. Therefore, one of the obvious ways to assess whether TNE has enhanced certain skills is to ask the students of TNE programmes about their own experiences. TNE students were provided with a list of ten skills and asked to what extent, if at all, the skills were enhanced by their TNE programme.

Analysis of the data reveals that all skills listed, with the exception of other language skills, were perceived as being significantly enhanced. The table above lists the skills in order of importance. analytical thinking scored highest, with international outlook and adaptability to change only marginally behind.

TNE students perceived their analytical thinking to be the most enhanced of the skills, and this ties with their views that teaching methods on TNE programmes rely more on critical thinking and voicing of opinions compared with local programmes.

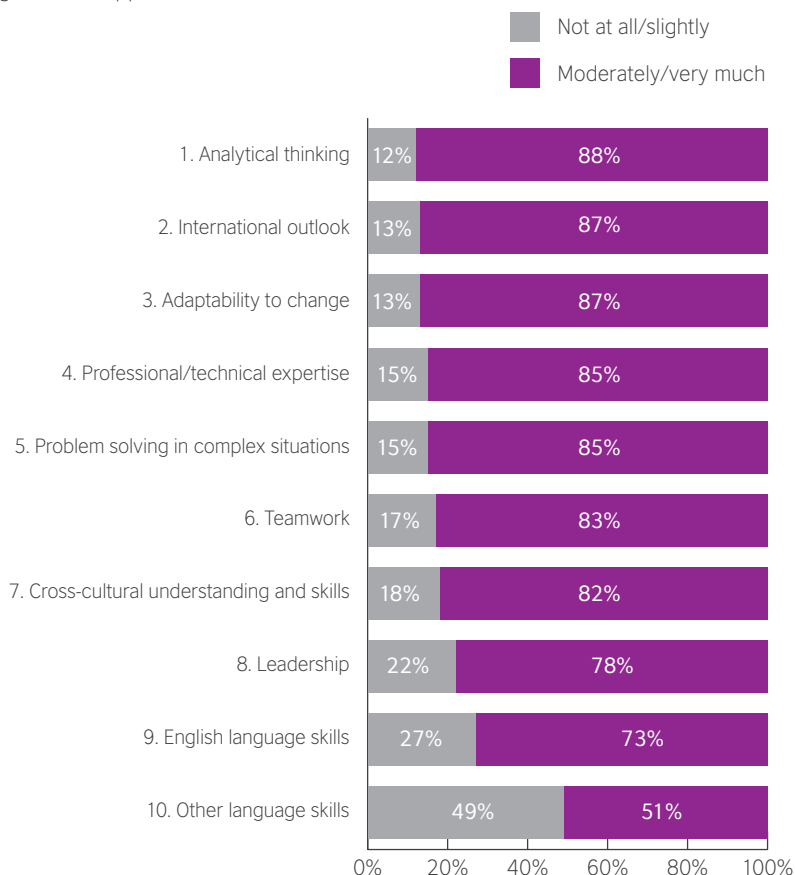
International outlook is rated second, which is probably not surprising considering that TNE students selected this as the main benefit of TNE at the student/institution level. Adaptability to change being rated next also suggests that TNE students consider themselves to be open-minded, flexible and accepting of new environments and cultures.

It is interesting to note that while improving intercultural competence was rated as the third most important reason for choosing a TNE programme (see Chart 4.2), it was only rated as the seventh most enhanced skill in the above table. This may suggest that the cultural experience of studying a TNE programme may fall somewhat short of student expectations.

Surprisingly, English language skills was ranked second from the bottom by TNE students in terms of importance. From the comments provided, some respondents reported that their language skills were not enhanced because they were already strong, or understanding other language skills was not critical to the course, e.g. one of the respondents stated 'the majority of students already have English as a second or third language.'

Chart 8.1: TNE students' skills enhanced by TNE programme

Please rate the extent to which the following skills were enhanced during your TNE programme, if applicable.



Response number: TNE students/graduates 798.

Additional skills mentioned in the comments include marketing skills, decision making, confidence, soft skills, social and communication skills, thinking outside the box, and particularly multidisciplinary skills. Mixing with people from different backgrounds and cultures was credited with providing the right environment for developing the skills listed in Chart 8.1 above. For some respondents, the multicultural and multidisciplinary environment was more important than the information and teaching approach used. Workshops with international students were credited with developing cross-cultural interaction skills.

8.2 Skills impacts: other survey groups

A slightly different question was asked of six other survey groups. While the same list of skills was provided, respondents were asked if TNE graduates were better equipped than locally educated (non-TNE) graduates. This question was also differentiated between undergraduate and postgraduate students. The skills are ranked in order of importance based on the average scores across all six survey groups, with each group equally weighted.

Table 8.2: TNE students' skills enhanced at undergraduate level

Do you think that graduates of TNE undergraduate programmes are worse or better equipped than locally educated graduates in the following areas?

Skills	Non-TNE students	TNE faculty	TNE senior leaders	Non-TNE faculty	HE experts	Employers
1. International outlook	1	1	1	1	1	1
2. English language skills	2	2	2	2	1	3
3. Cross-cultural understanding and skills	3	3	2	3	3	2
4. Adaptability to change	4	4	4	6	4	3
5. Analytical thinking	9	6	9	4	6	6
6. Problem solving in complex situations	7	5	7	9	5	9
7. Professional/technical expertise	5	8	6	5	8	8
8. Teamwork	10	9	5	7	7	6
9. Leadership	6	7	8	8	9	5
10. Other language skills	8	10	10	10	10	10

Response numbers: non-TNE students 146; TNE faculty 148; TNE senior leaders 57; non-TNE faculty 51; HE experts 52; employers 46.

A remarkable degree of consistency in views is apparent across the six different survey groups. All groups, including non-TNE students and non-TNE faculty, believed that TNE undergraduate students are better equipped than locally educated undergraduates students in all ten skills areas listed. All survey groups were of the view that TNE students benefit most from an international outlook, although HE experts had this tied with English language skills; and all survey groups, except one, believed that the skills advantages enjoyed by TNE graduates were least pronounced in other language skills. Non-TNE students believed the advantages were least pronounced in teamwork.

While consistency in views is apparent across the above groups, these views are quite different to those provided by the TNE students. While TNE students believed their analytical thinking to be the most enhanced skill, this was only rated fifth on average by the other survey groups. Surprisingly, TNE senior leaders rated this as only the ninth most enhanced skill, just ahead of other language skills. This divergence in views between the students and academic leaders of TNE programmes is worthy of further investigation. However, TNE students are probably the best placed to comment on how their own skills have been enhanced. On the other hand, TNE student views about the positive impact of their TNE

programmes on their international outlook is shared by all of the other survey groups. Similarly, other language skills are considered to be the least enhanced skill by all groups surveyed.

The same question was asked again, focusing on postgraduate students.

Table 8.3: TNE students' skills enhanced at postgraduate level

Do you think that TNE graduates of postgraduate (taught and research) programmes are worse or better equipped than locally educated graduates in the following areas?

Skills	Non-TNE students	TNE faculty	TNE senior leaders	Non-TNE faculty	HE experts	Employers
1. International outlook	1	1	1	1	2	1
2. English language skills	2	3	4	2	1	1
3. Cross-cultural understanding and skills	3	2	2	3	4	4
4. Adaptability to change	5	4	3	7	6	7
5. Professional/technical expertise	4	8	5	4	7	3
6. Problem solving in complex situations	7	7	6	6	5	8
7. Analytical thinking	8	5	9	4	3	10
8. Leadership	10	6	7	8	8	4
9. Teamwork	9	9	7	9	9	4
10. Other language skills	6	10	10	10	10	9

Response numbers: non-TNE students 146; TNE faculty 148; TNE senior leaders 57; non-TNE faculty 51; HE experts 52; employers 46.

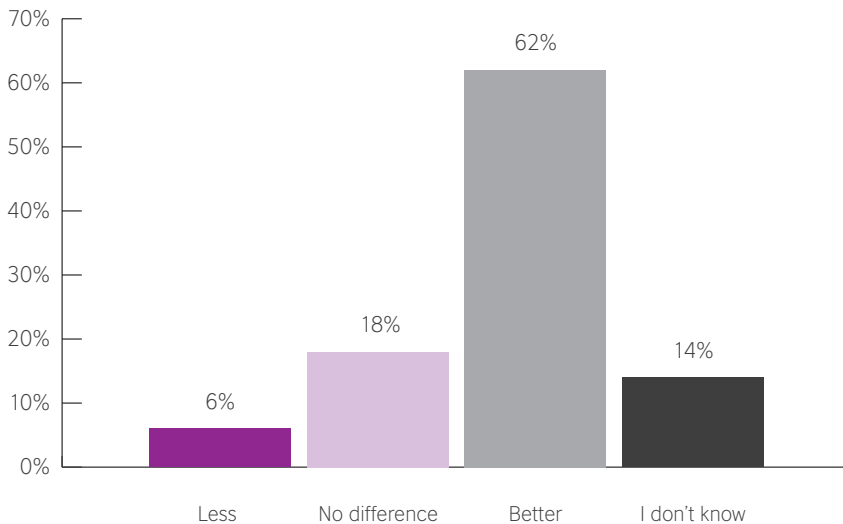
Again, a high degree of consistency in views is apparent across the survey groups. International outlook again scores highest, although this time HE experts chose English language and employers tied English language with international outlook. Interestingly, employers believed the skills advantages enjoyed by TNE postgraduate students were least pronounced in analytical thinking. Overall, postgraduate skills are rated as being marginally more enhanced than undergraduate skills.

8.3 TNE students' earning power

In an attempt to capture the financial outcome of studying a TNE programme, in terms of earning power, the following question was asked of TNE students.

Chart 8.4: Earning power of TNE students

Do you now consider your earning power to be greater having studied a TNE programme than if you had studied a local programme?



Response number: TNE students 786.

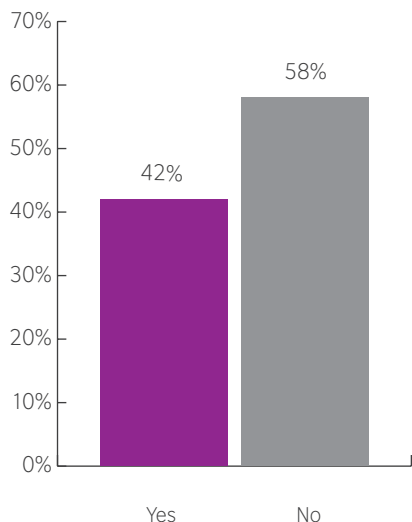
The majority (62 per cent) of respondents believed that studying a TNE programme had enhanced their earning potential relative to studying a local programme. This may partially explain why TNE is generally considered good value for money by students, despite being considered significantly more expensive than local programmes. However, since 64 per cent of survey respondent were still studying their TNE programme when they completed this survey, these views may not be based on real-life experience. Filtering the data by the 135 TNE graduates who continued in the same job after graduation reveals that 46 per cent of respondents selected 'better' and 36 per cent 'no difference', suggesting that real-life experience does somewhat temper the optimism regarding the earnings benefits of TNE programmes.

8.4 Internship/work experience

The link between skills acquisition and internships is relevant and thus the prevalence of internships in TNE programmes was assessed via the following question asked of TNE students.

Chart 8.5: Internships offered on TNE programmes

Did your TNE programme include an internship or work-experience opportunity?



Response number: TNE students 838.

The data would appear to support this proposition, with 42 per cent of respondents stating that their TNE programmes did include an internship or work-experience opportunity. A large number of comments were provided, which allow for further examination of this topic. It is interesting to note the high proportion of respondents who stated that their internship was a mandatory part of their TNE programme. Numerous examples were provided of specified minimum periods of training/field work forming part of the curriculum, often as a graduation prerequisite. In the majority of cases the internship was arranged by the institution, but in some cases the onus was on the student to find a placement. 'A compulsory internship for duration of six months at one of the German companies'; and also 'You must do a one-month internship in Jordan and six-month internship in Germany.'

Germany was by far the most frequently mentioned country where internships took place, despite the fact that many more respondents studied on UK (50 per cent) programmes than German (20 per cent) programmes. Again, many of these internships appear to have been core components of the TNE programme, with many in teaching and engineering disciplines. A link between engineering programmes and placements in industry was also noticeable: 'In our third year we have an industrial attachment'; 'minimum six month internship in one of the German industries'; and 'Training in teaching German as a foreign and second language in an international school in Egypt for two months'. However, the diversity of internship examples provided shows that TNE programmes are being offered in many different subject areas. Internship examples include accounting firm; hotels, hospitals, pharmacies and counselling centres; pharmaceutical companies; local newspaper; design department of a bicycle manufacturing company; teaching and translating; university laboratory assistant; management consulting; electrical engineering; solid-waste management; and design agency.

Many of the placements formed part of a master's TNE programme, with the emphasis on research rather than work experience. Where specific examples were provided, most of these were with German universities, often over the summer period.

For a certain cohort of respondents, internships were optional, or could be arranged with the assistance of a faculty member: 'The internship was not part of the course but thanks to the help of a lecturer.' 'Some people get an option of interning for the professors of the course.'

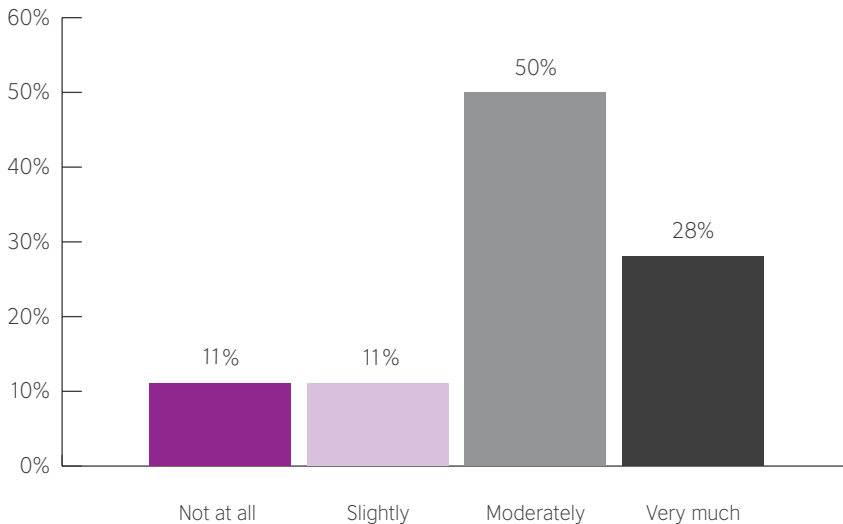
Very few negative comments were provided. One respondent stated that international students on TNE programmes find it difficult to find work experience because of visa restrictions. Another stated that internships are biased towards sending country students, not local students, on the TNE programme. And one respondent stated that internships are only available for full-time students, not part-time students.

8.5 TNE addressing skills gaps

The extent to which TNE is addressing skills gaps in the host country is a very important topic. Therefore, the following question was asked of higher education experts.

Chart 8.6: TNE addressing skills gaps: higher education experts

Do you believe that TNE graduates are addressing skills gaps in the local labour market?



Response number: HE experts 56.

The 56 higher education experts who responded to the above question were generally of the view that TNE graduates are moderately addressing skills gaps in the local labour market. However, this came with some caveats, as provided via optional comments.

For a number of respondents the skills impact depends on the type of TNE programmes offered. Specialised TNE courses covering niche topics were felt to have a positive impact on addressing local skills gaps. However, it was also felt that many TNE institutions are offering programmes that were already available locally, and therefore their contribution was viewed as limited. Two examples of the comments are provided as follows:

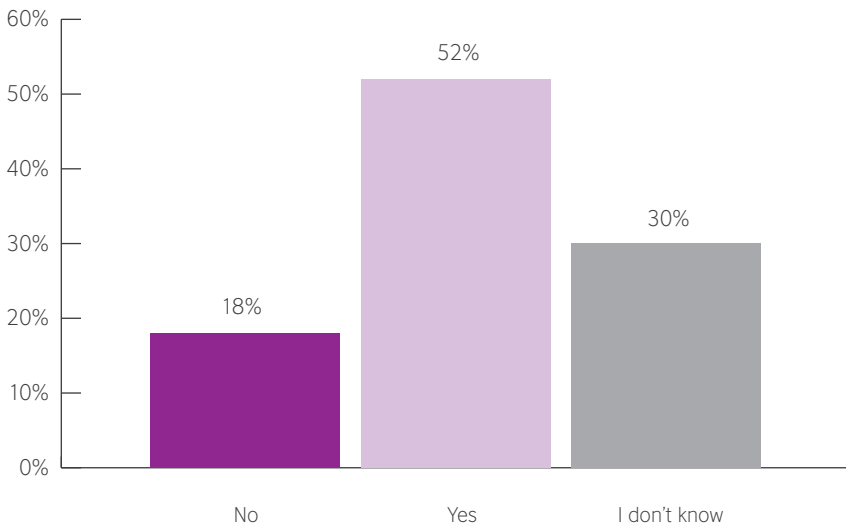
'TNE programmes are geared towards employability and are almost exclusively in areas such as business, engineering, IT and law where job opportunities are plentiful both locally and within the region. I don't think there is any concerted effort to address skills gaps.'

'There is concern that there is a shortage of labour with vocational skills and a surplus of TNE graduates from business related programmes.'

One respondent stated that since TNE is expanding access to tertiary education, it is also indirectly addressing skills gaps. Another respondent believed that TNE qualifications are not well suited to the needs of the public sector.

Chart 8.7: TNE addressing skills gaps: employers

In your experience, are TNE graduate employees meeting specific skills requirements in your company that are not being supplied by graduates of local programmes?



Response number: employers 46.

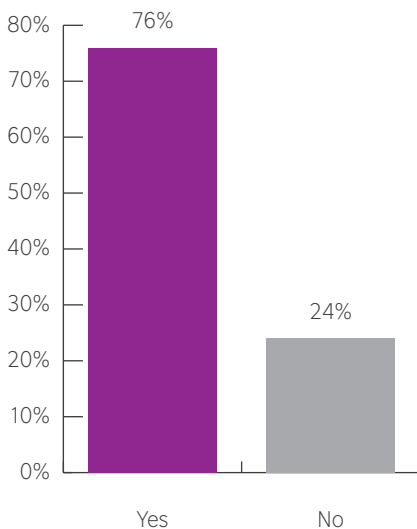
With only 46 responses to this question, some caution is warranted in interpreting the data. Over half of respondents believed that TNE graduates are meeting skills gaps in their company. However, a certain lack of conviction was apparent, both in the number of respondents who chose 'I don't know' and also in the optional comments provided. Views in favour of TNE graduates emphasised the capacity for TNE to offer programmes in niche subject areas, as well as producing graduates with more focus owing to the relatively high fees they paid. Some concern was expressed about an emphasis by TNE providers on quantity over quality. One respondent stated that of most importance is whether a graduate (TNE or non-TNE) has practical work experience.

8.6 Employer preference for TNE graduates

This section assesses the extent to which employers have a preference for TNE graduates.

Chart 8.8: TNE students' views about employer preference

Do you think employers perceive your TNE programme to be advantageous when selecting job candidates or evaluating for promotions within a company?



Response number: TNE students 786.

TNE students are firmly of the opinion that employers perceive TNE to be advantageous when selecting job candidates. A number of reasons were given for this, with two standing out as most important:

- Prestige/status of the foreign university. The status of the foreign partner/parent institution was considered of great importance, and something that is generally considered a positive of TNE programmes. Specific reference to issues such as reputation and university rankings were made in the comments provided by respondents: 'The name and status as a good university will give us the advantage.'
- International outlook/multicultural experience. Repeated reference was made to employers having a preference for graduates with an international outlook, strong multicultural experience and competence and an internationally recognised qualification. The following comment provides an example: 'Yes, because candidates of TNE programmes have an international outlook, something essential in a developing country like Botswana.'

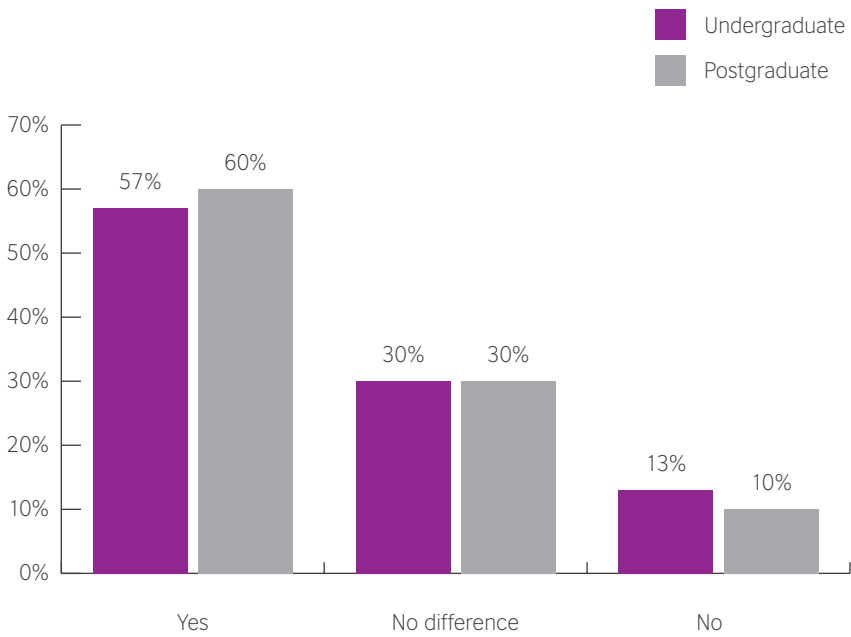
Another theme with respondents, often linked with international outlook, was the preference of employers for graduates with advanced language skills, particularly in English and German. TNE students definitely felt they had the advantage in this regard: 'It is enough that we speak at least three languages (Arabic, English and German) when we apply for a job.'; 'Companies want the employees to have a global mindset as well as multilingual capabilities to create values for the company. TNE programme definitely equip students with these necessary skills.'

Where respondents selected 'no' to the above question, the reasons given were generally fairly neutral or lacking in negativity towards TNE programmes. A number of respondents were of the view that employers hire people on the basis of individual ability and experience, rather than whether their qualification was awarded local or internationally: 'Employers consider institutions, but in the end it's always about individuals and how they perform during interviews.'; 'I think the chances are the same. Employers still look at personal capability.' This view was particularly apparent in relation to employers considering candidates for promotion, as opposed to new hires. Other comments were company- or country-specific, e.g. 'It depends on whether you apply to a local or international company' or 'local employers favour local graduates'. One respondent observed that TNE graduates are not preferred by employers because 'Nowadays, too many students come back from overseas.'

TNE faculty were asked a similar question to TNE students about employer preference for TNE graduates, differentiating between undergraduate and postgraduate programmes.

Chart 8.9: TNE faculty views about employer preference

Do you think that graduates of undergraduate/postgraduate programmes are favoured by employers over locally educated graduates of undergraduate/postgraduate programmes?



Response number: TNE faculty 148.

There was hardly any differentiation by TNE faculty respondents between undergraduate and postgraduate TNE programmes. It is notable that about 40 per cent of respondents did not believe that graduates of TNE programmes are favoured by employers.

Overall, the main points raised by TNE faculty are similar to those raised by TNE students, with international outlook and status/prestige of the foreign university the main reasons given for employers having a preference for TNE graduates.

'The foreign brand carries a lot of weight here with certain companies.'

'I think this depends on the field/sector that said "employers" represent. Usually international exposure is looked upon favourably however.'

On the other hand, a view was expressed that local employers would not necessarily have a preference for TNE graduates. And a point made earlier by HE experts about TNE graduates not being considered for the public sector was raised again here.

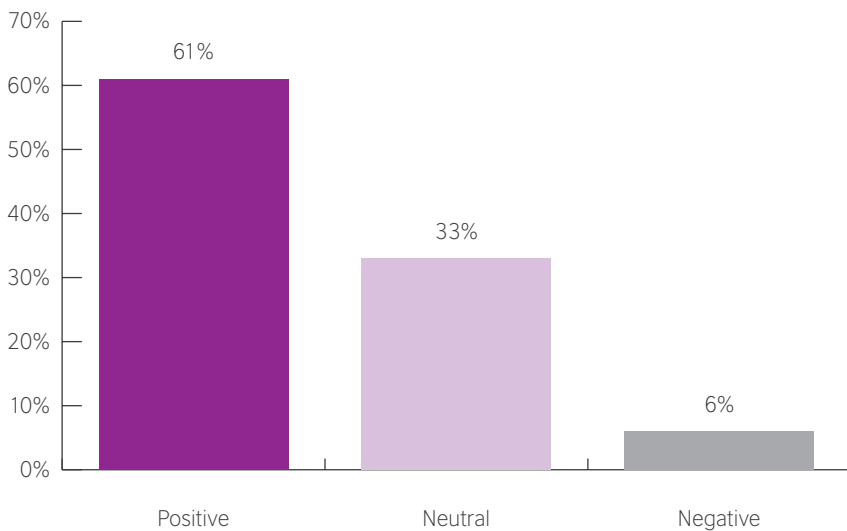
'International employers may well favour TNE graduates but not sure about local ones.'

'Amongst certain sectors. The public sector here will prefer locally educated students.'

Employers themselves were asked about their views on hiring or promoting graduates of TNE programmes.

Chart 8.10: Employer preference for TNE graduates

What impact would a TNE qualification make to graduates in terms of being hired or promoted?



Response number: employers 46.

Although a small sample size, employers appear in general to be positively disposed towards TNE graduates. However, it's clear from the comments provided that employers consider more than the educational qualification when hiring or promoting staff. The capabilities of the individual appear to be considered most important. The strong language skills of TNE graduates was also referenced.

In a separate question, employers were asked if they had a policy of considering graduates of certain TNE programmes. The responses provided suggest that employers don't have specific or formal policies in place, but in some cases do consider graduates from certain TNE programmes when hiring, e.g. 'Not a real policy but we do hire them.'

Another question asked of employers suggest that work placement or graduate programme arrangements with institutions providing TNE programmes are not common. A few examples were provided by employers of staff members having completed a TNE programme during their employment with the company, mostly with

professional bodies, including financial, accountancy and purchasing manager institutions, and one example was provided of an employee who completed a BA in Fashion via TNE.

8.7 Summary of key findings

- TNE students perceived their analytical thinking to be the most enhanced of their skills, and this ties with their views that teaching methods on TNE programmes rely more on critical thinking and voicing of opinions compared with local programmes.
- Surprisingly, English language skills was ranked second from bottom by TNE students in terms of importance. However, this appears to be because their language skills were already strong.
- A remarkable degree of consistency in views is apparent across the different target groups. All groups, including non-TNE students and non-TNE faculty, believed that TNE graduates are better equipped than locally educated graduates in all ten skills areas listed.

- In contrast to the TNE students, the other survey groups were of the view that international outlook is most enhanced by TNE programmes, and analytical thinking only rated fifth on average.
- On the other hand, TNE student views about the positive impact of their TNE programmes on their international outlook is shared by all of the other survey groups. Similarly, 'other language skills' are considered to be the least enhanced skill by all groups surveyed.
- The majority (62 per cent) of respondents believed that studying a TNE programme had enhanced their earning potential relative to studying a local programme. This may partially explain why TNE is generally considered good value for money by students, despite being considered significantly more expensive than local programmes.
- 42 per cent of TNE students reported that their TNE programme included an internship or work-experience opportunity. It is interesting to note the high proportion of respondents who stated that their internship was a mandatory part of their TNE programme.

- Higher education experts were generally of the view that TNE graduates are moderately addressing skills gaps in the local labour market, but this depends on the type of TNE programmes offered. Specialised TNE courses covering niche topics were felt to have a positive impact on addressing local skills gaps. However, it was also felt that many TNE institutions are offering programmes already available locally, and therefore their contribution was viewed as limited.
- TNE students are firmly of the opinion that employers perceive TNE to be advantageous when selecting job candidates. The main reasons given for this were:
 - 1 prestige/status of the foreign university
 - 2 the international outlook/multicultural experience and competence of TNE graduates.
- Employers appear in general to be positively disposed towards TNE graduates. However, it is clear from the comments provided that employers consider more than the educational qualification when hiring or promoting staff, with the capabilities of the individual considered of most importance.

9. Looking forward and summary of key findings

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The purpose of this chapter is to look to the future growth of programme and provider mobility, assess the overall perception of risks and benefits, and summarise the key findings relevant to the different impacts and implications of TNE for host countries.

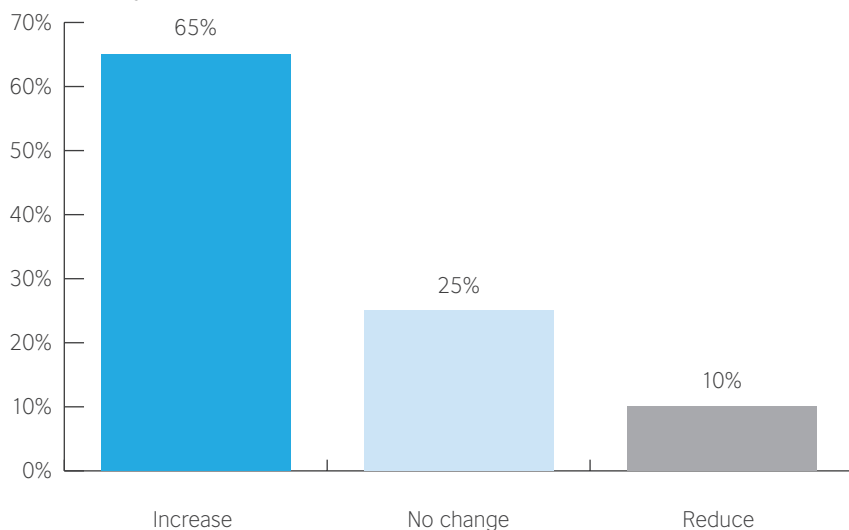
9.1 Increase or decrease in capacity and number of TNE programmes

The future of programme and provider mobility in terms of size and scope is a topic of great interest to policy makers, providers and researchers alike. Focusing on a two-year horizon, senior leaders of TNE programmes and institutions were asked about the future growth of TNE provision.

The findings clearly indicate that the majority (65 per cent) of senior leaders believe that the number of TNE programmes will continue to increase over the next two years. Interestingly, only ten per cent thought that they would decrease. However, the low response rate to this question should be kept in mind in thinking about future growth.

Chart 9.1: Growth in number of TNE programmes

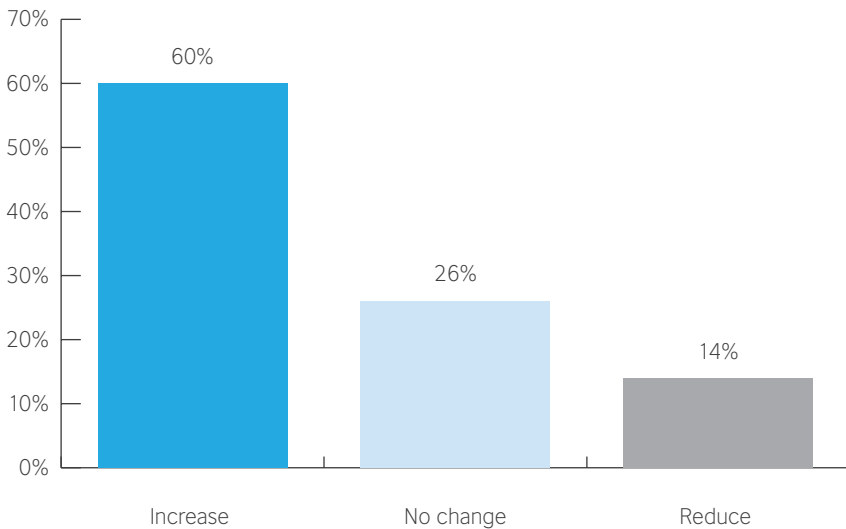
Do you expect to increase or decrease the number of your TNE programmes on offer over the next two years?



Response number: senior TNE leaders 62.

Chart 9.2: Growth in capacity of existing TNE programmes

Do you expect to increase or decrease the capacity (number of students enrolled) of your existing TNE programmes on offer over the next two years?



Response number: senior TNE leaders 62.

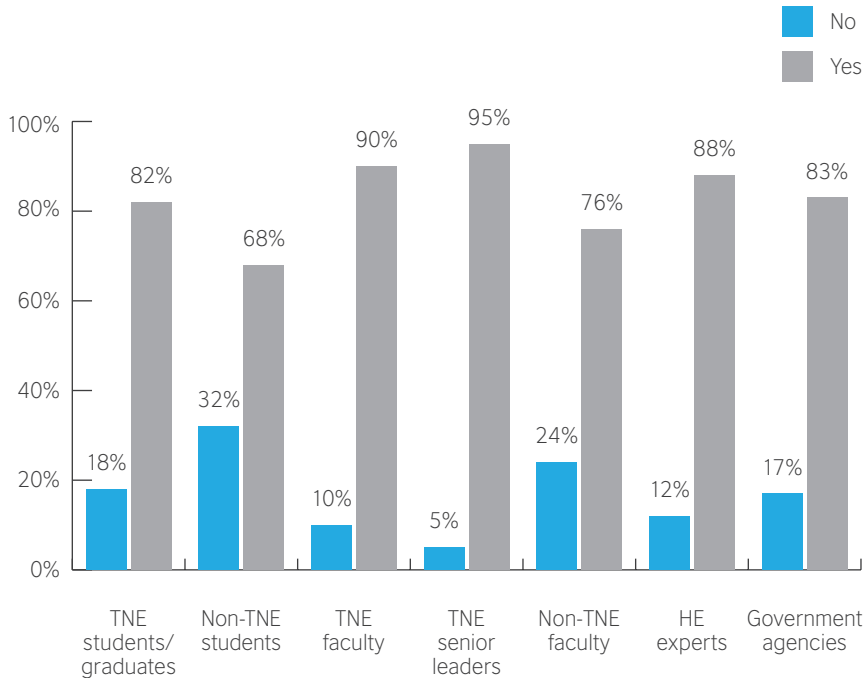
Senior TNE leaders were also optimistic about the growth in number of students enrolling in existing TNE programmes, as 60 per cent thought there would be an increase, while 26 per cent stated that there would not be a change and 14 per cent thought that numbers of students would decrease. On balance, therefore, it would appear from the previous two charts that both the capacity and number of TNE programmes looks set to expand in host countries. One respondent from Vietnam stated 'We are planning to broaden the range of programs that are offered at both undergraduate and graduate levels and increase the number of research degree candidates supervised on the campus.'

9.2 Risks and benefits

In Chapter 4 (see page 15), the findings about the positive and negative attributes of TNE were discussed. Overall, the positives at the student/institution level were perceived by respondents to be significant and allowed for fairly robust conclusions. The negative attributes or consequences were generally not perceived as being very important or relevant by survey respondents, with the exception of the high cost of TNE programmes compared with local programmes. In any case, a separate question was asked of respondents about whether they believed the positive attributes or benefits outweighed the negative attributes. The responses to this question are presented as follows.

Chart 9.3: Benefits versus risks at student or institution level

Do you think the 'student or institution' level benefits of TNE outweigh the risks?



Response numbers: TNE students 810; non-TNE students 136; TNE faculty 144; TNE senior leaders 57; HE experts 52; government agencies 30.

The findings are convincing. All respondent groups believe that at the institutional or student level, the potential benefits of TNE definitely outweigh the possible risks. Upon closer examination, it is enlightening to see that TNE senior leaders (95 per cent), TNE faculty (90 per cent) and HE experts (88 per cent) groups are the most committed to this position. It is not surprising that the non-TNE students (68 per cent) and non-TNE faculty (76 per cent) have lower scores given that they do not have any direct experience with TNE per se. Even so, the vast majority still believe that the benefits of TNE outweigh the risks at the institutional or student level. This perception bodes well for the acceptability of TNE as a worthwhile form of providing international education opportunities to students as an alternative to students having to move to the country of the awarding institution to complete a full programme of study.

The optional comments provided generally revisit a number of themes discussed throughout the report. For TNE students, the potential for TNE to offer an international and multicultural experience, the quality and prestige of the foreign institution/education system and getting an internationally recognised qualification were considered the major benefits.

It is interesting to see the issue of costs being raised here again as both a benefit and a risk of TNE – similar to the issues discussed in sections 7.1 and 7.2 above – further confirming the importance of cost considerations and whether they are compared against studying abroad or local programmes. It also further impresses the extent to which TNE and traditional student mobility may be considered as alternative options. Otherwise, the risks highlighted by TNE students included employers being unfamiliar with TNE, lack of commitment

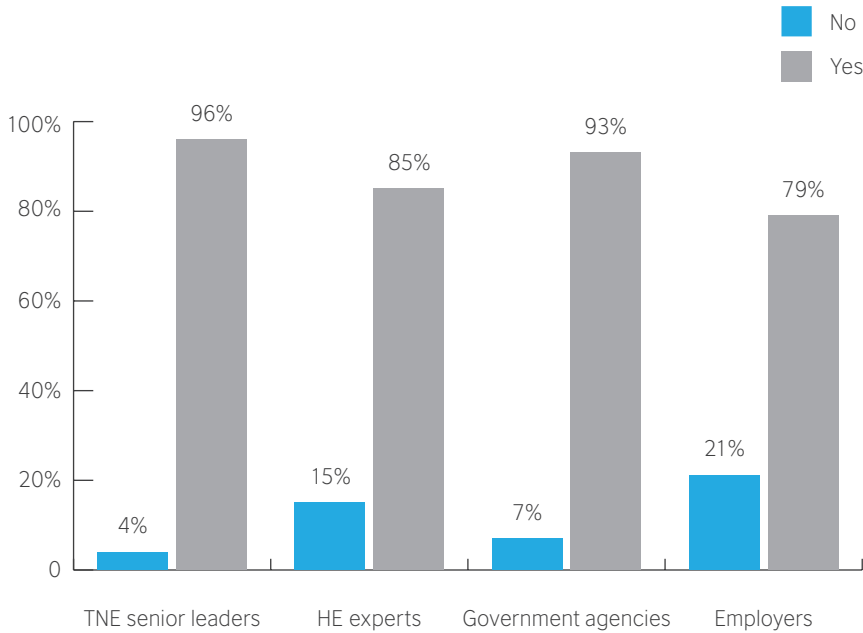
of fly-in faculty, TNE quality not matching programmes in the home/sending country and risks associated with smaller, lesser-known institutions.

For the non-TNE students, the benefits of international and multicultural experience were sometimes framed within a quasi capacity-building/development context. The contribution that TNE can make to solving global- or national-level problems is not a theme generally picked up on in this research, but may become a more important discussion topic as TNE becomes more research-focused. The other groups provided relatively few comments, generally focusing on issues already discussed.

The same question was asked of four target groups of respondents who have a national perspective and could judge whether TNE benefits or risks were predominant at the country or national level.

Chart 9.4: Benefits versus risks at the national level

Do you think the 'national' level benefits of TNE outweigh the risks?



Response numbers: TNE senior leaders 57; HE experts 52; government agencies 30; employers 42.

Once again, the evidence is clear and compelling. The overwhelming majority of respondents believe that the benefits of TNE at the national level outweigh the potential risks or unintended consequences. The fact that 96 per cent of the TNE leaders emphasise the benefits of TNE is a powerful finding, as these individuals are directly involved in the planning and assessment of the value of TNE programmes and are thus knowledgeable about TNE objectives and outcomes. The only caveat to interpreting these results is the very low response rate.

Few comments were provided by these groups, but one theme that was reiterated by the HE experts was the benefit of TNE in providing access to higher education in the host country. The extent to which host countries rely on TNE for providing access to higher education and the implication of this for the domestic-education system is an issue that deserves greater attention.

Risks at the national level were generally felt to depend on the mode of TNE delivery used. Different risk profiles were identified between branch campus degrees and top-up degrees, for example, as well as

different risks between undergraduate and postgraduate programmes. Senior TNE leaders tended to emphasise that potential risks are mitigated by close communication and co-ordination between the host institution and the foreign partner/parent institution.

It is important and informative to look at the key findings in light of the indications that TNE is expected to increase in size both for the number and capacity of TNE programmes and second, that respondents overwhelmingly state that the benefits outweigh the risks with regards to the impact on host countries. These two major findings provide an instructive lens with which to view the summary of key findings related to the academic, social/cultural, economic and skills impact on host countries.

9.3 Profile of TNE students

The 912 TNE students who participated in this research, plus the 346 who were part of the pilot study from countries in all regions of the world, provide new insights into what characterises a TNE student. At the risk of over-generalising, some of the most common and interesting characteristics of

the student respondents from the current study are provided.

- 52 per cent are female, 48 per cent male.
- 58 per cent are under 24, 33 per cent are 25–35, nine per cent are over 35.
- 31 per cent of TNE students studied a master's or PhD programme.
- 86 per cent were full-time students.
- 54 per cent studied at a branch campus.
- 39 per cent of programmes were supported by scholarships.
- 27 per cent were employed full time, and ten per cent were working part time.
- 44 per cent continued in the same job after graduation.

This profile raises questions about how to cater to a student cohort that is generally older than the traditional secondary school leaver entering higher education and where almost 40 per cent are already working full or part time. These fascinating findings clearly indicate that more research is required to better understand the characteristics and needs of TNE students.

9.4 Awareness and rationales – key findings

- It is both surprising and troublesome that 61 per cent of the non-TNE students and 54 per cent of the non-TNE faculty respondents did not know about the TNE opportunities in their country. This suggests that the full potential of collaborative education programmes is not being realised and that more work needs to be done to publicise TNE opportunities.
- The number-one rationale driving students to enrol in TNE is to improve professional skills for career development. The potential to develop the prerequisite skills of employment is clearly stronger than the academic-related benefits of greater programme flexibility, saving time by not studying abroad and non-admission to local equivalent programme, which were ranked as the three least important rationales for TNE.
- The opportunity to develop intercultural competence ranks third in importance as a driving rationale. This is an encouraging sign, but whether or not students' expectations of developing intercultural competence are actually realised through TNE programmes needs verification.
- Branding and profile of the foreign partner/parent institution has an influence on a student's decision to enrol in a TNE programme, as the perceived importance of the qualification and the status of the awarding institution ranked in second and fourth place respectively as key motivations for TNE students.

9.5 Positive and negative features of TNE – key findings

- Overall, the number-one positive attribute or benefit of TNE at the institutional and student level is that TNE provides an affordable alternative to full-time studying abroad for an international qualification. This is solid evidence that the increasing interest and demand for international education can be partially met through programme and provider mobility, not only through student mobility.
- From the student (TNE and non-TNE) perspectives, the most positive attribute of TNE is the opportunity to gain a more international outlook. The message about

the importance of increased awareness and knowledge about international issues and events has been clearly understood by TNE students, as they believe that TNE can help them gain this international understanding. There is corroborating evidence that this rationale and expectation is met for TNE students. When asked which skills had been enhanced by TNE, international outlook ranked second in importance after analytical skills.

- When asked to rate the negative aspects of TNE, the majority of participants did not find the negative attributes to be important or applicable. This is surprising, but the finding is confirmed by the overall response that the benefits of TNE overwhelmingly outweigh the potential risks.
- Keeping in mind that respondents did not rate the negative attributes or TNE as very important and thus significant, it is revealing to see that the number-one negative attribute of TNE from a national-level perspective is the competition for students and staff between TNE programmes/providers and local institutions. This competition for students contrasts with the finding that providing greater access for students is seen as the number-one positive of TNE at the institutional level. Clearly, competition for students and providing greater access are not mutually exclusive.
- The risk of brain drain is ranked in third place as a negative aspect of TNE at the national level. While the potential for brain drain or brain gain varies from country to country, it is revealing that it did not rank higher given the hot debate about this potential risk.

9.6 Academic impacts and implications – key findings

- At the national level, academic impacts in the form of increased access to higher education and improvement in education quality are seen as the top two positive features/benefits of TNE and overall are reported as being more important than political, economic or skills benefits.
- In general, TNE is not providing different programmes to those offered locally, which dispels the myth that TNE is

offering specialised niche programmes not available in the host country. For the most part, TNE programmes are responding to student demand.

- There are no major differences in teaching styles according to TNE and non-TNE faculty. However, students' views indicate otherwise: TNE students reported a significant difference in TNE programme structure and teaching as compared to local programmes. The differences are both positive and negative, but the positive aspects seem to greatly outweigh the drawbacks.
- The majority of faculty teaching in TNE programmes are locals (62 per cent) and have more than three years teaching experience (81 per cent). Fly-in faculty represent a small percentage (six per cent) of teaching staff. About half (53 per cent) of the TNE teaching staff have visited the partner/parent institution primarily for administration, professional development and joint co-curricular design reasons.
- The majority (84 per cent) of TNE faculty feel moderately or fully supported administratively in their teaching duties. Students also report a high level of satisfaction/acceptability with the administration but identify specific areas for improvement.
- The quality assurance of TNE programme is undertaken by local institutions (69 per cent), local QA bodies (54 per cent) and by partner/parent institutions (41 per cent) and their QA bodies (35 per cent), indicating that most TNE programmes and providers are undergoing some type of local- and partner-level quality assurance process.
- About half (49 per cent) of the TNE students have a study-abroad experience during their TNE programme, which contributes to the high ranking that international outlook receives as both an enhanced skill and overall benefits gained by TNE students.

9.7 Cultural/social impacts and implications – key findings

- The most important cultural impact of TNE is articulated clearly by TNE and non-TNE students through their ranking of international outlook as the number-one benefit or positive attribute of TNE. This is strong evidence that TNE is seen as a

critical way to help students increase their understanding and knowledge about world issues and events.

- Developing intercultural awareness and competence is another high priority attributed to TNE programmes by TNE students, as they ranked it high as both a motivating factor and a direct benefit of TNE. Yet when asked which skills were actually enhanced by TNE, intercultural awareness and competence ranked in seventh place out of ten.
- Overall, the vast majority of HE experts (73 per cent) believe that TNE has a positive impact on intercultural relations within the country and more specifically on how students relate to different cultural and socio-economic groups. Yet examples were given where ethnic tensions were evident where there were a large number of international students enrolled in the TNE programme.
- The relationship between local and TNE programmes and institutions addresses one of the social impacts of TNE. The majority of non-TNE faculty believe that there is more of a competitive than a collaborative relationship between local and TNE HEIs. In contrast, the governmental agencies responses are more evenly distributed across competitive, neutral and collaborative relations.
- The issue of whether TNE programmes and curriculum were too Western-centric and not sensitive to local context and culture did not rank high as a potential negative consequence of TNE. However, open comments suggest that this issue merits further investigation.
- The impact of world league tables and rankings on the attractiveness of foreign institutions in host countries is an issue that deserves more research and analysis.

9.8 Economic impacts and implications – key findings

- The main positive of TNE at the student/institution level is that TNE is a more affordable alternative to studying the entire programme abroad. The main negative of TNE at the student/institution level was also framed within an economic context, being the high cost of TNE compared with local programmes.

- 72 per cent of TNE students were of the opinion that their TNE programme represented good value for money compared with similar local programmes. Therefore, while TNE programmes may be considered relatively expensive, most TNE students consider the money well spent.
- Scholarships play an important funding role for TNE, with 25 per cent of all TNE students reporting being funded by a scholarship from the host country, and 15 per cent from the sending country.
- As yet, the income-generating potential of TNE for the host country does not appear to be very pronounced. While survey respondents were of the view that income generation for the local economy is a positive attribute of TNE, it was ranked last out of seven options.
- In general, the impacts of TNE on infrastructure in host countries appear to be quite limited. Respondents rated this as the least significant of the positives at national level. Examples provided by higher education experts were fairly minor in scale, the important exception being countries attempting to become regional higher education hubs.

9.9 Skills impacts and implications – key findings

- A remarkable degree of consistency in views is apparent across the different target groups. All groups, including non-TNE students and non-TNE faculty, believed that TNE undergraduate students are better equipped than locally educated undergraduates students in all ten skills areas listed.
- TNE students perceived their analytical thinking to be the most enhanced of the skills, and this ties with their views that teaching methods on TNE programmes rely more on critical thinking and voicing of opinions compared with local programmes.
- In contrast to the TNE students, the other survey groups were of the view that international outlook is most enhanced by TNE programmes; analytical thinking rated fifth on average.
- 42 per cent of TNE students reported that their TNE programme included an internship or work-experience

opportunity. It is interesting to note the high proportion of respondents who stated that their internship was a mandatory part of their TNE programme.

- Higher education experts were generally of the view that TNE graduates are moderately addressing skills gaps in the local labour market, but this depends on the type of TNE programmes offered. Specialised TNE courses covering niche topics were felt to have a positive impact on addressing local skills gaps. However, it was also felt that many TNE institutions are offering programmes already available locally, and therefore their contribution was viewed as limited.
- TNE students are firmly of the opinion that employers perceive TNE to be advantageous when selecting job candidates. The main reasons given for this were:
 - 1 prestige/status of the foreign university
 - 2 the international outlook/multicultural experience and competence of TNE graduates.

9.10 Concluding remarks

The summary of key findings clearly illustrates the extensive number and diversity of impacts that TNE can have on host countries. It is well understood that provider and programme mobility affects countries in different ways. Even though this research reports on collective opinions of host country stakeholder groups, the individuality of impact for each host country must be appreciated. Just as there is not just one model of TNE provision, there is no universality in the way that TNE affects a country.

There are myriad factors that determine the impact and implications including:

- 1 maturity of higher education system in the host country
- 2 the national policy objectives and regulations guiding TNE
- 3 the predominate type of programme and provider mobility (i.e. twinning and franchise arrangements, joint/double degree programmes, distance education, branch campus, bin-national universities)
- 4 the number of local students and international students enrolled in TNE programmes
- 5 the relationship between TNE-engaged institutions and local higher education providers
- 6 the convergence or divergence between national-level rationales and expectations of TNE and institutional-level motives
- 7 the political, economic and cultural context

- 8 the involvement of other sectors such as immigration, science and technology, foreign affairs and the impact of their regulations on TNE
- 9 the needs of the labour market for trained talent
- 10 the history of international partnerships with foreign higher education systems and institutions
- 11 the experience of host-country institutions' collaboration with international education in general, and TNE in particular.

This list is not exhaustive; it only serves to illustrate the different issues that affect the academic, social/cultural, economic and skills impact of TNE on a host country.

This chapter began with a review of the forecasted growth in programme and provider mobility and the assessment of whether the potential benefits of TNE will outweigh the potential risks or negative aspects. There is a clear indication that the number of TNE programmes and students will increase in the near future and that benefits definitely overshadow potential risks. This very positive view of TNE is encouraging but signals that TNE will continue to change and evolve. Given the evolutionary nature of TNE it is critical that the impacts, implications and perhaps unintended consequences of TNE on host countries continue to be closely monitored and analysed. This is fundamental to ensuring that a country continues to provide relevant, quality and accessible higher education, which includes options for international programme and provider mobility.

