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THE SHAPE OF GLOBAL HIGHER EDUCATION: INTERNATIONAL COMPARISONS WITH EUROPE

International
Higher Education

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Countries' international strategies are effectively signalling the excellence of their higher education systems to prospective students.

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Foreword

NAFSA: Association of International Educators is very pleased to have worked with the British Council to present the latest in the 'Shape of global higher education' research series. International education lies at the core of an interconnected world characterised by peace, security and well-being for all. Knowledge and understanding of different cultures, frameworks and systems of higher education is essential to international education – to advance learning and scholarship, to foster understanding and respect among people of diverse backgrounds and perspectives, to develop globally competent individuals, and to build leadership in the global community. A greater knowledge and understanding of different educational environments is important to supporting growth in international higher education.

This research, along with a related report on the Americas, builds on previous work by the British Council to examine national policy frameworks across different nations and the impact of policy on internationalisation efforts of higher education institutions. Every student and scholar seeking the benefits of international education needs to find their path, and every higher education institution looks to integrate global perspectives into its teaching, research and service missions. Looking at multiple countries in a comparative manner is useful for the field of international education – allowing us to see what works and why, where improvement is needed, how innovation is cultivated, and the impact of systematic differences. Focusing on important elements of internationalising higher education – student mobility, transnational education and international research collaboration – allows us to move from abstract concepts to on-the-ground realities. Working together in the global higher education community, we are confident that this research will be a valuable tool to inform the vision of higher education institutions and national policymakers to further support international higher education engagement across the globe.

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1. Report overview

1.1 Background to the report

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

The British Council commissioned this update to the series and engaged support from NAFSA: Association of International Educators in the form of their intellectual input, expertise and guidance. This report focuses on 11 European countries. Parallel to this publication is a report which evaluates six countries in the Americas. An additional comparative perspective is brought by the inclusion of China, India and Australia.

1.2 Report structure

This report opens with an executive summary followed by an introduction to the research objectives and methodology. The study provides an update of the national policy landscapes for France, Germany, Greece, the Netherlands, Russia and the UK. The research is extended to include some new countries with the aim of achieving a better geographical coverage: Bulgaria, Poland, Ireland, Italy and Spain.

In addition to updating the assessment of national policies relating to international engagement in higher education, this volume of the study provides a deeper dive into the level of national support for international higher education engagement, including some analysis of national brands and promotion of student mobility.

The implications of these countries' national policy frameworks are detailed with regard to: (i) international student mobility; (ii) transnational education; (iii) international research collaboration; and (iv) sustainable development. A summary of the key findings concludes the report.

2. Executive summary

This report provides an assessment of selected countries' national frameworks for international engagement in higher education (HE). The country set includes 11 European countries (Bulgaria, France, Germany, Greece, Ireland, Italy, the Netherlands, Poland, Russia, Spain and the UK) and six comparator countries from the Americas (Canada, the USA, Mexico, Brazil, Colombia and Chile). Three additional countries have been included for comparison purposes: Australia, China and India.

This report focuses primarily on the European countries and brings a wider international perspective with occasional comparisons with the other study countries.

Parallel to this publication is a report which focuses on the Americas.[1]

The report attempts to capture the impact of countries' national frameworks on international student mobility, transnational education, academic mobility and research, and sustainable development. Special attention is paid to national commitments to internationalisation of HE.

As several of the countries in this study were also included in earlier volumes of this series, this report captures the changes in the policy landscape since 2016.

2.1 International higher education strategy

- Most countries recorded either increasing support for internationalisation of higher education (IHE) or very little change.
- Many countries have renewed or recently published IHE strategies, often accompanied by international student targets. Most strategies have strong international co-operation components and support for study abroad. The latter is likely to be influenced by participation in large-scale European Union (EU) programmes such as Erasmus+ and Horizon 2020.
- Countries where higher education institutions (HEIs) have the autonomy to charge tuition fees tend to have export-oriented strategies, while those with either relatively low tuition fees or no fees at all have broader and more comprehensive international education strategies.
- The global education context is a hugely competitive market. Strategy targets are more likely to be achieved if they articulate a strong benefit for those they seek to attract. This suggests the need for increasingly sophisticated strategies that not only take account of the needs and aspirations of the countries with which they engage, but also are appropriately balanced and funded to respond to these. Monetary commitment to promoting national education brands internationally is a reliable indicator of the global competition for student talent.
- This study shows a positive relationship between countries' inbound mobility ratios (i.e. the proportion of international students as a percentage of the total student population) and their wealth (measured by gross domestic product (GDP) per capita).
- The countries which are popular with international students have high levels of national policy support for their international engagement.
- This research found that bilateral and multilateral agreements are a growing element in international education strategies. However, there are indications that international education is becoming an important consideration in countries' foreign policy. While this is at an early stage in most countries, nevertheless, it has profound implications for the future of international education strategy and its delivery.

2.2 International student mobility

- Across all the European countries in this study, international student mobility is the most well-developed category of the national policy frameworks.
- Quality assurance of students' entry into HE and maintenance of standards of education provision is best developed in countries with an established track record of hosting international students.
- There is a positive association between the presence of a substantial number of inbound students in a country and the existence of quality assurance policies for education. Equally, countries with weaker quality assurance policy frameworks for international students have low inbound mobility.
- The stronger the national policy support for international students (measured by ease of obtaining student visas, post-study work opportunities and scholarships), the greater the inbound student mobility flows.

1. This report will be available from 29 May 2019: www.britishcouncil.org/education/ihe/knowledge-centre/global-landscape/shape-global-higher-education-vol-5

2.3 Research collaboration

- There is a strong positive relationship between inbound international student mobility flows and internationally produced research output as a proportion of the total research output from the country. Globally, the proportion of international students is the highest at PhD level. One explanation for this relationship is the contribution of international PhD students to their host country in terms of the research links they bring with them. Also, many of the countries with mature HE systems in this study have talent-focused policies which aim to attract global students at the research level.
- There is a strong positive relationship between inbound student mobility and quality of research – an established research culture relies on competition for the best students. There is a strong positive relationship between international research collaborations and the quality of the produced research, in terms of field-weighted citation impact (FWCI). The more international the research is, the higher its impact.
- Countries with a supportive policy framework for research produce high-impact research, in terms of FWCI, which exceeds the world average (FWCI = 1). This means that the research produced in these countries generates citations above the world's average citations.
- Time series data on research outputs across the studied 20 countries (with one exception) shows that the most significant increases in research output were in research produced by international co-operation. In all instances, this was at the expense of institutionally produced research and single authorship.

2.4 Transnational education[2] and collaborative education provision

- The majority of the 11 European countries studied have strong policy support for transnational education/international programme and provider mobility (TNE/IPPM). This is facilitated by EU policies and the European Higher Education Area (EHEA),[3] which allow and promote the mobility of programmes, people and institutions. Specifically, this relates to common frameworks of qualifications, standards and guidelines of quality assurance, and the European Credit Transfer and Accumulation System (ECTS).
- The highest scores are found among major TNE-exporting countries, such as the UK, Germany and the Netherlands. At the same time, Bulgaria, Ireland and Poland appear to have developed their TNE/IPPM policy frameworks and have the potential to emerge as key players.
- There is a strong regional co-operation in quality assurance and degree recognition across the selected European countries. The labour market recognises TNE/IPPM.

2.5 Sustainable development policies and implications

- Brain drain is relevant mainly to the countries with strong outbound student and academic flows. Most of the European countries do not report it as an issue.
- Countries aiming to attract talent appear less preoccupied with brain drain that their student flows may be causing. Overall, brain drain has received little policy attention in countries with mature HE systems.
- One area with untapped potential is TNE/IPPM. Its ability to contribute to widening equitable access to quality tertiary education and support capacity building is yet to be explored.
- Whereas teaching partnerships through TNE/IPPM are gaining popularity with overseas governments that aim to improve domestic HE capacity, TNE/IPPM has received little or no government support across most of the TNE-exporting countries.
- Of the advanced economies included in this study, most of their aid is focused on research partnerships aimed at tackling global challenges. A more balanced aid which supports capacity building through research and teaching will most likely provide a more effective support to the diverse needs of HE systems in those countries eligible for Official Development Assistance (ODA) and their learners.
- Widening equitable access to quality HE is a policy preoccupation in many countries with unmet demand for education. TNE/IPPM has the means and technological advances to tackle that issue. Yet, while some international education strategies reference TNE/IPPM, a formal commitment to improving access to HE globally would be a welcome and timely development.

2. Transnational education is broadly defined as the education provision in a country different to where the awarding institution is based. The term is also known as cross-border provision. A new term *international programme and provider mobility* has been coined by Jane Knight, and this report will use the abbreviation 'TNE/IPPM' to refer broadly to this form of international education. See Knight, J and McNamara, J (2016) *Transnational education: A classification framework and data collection guidelines for international programme and provider mobility (IPPM)*. Available online at: www.britishcouncil.org/sites/default/files/tne_classification_framework-final.pdf
3. www.ehea.info

3. Aims, objectives and methodology

3.1 Research background

The British Council developed the initial research framework for this study in 2010. However, it was updated in 2016[4] when detailed metrics were developed, with 37 indicators which are grouped in the following broad categories:

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

3.2 Aims and objectives

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

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

The focus of this report is on 11 European countries. Previous studies in the 'Shape of Global Higher Education' series found that the EU had the highest level of national support for international engagement.[5] The countries are part of the European Higher Education Area (EHEA) which is a 'unique international collaboration on higher education and the result of the political will of 48 countries'.[6] This is further strengthened by the EU initiatives, aiming to improve HE mobility and research such as Erasmus+ and Horizon 2020. Over 83 per cent of the internationally mobile students in Europe choose to study in another European country.[7]

There were 19.6 million tertiary education students in the EU in 2016.[8] This research covers the seven largest HE systems in the EU, which are: Germany, with 15.5 per cent of the tertiary education students in the EU-28; France (12.7 per cent of the total); the UK (12.2 per cent); Spain (ten per cent); Italy (9.3 per cent); Poland (8.2 per cent); and the Netherlands (4.3 per cent). Equally, the research covers smaller HE systems representing different geographies, such as Ireland, Greece and Bulgaria. Russia is also included – it is a member of the EHEA but not the EU.

The study draws international comparisons with selected countries in the Americas: Canada, the USA, Mexico, Colombia, Brazil and Chile. An additional comparative perspective is brought by the inclusion of China, India and Australia.

3.3 Research methodology

This research uses an index-based methodology. The three categories in Section 3.1 use a set of qualitative indicators – 37 indicators in total – and contribute equally to an overall National Policies Framework (NPF). The information collected against each indicator draws on policy documents sourced from government departments, HE agencies and regulatory bodies. All data is factual and reflects the political will of the national governments to support international engagement. In instances where no adequate policy documents were found, the academic literature was consulted and interviews with locally based experts have taken place. British Council staff and their access to experts on the ground across the countries studied were critical contributors to this study.

4. https://www.britishcouncil.org/education/ihe/knowledge-centre/global-landscape/report-shape-global-higher-education
5. https://www.britishcouncil.org/education/ihe/knowledge-centre/global-landscape/shape-global-higher-education-vol-2
6. www.ehea.info
7. Analysis of UIS data.
8. Eurostat data: https://ec.europa.eu/eurostat/statistics-explained/index.php/Tertiary_education_statistic

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

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

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

Table 1: Structure of the National Policies Framework

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

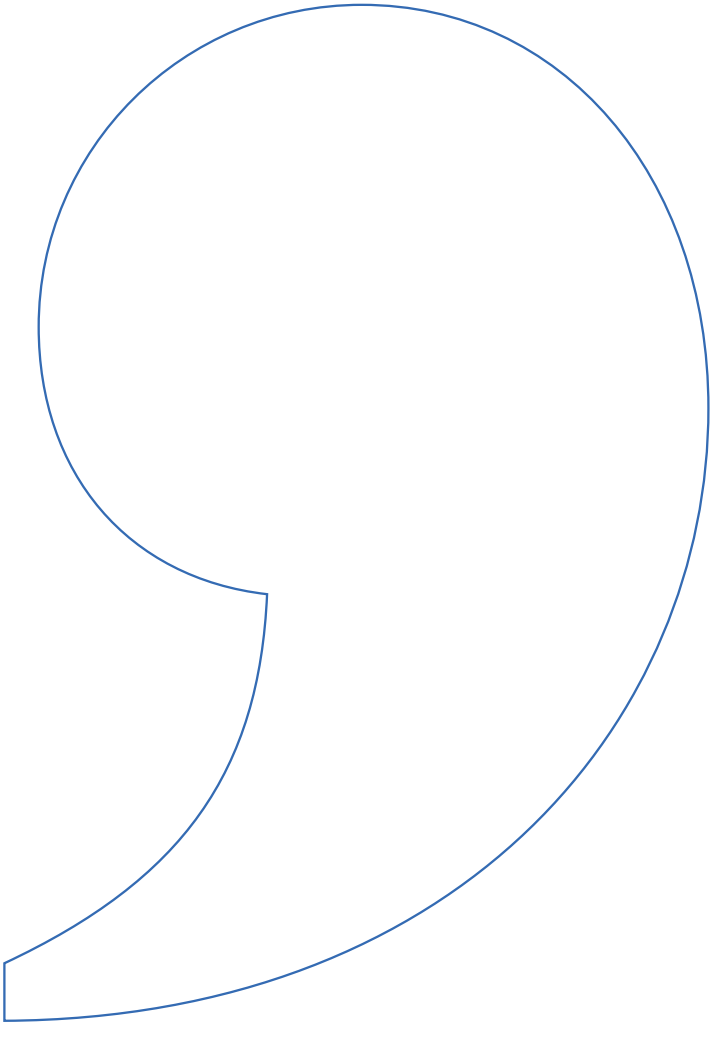
Source: Ilieva, J and Peak, M (2016) *The Shape of Global Higher Education: National policies framework for international engagement*; Report for the British Council: www.britishcouncil.org/education/ihe/knowledge-centre/global-landscape/report-shape-global-higher-education

3.4 Geographical coverage

There are 11 European countries focused on in this report, listed in Table 2. Some of the policy data consists of updates for countries previously evaluated (in 2016 or 2017), and some is newly added.

Table 2: List of countries

Update of national policies	Newly included countries
France	Bulgaria
Germany	Ireland
Greece	Italy
Netherlands	Poland
Russia	Spain
UK	



4. National Policies Framework across selected European countries

4.1 Overall findings

Table 3 summarises the overall assessments of countries' international education policies in terms of their (i) openness, (ii) quality assurance frameworks and overseas degree recognition, and (iii) equitable access and sustainable development. Table 4 gives the overall scores. In addition to Europe, selected countries from the Americas, Asia and Australasia are included for comparison.

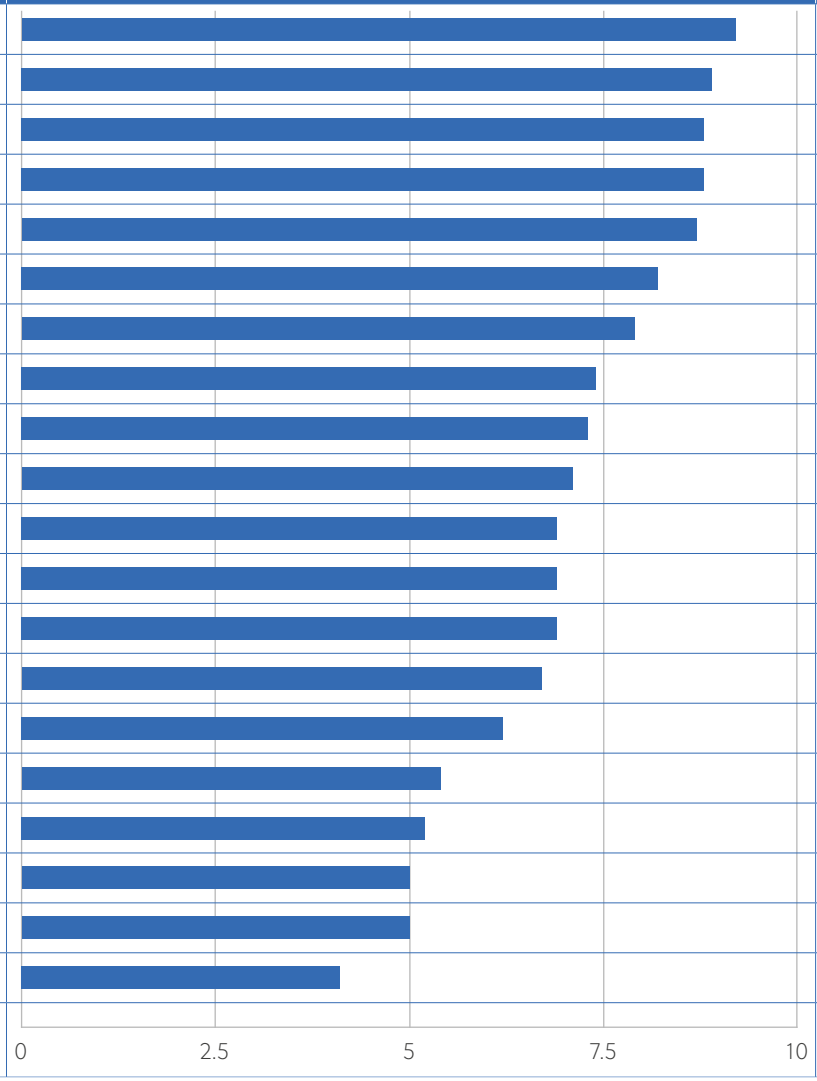
In the European countries studied, the national HE systems of the Netherlands, Germany, Ireland, Poland and France have the most significant degree of openness. All these countries have dedicated bodies which oversee executing the implementation of the respective strategies, such as NUFFIC in the Netherlands, DAAD in Germany, NAWA in Poland and Campus France in France. In Ireland, a government department is tasked with the internationalisation of education. Across the three categories, these countries are among those with the most supportive policy environment for international engagement.

Table 3: Summary of National Policies Framework assessment

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

Table 4: Overall scores by country

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



4.2 International education strategies across the selected European countries

Seven of the 11 European countries have published international education strategies since 2015. These are France, Germany, Ireland, Poland, Spain, the Netherlands and the UK. Except for the Netherlands, Italy, Bulgaria, Spain and Greece, countries in the study all have international student recruitment targets to be achieved by the end of the period covered in their strategy documents.

The strongest indicator in this category is national governments entering bilateral and multilateral agreements with other countries to support international collaborations in education and research.

With the exception of Greece, all countries have put such agreements in place at the national level over the past five years. Agreements in Greece were mostly initiated at an institutional level only.

Table 5: International strategies

Country	Presence of international strategy	International student recruitment targets	Body accountable for the strategy	Notes
Bulgaria	No co-ordinated internationalisation strategy but strong alignment with the Bologna Process.	N/A	The International Co-operation Directorate at the Ministry of Science and Education	Strong international engagement through bilateral agreements for co-operation.
France	Internationalisation strategy was launched in 2018.	500,000 international students by 2027.	Campus France	Strong engagement through Memorandum of Understanding (MoU) and international agreements.
Germany	The latest international strategy was launched in 2017.	350,000 international students by 2020. This target was achieved in 2018.	DAAD	Strong performance in international co-operation and development.
Greece	Broad higher education strategy with internationalisation components based on EU large-scale programmes.	N/A	N/A	Most of the international agreements are at higher education institution level.
Ireland	International strategy 2016–2020 'Irish education globally connected'.	44,000 international students by 2019/20. 15% of all full-time students to be international.	Enterprise Ireland and the High-Level Group	To grow international co-operation.
Italy	There is no co-ordinated strategy, but there is a strong push for internationalisation.	N/A	No dedicated body. The Italian Rector's Conference seeks to contribute to the development of internationalisation.	Strong focus on co-operation and collaborations internationally.

Country	Presence of international strategy	International student recruitment targets	Body accountable for the strategy	Notes
Netherlands	The Ministry of Education, Culture and Science published an internationalisation strategy in June 2018.	N/A	NUFFIC	Active engagement in international co-operation.
Poland	The HE internationalisation programme was launched in 2015.	To attract 100,000 international students.	The National Polish Agency for Academic Exchange (NAWA) was set up in October 2017.	Strong focus on co-operation and development.
Russia	There is no comprehensive international strategy. However, there is an effort to align the HE system with the Bologna Process. The export strategy from 2017 aims to triple the number of international students.	710,000 international students by 2025.	Ministry of Science and Higher Education and the Ministry of Foreign Affairs.	There is an attempt to strengthen international co-operation in higher education.
Spain	Strategy for internationalising Spanish universities 2015–2020. It aims to increase the number of international students and the international competitiveness of Spanish universities.	While the strategy aims to increase the number of international students, no concrete targets are published.	The Spanish Service for the Internationalisation of Education (SEPIE) is the body dedicated to promoting the internationalisation of Spanish HE.	The effort to strengthen and grow international agreements and MoUs.
UK	A renewed commitment to internationalisation was published in a joint strategy by the Department for Education and the Department for International Trade on 16 March 2019	600,000 international students by 2030.	The new international strategy will have a new champion. Currently, the International Education Council is the strategy-implementing body. It draws on stakeholders across the education sectors, sector bodies and national agencies.	The UK has maintained its international engagement, particularly research co-operation.

While Table 5 shows a strong focus on targets for international student recruitment, there are differences in strategic approach. These appear to be primarily related to levels of international student tuition fees. Countries where higher education institutions (HEIs) have the autonomy to charge tuition fees tend to have much more heavily export-oriented strategies, while those with relatively low tuition fees, or no fees at all, have broader and more comprehensive international education strategies. An example of the former is the UK, where the main focus of the latest strategy (launched in March 2019) is an export target of £35 billion education exports (a growth of 75 per cent from current levels) and an increase in students hosted in the UK to 600,000 per year, both by 2030. The strategy sets out the aim of building the UK's global share of the international student market.

In contrast, a much broader approach is taken by the Netherlands. Universities do charge tuition fees, but these are relatively low compared with UK universities. The Netherlands' international strategy, updated in June 2018, aims to expand and support the country's international networks and to enable international students to access the domestic labour market. Germany also has a broader, more comprehensive approach. Alongside its inward mobility targets there is an equally strong focus on outward mobility. Both countries have exceeded the 20 per cent study abroad target to complete a period of study or training abroad by 2020, as agreed by the EU ministers.[9] These are 22 per cent for the Netherlands and 32–35 per cent for Germany (35 per cent for university students and 32 per cent for students at the universities of applied sciences).[10] Germany aims to send 50 per cent of its tertiary education students abroad by 2020.

It is not within the remit of this research to comment on the effectiveness of different countries' strategic approaches, other than to make the general point that the global education context is a hugely competitive market. As with any other market, targets are more likely to be achieved if they articulate a strong benefit for those they seek to attract. This suggests the need for increasingly sophisticated strategies that not only take account of the needs and aspirations of the countries with which they engage, but that are also appropriately balanced and funded to respond to them.

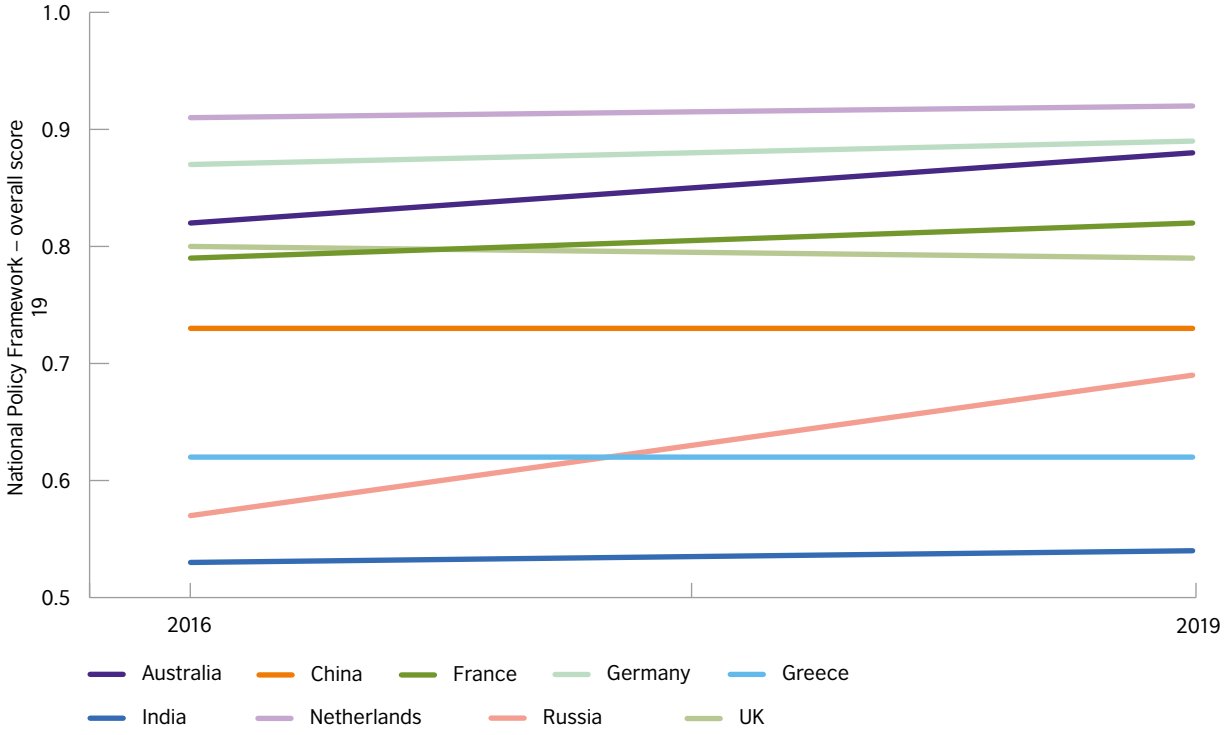
HEIs' international strategies are not considered in this report. In many countries, however, HEIs are the primary driver of IHE. This means that synergies between their strategies and national strategies are critically important in achieving targets. Consequently, the extent to which government strategy specifically incentivises HEIs to engage and deliver on the national strategy will be a major determinant of the latter's success. Historically, government rhetoric has been more productive when backed by financial incentives. This has been particularly the case in countries where a significant proportion of HEIs' income is not from direct government funding.

4.3 Changes in countries' national policy support 2016–19

While most countries have experienced increases in their national support for internationalisation, slight declines were experienced in the UK. Figure 1 only includes those countries in which policy environment was evaluated as part of previous research. Poland, Bulgaria, Italy, Ireland and Spain are newly added and, therefore, this is the first evaluation of their policy environment.

9. https://ec.europa.eu/education/policies/higher-education/mobility-and-cooperation_en.
10. DAAD (2017) *Wissenschaft weltoffen kompakt 2018: Facts and Figures on the International Nature of Study and Research in Germany,* page 16. Available online at: www.wissenschaftweltoffen.de/kompakt/wwo2018_kompakt_en.pdf

Figure 1: Changes in countries' national policies 2016 to 2019



Source: British Council (2016) *The shape of global higher education.*

The UK is the country among this group which has in recent years experienced the most substantial changes in its regulatory framework, introduced through the Higher Education and Research Act 2017 (HERA).[11]

The marginal drop in the UK scores can be attributed to indicators relating to quality assurance of TNE/IPPM overseas. Following the enactment of HERA, cyclical reviews of education provision across institutions in England, previously conducted by the Quality Assurance Agency (QAA), have been replaced by a basket of indicators monitored by England's new regulator, the Office for Students. This basket of metrics does not fully capture TNE activities. The QAA is working with the sector on a revised model for TNE review, which is expected to go out for consultation in Spring 2019.

While this assessment is based on the current regulatory and policy environment, many of the index scores for the UK have not changed since 2016. However, there are some important factors stemming from the period of uncertainty regarding the UK's relationship with the EU that may affect future international engagement and the UK's indicators in this study. Such factors include:

- Uncertainty around the UK's continued participation in Erasmus+. Currently, the UK has no national-level funding for UK students' outbound mobility. Whereas Erasmus+ accounts for most of the outbound mobility from the UK, the rest of the study abroad in the country is organised by individual HEIs, in many instances with institutions providing some financial support and incentives. At present, there is no confirmed government plan with regard to the UK's participation in Erasmus+ beyond 2020.
- Uncertainty over the status of EU academics post-Brexit.
- Uncertainty over the status of EU students post-Brexit, including their access to loans and tuition fee levels.

11. Higher Education and Research Bill: www.gov.uk/government/collections/higher-education-and-research-bill

4.4 International education strategies: international comparisons

Broadening the comparisons to include countries from the Americas highlights clear links between international strategies, inbound student mobility and government expenditure on tertiary education.

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

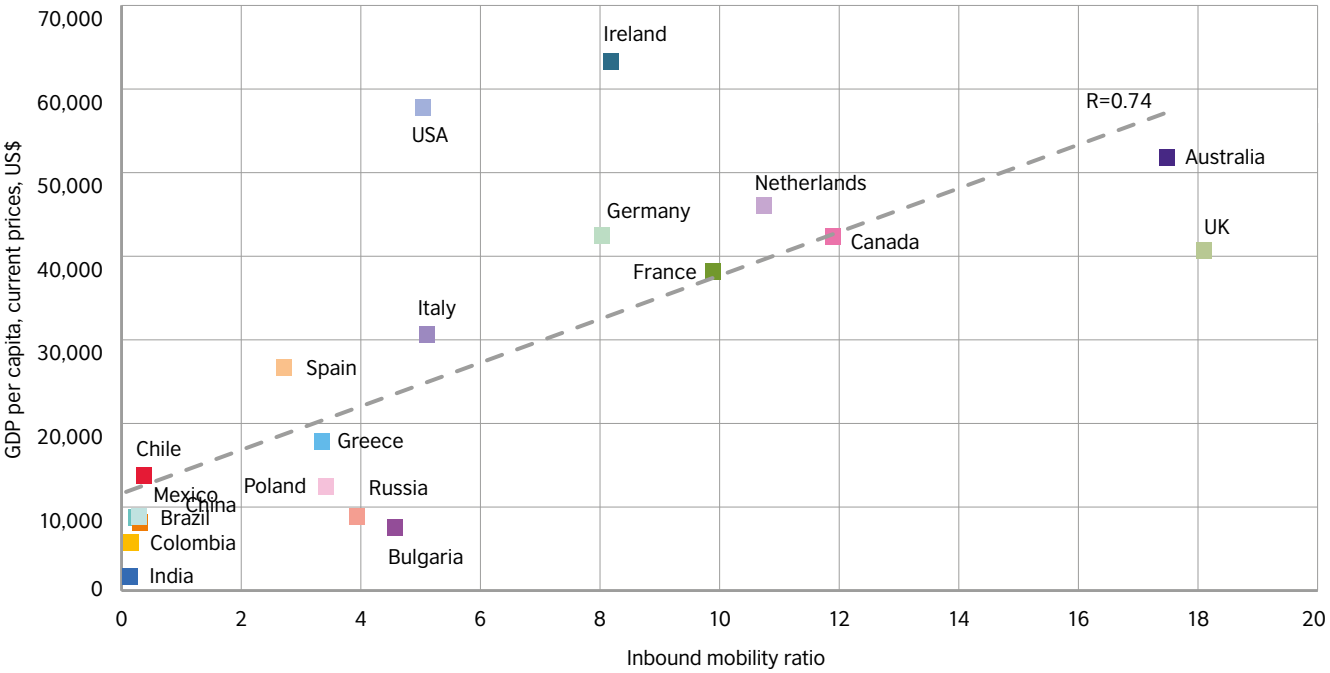
Student mobility continues to be the most popular component in national strategies for international engagement. It is particularly strong in countries with an established reputation as education exporters, for example, Australia, the UK, the Netherlands and Canada, followed by France and Germany.

Figure 2 shows the positive relationship between countries' inbound mobility ratios (i.e. the proportion of international students as a percentage of the total student population) and their gross domestic product (GDP) per capita. It draws on the latest available data from the United Nations Educational, Scientific and Cultural Organisation (UNESCO), which is for 2016.

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

Figure 2 suggests that the USA and Ireland have a high potential to attract more international students. While Italy's GDP per capita is just under half that of the USA, it attracts a similar proportion of international students as the USA. Bulgaria presents an interesting comparison: its GDP per capita is almost seven and half times lower than that of the USA, however, at 4.6 per cent its inbound mobility ratio is similar to that of the USA, which is five per cent. Similarly, Ireland enjoys significantly higher wealth per capita than Germany. However, the proportion of international students in the two countries is around eight per cent of the total student population.

Figure 2: GDP per capita and inbound student mobility ratio in 2016



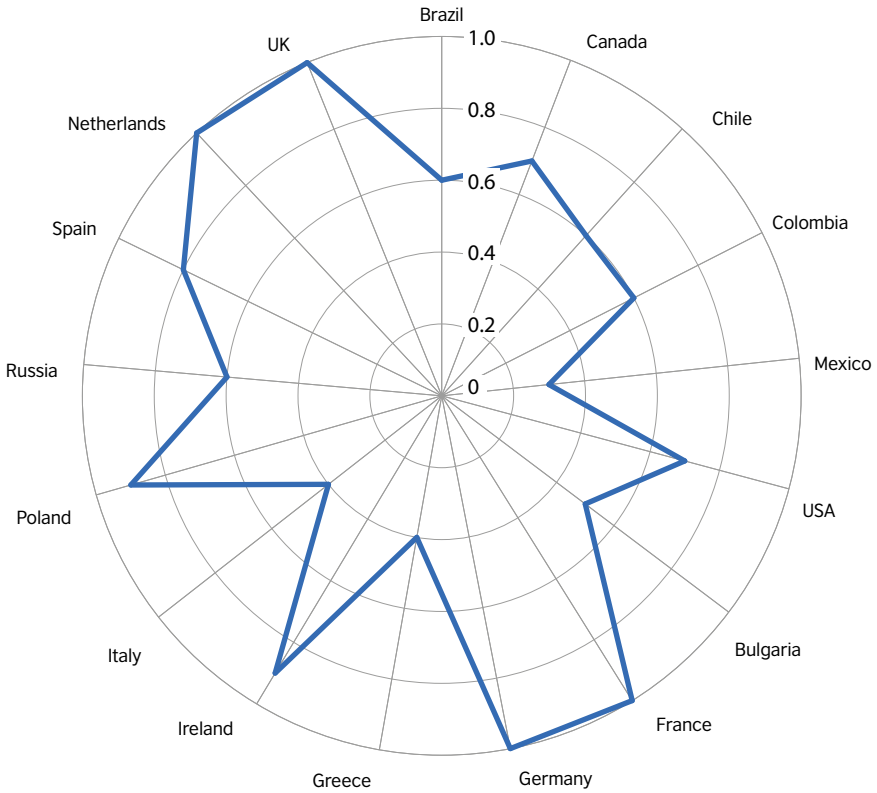
Source: British Council analysis, gross domestic product per capita, current prices; US$; International Monetary Fund, World Economic Outlook Database, October 2018.

In addition to greater wealth, the countries with high inbound mobility ratios (except for Poland) also have high levels of national policy support for their international engagement. Figure 3 highlights countries' scores on comprehensive international education strategies. Indicators in this category include the following questions:

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

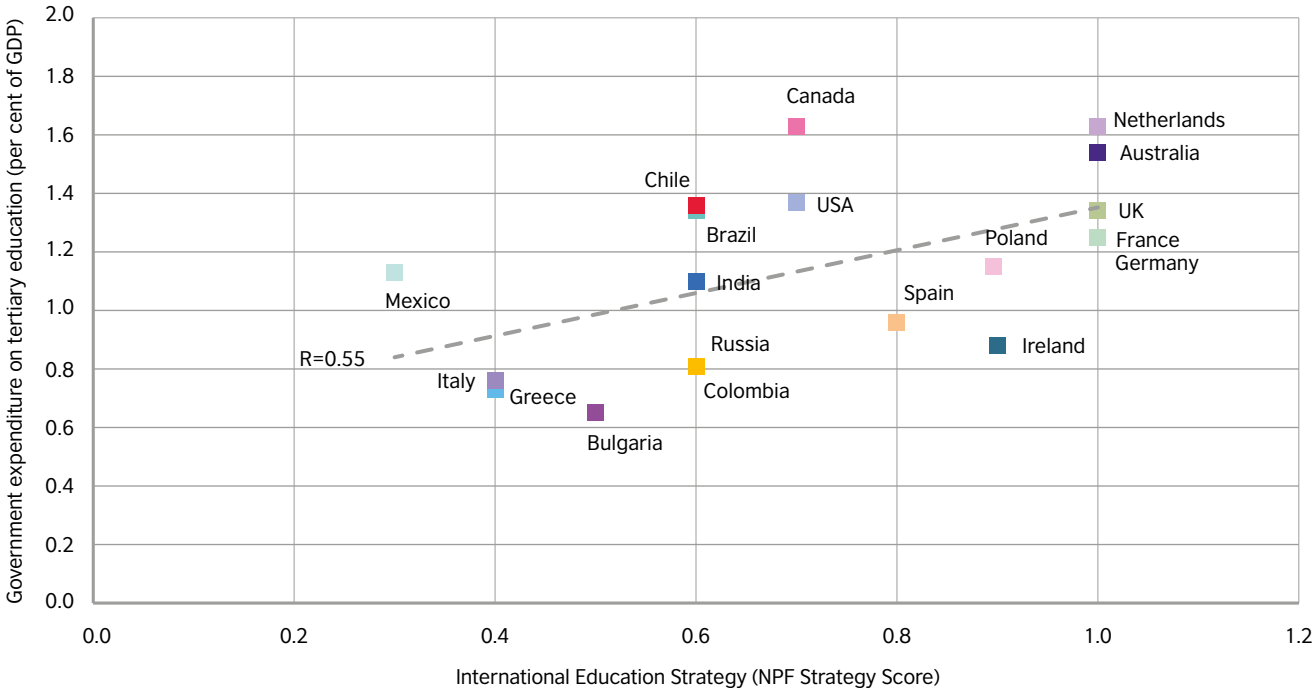
As already noted, most countries, except Bulgaria, Greece, Italy and Russia, have well-developed and comprehensive international education strategies. The Americas compare less favourably on this measure. The USA and Canada have devolved HE systems, whereas other countries in the region mainly import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

Figure 3: International education strategies in Europe and the Americas



There is clear evidence that government expenditure on tertiary education, as a percentage of GDP, and the concurrent existence of a well-developed international education strategy, is linked with higher ratios of inbound mobility. More specifically, the evidence suggests that countries that attract a substantial proportion of international students (more than eight international students for every 100 students) have a combination of (i) a developed international education strategy[12] (NPF score of NPF>0.90), and (ii) robust funding for tertiary education (>1.34 per cent of GDP). This is illustrated in Figure 4.

Figure 4: International education strategy, government expenditure on tertiary education[13]



Source: British Council analysis, Euromonitor, UNESCO UIS.

Table 6: Inbound mobility ratios

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

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

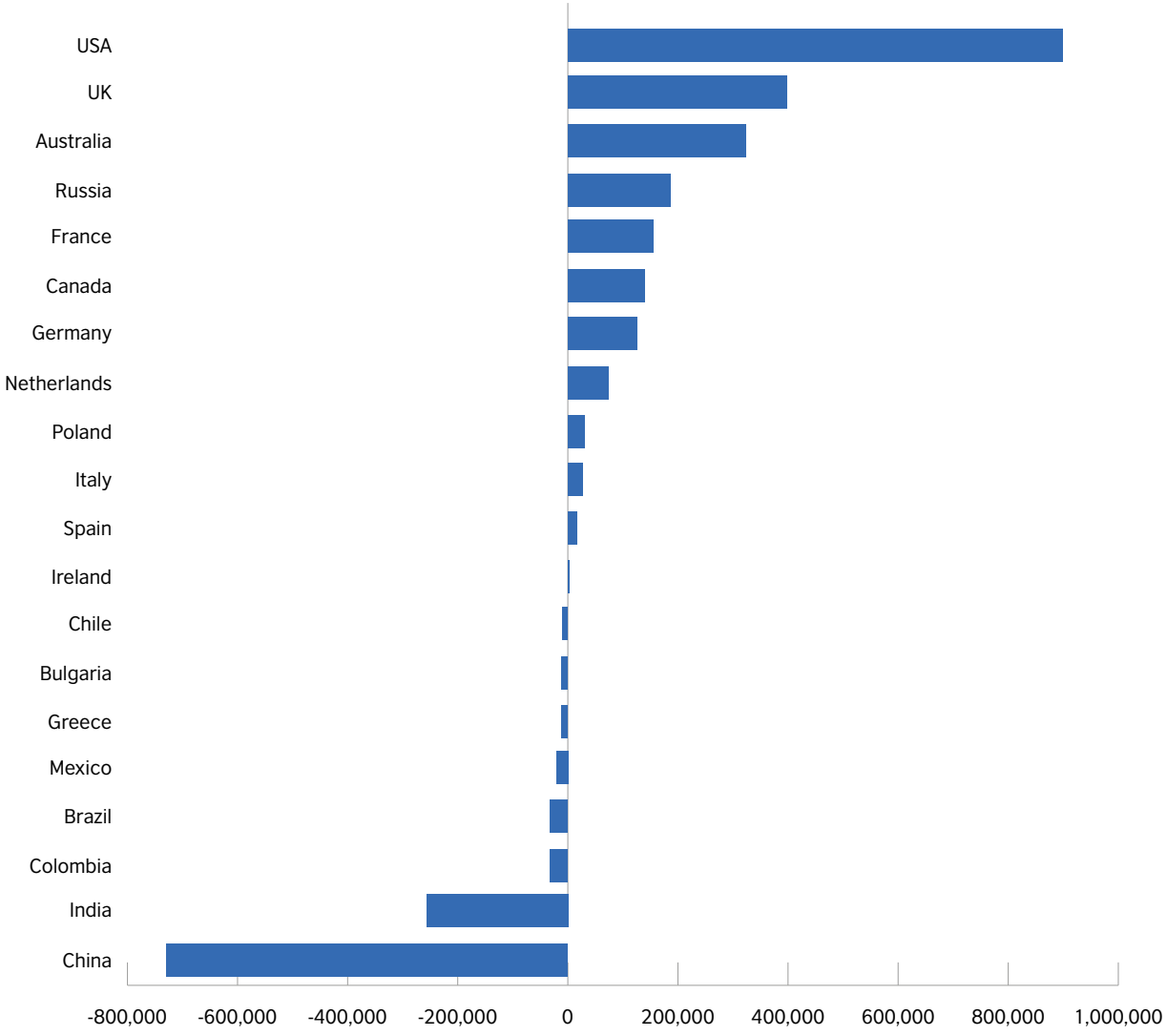
12. Measured against OPEN questions 11–15 in the NPF.
13. China does not report expenditure data, hence it is not included in this graph.

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

Figure 5 shows the net flows of international students. The divide between net exporters and net importers of HE is quite clear and is illustrated by the heavy inbound balance of the USA, the UK and Australia and outbound mobility of China, India, Colombia, Brazil and Mexico.

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

Figure 5: Net flows of international student mobility



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

4.5 National education brands and international promotion

Within IHE, inbound student mobility remains the priority for most governments. This study, therefore, attempts to compare national spending on education promotion as a proxy for governments' commitment to internationalisation. There are, however, limitations in the data. Comparable data was difficult to obtain and, where available, the quoted budget figures varied based on the variables used. These include staff costs (only included for a few countries), language provision (e.g. in the USA) and broad internationalisation budget.

Monetary commitment to promoting national education brands internationally is a reliable indicator of the global competition for student talent.

Table 7: National commitment to IHE – education brands and expenditure for internationalisation

Country	Education brand (if available)	Ballpark promotion/IHE spending	Notes	Number of international students (latest year)
Canada	EduCanada https://educanada.ca/	Can$3 million p.a. Approximately £1.691 million	Estimate. Most recent year, the figure is $3 million. Nearly all provinces also spend money to promote education in their jurisdiction and the largest piece of expenditure by far comes from institutions.	189,478
Chile		2016: 284 million pesos 153.36 million from the government Approximately £177,000	National education brand; of which 54 per cent comes from government.	4,568
China	Studying in China	RMB3.32 billion in 2018 Approximately £777.5 million	Mainly scholarships for international students. RMB3.32 billion in 2018, while actual expenditure in 2017 was 2.86 billion.	137,527
Germany	Study in Germany – Land of ideas https://www.study-in.de/en/	€2 million p.a. Approximately £1.725 million	The budget for the Study in Germany campaign.	245,349
Italy	Uni-Italia www.uni-italia.it/en	€2,132,579 in 2018 Approximately £1.84 million	Promotion of Italian language teaching in 83 countries worldwide, to promote the Italian language and culture. Also, €18 million earmarked for IHE 2017–20 with projected spend: €750,000 for 2017; €3,750,000 for 2018; €6,750,000 for 2019; €6,750,000 for 2020.	92,655
Mexico		Scholarships for incoming international students	2015: 3,675 (US$23.6 million) 2016: 3,659 (US$19.5 million) 2017: 3,883 (US$21.6 million) Approximately £16.5 million in 2017.	25,125

Country	Education brand (if available)	Ballpark promotion/IHE spending	Notes	Number of international students (latest year)
Netherlands	Study in Holland https://www.studyinholland.nl/	€5,888,447 in 2018 Approximately £5.08 million	Includes international student mobility and their promotion of Dutch HE and vocational education abroad, and efforts to retain international students after they have completed their studies in the Netherlands.	89,920
Poland	Go Poland http://go-poland.pl/	Promotion budget: €450,544 Approximately £390,000 NAWA overall budget: €50 million Approximately £43 million	The budget includes the following: • promotion materials and gadgets • exhibitions and fairs • development of Go Poland brand (webpage and printed materials) • marketing activities (paid advertisements).	54,734
UK	GREAT https://study-uk.britishcouncil.org/	£6 million p.a.	£6 million (£3 million from the government, £3 million from the British Council with official development assistance requirement).	432,001
US	Study in the USA https://educationusa.state.gov/	US$12,518,000 Approximately £9.4 million	This is the EducationUSA estimate for 2017 for educational advising student services. Other budgets include English language programmes: US$42 million; and global education exchanges: US$54.5 million.	971,417

Rather than promotional spend, figures for China and Mexico refer to average scholarship spend per incoming student.

Case study: Evolution of higher education system in Poland since 1990

1	2	3	4
Higher education for everyone	Implementation of the Bologna Process	Quality and compliance of higher education	Excellence in research and internationalisation
Law, 1990	1999	Law, 2005	Law, 2018

1 Higher education for everyone
Law, 1990

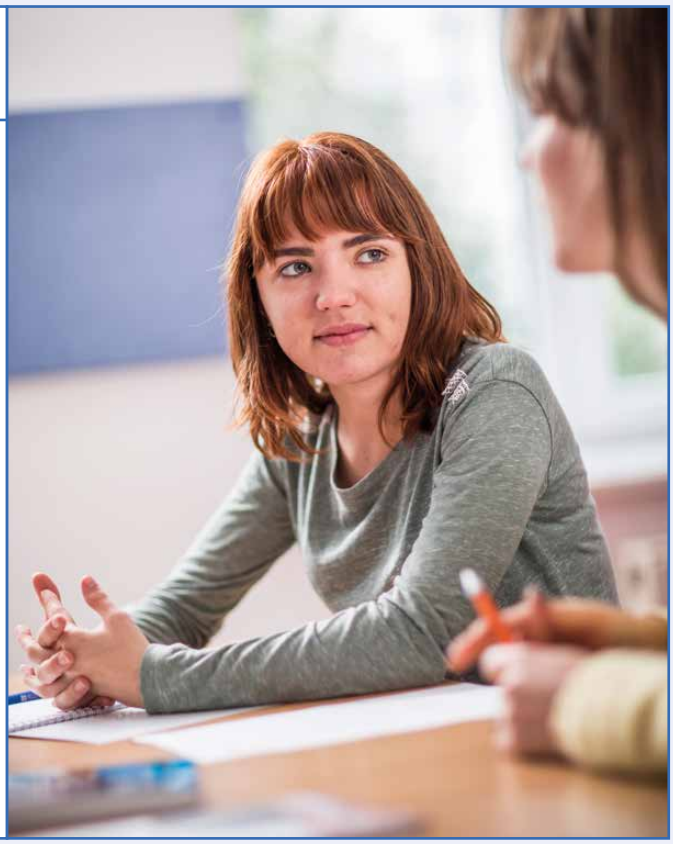
- Autonomy of HEIs
- The liberty of research
- The opening of the higher education system for private HEIs and an increase of available study possibilities, from 112 HEIs in 1990 to 247 in 2004

Greatest success

Increasing availability of HE

Greatest problem

A compromised standard in research and teaching



2 Implementation of the Bologna Process
1999

3 Quality and compliance of higher education

Law, 2005

- Introduction of three-stage education – Bachelor's/Master's/Doctoral
- Final-year examination at school is eligible for all studies
- Restrictions in employment for scholars
- Anti-plagiarism solutions

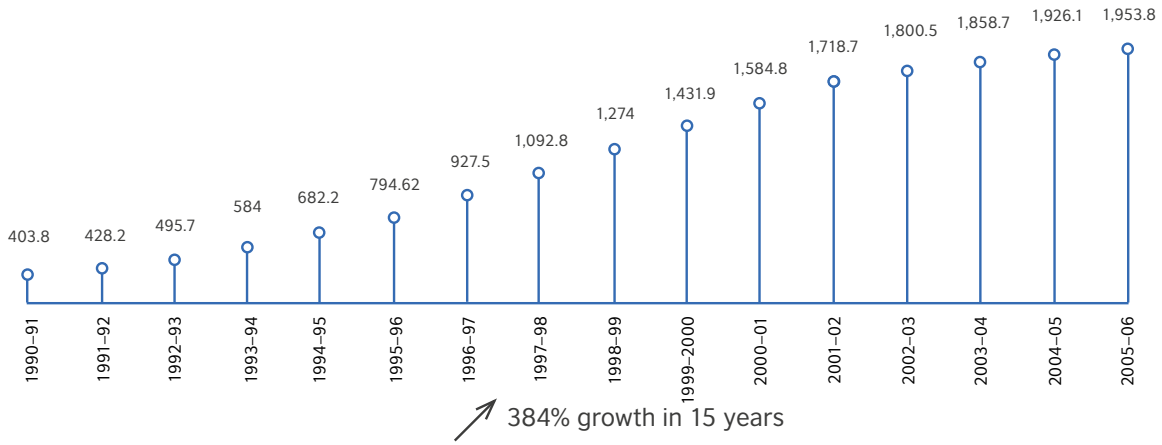
Greatest success

A large number of students, system compliant with EU

Greatest problem

Unsatisfactory quality of research

HE students in Poland 1990–2005 (thousands)

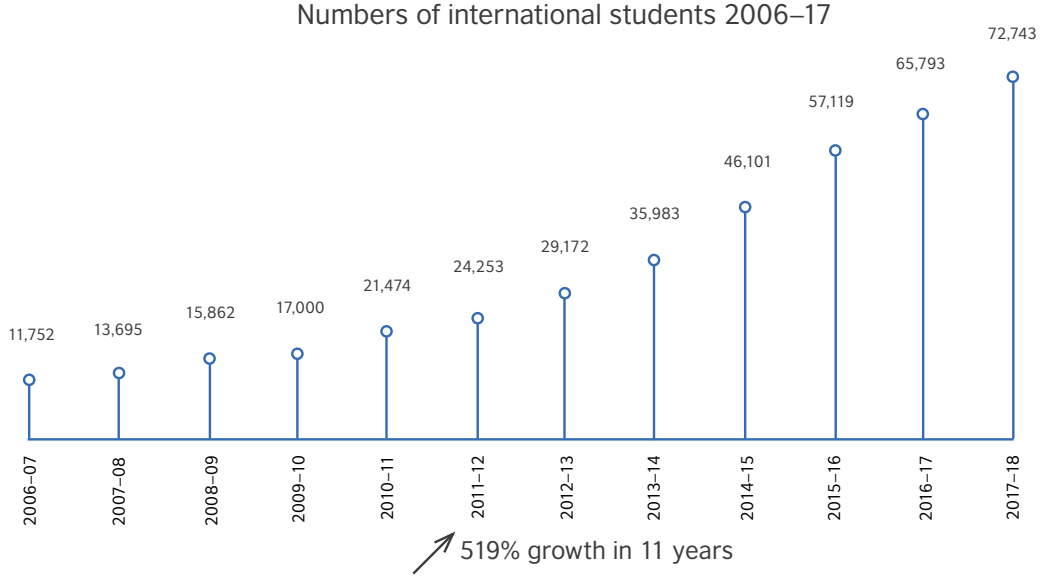


4 Excellence in research and internationalisation

Law, 2018

- HEIs evaluated mainly by the number of papers published in international scientific journals
- Two categories of HEIs – academic and professional – with different financial schemes
- Each PhD student will be awarded a scholarship
- More autonomy for HEIs
- Establishment of NAWA – National Agency for Academic Exchange

Numbers of international students 2006–17



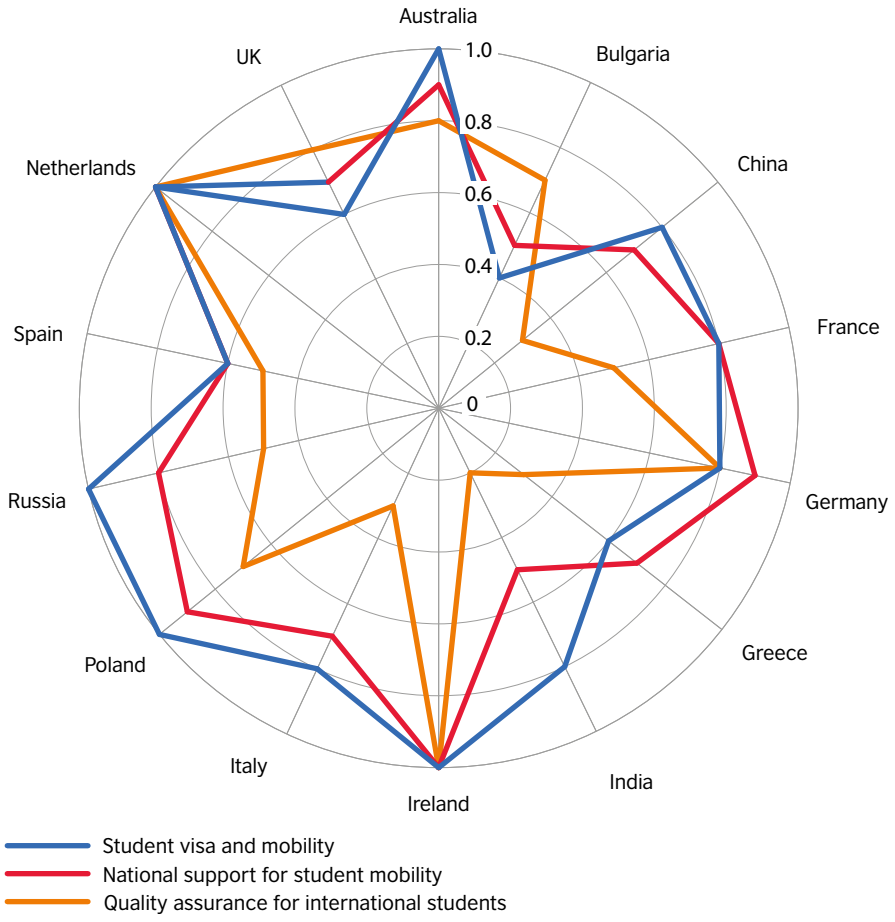
Source: NAWA (Polish National Agency for Academic Exchange).

5. Implications for international student mobility

Across all the European countries in this study, international student mobility is the most well-developed category of the National Policies Framework (NPF).

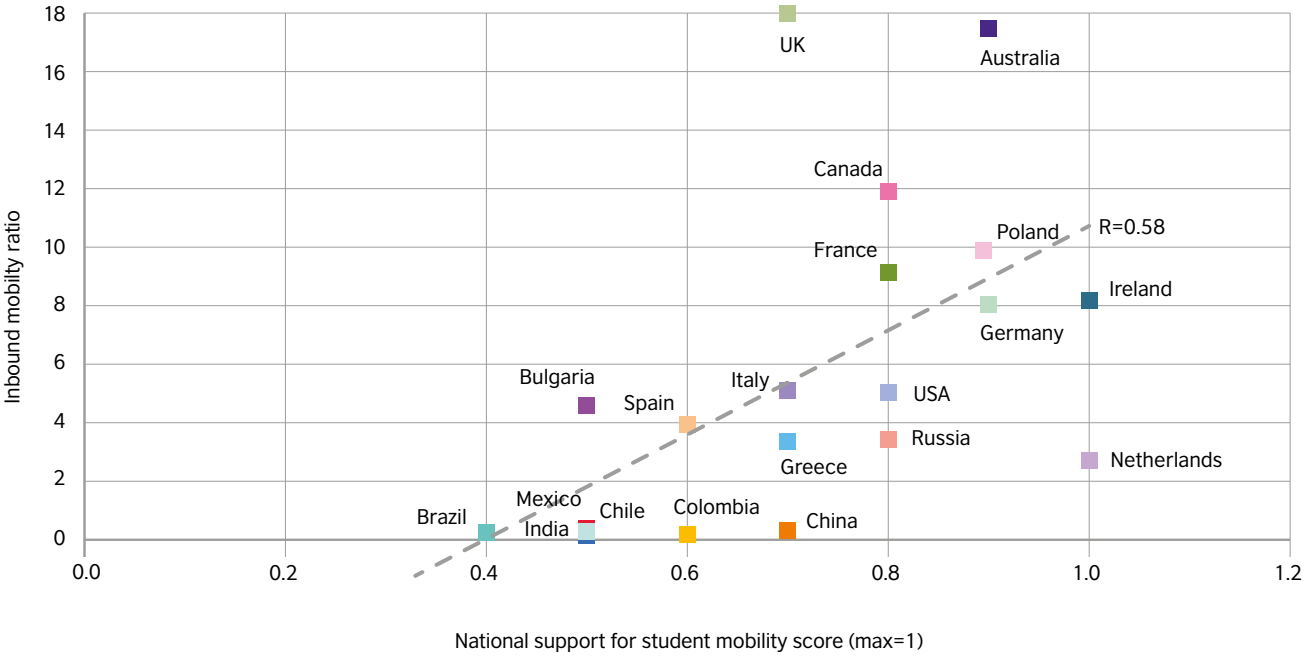
Quality assurance of students' enrolment, and maintenance of standards of education provision is best developed in countries with an established track record for hosting international students, for example, Australia, Germany, Ireland, the Netherlands and the UK. Australia, China and India are included in Figure 6 for comparative purposes.

Figure 6: Policy support for international student mobility



There is a strong positive relationship between countries' supportive environment for inbound student mobility and the inbound student flows. To standardise the inbound mobility and control for the size of the domestic HE system, Figure 7 uses the inbound mobility ratio published by the UNESCO Institute for Statistics, which shows the proportion of international students among the total student population in each country. The countries with the highest inbound ratios are the UK and Australia, which also charge the highest levels of tuition fees. The Netherlands is one of the countries with the most substantial programme provision in the English language, with 375 English-taught bachelor courses.[14]

Figure 7: National support for international student mobility and inbound student flows



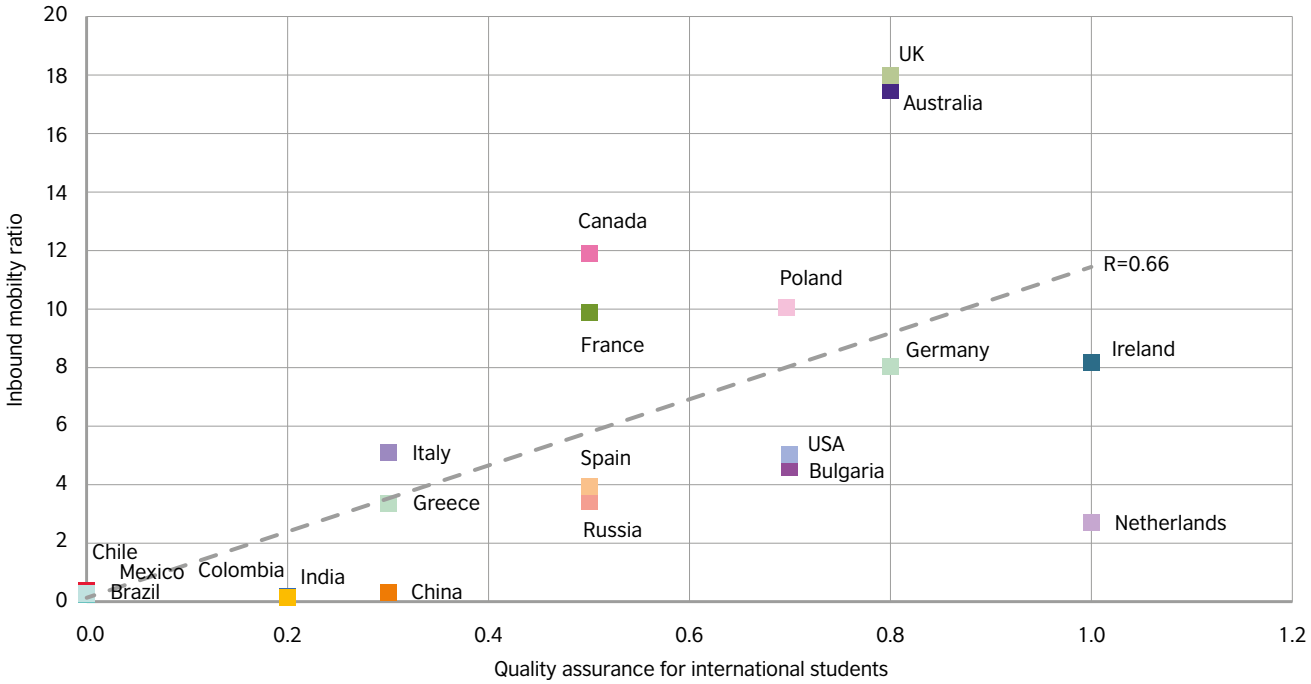
Source: British Council, UNESCO Institute for Statistics.

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

Furthermore, there is a link between the presence of a substantial number of inbound students in a country and the existence of quality assurance policies. This explains why countries with low inbound mobility (e.g. Greece, Italy, India, Spain) have a weaker quality assurance policy framework for international students, as shown in Figure 8. One exception is China, which has a high absolute number of international students (440,000,[15] but has a low inbound mobility ratio (around 0.3).

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

Figure 8: Positive relationship between quality assurance for international students and inbound mobility



Source British Council, UNESCO Institute for Statistics.

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

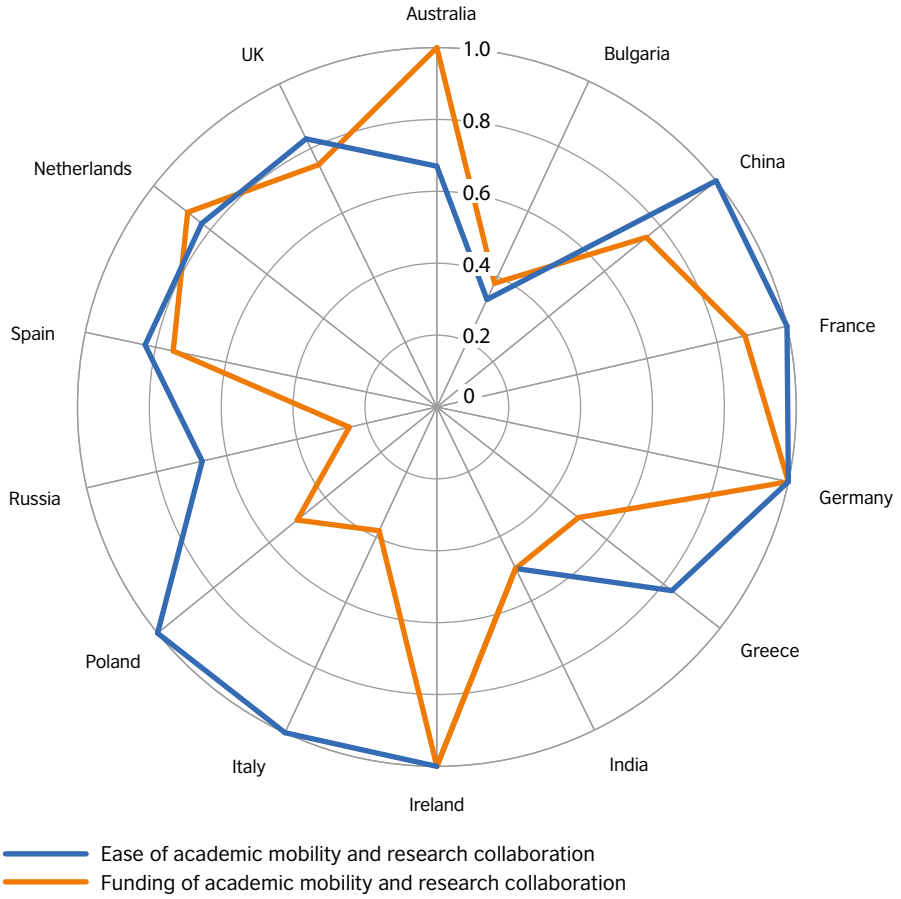
6. Implications for international research collaborations

6.1 Policy support for research mobility and collaborations in selected European countries

International research collaboration is another area which enjoys a high degree of support in national policies (although there are variations between countries). As shown in Figure 9, 'Ease of academic mobility and research collaborations' studies the countries' visa policies for academic mobility and the presence of 'talent initiatives' aimed at attracting researchers. It also considers whether internationally produced research output is used in national research assessments for funding.

The second category, 'Funding of academic mobility and research collaboration', looks at government funding for inbound and outbound academic mobility and funding for international research co-operation. This area is significantly stronger across the 11 European countries than in Australia and India. In addition to research funded by the EU's Horizon programme, all countries except Bulgaria have funds earmarked for international collaborations.

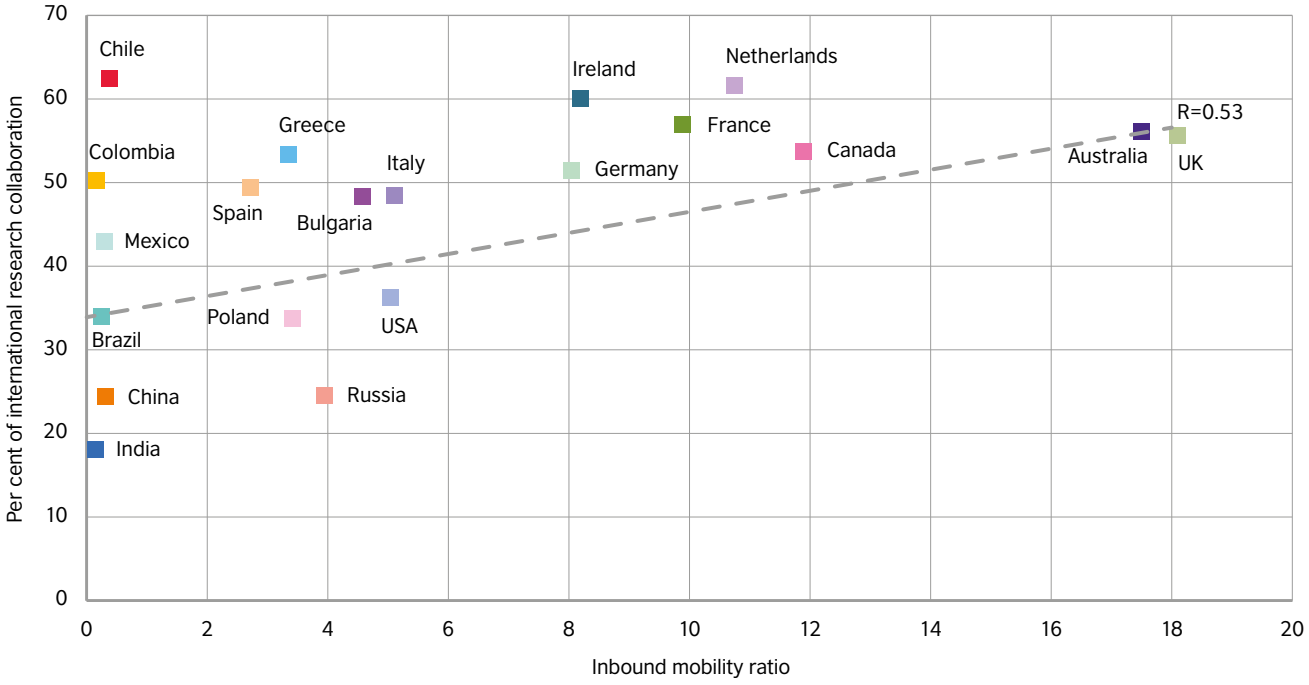
Figure 9: Ease of academic and research mobility and funding for academic and research collaborations – Focus on Europe



This analysis includes additional data on the impact of internationalisation on the quality of research output. There is a strong positive relationship between inbound international student mobility flows and internationally produced research output as a proportion of the total research output from the country.[16] Organisation for Economic Co-operation and Development (OECD) data shows that the proportion of international students across OECD countries is the highest at the PhD level.[17] One explanation for this relationship is the contribution of international PhD students to their host country in terms of research links they bring with them. Also, many of the countries with mature HE systems in this study (e.g. the Netherlands, Germany, France and Ireland) have talent-focused policies which aim to attract global students at the research level. Local and regional funding programmes also support non-mobility-related international research collaboration. This is more visible in the EHEA, with the existence of substantial research funding projects (e.g. Horizon 2020).

As shown in Figure 10, the analysis of Scopus data about the nature of research collaborations and inbound mobility suggests that most countries with substantial international research collaboration (>50 per cent of total research collaboration) have a high inbound mobility ratio (>seven per cent).

Figure 10: International research collaboration as percentage of total research collaboration versus inbound mobility ratio

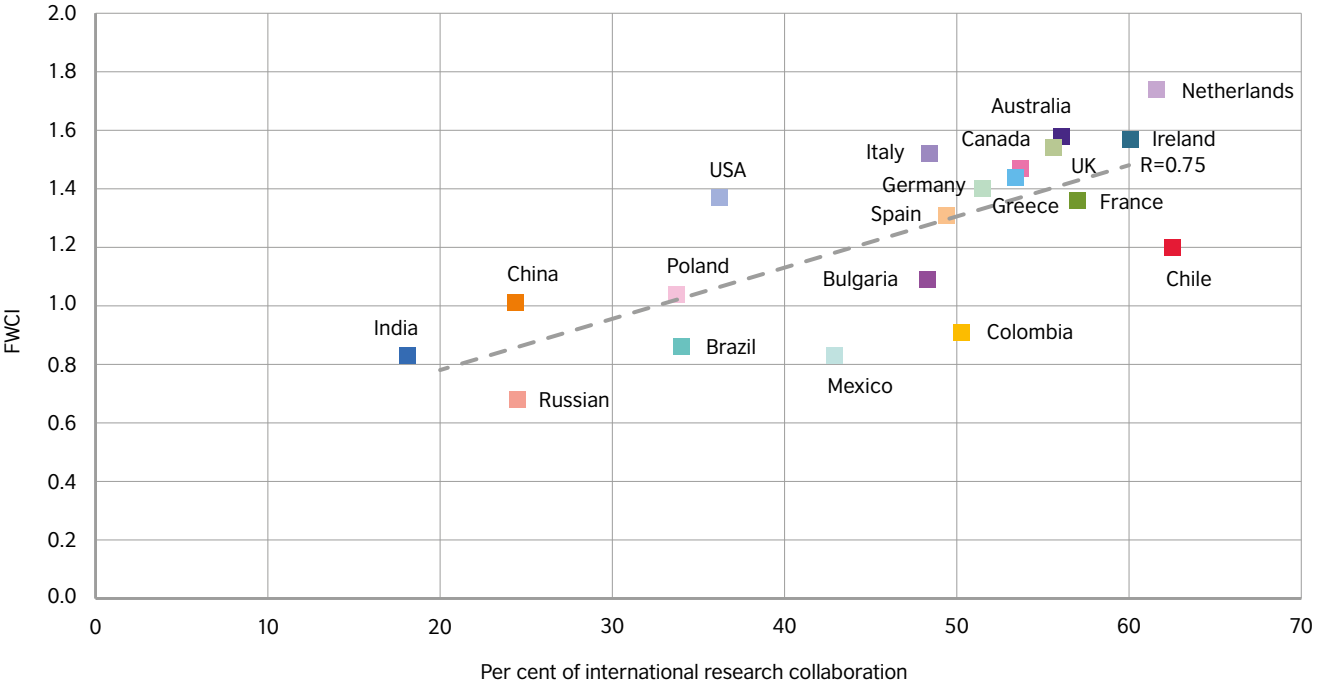


Source: British Council analysis, Scopus/Scival, UNESCO Institute of Statistics

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

Additional analysis of Scopus data shows there is a strong positive relationship between international research collaborations and the quality of the produced research, in terms of field weighted citation impact (FWCI), as demonstrated in Figure 11. The more international the research, the higher its impact citation and, therefore, its quality.[18]

Figure 11: International research collaboration as percentage of total research collaboration versus FWCI



Source: British Council analysis, Scopus/Scival

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

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

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

When it comes to ease of academic mobility and research collaboration, most countries appear to have a strong (>0.50) policy framework to enable or facilitate academic mobility and research collaboration. The lowest scores are in Bulgaria, Colombia and India. See Figure 12 for details.

The analysis of Scopus data shows that research globally is increasingly international. International collaborations have contributed to a significant increase in the impact of collaborative research but, equally, the quality of the overall research output has improved (see Figure 11).

Countries with a positive policy framework (e.g. >0.6 total score in NPF) produce high-impact research, in terms of FWCI, which exceeds the world average (FWCI = 1). More specifically, as shown in Figure 13 (see highlighted area), with the exception of Russia, all countries with a total NPF score of 0.6 or above have an FWCI of more than 1. This means that the research produced in these countries generates citations above the world's average in the particular subject area.

Figure 12: Academic mobility and funding for research collaborations – global comparisons

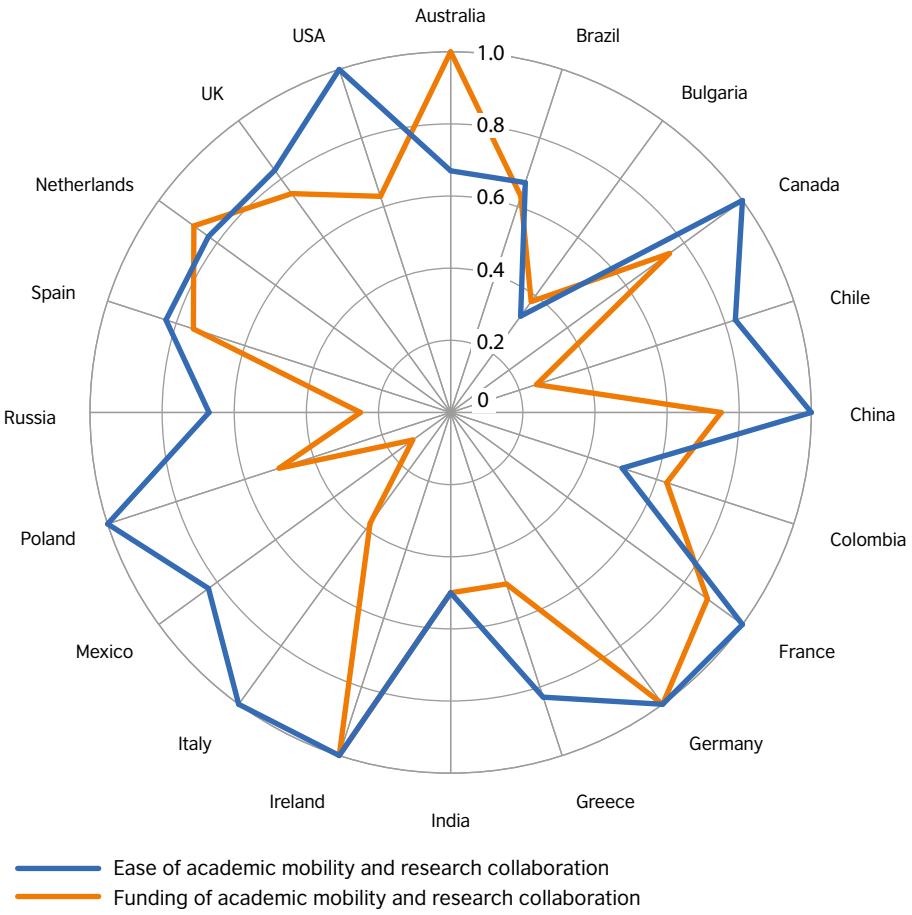
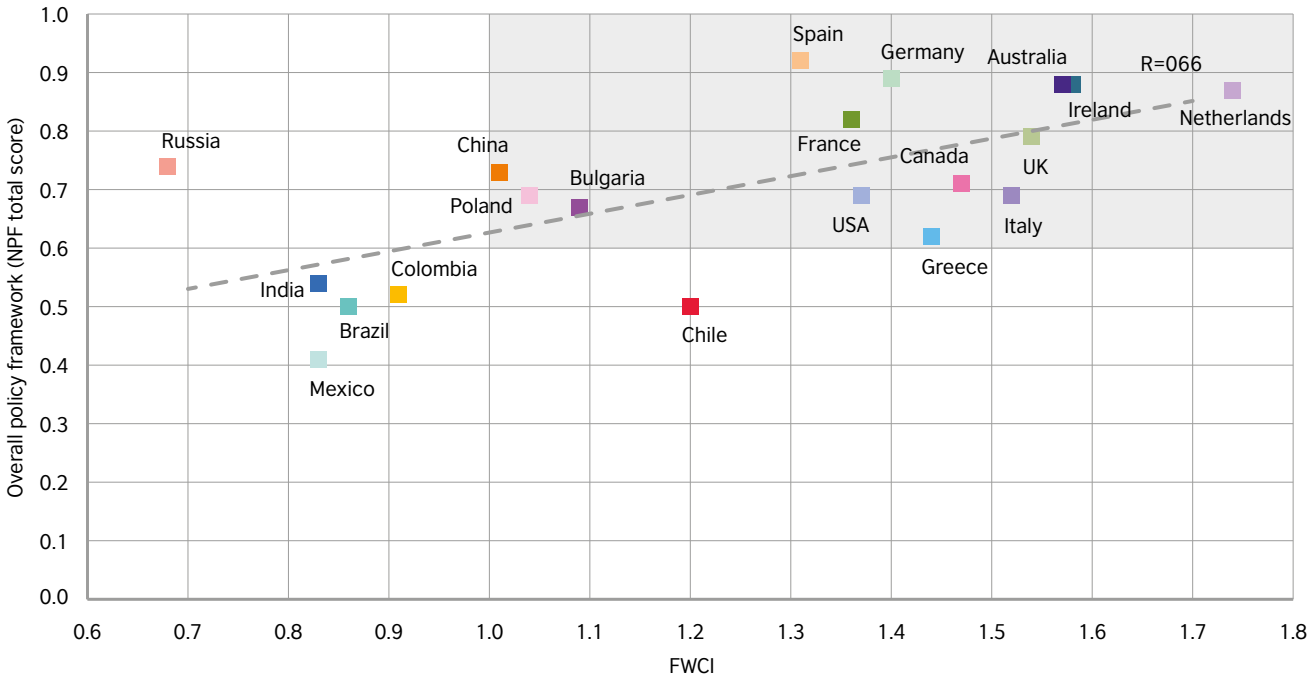


Figure 13: Overall policy framework and FWCI

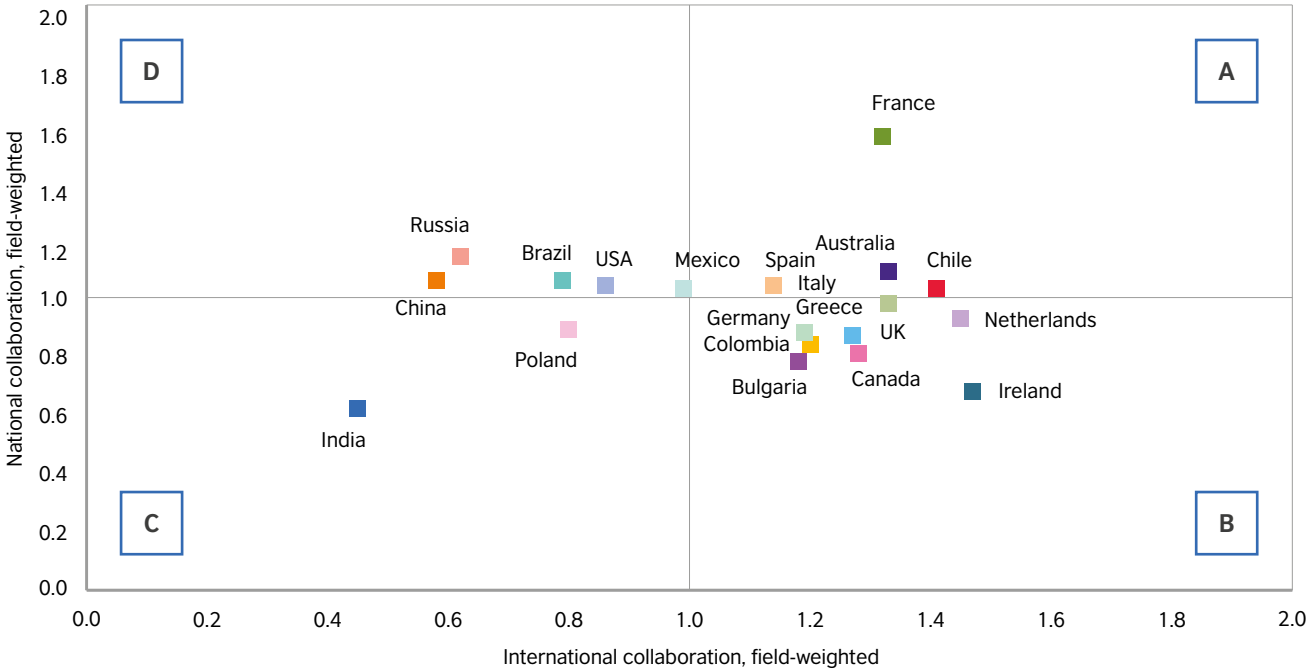


Source: British Council, Scopus/Scival.

Looking at the evolution of national and international collaboration across the countries of this research, the analysis of Scopus data for 22 years shows that seven countries have experienced a concurrent increase in their field-weighted[19] international and national research collaboration activity. This means that these countries have improved the volume of both international and national collaborative research in relation to the average collaboration in each subject or field. In some countries (e.g. the USA, the UK, Italy and France (see Figure 15)) there has been a slight decline in the field-weighted national research collaboration followed by an increase in the international research collaboration. This implies that the research produced in these countries, in comparison with the world average, relies more on international and less on national collaboration. This is primarily because these countries are leaders in international research collaboration activity.

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

Figure 14: National collaboration versus international collaboration (field-weighted collaboration, 2018)



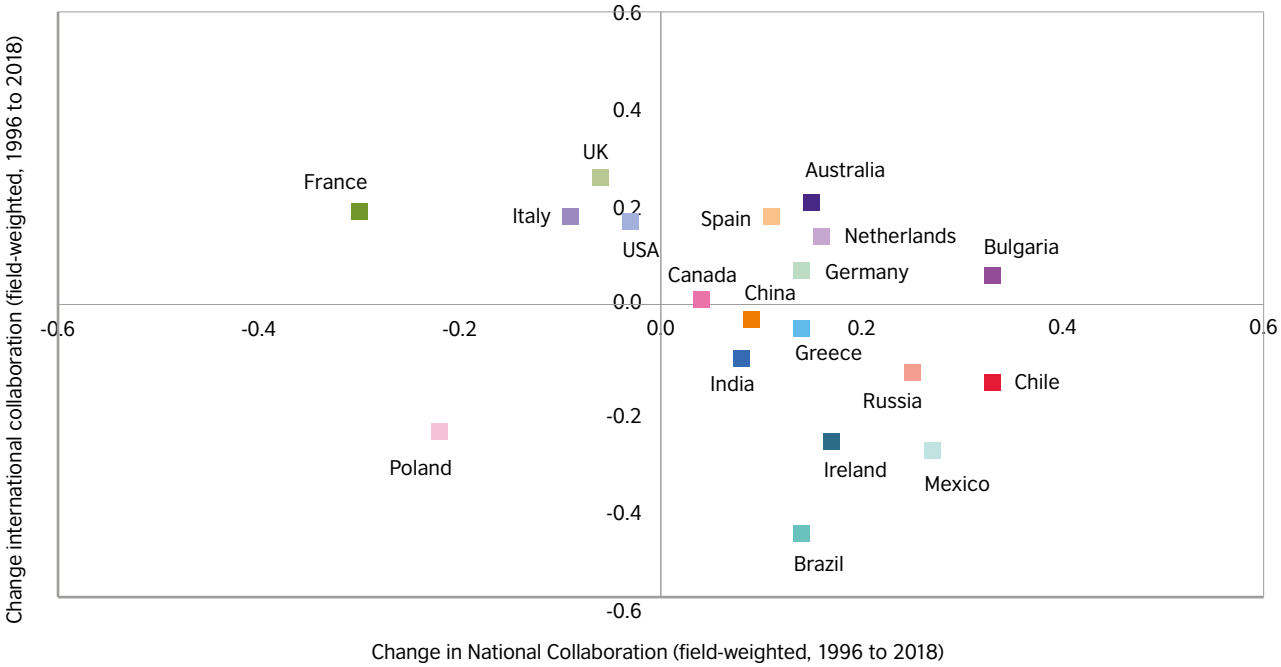
Source: Scopus/Scival.

Figure 14 shows that in 2018, France, Spain, Australia and Chile (see A) produced research-based national and international collaboration that exceeded the world's field-weighted average collaboration activity. Another group of countries (see B), including Germany, the UK, Canada and Bulgaria, produce research which relies more on international collaboration and less on national collaboration when compared with the world's field-weighted average. These countries seem to be less self-sufficient and depend more on international collaboration for their research outputs.

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

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

Figure 15: Change in national and international research collaboration (field-weighted, change 1996 to 2018)



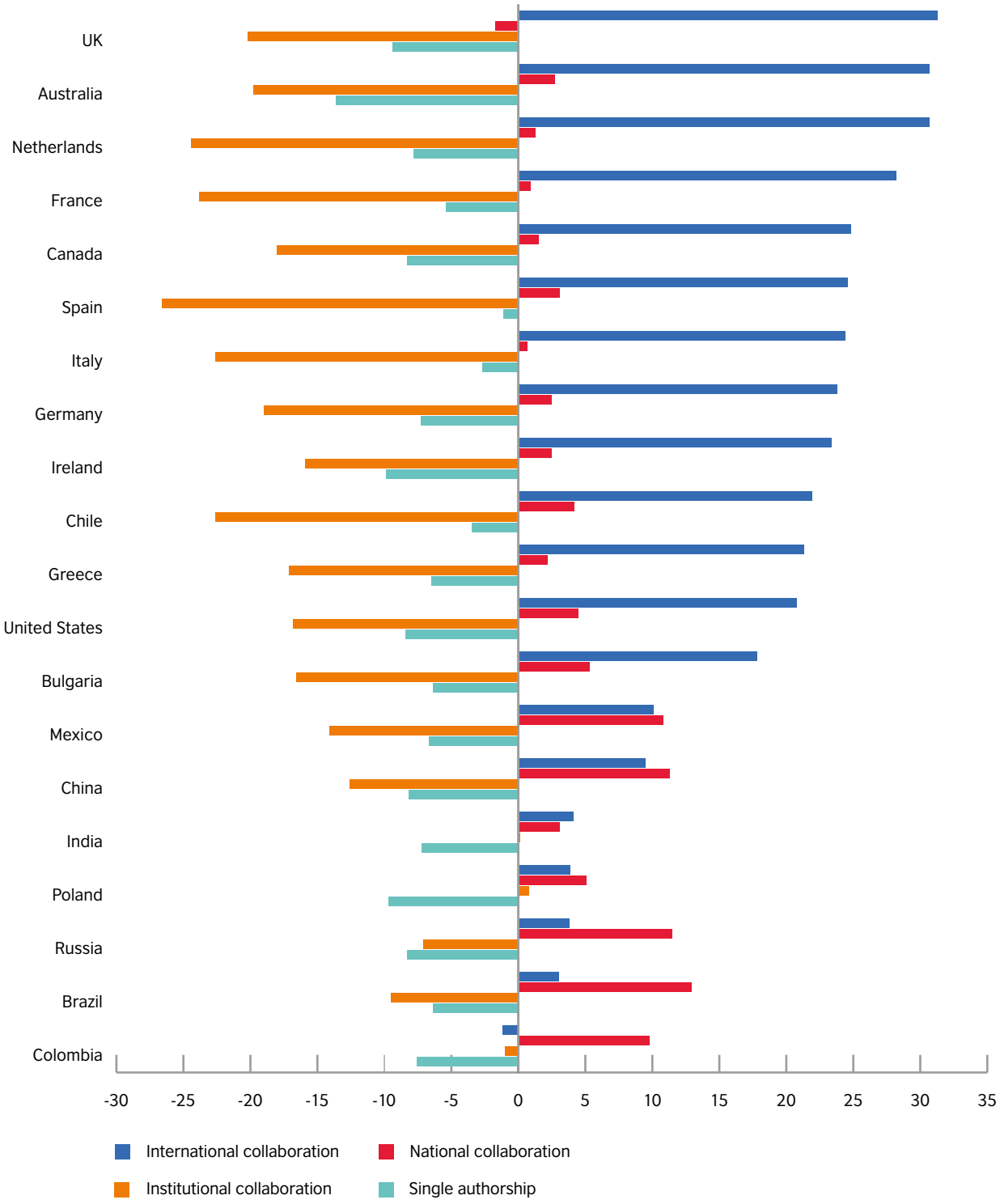
Source: Scopus/Scival.

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

The ten countries in the top half of Figure 15 increased international field-weighted collaboration, and the 14 countries on the right-hand side increased their national field-weighted collaboration.

Figure 16 illustrates that the most significant increases in research output were in the proportion of research produced in international collaboration. In all instances, this was at the expense of institutionally produced research and single authorship. Russia, Mexico, Colombia and China were the countries where most of the increases were in national co-operation.

Figure 16: Evolution of research collaboration by type (percentage change 1996 to 2018)



Source: Scopus/Scival.

7. Implications for transnational education

7.1 Policy support for transnational education in Europe

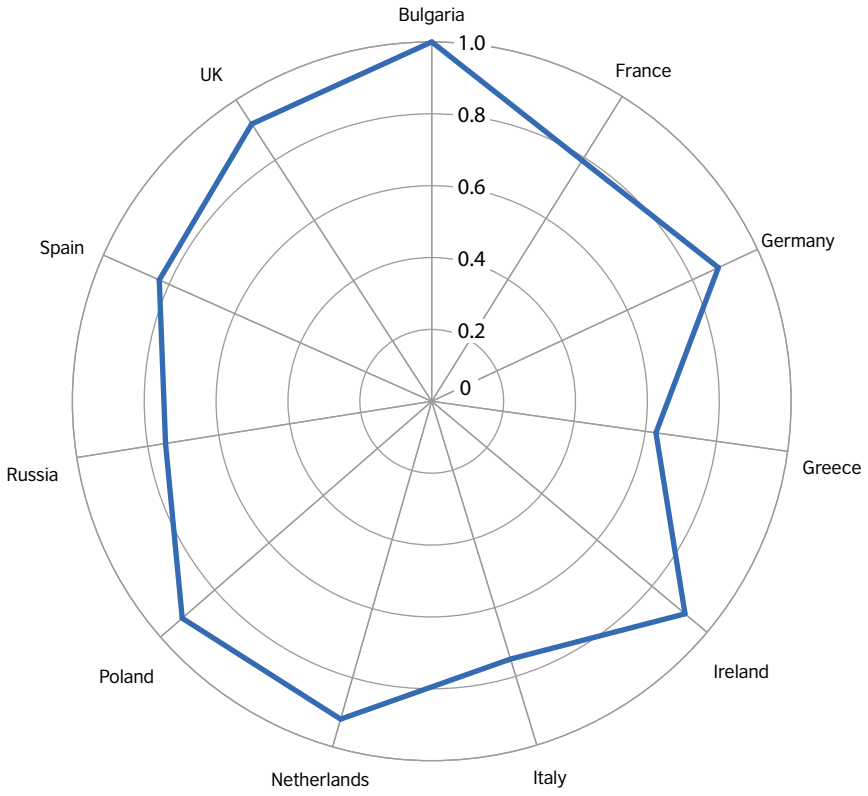
The policy framework in Europe for TNE/IPPM activities remains strong. The majority of the 11 countries in the study score more than 0.75 in the TNE composite index.[20] This is facilitated by EU policies and the EHEA,[21] which allow and promote the mobility of programmes, people and institutions. Specifically, this relates to common frameworks of qualifications, standards and guidelines of quality assurance and the European Credit Transfer and Accumulation System.

As expected, the highest scores are found among major TNE-exporting countries, e.g. the UK, Germany and the Netherlands. At the same time, Bulgaria, Ireland and Poland appear to have developed their TNE/IPPM policy frameworks and are potentially set to emerge as key players in TNE/IPPM within Europe. Whether this happens will be a function of government support and rigour of policy implementation.

In the context of TNE/IPPM, one of the strong areas of the European countries is the existence of programme and provider mobility regulations. Though Italy is an exception, the other ten countries have a clear and consistent regulatory framework for the establishment, accreditation and implementation of cross-border HE programmes by domestic and foreign HEIs.

The lowest score in Europe in the TNE/IPPM composite index is for Greece, Europe's major importing country of TNE/IPPM programmes, with more than 17,000 TNE/IPPM students. As shown in Figure 17, this is primarily due to low scores in the components related to the recognition of TNE/IPPM qualifications and quality assurance. Similar gaps with the recognition of TNE qualifications are observed in France, Poland and Russia.

Figure 17: TNE policy framework composite by European country (total score)



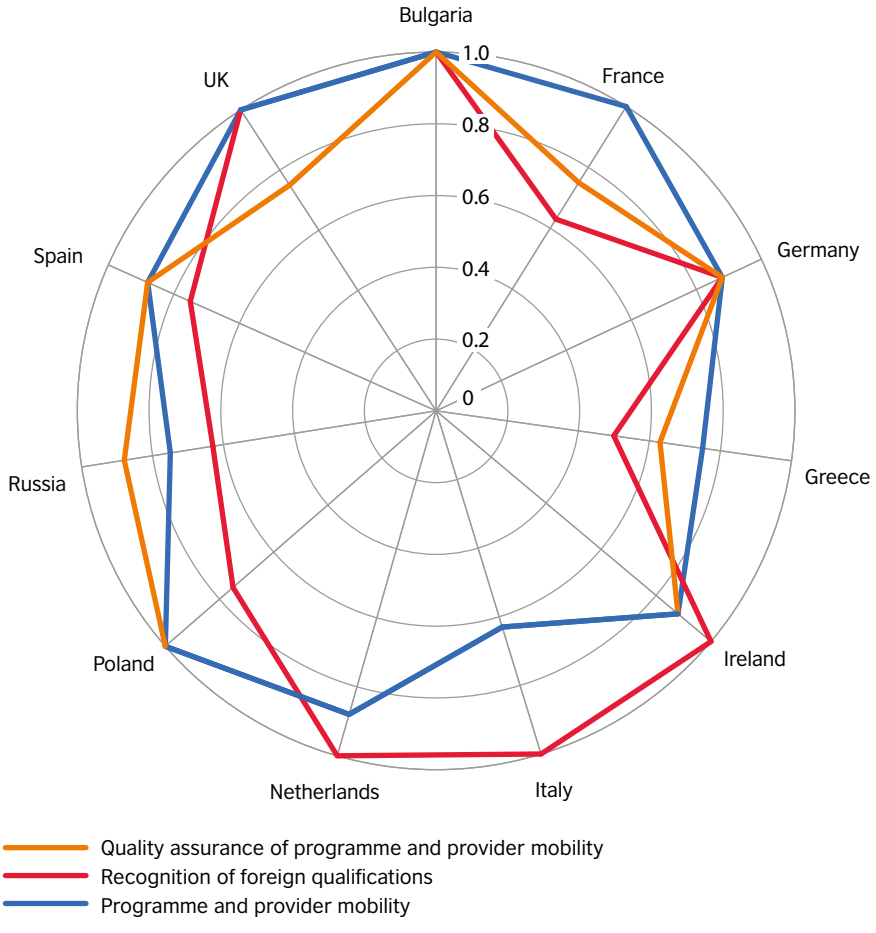
20. This is the average score for the TNE-related policy variables, which are QUAL 2, QUAL 3 and OPEN 4.
21. www.ehea.info

Table 8: TNE policy framework composite score for European countries

	TNE composite*
1. Bulgaria	1.00
2. Ireland	0.92
3. Netherlands	0.92
4. Poland	0.92
5. UK	0.92
6. Germany	0.88
7. Spain	0.83
8. France	0.79
9. Italy	0.75
10. Russia	0.75
11. Greece	0.63

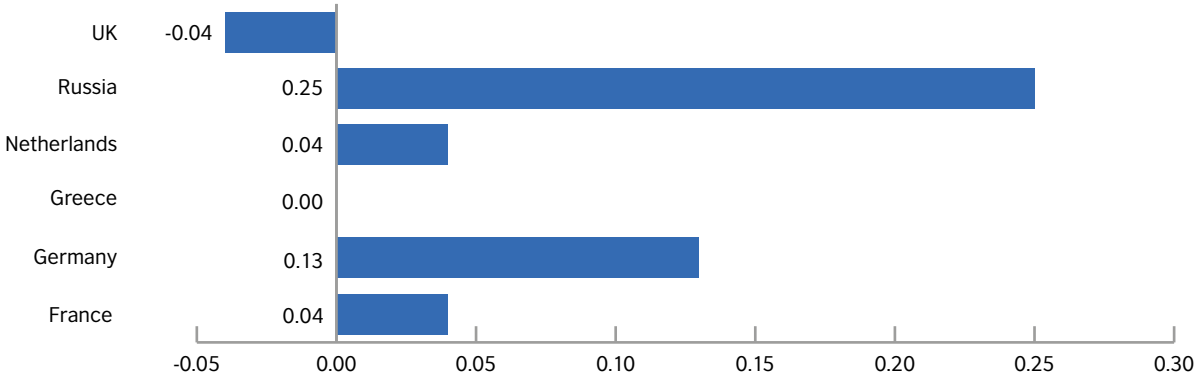
*See 'Transnational education' component of Table 10 (Appendix)

Figure 18: TNE policy framework composite by European country (score by component)



Among countries previously evaluated in the NPF research, Russia and Germany have made notable improvements in their TNE/IPPM policy environment (see Figure 19). Specifically, Russia has improved its TNE composite score from 0.5 in 2016 to 0.75 in 2019. This is the result of improvements across all three components of the TNE composite (quality assurance of programme and provider mobility, recognition of foreign qualifications, and programme and provider mobility). Germany has improved its TNE composite by 0.13, from 0.75 in 2016 to 0.88 in 2019. This is primarily due to improvements in the programme and provider mobility indicator.

Figure 19: Change in TNE policy framework composite (2016 to 2019)

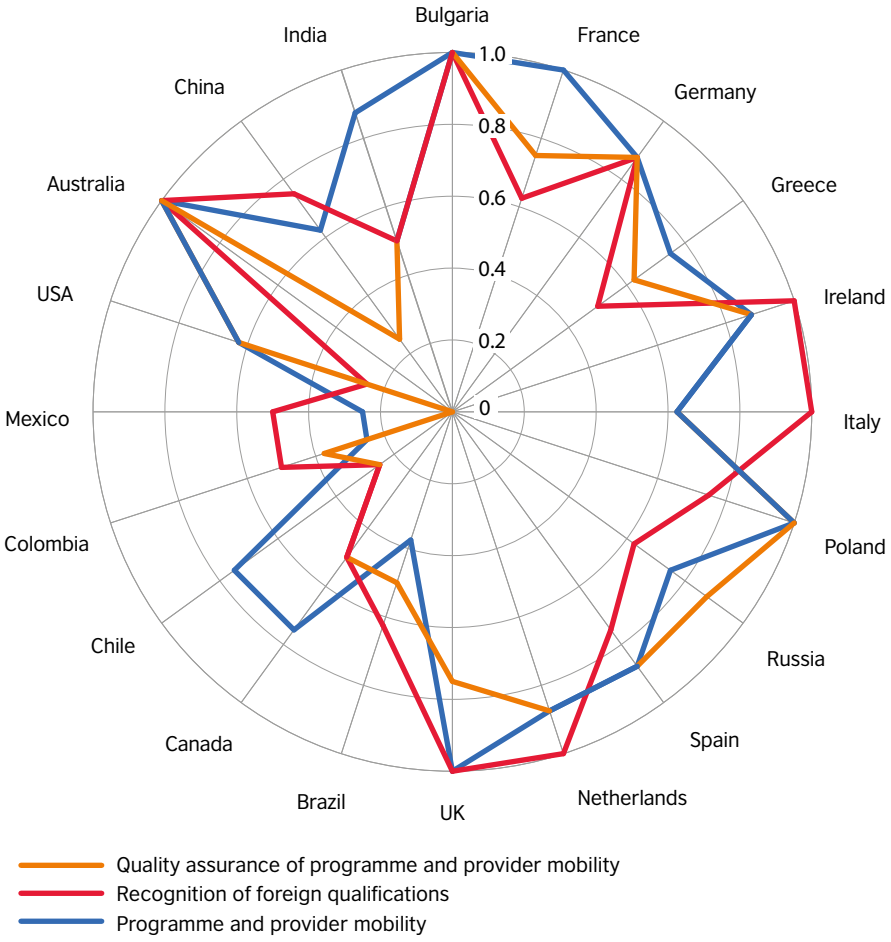


7.2 International comparisons in policy support for TNE/IPPM

Compared to the Americas, the data shows that the 11 European countries have stronger regulatory frameworks for TNE/IPPM (see Figure 20). This can be explained by the harmonised HE policies across the EU and the EHEA.

In contrast, the Latin American countries in this study are mainly focused on outbound student mobility so, while some HEIs engage in TNE/IPPM, there is no formal regulatory framework. As discussed earlier, HE in the USA and Canada is devolved. While there is no federal-level regulatory framework, US and Canadian institutions are active in the provision of TNE/IPPM globally. The USA has the highest number of international branch campuses.[22]

Figure 20: Policy framework for TNE/IPPM



22. http://cbert.org/resources-data/branch-campus/


Widening access to quality HE is a policy preoccupation in many countries with unmet demand for education. TNE/IPPM has the means and technological advances to tackle that issue.

Case study: Opportunities for TNE/IPPM and teaching partnerships with Bulgaria

Quick facts about Bulgaria

Population: 7,153,784 (2016)

Capital: Sofia

Geographical size: 111,002 km^2

Official EU language(s): Bulgarian

EU membership: since 2007

Currency: Bulgarian lev (BGN)

Number of HEIs: 51 public and private universities, specialised institutes, colleges

Number of students in HE: 221,000 (2017–18)

Typical tuition fees: Tuition fees for students from the EU typically range from around BGN320 to BGN1,550 (€160–850) per year. Tuition fees for students from outside the EU typically range from around BGN1,500 to BGN8,000 (€800–€4,000) per year.

Number of international students in higher education: 14,200 (6.4 per cent of total 2017–18). While the number of Bulgarian students dropped by 5.9 per cent compared to the previous year, international students grew by ten per cent year on year, and 32.2 per cent compared to 2013–14. The largest numbers are from Greece (25.8 per cent of total), the UK (14.1 per cent or about 2,000), Turkey (10.5 per cent), Germany (8.6 per cent) and Ukraine (5.4 per cent).

Language of instruction: Most HE programmes in Bulgaria are taught in the Bulgarian language, but many are taught in English, German, French and Russian too.

Surveying Bulgarian policies in TNE will encourage transnational collaborations between Bulgarian HEIs and UK universities. We would like to emphasise that partnering not just in [science, technology, engineering and maths] programmes but also in the social sciences and humanities (e.g. history, political science, journalism) would be rather forward-looking.

Denitza Sacheva, Deputy Minister of Education & Science

Management of HE is shared between centralised state authorities and institutions. The government is responsible for the long-term strategies and policies and creating conditions for academic autonomy, quality assurance in training and scientific research. HEIs are governed according to the delegated authorities of academic autonomy, while the state provides continuous support for the development of modern institutional management by the competitive distribution of resources.

The reform in HE is further encouraged through increased internationalisation at national, institutional, programme and human resources levels.

10 November 1989 – Bulgaria's socialist government resigned.

3 April 1990 – Parliament adopted the new Constitution of the Republic of Bulgaria, which was transformed into the Parliamentary Republic.

Major features of the reform in HE:
1995 – the Higher Education Act was adopted, granting:

- Academic autonomy to HEIs
- Mechanisms for quality assurance
- Equal opportunity for life-long learning and access to HE across social strata
- Effective public funding and resourcing
- Access of stakeholders to the process of policy development and quality assurance implementation
- Partnerships between HEI and business.

19 June 1999 – Bulgaria signed the Bologna Joint Declaration of the European Ministers of Education along with 28 other countries.

Bulgaria's response to the Bologna Declaration was twofold: legislative developments and identification of priority areas in HE, including practical measures to support achieving the priorities.

2000 – a year after the Declaration, a range of legislative initiatives was launched in Bulgaria.

Changes that took place in response to the Bologna Process:

- Introduction of a three-tier system of training for bachelor, master and doctoral degrees.
- Register of HE and professional areas based on international educational standards.
- 1996 – establishment of the National Accreditation and Assessment Agency.
- Access to the mobility of students and academic staff through European programmes.
- 2004 – the introduction of a Credit Transfer System.
- Europass Diploma Supplement.
- National Qualifications Framework.
- 2008 – Professional Qualifications Recognition Act.

Several forms of transnational entities are stipulated by the Higher Education Act – **joint degrees, franchises, and other forms of co-operation, excluding the set-up of a branch (divisions) of a non-EU foreign HEI**. HEIs are granted by law the autonomy to associate with foreign HEIs.

Existing British–Bulgarian TNE/IPPM partnerships:

- Varna University of Management and Cardiff Metropolitan University
- New Bulgarian University and the University of Sheffield International Faculty CITY College.

Recognised HEIs from **EU member states can open branches** on the territory of the country under the conditions and procedures determined in the Higher Education Act (2016). While **third-country HEIs** cannot open their branches on the territory of the Republic of Bulgaria, they can create joint departments with Bulgarian HEIs.

Some of the latest amendments in the Higher Education Act (**2016**) further support and encourage TNE/IPPM opportunities by providing accredited HEIs in Bulgaria with the right to educate undergraduate and postgraduate students through a contract for joint educational activity with foreign HEIs, provided the following requirements are met:

- For EU member states and the European Economic Area – the HEI is accredited by an agency, which is a member of the European Network for Quality Assurance in Higher Education, and entered into the European quality assurance register for higher education.
- For third countries – the HEI is accredited in compliance with the respective national laws.

8. Sustainable development

The National Policies Framework (NPF) looks at the unintended consequences of internationalisation, such as the displacement of vulnerable local students by international students and brain drain from countries.

In terms of anti-displacement policies, the study shows that most of the countries seeking to improve the capacity of their HE systems do not have substantial inbound student mobility and, therefore, do not have specific policies in place. Conversely, mature HE systems do have policies in place to support marginalised students.

Brain drain is mainly relevant to the countries with strong outbound student and academic flows. Most of the European countries do not report it as an issue. Countries aiming to attract talent appear less preoccupied with the brain drain that their student flows may be causing.

The NPF was developed in 2015–16, just before the United Nations' Sustainable Development Goals (SDGs) were published. Given the strong focus on education, thought should be given to including measures of countries' commitment to supporting the SDGs and the development of HE globally in future NPF indicators.

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

Increasingly, national governments worldwide recognise that TNE/IPPM can enhance domestic HE through capacity-building initiatives. For this reason, government-funded TNE/IPPM initiatives are seeing growing popularity in South-East Asia, such as the UK–Thailand Transnational Education Development Project jointly run by the British Council in Thailand in association with the Office of the Higher Education Commission.[23] Another example, of 'supply-side' TNE/IPPM, is the Joint Development of Niche Programmes through the Philippine–UK Linkages programme, run by the British Council and the Philippines Commission on Higher Education.[24] This is the first international programme funded by the Commission on Higher Education (Phillippines), which supports the capacity development of local HEIs in niche subject areas that are of strategic importance for the country's economic development. All programmes mentioned above support collaborative teaching partnerships between local and international HEIs.

Whereas teaching partnerships through TNE/IPPM are gaining popularity with overseas governments that aim to improve domestic HE capacity, TNE/IPPM has received little or no government support or attention in most of the TNE-exporting countries. Germany is an exception, where in addition to student and academic mobility, financial support also forms part of the infrastructure development for branch campuses overseas. Germany's national policy on TNE/IPPM is summarised as:

> *Strengthening the internationalisation of the German HE system through TNE activities of German universities and at the same time employing TNE as an instrument of regional or bilateral co-operation beyond mere HE policy, for science diplomacy, development co-operation …*[25]

Most of the aid donors, such as the UK, have mainly focused on research partnerships aimed at tackling global challenges. Government funding in research partnerships in ODA-eligible countries, through large-scale programmes like the Newton Fund[26] and the Global Challenges Research Fund[27] of UK Research and Innovation, has been very successful in advancing high-impact research.

23. British Council: UK–Thailand Transnational Education Development Project: www.britishcouncil.or.th/en/programmes/education/our-work-support-higher-education-and-research-sector/uk-thailand-transnational-education-development-project
24. British Council: Joint Development of Niche Programmes: www.britishcouncil.ph/tne
25. DAAD (2014, p.8) Transnational education in Germany: DAAD position paper: www.daad.de/medien/der-daad/analysen-studien/tne-position_paper.pdf
26. Newton Fund: www.newtonfund.ac.uk/
27. Global Challenges Research Fund: www.ukri.org/research/global-challenges-research-fund/

A recent analysis of the Web of Science data shows global research is increasingly focused on addressing the United Nations' SDGs.[28] Research co-authored by the European nations dominates the contributions of other nations. The UK was singled out in the research as a key contributor to the research addressing the SDGs.

However, similar levels of investment in TNE/IPPM are yet to be made in order to advance teaching capacity building in the countries that most need it. A better balance in donor countries' aid programmes between capacity building through research and teaching will most likely provide more effective support to the diverse needs of HE systems in ODA countries and their learners. TNE/IPPM provides the means for universities to connect with both partner institutions and students in remote locations globally.

The British Council welcomed the arrival of the recently published International Education Strategy in the UK. However, in response, it observed that:

> *Knowledge diplomacy and soft power are built on trust. That trust is best achieved through recognising the commitment of the UK to solving shared challenges, and in contributing to the growth of higher education in other countries.*
>
> *By contributing to improved HE quality and research strength in other nations we provide a fertile base for ongoing and sustainable collaboration.*[29]

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

28. Nakamura, M, Pendlebury, D, Schnell, J and Szomszor, M (2019) *Navigating the Structure of Research on Sustainable Development Goals.* Institute for Scientific Information. Available online at: https://clarivate.com/wp-content/uploads/dlm_uploads/2019/03/Navigating-the-Structure-of-Research-on-Sustainable-Development-Goals.pdf.
Myklebust, JP (2019) Research is more focused on Sustainable Development Goals. *University World News* 5 April 2019. Available online at: www.universityworldnews.com/post.php?story=20190405090658546
29. British Council (2019) The International Education Strategy, a Polemic for Trade or a Panacea for Collaboration? www.britishcouncil.org/education/ihe/news/international-education-strategy-polemic-trade-panacea-collaboration

9. Summary

The global HE landscape is hugely competitive. Nations' ambitions and competition for talent are signalled in their strategies for international education engagement. Often, a government cross-department strategy demonstrates a united front. Where this results in a co-ordination of international education and immigration policies, this helps to project a message of welcome to potential students and researchers. However, national targets are also more likely to be successful if they articulate a strong benefit for those they seek to attract. This implies that a country's education proposition needs to be backed by monetary commitment. The latter is a reliable indicator of the level of global competition for student talent.

This research found that bilateral and multilateral agreements were a growing element in international education strategies. However, there were also indications that international education was becoming an important consideration in countries' foreign policy. While this is at an early stage in most countries, nevertheless, it has profound implications for the future of international education strategy and its delivery. More research is needed to quantify this development.

This research finds that countries with high levels of national support for their international engagement also have high inbound student mobility. Equally, there is a strong positive relationship between student mobility and quality of research – an established research culture relies on competition for the best students. A supportive policy environment was found to be just as essential for research: countries with favourable policy frameworks tend to produce high-impact research.

This report highlights the considerable untapped potential of TNE/IPPM to support HE development agendas in countries seeking to improve their capacity. Most of the developed countries' aid focuses on research only. Arguably this does little to ameliorate the inequality and lack of access to tertiary education that are real blocks to economic development in many countries. A better balance between capacity building through research and through teaching is likely to provide a much more effective and cost-efficient support to the diverse needs of HE systems, their learners and local communities.

Appendix

Table 9: Detailed structure of the National Policies Framework

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

Table 9: Detailed structure of the National Policies Framework (continued)

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

3. Access and sustainability	
3.1 Student mobility funding	
Outbound scholarships/access to student loans for study abroad	Do scholarship programmes for studying abroad exist, are they well publicised and are they available at all levels of study?
Inbound scholarships/access to student loans for international students	Do scholarship programmes for foreign students exist, are they well publicised and are they available at all levels of study?

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

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

Table 10: Thematic framework for analysis of national policies

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

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

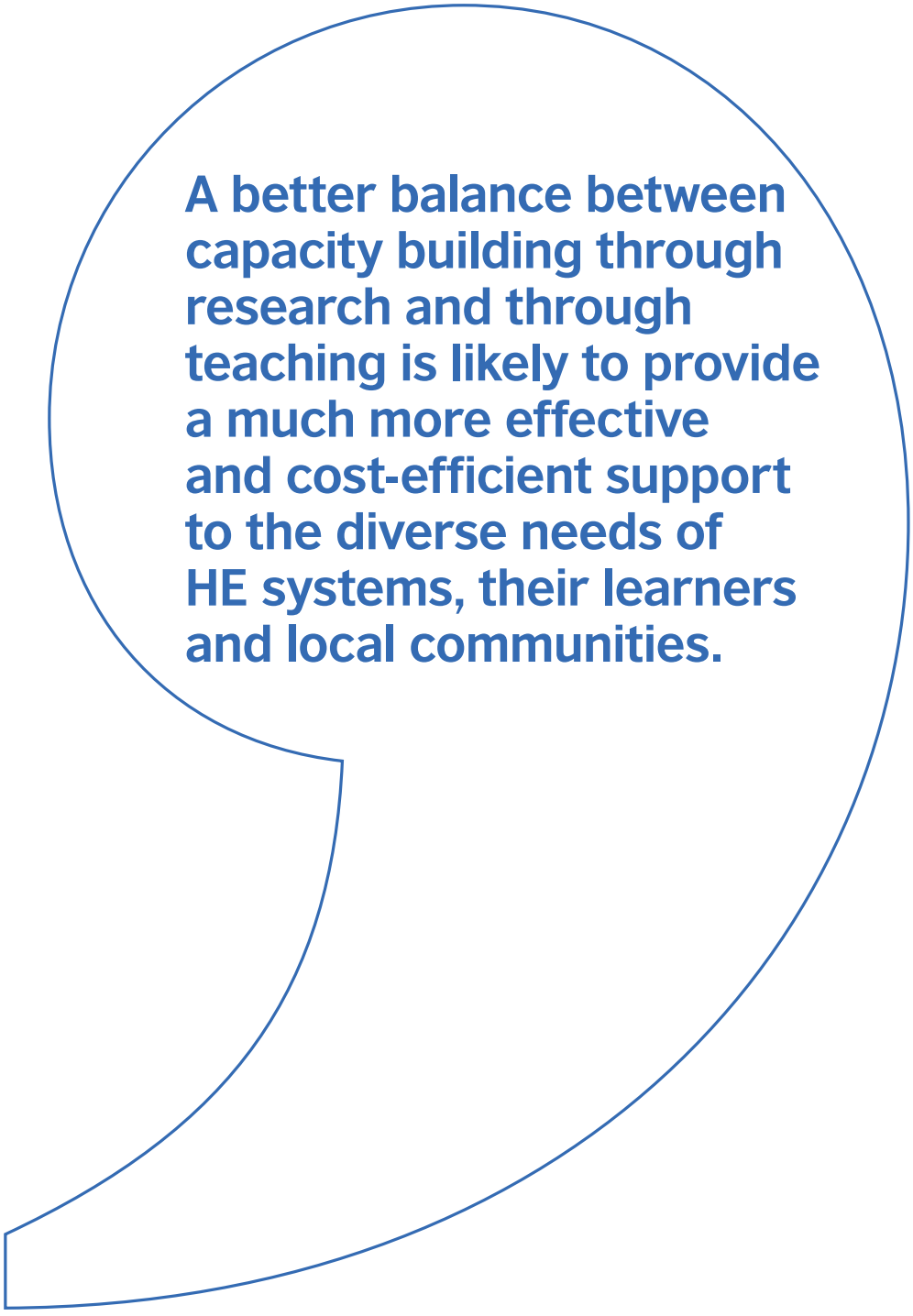
Transnational education	Contribution to overall score
1. International mobility of academic programmes and HEIs	**1/3*(0.33)**
Setting up operations by foreign institutions	
Cross-border programme provision	
Clarity and application of regulations for foreign institutions	
Domestic institutions abroad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

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

Table 11: Government expenditures on education (as percentage of GDP), inbound mobility ratio and international education strategy

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

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


A better balance between capacity building through research and through teaching is likely to provide a much more effective and cost-efficient support to the diverse needs of HE systems, their learners and local communities.