



**Asia-Pacific  
Economic Cooperation**

# **Enhancing cross-border higher education institution mobility in the APEC region**

**APEC Group on Services**  
Research report



May 2015





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Research report

May 2015

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## Abstract

This report presents findings of a study of the policy context around higher education institution (HEI) mobility in eight APEC economies – China, Indonesia, Malaysia, Mexico, Peru, the Philippines, Singapore and Viet Nam. The report provides insights into different policy contexts gathered from desktop research and from interviews with 68 participants. These all had direct involvement in HEI mobility in the eight economies in the study, including through senior positions in ministries of education, in bodies aligned to ministries, in accreditation and quality assurance agencies, and in foreign and local HEIs.

The report identifies regulations, practices, policies, legislative contexts and interpretations, which both facilitate and limit the mobility of HEIs in each economy. It summarises key trends across the eight economies and the major domestic imperatives they respond to, and highlights significant differences in approach among them. The report indicates the impact these policy contexts have on establishing and operating collaborative programmes and the campuses of foreign HEIs. It also presents one or more examples of HEI mobility in each economy.

Leveraging insights gained from the research undertaken for this study, the report concludes by identifying opportunities to enhance collaboration on HEI mobility across APEC economies. While acknowledging the very significant differences between APEC economies and their respective higher education systems, the report identifies ways in which mutual efforts could help reduce barriers to cross-border mobility of HEIs. This includes multilateral cooperation on quality assurance and credit recognition, as well as greater collaboration on online education.



## Foreword

Education is a vital ingredient to economic growth in the Asia-Pacific region.

Cooperation between APEC economies on education can drive productivity growth and help economies climb the value chain as knowledge and skills are transferred across borders. It can reduce the transaction costs for delivering education services and facilitate expanded trade. Cooperation through education also fosters cultural understanding and helps to build people-to-people links of enduring value. With these benefits in mind, in 2012 APEC Leaders issued a statement encouraging further action in APEC to enhance the mobility of students, researchers and education providers in the region.

This report takes forward the 2012 Declaration by addressing issues relating to higher education provider mobility in eight APEC economies.

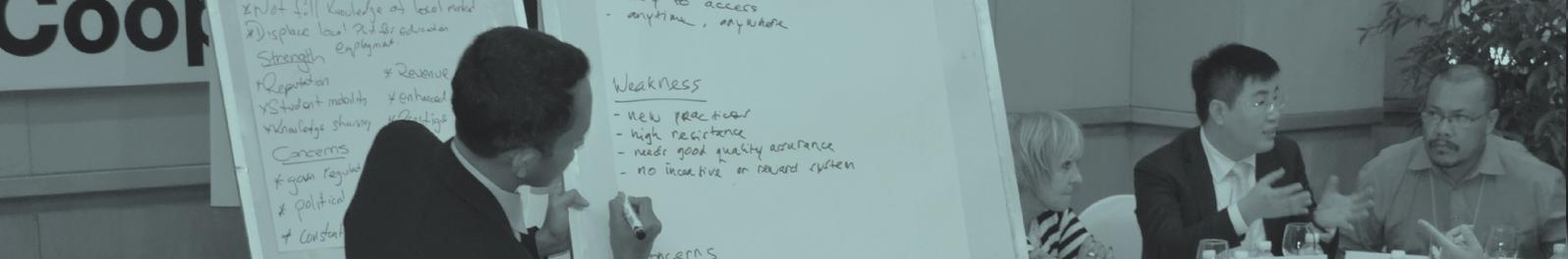
APEC is centrally important to the offshore higher education landscape. More than three-quarters of the 231 international branch campuses globally involve at least one APEC economy (either as host or source economy), while one-fifth of branch campuses are both located in the APEC region and feature another APEC economy as the foreign provider. The education environment is evolving rapidly and new forms of mobility are emerging, including joint partnership programs, twinning arrangements and online study schemes. This is helping improve access to quality higher education, broaden the number of courses, increase opportunities for research collaboration, boost the supply of education services to meet rising domestic demand, and increase exports in education services.

The report highlights a number of proposed actions to overcome policy and regulatory impediments. These include addressing differences in quality assurance and credit recognition arrangements between economies, improving data collection on provider mobility in APEC, and information sharing about new innovative forms of education cooperation, as well as maintaining open and transparent regulatory regimes. The report also points to the need for a better understanding of how the internet is being harnessed to deliver education across borders. As a forum where best practice is shared, APEC has an important role in taking these issues forward.

The development of the report has been led by Australia and is sponsored by APEC's Group on Services. It draws on research undertaken in China, Indonesia, Malaysia, Mexico, Peru, Philippines, Singapore and Viet Nam where key government education agencies, regulators and education providers were interviewed.

I commend this report to colleagues.

The Hon Andrew Robb AO MP  
Minister for Trade and Investment, Australia



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The study on which this report is based was only possible due to the good will and kind cooperation of a large number of people. Profound thanks is due to all participants who agreed to be interviewed for this project, and whose details are listed in Appendix A. All are busy people who found time in their hectic schedules to be interviewed, provide documents and answer a long list of questions. Particular thanks to all of those who supplied food, drinks, transport, directions for taxi drivers and umbrellas. The author also appreciates those who provided feedback on the first draft of this report. Thanks also to members of the APEC Group on Services who provided feedback on a later draft of the report.

All of the research conducted for the study was undertaken during August 2014 during visits to eight APEC economies. Arranging the many interviews that needed to take place in such a short period of time relied on the efforts of Australian representatives in each economy. In particular, the author would like to thank the following education counsellors and managers and their respective teams: Christopher Lawson in Beijing, Kim Cleary in Hanoi, Karen Welsh in Kuala Lumpur, Benjie Garcia in Manila, Astrida Upitis in Jakarta, Edgar Sanchez in Mexico City and Paola Vicente in Lima.

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Finally, thanks to Leslie Williams and Simon Dawkins from the Department of Foreign Affairs and Trade in Australia who entrusted the author of this report with the study and who have provided endless support and advice throughout its evolution.

### **Sarah Richardson**

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## Executive summary

Higher education institution (HEI) mobility among APEC economies is important to achieve social and economic goals in this global era, as reflected by the 2012 APEC Economic Leaders in the Vladivostok Declaration. Optimising the potential of HEI mobility requires policy contexts which facilitate mobility in all APEC economies.

### Approach

- > This report summarises insights into the policy context around HEI mobility gained from **policy analysis and interviews** with 68 key stakeholders.
- > Interviews were conducted with higher education stakeholders in **eight APEC economies** – China, Indonesia, Malaysia, Mexico, the Philippines, Peru, Singapore and Viet Nam.
- > All interviews were undertaken in **August 2014**.
- > For each economy the report provides an overview of the policy context. It also presents at least one **case study** for each economy studied to illustrate different forms of HEI mobility.

### Policy differences and similarities

- > The policy around HEI mobility in the eight economies **varies considerably**, from extremely rigorous and well-developed approaches, to much more laissez faire contexts.
- > Much HEI mobility grows out of **relationships between faculties** at two or more HEIs in different economies, with policy tending to follow these informal types of internationalisation.
- > A common objective is to **enhance human capital** and to ensure that graduates are prepared for a global environment. This requires students to gain appropriate communication skills and an exposure to international contexts.
- > Another imperative is to ensure that higher education systems have the **capacity to meet demand** among potential students. Participants viewed HEI mobility as one way to achieve this.
- > Participants also appreciated the value of HEI mobility in stimulating the **diffusion of research and teaching expertise across borders**, enhancing the overall quality of higher education provision.

- > Balancing these benefits with a need to **assure the quality of higher education** provided to students in their economies lies at the heart of policy considerations.
- > Participants expressed little interest in allowing foreign HEIs to operate unless relevant authorities could be **assured of their good standing**.
- > As such, participants emphasised the need to have policies and processes in place to **assess the offerings of foreign HEIs** and to enable ongoing oversight of their activities.
- > Matching demand and supply and engaging in international linkages were explicitly mentioned, with an emphasis on **two-way exchange and reciprocal relationships**.
- > A challenge to this policy approach is that **many flows tend to be uni-directional**. This is partly for prestige and language reasons – foreign HEIs from English-language economies are particularly sought after.
- > **Widely differing cost structures** can also restrict HEI mobility.

### Forms of HEI mobility

- > While campuses of foreign HEIs are present in some of the eight economies included in this study, **the most prevalent form of HEI mobility is collaborative programmes** (encompassing dual and joint degrees and other forms of programme collaboration).
- > Participants made clear that in many cases **collaborative programmes are the preferred form of HEI mobility**.
- > Collaborative programmes are regarded by many of the participants in this study as having **excellent potential for knowledge transfer, student access and research collaboration**.
- > Collaborative programmes engage both local and foreign HEIs to work together to **enhance teaching and learning**, and frequently lead to research partnerships.
- > While **campuses of foreign HEIs** were also regarded favourably, participants expressed less certainty about their widespread benefits beyond those students with the means to attend them. They tended to be regarded as having a particularly **valuable role to play in educating future leaders**.
- > But there was less certainty among participants about the engagement of the campuses of foreign HEIs with the local higher education sector as a whole, and many felt that this **limited knowledge transfer**.
- > Despite these reservations the majority of participants in this study regard HEI mobility in very favourable terms and many **predict a growth in the number of campuses of foreign HEIs** in coming years.
- > Among the eight economies which were included, HEI mobility which uses **online modalities** to deliver higher education across borders, remains **largely under-developed**.



## Policy dynamics

- > On the whole, **foreign HEIs are encouraged to form partnerships with local providers** in each of the eight economies.
- > However it is important to note that **policy contexts and policy implementation are not necessarily equivalent**.
- > A number of participants commented that while policies may appear welcoming to HEI mobility they are not always applied in this way, and can sometimes become **onerous and bureaucratic**.
- > In almost all cases encountered during this study, HEI mobility is premised on a **relationship between a foreign HEI and a local equivalent**.
- > In some cases the division of tasks between the partner HEIs is quite explicit. For example the foreign HEI may **take care of all academic aspects** while the local partner focuses on the provision of facilities and administration.
- > Economies included in this study generally only allow foreign HEIs to be active that **are recognised, quality assured and accredited in their home economy**.
- > Participants suggested that well known and transparent quality assurance systems such as those in the **UK, Australia and Malaysia** are highly trusted, meaning that HEIs from these economies tend to be welcomed by the economies included in the study.

- > Participants stated that foreign HEIs from economies with **less well-developed quality assurance systems** are regarded with greater hesitancy.
- > Some of the economies in the study limit which of their own HEIs can engage with foreign partners to ensure high quality collaborations.
- > The participants in this study emphasised that in all cases HEI mobility arises out of **long-term engagement** in an economy.
- > This typically starts with the development of one-to-one relationships between students who undertake post-graduate research together, indicating the importance of **mobility during research programmes**.
- > Interestingly, a large proportion of **participants in this study** had themselves undertaken postgraduate degrees in foreign economies.
- > Once relationships are developed, faculties then tend to start **collaborating around student exchange**. Once these are well established the next step is for a faculty to move on to collaborative programmes. If foreign campuses are developed, they tend to come at the final stage in this progression.
- > The step-by-step approach reported by participants ensures that **trust and good working relationships evolve over time**.
- > Its implication for foreign HEIs is that they need to think about mobility as a **long-term, sustained engagement**. Indeed all of the institutional participants in this study reported that this was of utmost importance.
- > For policy makers the pathway taken by participants in this study towards HEI mobility indicates a need to consider **policy around all steps in the process** to promote provider mobility in the longer term.

### Overcoming barriers to HEI mobility

- > Based on interviews with a broad range of stakeholders in the eight economies included in this study, the report contains a number of **policy recommendations** that could contribute to a suitable environment for HEI mobility.
- > The barriers to HEI mobility that are in place in a number of the economies included in this study derive from an interest in **controlling the quality** of the higher education sector. Some barriers could potentially be mitigated through multilateral approaches.
- > One key priority for some APEC economies is to develop a **regional system, which enables economies to recognise the quality assurance system** in place in other APEC economies.
- > Given that many such systems are already in place around the world, this may indicate the need for a framework which **leverages existing processes**.

- > Such a move would also require **capacity building** among APEC economies where quality assurance systems currently lack rigour.
- > A second key priority for some APEC economies is to develop an **umbrella agreement around credit recognition**. Once again, this requires capacity building to ensure that all APEC economies have qualifications frameworks that can be easily compared.
- > And once again this points to an **opportunity to leverage the regional frameworks** already in place to enable broader coverage and recognition.
- > These two approaches would contribute to giving governments a **greater deal of reassurance** in their ability to control the quality of foreign HEIs and may lead to a relaxing of barriers to HEI mobility.
- > A third key priority for APEC economies is to **enhance information sharing** about different higher education systems, processes and contexts.
- > Potentially mobile HEIs would like to learn about **opportunities for mobility** and economies would like to understand which HEIs are interested in being mobile, and in which disciplines.
- > Participants in this study felt that APEC has an important role to play in advocating HEI mobility through **international forums** and information sharing.
- > A fourth priority is to **enhance data collection about HEI mobility**. For example there is currently no shared data source on collaborative programmes either between or within economies.
- > This means that much HEI mobility is unknown, which impedes opportunities to **learn from good practice** and to develop relevant policy to facilitate it. Overcoming this requires a coherent and mutually beneficial strategy.
- > Finally, it is important that APEC economies collaborate to **broaden the benefits of HEI mobility**. Online mobility remains extremely underdeveloped and yet provides significant opportunities to ensure that all students can gain some form of international education, regardless of their financial means.
- > This is essential if APEC economies are to **reach their social and economic potential** in coming years.



## Introduction

Many of the top ranked higher education institutions (HEIs) in the world are found in the Asia–Pacific region. In fact two-thirds of the top 100 universities are located in APEC economies.<sup>1</sup> While rankings are an imperfect indicator of the quality of higher education provision, these figures suggest that some of the best practice in higher education can be found among APEC economies.

Equally, some of the greatest current and future unmet demand for higher education is found among APEC economies. These have a combined population of 2.8 billion, 34.2 per cent of which is aged less than 25 years, but a gross tertiary enrolment rate of just 42.3 per cent. These figures indicate a significant unmet demand for higher education, which has the potential to limit future economic growth if it is not addressed.

The confluence of these two factors highlights an opportunity for significant expansion in high quality higher education provision among APEC economies. Drawing on the strengths of world class HEIs, APEC economies will be better able to meet the demands for advanced skills and knowledge of a large population of young people. If this can be achieved, APEC economies will have greater ability to meet the needs of the 21<sup>st</sup> century, fuelling economic growth through the expansion of a pool of talented human resources.

This is an important element in APEC's goal of supporting sustainable economic growth and prosperity in the Asia–Pacific. As APEC economic leaders stated in Annex D of the 2012 Vladivostok Declaration:

*All APEC economies stand to gain from enhancing collaboration on cross-border education ... Access to a wide range of quality higher education services is critical for sustainable growth ... High quality cross-border education equips students with the 21st century competencies they need for their full participation in a globalized and knowledge based society.<sup>2</sup>*

Optimising the potential benefits that greater HEI mobility has to offer will only be achieved if the APEC community has policies in place which facilitate the spread of excellence in higher education across national borders. Cross-border HEI mobility must be made possible through supportive regulatory frameworks that balance the need to protect the quality of higher education offered in an APEC economy with an environment in which HEI mobility is possible.

The current situation is one in which policies and regulations are not always conducive to HEI mobility. Indeed, many HEIs are discouraged from engaging in activities in other economies due to the complex regulations they face and the transaction costs these entail. As a consequence the cross-border activities of HEIs among APEC economies remain sub-optimal.

Establishing why this is the case requires identifying factors which both facilitate and impede the mobility of HEIs. It also means highlighting possibilities for overcoming the barriers that are in place. To contribute to this task, this study was informed by three key objectives:

1. To improve understanding of the policy contexts in a number of APEC economies around the cross-border mobility of HEIs.
2. To identify any policy or regulatory contexts in those economies which limit the cross-border mobility of HEIs.
3. To identify opportunities for APEC economies to collaborate and provide mutual support to reduce barriers to the cross-border mobility of HEIs.

This report presents findings from interviews undertaken in eight APEC economies as well as an analysis of policy documents. It outlines common themes and highlights the elements which differ between the economies included in the study. It then goes on to identify areas in which the study indicates collaboration would facilitate greater cross-border mobility of HEIs among APEC economies.



## Background

The cross-border mobility of HEIs is already a significant phenomenon among APEC economies but its prevalence is not uniform. This study set out to identify the key policy contexts in APEC economies that both facilitate and impede the mobility of HEIs.

In determining the scope of this study a number of key design factors were considered which met objectives while fitting budget and time parameters. It was not possible to visit all 21 of the member economies and so the first consideration was which economies should be included. The second consideration was whether to focus on tertiary education as a whole (including technical and vocational education and training (VET)) or higher education in particular. The third key consideration was which key participants should be included.

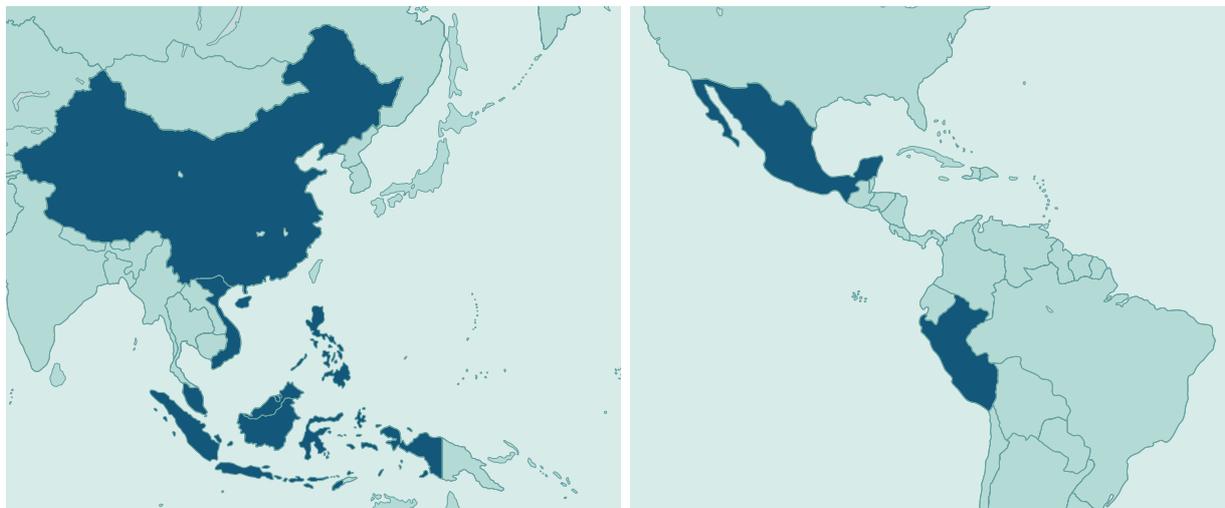
The selection of economies for inclusion was made by analysing relevant contextual factors. The first key characteristic considered was current and future demand for higher education and the current capacity of the higher education sector in each economy.

Factors such as population size, the proportion of the population aged under 25 and the gross tertiary enrolment ratio (GER)<sup>3</sup> were considered. Other factors included the GDP per capita, the economic growth rate and whether economies were signatories to the General Agreement on Trades in Services in the World Trade Organization.

Analysis also took into account the number of foreign HEIs with branch campuses in each economy. This is not a comprehensive indicator of the existence of HEI mobility but is sufficient in the absence of international data sets on other forms of HEI mobility. Table 1 provides an overview of all these factors for all 21 APEC economies.

Eight APEC economies were selected for inclusion in this project: China, Indonesia, Malaysia, Mexico, Peru, the Philippines, Singapore and Viet Nam.

**Figure 1: APEC economies visited during study**



The tertiary education sector is very large and diverse, incorporating both HEIs, including universities, and VET institutions. Both the higher education and VET sectors are highly internationalised.<sup>12</sup>

There are clearly commonalities between the two sectors but they tend to be organised very differently, with VET often falling outside the ministries of education. The VET sector also encompasses study at a range of levels. An attempt to include both the higher education and VET sectors in this project would likely have resulted in a study that was very broad but limited in depth.

The higher education sector alone was chosen for inclusion in this study, with the recommendation for a subsequent study on the VET sector.

In each economy it is important to gain a comprehensive overview of the policy and regulatory context around cross-border HEI mobility. This requires undertaking interviews with a selection of key participants who are able to provide a range of perspectives on the context

Key participants selected for inclusion were policy makers responsible for the activities of local and foreign HEIs, agencies responsible for quality assurance and accreditation and representatives of foreign HEIs active in APEC economies.

Table 1: Overview of APEC economies

APEC economy	Population (million) <sup>4</sup>	Gross tertiary enrolment ratio (2012) <sup>5</sup>	Population aged under 25 (%) <sup>6</sup>	GDP per capita (US\$'000) <sup>7</sup>	2013 GDP real growth rate (%) <sup>8</sup>	Campuses of foreign institutions <sup>9</sup>	GATS higher education commitment <sup>10</sup>
Australia	23	86.33	31.3	43	2.5	3	Y
Canada	35	58.88 (2000)	28.2	43.1	1.6	3	N
Brunei Darussalam	0.4	24.34	41.5	54.8	1.4	0	N
Chile	18	74.39	37.0	19.1	4.4	0	N
China	1,350	26.70	31.8	9.8	7.7	29	Y
Hong Kong, China	7	59.67	23.6	52.7	2.9	3	N
Indonesia	247	31.51	43.3	5.2	5.3	1	N
Japan	128	61.46	22.9	37.1	2.0	3	Y
Malaysia	29	35.97	45.7	17.5	4.7	6	N
Mexico	121	28.99	46.0	15.6	1.2	2	Y
New Zealand	4	79.78	33.9	30.4	2.5	1	Y
Papua New Guinea	7	1.89 (1999)	54.1	2.9	5.4	0	N
Peru	30	42.64	46.5	11.1	5.1	0	N
Philippines	97	28.20 (2009)	52.7	4.7	6.8	0	N
Republic of Korea	50	98.38	27.6	33.2	2.8	3	N
Russian Federation	144	76.14	27.1	18.1	1.3	0	Y
Singapore	5	-	31.2	62.4	4.1	14	N
Chinese Taipei <sup>11</sup>	23	-	27.4	39.6	2.2	1	Y
Thailand	67	51.40	32.6	9.9	2.9	3	Y
United States	314	94.28	33.1	52.8	1.6	3	N
Viet Nam	89	24.60	41.2	4.0	5.3	2	Y



## Research methodology

The research methodology was to conduct constructed interviews with key participants in each selected APEC economy. Key participants were identified with the assistance of Australian Government representatives in each APEC economy and through the use of existing contacts. As many interviews as possible were scheduled in each economy. In some cases key participants were located at a distance from each other, which required internal as well as international travel.

Interview questions were designed to ensure that the data collected responded to the requirements of the study, enabled an evaluation of similarities and differences between APEC economies and informed future work to overcome impediments to HEI mobility.

Two sets of interview questions were designed, the first aimed at those with oversight for the higher education sector (such as education ministries), the second for foreign HEIs based in the economies studied. The wide variety of participants and their roles and responsibilities meant that each interview was tailored to participants. Questions are shown in appendices B and C.

Hand written notes were taken during all interviews. No audio recordings were made. Participants were assured that they would not be personally identified in the report other than being included in the list of participants in appendix A.

All participants were informed of the purpose of the study and its scope. A plain language statement can be found in appendix D. Participants were not provided with any reward for their involvement in the study, although all were sent a thank you note, some reading material, and some were given a USB.

In total, 41 interviews were conducted with 68 key participants. Table 2 provides a breakdown of the interviews in each economy.

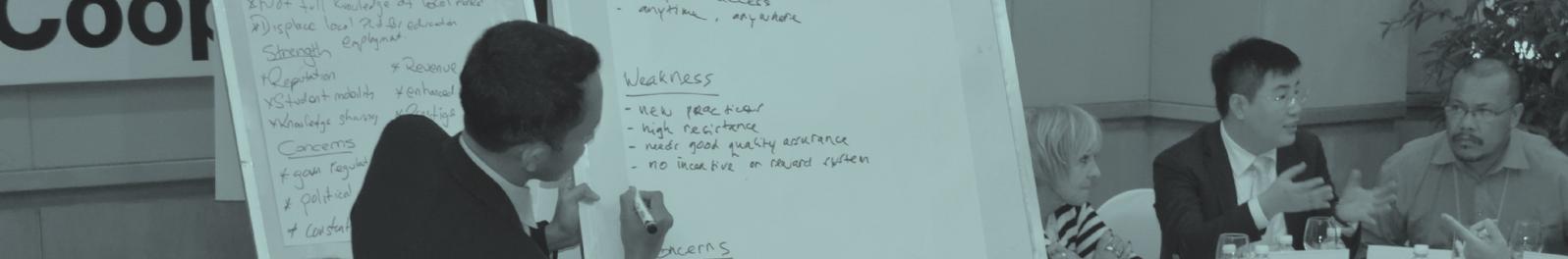
**Table 2: Interviews conducted**

Date (August 2014)	APEC economy	Interviews	Participants
4–8	China	8	14
11–12	Viet Nam	6	14
14–15	The Philippines	5	7
18–19	Malaysia	5	7
20–21	Indonesia	4	5
22	Singapore	3	4
25–27	Mexico	6	10
28–29	Peru	4	7
Total		41	68

It is important to note that the research covered a number of different forms of cross-border HEI mobility, namely campuses of foreign HEIs, collaborative programmes and online delivery. There are variations in how some of these forms of mobility are defined between and within APEC economies. For clarity, this report uses the following definitions:

**Campuses of foreign HEIs** – an entity that is owned, at least in part, by a foreign education institution, operated in the name of the foreign education institution, engages in at least some face-to-face teaching, and provides access to an entire academic program that leads to a credential awarded by the foreign education institution.<sup>13</sup>

**Collaborative programmes** – a collaborative-degree program is offered by two or more institutions in different economies and features a jointly developed and integrated curriculum, as well as a clear agreement on credit recognition. In **joint-degree programs**, students receive a degree certificate issued jointly by the host institutions; in **double-degree programs**, students are given degree certificates issued separately by each of the institutions involved in the program.<sup>14</sup>



## Limitations of this report

It is important that this report be read with due regard to its limitations. These were imposed by the context in which the study was undertaken, by budget and time restrictions, and the intent of the research. The three most important limitations are as follows:

### Generalisability

At no point did this study attempt to review policies and practices around higher education mobility in all APEC economies. As such, the findings contained in this report cannot be generalised to APEC economies not included in this study. Indeed, the sheer size and diversity of APEC economies and their respective higher education systems—including significant variations even *within* economies—means that a host of detailed reports would need to be written to achieve a complete picture.

Nevertheless, it is hoped that the recommendations at the end of the report represent a useful starting point for initiatives which could help to overcome some of the current barriers to the mobility of HEIs among APEC economies.

### Representation of policy contexts

The report is not, and does not set out to be, a comprehensive guide to higher education mobility policies in APEC economies. It cannot even be said to perform this function for the eight APEC economies included. The approach taken was to interview a breadth of stakeholders in the time allowed to gain an insight into the general policy context around HEI mobility in each economy. It was not possible to interview a representative sample of policy makers and so the insights may not fully represent the nuances of the context in each case. This is particularly true given the contradictory statements made by participants within the same economy, suggesting that interpretations of policy varied considerably.

Despite this, the report aims to give readers an impression of the policy context in each of the eight economies and highlight not only the very great variations between them, but also their clear commonalities.

## Permanence

The policy context around higher education institution mobility is highly fluid. There were policy changes either underway or pending in many of the economies included in the study. As such, this report cannot hope to be more than a snapshot in time of a very dynamic context. Similarly the number of foreign HEIs active in each economy was relatively fluid, with new developments ongoing and pending in many contexts.

With this understanding in place, the report presents a picture of the policy contexts around higher education institution mobility at a certain time and in certain places, illustrating the nuanced and complex relationship between context and policy making.





## Objectives and forms of institution mobility

Any study of policy requires a keen awareness of the context out of which it has arisen and the objectives which it intends to serve. In the education context this means acknowledging the wide variety of actors, interests, HEIs, ideas and dynamics which shape policy.<sup>15</sup> Recent references to complexity theory in educational policy making<sup>16</sup> and the progressive decentralisation of educational governance<sup>17</sup> are reminders of the environment in which educational policy should be regarded.

This section identifies the key policy objectives which participants in this study identified as being the target of HEI mobility. It goes on to identify the most common forms of HEI mobility and the reasons given by participants for why certain forms are preferred over others in their economies. This is intended to set the scene for the analysis of policy that follows.

### Objectives of HEI mobility

It is important to understand the objectives that motivate HEI mobility. These inform policy and impact the way in which HEI mobility is expressed in each economy. Inevitably the anticipated benefits of HEI mobility vary among stakeholders. Nevertheless, several key themes emerged from interviews, and those factors most commonly mentioned were:

**Global graduates** – participants emphasised the need for graduates to be prepared to live and work in a global environment. They felt that students need opportunities to gain relevant skills and knowledge, including the ability to communicate with people in different economies and cultures, a strong awareness of professional contexts at the international level and (where possible) some experience of a foreign economy.

**Local graduates** – participants were equally insistent that graduates should have skills and knowledge of direct relevance to their local context. Participants expressed concern that students who undertake an entire degree overseas can become distanced from the local context, to the detriment of their employability and engagement with their homeland. HEI mobility was therefore regarded by participants as giving students the opportunity to gain an international education at home. Participants regarded this as the best of both worlds, which enables students to establish and reinforce professional networks in preparation for graduation.

**English language proficiency** – in three of the economies included in the study English is already the lingua franca of higher education (Malaysia, the Philippines and Singapore). Where this is not the case, enhancing English language proficiency among higher education students was highlighted by participants as one of the strongest drivers of HEI mobility.

Participants from economies where English does not dominate expressed their hope that the presence of foreign HEIs would help students improve their English language skills. As participants commented, this is one of the key reasons why HEIs from Australia, the United Kingdom and the United States are most prominent as sources of mobile HEIs.

**Parental reassurance** – many participants highlighted the appreciation among the parents of higher education students in their economies of having collaborative programmes or foreign campuses available nearby. Participants recounted that many parents expressed a preference for keeping their children close to home, particularly in the early stage of their higher education, and then having the option to facilitate their overseas study at a later stage in their education, if this was affordable.

**Expanded higher education capacity** – in some economies included in the study, the local higher education system has a limited capacity to absorb demand from students. In these cases participants indicated that HEI mobility is important as a means of increasing capacity and giving students more study options. While it is the case that foreign HEIs tend to attract wealthier than average students, participants felt that this was important to give middle class families an alternative to local HEIs, and elite families an alternative to studying overseas.

**Enhanced research capacity** – participants highlighted that host governments, local HEIs and foreign HEIs in their economies are interested in HEI mobility as a means to expand research capacity, particularly to enhance institutional rankings. Participants suggested that host governments viewed HEI mobility as a way to enhance the capacity of local HEIs to engage in high-level research.

Participants indicated that local HEIs were interested in gaining access to advanced research infrastructure and colleagues in foreign HEIs. Participants also noted that foreign HEIs regarded HEI mobility as a way to conduct research in different environments and contexts.

**Expanded teaching capacity** – participants from several economies indicated that one of the attractions of HEI mobility was to enhance the methodologies used by faculties in local HEIs to teach students. These participants highlighted the importance of the diffusion of curricula, teaching materials and pedagogy, and the benefits that HEI mobility could offer in enhancing the overall quality of higher education in their economies.

**Institutional revenue** – much tends to be made of the potential for foreign HEIs to make significant revenues from international campuses. Participants from foreign HEIs included in this study emphasised that this was not the case. As they made clear, costs of establishment and provision tend to be very high and it can take a number of years to recoup these.

Moreover, participants from foreign HEIs stated that any surplus tended to be reinvested into the local campus rather than remitted to the home economy. Participants from local HEIs which engaged in collaborative programmes with foreign HEIs welcomed the revenue they were able to raise from doing so, where this was possible, but again stressed that this was limited in scope.

**Catalyst for change** – in some economies participants expressed a sense of frustration with higher education leaders and a perceived resistance to change. In these cases participants reported that the mobility of foreign HEIs was regarded as a potential means to stimulate change in the higher education sector through the diffusion of new models of education and ways of thinking. As such, these participants suggested that HEI mobility has the capacity to push reforms in local HEIs.

### Common forms of HEI mobility

In some of the economies included in this study higher education systems are very large indeed. They are characterised by enormous numbers of enrolled students and a significant number of HEIs. The second column of Table 3 shows UNESCO data on the number of students enrolled in tertiary education (no data is available for China but it is believed to have the largest tertiary education sector in the world).



**Table 3: Institution mobility in eight APEC economies**

APEC economy	Tertiary education enrolments 2012 <sup>18</sup>	Campuses of foreign institutions	Source of foreign institutions
China	–	29	United States (11), United Kingdom (6), Australia (2), Hong Kong, China (2), Germany (2), Canada (1), Ireland (1), Japan (1), Netherlands (1), Korea (1)
Indonesia	5,051,637	1	France (1)
Malaysia	572,393 <sup>19</sup>	6	United Kingdom (5), Australia (3), Ireland (1)
Mexico	3,013,465	2	United States (2)
Peru	835,273 <sup>20</sup>	0	
The Philippines	2,387,557 <sup>21</sup>	0	
Singapore	143,964	14	United States (6), Australia (3), France (2), China (1), United Kingdom (1)
Viet Nam	1,405,013	2	Australia (2)

The most common forms of HEI mobility around the world are campuses of foreign HEIs and collaborative programmes. The first type of HEI mobility is easily recognisable and consequently data is readily available. Data shown in the third and fourth columns of Table 3 are taken from the 'Branch Campus Listing' maintained by Global Higher Education.<sup>22</sup>

Data on collaborative programmes is more difficult to identify. There is no international database on collaborative programmes and many APEC economies do not have a national database on collaborative programmes. This is partly because HEIs in many jurisdictions have some independence around establishing collaborative programmes and are not required to report their activities to government.

The paucity of data is made more complex by the significant fluctuation in collaborative programmes, meaning that any data centrally collected by APEC economies can rapidly become out of date.

What did become clear during the research for this study however, was the very significant predominance of collaborative degree programmes over campuses of foreign HEIs in the economies included in the study. This was a result of both practical factors and policy contexts. Policy contexts will be discussed in the following section.

Many participants in this study discussed the relative advantages and disadvantages of collaborative programmes and overseas campuses. Their comments are discussed below. On the whole participants expressed support for both models but this was tempered by some pragmatic considerations.

## Campuses of foreign institutions

Participants reported that campuses of foreign HEIs provided excellent opportunities for students to gain a high quality international education without needing to travel overseas. Where relevant, campuses of foreign HEIs gave local students the opportunity to enhance their English language skills. Students were also able to engage in exchanges at overseas campuses of the foreign HEI.

**Figure 2: Nottingham University – Ningbo and Kuala Lumpur**

### Nottingham University – Ningbo and Kuala Lumpur

Nottingham University from the United Kingdom has established campuses in two of the economies included in this study – China and Malaysia. Notable for the presence of an iconic lake and clock tower of the home campus in the UK, both campuses were established several years ago and have developed incrementally. Nottingham Ningbo currently has 6,000 students while Nottingham Kuala Lumpur has 5,000. To establish both campuses Nottingham University partnered with local higher education organisations but Nottingham University retains responsibility for all academic elements and students receive a degree from Nottingham University.

The campuses come under both British and local quality assurance systems and the curriculum and teaching materials used are identical to those in the UK. Teaching staff are recruited internationally based on the Nottingham UK criteria and many are expatriates from English speaking economies. Some key academics are seconded from Nottingham UK. Almost 90 per cent (China campus) and 65 per cent (Malaysia campus) of students are local and both campuses attract extremely high calibre candidates from elite backgrounds. It is planned that by 2020, 20 per cent (China campus) and 40 per cent (Malaysia campus) of students will be international students. Employment outcomes for graduates are excellent and many go on to international study after they graduate.

Nottingham University has an explicit strategy to establish campuses in Asian economies, acknowledging that the centre of politics, economies and culture is shifting to the region. The university has a multifaceted motivation in reaching out internationally which encompasses providing international opportunities to its students and teaching staff, generating new research collaborations, accessing talented students and enhancing its reputation. The establishment of further Asian campuses is a consideration in the future.

Participants further reported that the existence of campuses of foreign HEIs gave local teaching staff the opportunity to be employed by a foreign HEI and to have access to high quality research infrastructure.

While this is true in many instances, it is also important to note that many of the local teaching staff employed by campuses of foreign HEIs are expatriates from English speaking economies. This is partly due to the common requirement for teaching staff to teach in the English language. At the same time, it reflects the high esteem in which their foreign qualifications and experience are held by foreign HEIs.

In almost all cases included in this report, foreign campuses had evolved out of a longstanding engagement with the host economy over many years, if not decades. A common pattern reported by participants is that HEIs start with student exchange, move towards collaborative programmes and then finally progress to establishing a campus.

As participants emphasised, for campuses of foreign HEIs to be established it was important that there were strong interpersonal connections between representatives of the foreign HEIs, representatives of local partner HEIs and, where possible, policy makers in the host economy.

In some economies included in this study, there are stated intentions to significantly increase the number of campuses of foreign HEIs. One province in China, for example, hopes to establish 10 campuses of foreign HEIs in the future. Where such an outcome is desired host governments may provide incentives, such a free land or buildings. As participants pointed out however, this is an expensive undertaking, a fact that may temper some of the enthusiasm.

From the point of view of foreign HEIs, the costs involved in establishing a campus in another economy can be significant. This means, as many participants pointed out, that a coherent, long-term strategy is required to ensure success. Participants recommended that foreign campuses should not be regarded as a money making venture by HEIs. Indeed, the inverse was frequently the case. Instead participants felt that foreign campuses should be seen as an investment in building sustained connections in another economy for the benefit of students, and to support research collaborations.

While undertaking research for this study it was announced that the partnership between Johns Hopkins University in the United States and Perdana University Graduate School of Medicine in Malaysia had been terminated. This follows the termination of a similar Johns Hopkins initiative in Singapore in 2006. These are not isolated occurrences and follow high profile terminations of other HEI partnerships around the world. Such incidents are illustrative of the high degree of clarity between partner HEIs which is required if foreign activities are to succeed.

Despite the advantages offered to students, host economies and local teaching staff by the campuses of foreign HEIs, participants also noted their limitations. Most of all, participants pointed out that the relatively high fees meant that (unless scholarships are provided) access tends to be limited to elite students. Nevertheless, participants suggested that the role played by the campuses of foreign HEIs in educating elite students to take leading roles in government, business and research was both important and valuable.

Another concern regarding satellite campuses of foreign HEIs is a perception that foreign HEIs tend to focus on collaborative activities with their home campuses to the exclusion of building connections with local HEIs. While the two are clearly not mutually exclusive, there was a sense among participants that research and teaching collaborations between the campuses of foreign and local HEIs are under-developed. As a consequence, participants suggested that the opportunity for knowledge transfer is less than it could be.

Despite these considerations, participants from those economies included in the study that do have campuses of foreign providers reported their high value and the desire to attract more foreign HEIs in the future. But equally they emphasised the need for any foreign HEIs that wish to set up campuses to demonstrate their high standing and the appropriate quality assurance and accreditation in their home economies.

### Figure 3: New York University Shanghai and Yale-NUS College

#### Liberal Arts degrees for future leaders

New York University Shanghai is the first Sino-US joint venture higher education institution in China and was established in collaboration with East China Normal University. It is a contemporary expression of the longstanding international engagement of both universities and teaches Liberal Arts degrees to Chinese and international students. Current enrolments stand at just 300 and are planned to rise to 500 for each annual intake. The aim is to take high calibre students and develop their global vision and capacity to lead their respective societies into the future.

Similarly, Yale-NUS College is based on the goal of educating elite students to be global leaders. Located at the National University of Singapore, Yale College has a similar profile to its counterpart in Shanghai.

About 60 per cent of students are Singaporean and the rest are international. Yale College Singapore teaches a Liberal Arts degree and is a fully residential college enrolling only a small cohort of students, with a target maximum of 1,000.

Both institutions reflect the interest of their parent institutions in engaging in Asia and:

1. giving home students the opportunity to become Asia literate
2. teaching the next generation of Asian leaders
3. establishing global networks.

Both use a high cost model with a combination of visiting faculty from their home campuses, distinguished visiting faculty, long-term faculty and contract faculty, some of who are locally appointed. One significant difference is that students at Yale-NUS College will gain a degree from the National University of Singapore, rather than Yale University, while those at New York University Shanghai will gain a degree from New York University.

## Collaborative programmes

Not all APEC economies included in this study have campuses of foreign HEIs. But participants in all eight economies report a great deal of activity around collaborative programmes. In some economies the majority of HEIs are engaged in collaborative programmes with foreign partners. In other economies international collaborations are limited to just a handful of HEIs. And in some, the government restricts all but the top quality HEIs from engaging in collaborative programmes.



In all economies included in the study participants reported that collaborative programmes are viewed to be a great advantage to the higher education sector. Both dual and joint programmes are well represented. There are significant variations in how they are defined, structured and particularly in policies around the certification of degrees. In many instances HEIs are able to determine what kind of certificate students receive. As such, no attempt will be made here to discuss dual and joint degrees separately.

It is important to note that collaborative programmes frequently occur at the level of individual courses or subjects. As participants reported, they tend to arise from a 'bottom up' approach, generally growing out of personal connections between two or more academic teaching staff in two or more HEIs. They may expand to the institutional level, in which two HEIs sign a memorandum of understanding to cooperate. Nevertheless, many do not become institutionalised and, even if they do, participants emphasised that their ongoing operation tends to rely on personal relationships between teaching staff at different HEIs.

Participants explained that the popularity of collaborative programmes arises from the mutual benefit for HEIs and the flow of ideas and knowledge between collaborating HEIs. By their nature, collaborative programmes tend to involve a high degree of negotiation and engagement between partners (whether HEIs or an individual faculty) on curricula, teaching materials, pedagogy and assessment.

#### Figure 4: Hanoi University and La Trobe University

##### Hanoi University and La Trobe University

Australia's La Trobe University began collaborative programmes with Hanoi University in Viet Nam in 2003. The largest programme focuses on delivering a Bachelor of Business and an MBA to small groups of students.

Over time more than 1,000 Viet Nameese students have passed through these programmes. The curriculum is the same as that at La Trobe University in Australia and all teaching materials and assessments are developed in Australia. Assessments are also marked in Australia. Students from Hanoi University are able to take some of their course in Australia if they wish and Hanoi University is keen to accept students from La Trobe University but finds there is limited interest among Australian students in studying in Viet Nam.

The relationship between the two institutions grew out of individual relationships between faculties in each institution. There was a long period of discussion and planning before the two institutions agreed to partner with each other. The business focus grew out of demand from the Viet Nam Government and from Vietnamese students to drive the development of entrepreneurs.

Hanoi University has a total of 10 collaborative programmes including with institutions in Italy and the UK, in addition to more than 150 agreements with institutions around the world focused on student exchange. As the pre-eminent Vietnamese university for foreign language study, Hanoi University is well placed to engage internationally. It also benefits from earning income from some of the collaborative programmes (although not all are profitable).

For faculty in emerging economies, participants suggested that the opportunity to engage with colleagues in other economies is invaluable. Some may have undertaken post-graduate education overseas and relish the opportunity to continue to engage with colleagues in those places. Those who have not had an opportunity to study overseas are able to gain an insight into different ways of educating students.

Participants reported that a further benefit of collaborative programmes for faculty is that ongoing contact with colleagues at HEIs in other economies tends to lead to further collaborations, particularly around research. All participants regarded transnational research as highly beneficial. They further indicated that faculty from economies where English is not the first language are particularly keen to collaborate on English language publications. This desire is unsurprisingly driven by the importance of publications in English in calculating institutional rankings.

Participants further suggested that collaborative programmes can give students expanded opportunities to work with their peers in other economies. Where collaborative programmes are optimised, students can flow from one partner HEI to another in mutual exchanges. But as participants pointed out this is not always possible, and in other cases (and particularly where the cost of living in two economies is markedly different) students can still gain international insights and exposure without the need for mobility.

Representatives from many of the HEIs interviewed for this project expressed the view that collaborative programmes have become an essential element of a contemporary higher education. They felt driven to engage with partner HEIs in other economies by a desire to ensure that their students were exposed to international contexts, perspectives and ways of thinking. In economies where English was not the first language, HEIs were also motivated by the desire to help students to gain English proficiency. Again, they viewed this as an essential part of a modern day higher education.

In every economy included in the study there was an expectation that collaborative programmes would continue to expand into the future. Indeed, participants from economies where collaborative programmes remain limited expressed as a priority the need to expand collaborative programmes to other HEIs and to a greater number of courses and subjects. In Peru for example, significant concern was expressed that the poor English language skills of many students was preventing HEIs from engaging in collaborative programmes outside Spanish-speaking economies, and that it was a matter of urgency to overcome this.

## **Online institution mobility**

Online education is gaining traction around the world. The explosive growth of MOOCs (Massive Open Online Course) is a factor influencing the higher education sector in all the APEC economies included in this study. Discussions on expanding provider mobility into the online environment are active and ongoing throughout the region. Interestingly however, this study uncovered markedly different responses between economies towards online provision. This is despite the fact that almost every economy has an established model of 'open university' aimed at mature aged students.

Participants reported that in some economies—including Malaysia and Indonesia—online delivery is regarded as an important element of higher education, with an already widespread use of blended modes of learning. Online learning is regarded as having a number of advantages, such as bringing students from different parts of the economy together in joint online classrooms and enabling resources to be shared and disseminated.

Some participants further noted that employers are likely to prefer a series of badges in the future, demonstrating an array of learning experiences, rather than a single degree. Nevertheless, the current emphasis remains on online education at the postgraduate and professional levels rather than at the undergraduate level.



In economies such as Indonesia and Peru, which have geographically diverse populations and an ever-increasing demand for higher education, participants regarded online delivery as a valuable solution to enhancing human resource development. This is, of course, dependent on internet service delivery, capacity and affordability.

In other economies however, there appears to be a cultural aversion to online delivery despite the fact that some online education is already in place. Participants from economies including Viet Nam and the Philippines expressed this as a key consideration. In these cases participants suggested that face-to-face delivery is regarded as an essential component of higher education, with online delivery regarded as a poor second choice. This perception is maintained despite online delivery success stories such as English language programmes.

Regardless of attitudes towards the benefits or disadvantages of online delivery, it is clear from this study that it is yet to enter the context of provider mobility in a significant way in the economies included in the study. This is partly because quality assurance agencies tend to be unprepared to quality assure online programmes. Until this situation is altered, online provider mobility remains something with considerable potential but which is still some way off being broadly implemented.



## Policy contexts

Policies around cross border provider mobility, like all other policies, do not evolve in a vacuum. Policy agendas are set according to aspects of social practice that are regarded as in need of structures and controls.

Policies are formulated to balance the demands of a plethora of stakeholders and to arrive at an acceptable course of action. And policies are implemented by a wide array of actors that may each interpret the policy somewhat differently. These are all important considerations in thinking about the policy context around the cross-border mobility of HEIs among APEC economies.

The eight economies included in this study exhibited a wide array of policy approaches. At one extreme some economies employ an extremely *laissez faire* approach, in which HEIs have little policy constraint and significant freedom to engage in cross border education. At the other extreme, some economies have a highly rigorous, bureaucratic and detailed approach to cross-border provider mobility. In these cases, every element of establishing and functioning the HEIs is subject to detailed oversight.

But the situation is not black and white. Indeed, participants from many of the economies highlighted a variation in policy approaches to different elements of cross border provider mobility. This is largely due to the different actors responsible for aspects such as accreditation, quality assurance, institutional management and international relations.

Participants also emphasised that policy around cross border mobility of HEIs generally follows practice. This means that those economies in which provider mobility is well established tend to have the most developed policy approaches towards it, while economies in which there is little provider mobility are yet to develop comprehensive policy approaches towards it.

In this section, a range of policy contexts is considered. Multilateral approaches, including commitments to General Agreement on Trade in Services (GATS) in higher education and participation in multilateral higher education policy coordination, are considered first. Following this, the unique policy context of each of the economies included in this study is summarised.

## Multilateral policy contexts

At the multilateral level, three of the APEC economies included in the study have made a commitment to GATS on higher education – China, Mexico and Viet Nam.

The cross-border mobility of HEIs references the elements of GATS, which refer to the ‘commercial presence’ of one member in the territory of another. While balancing the need to accord a degree of protection to domestic HEIs, GATS recommends that an economy ‘shall afford adequate opportunity for any other member to demonstrate that education, experience, licenses, or certifications obtained or requirements met in that other member’s territory should be recognised’ (article 7, paragraph 4:2).<sup>23</sup>

Because HEI mobility incorporates the movement of students and faculty, it also references two other modes of GATS. Mode 2, known as ‘consumption abroad’ refers to the international movement of students to engage in education (a common feature of collaborative programmes). Mode 4 of GATS, known as ‘presence of natural persons’, refers to the international movement of faculty to teach students in a foreign economy. Depending on how HEI mobility plays out it can also involve Mode 1 of GATS, known as ‘cross-border supply’, such as the cross-border provision of online courses. Knight provides an excellent explanation of the role of GATS in cross-border higher education mobility.<sup>24</sup>

It is clearly important for economies to be signatories of GATS in higher education. But as research for this study made clear, it cannot be concluded that economies that are signatories to GATS have a more welcoming regulatory environment around cross-border mobility than those that do not. Instead a much more nuanced picture became apparent.

Beyond commitments to GATS, many of the economies included in the study coordinate higher education activities with regional neighbours. The most prominent example is the Association of South East Asian Nations (ASEAN). Five of the economies included in the study – Indonesia, Malaysia, the Philippines, Singapore and Viet Nam – are active members of ASEAN.

ASEAN has a high degree of coordination around cross-border higher education. Initiatives include the ASEAN Credit Transfer System, the ASEAN International Mobility for Students programme, the ASEAN Quality Assurance Network and the ASEAN Qualifications Reference Framework. One of the key priorities in ASEAN’s five-year plan is ‘strengthening cross-border mobility and internationalisation of education’. This includes developing a regional action plan to internationalise higher education such as through faculty exchange, establishing ASEAN area studies programmes and regional research activities.<sup>25</sup> Many of these activities are well developed.

In addition to multilateral policy coordination on cross-border education, most economies included in the study have a number of bilateral agreements on different aspects of cross-border provider mobility. These are most common in the area of quality assurance. For example the Malaysian Qualifications Agency and the Council for Private Education in Singapore both have memoranda of arrangement or cooperation with the Tertiary Education Quality and Standards Agency (TEQSA) in Australia.

## An introduction of national policy contexts

Higher education policy tends to incorporate a series of key aspects in relation to the activities of HEIs: establishment, management and functioning, resources, quality assurance, enrolment of students, recognition of qualifications, staffing, and research activities. The coverage of each of these elements in higher education policy varies across economies.

Looked at in terms of cross-border HEI mobility, we can establish a series of questions to target the analysis of policy in individual economies:

**Table 4: Key policy considerations**

What policies shape the ...
Establishment of foreign provider activities?
Management and functioning of foreign provider activities?
Resourcing of foreign provider activities?
Quality assurance of foreign provider activities?
Enrolment of students into foreign provider activities?
Recognition of qualifications obtained from foreign institutions?
Staffing of activities conducted by foreign institutions?
Ability of foreign institutions to engage in research?

While looking at the following sections it is important to note that policy context and policy implementation are not necessarily equivalent. Many participants in this study commented on the contrast between policy contexts that are overtly welcoming to foreign HEIs, and the implementation of policy in a way which suggests concern among host governments in being unable to control how foreign HEIs act. Foreign HEIs also find themselves having a somewhat split identity – under some policies they are regarded as a local HEI and in others they are seen as a foreign HEI. This can lead to complexities in their day-to-day operations.

## China

China's National Plan for Medium and Long-Term Education Reform and Development (2010–2020) is based on the goal to make China 'an educationally advanced economy with rich human resources' by the year 2020.<sup>26</sup> With specific reference to education this means building China 'into a power to be reckoned with in the global higher education landscape'.<sup>27</sup> Part of the goal is to increase the gross higher education enrolment rate to 40 per cent. This includes approaches to solve some of the 'bottleneck' problems associated with education,<sup>28</sup> one of which is inadequate supply to meet demand.

Chapter 16 of the plan addresses 'further opening China's education' and incorporates a number of strategies that involve expanding collaboration with international partners.<sup>29</sup> This is broadly defined and encompasses exchanges and cooperation, cooperating with HEIs in other economies on teaching and research, attracting scholars from around the world, facilitating mutual recognition of credentials and degrees, and greater participation in international collaboration.

In an economy the size of China there is a range of regulations and policies that influence cross-border education. These can vary at the provincial level, but nevertheless there are some common themes. In relation to HEI mobility several elements stand out. First, the desire to increase the number of citizens 'imbued with global vision, well-versed in international rules, and capable of participating in international affairs and competition'.

This indicates that students should be exposed to foreign environments, either through overseas study or through a more internationalised form of study in China. For example the Chinese Ministry of Education would like up to one-third of all Chinese-foreign collaborative courses to be taught by foreign faculty.

Second, the encouragement of Chinese educational HEIs to 'engage in diverse forms of international exchanges and cooperation ... [such as] joint schools or joint projects in cooperation with foreign partners'. This explicitly addresses the desire to expand dual and joint degrees. Third, the goal to provide greater support to 'mutual or joint conferment of academic degrees between Chinese and foreign colleges'. This indicates the need for close cooperation between HEIs in economies outside China with those within China.

Fourth, a reference to 'platforms for collaborative teaching and research', which suggests the need to build ways (including online) to enable parts of curricula to be jointly taught with HEIs in other economies. Fifth, the intention that 'high-quality Chinese educational institutions shall be encouraged to run branches overseas' which is a clear reference to outward HEI mobility. And finally the reference to an intensification of participation in bilateral and multilateral collaborations in education.

Overall, the Chinese policy context is one which strongly encourages all forms of cross-border education, including HEI mobility. At the same time, China is one of the most popular destinations for foreign HEIs. For example a recent report from the Institute of International Education found that China was one of the top two economies in which HEIs from Australia, France, Germany, Italy, the United Kingdom and the United States had established collaborative programmes.<sup>30</sup> China is also the top economy in which HEIs from the same economies would like to establish joint and double degree programmes in the future. Given China's rapid economic development this interest is understandable.

Chinese policy ensures that provider mobility is tightly controlled and regulated to ensure that only quality provision is allowed to take place. There are two key forms of Sino cooperation on education—joint programmes (within HEIs) and joint HEIs (with an independent legal status). The Shanghai New York University is an example of the latter.

Regulations on Chinese-foreign cooperation in HEIs were adopted in 2003, and the Ministry of Education published implementation measures for the regulations in 2004. In 2013 a revised framework for cross border quality assurance was put in place. To get approval to be active in China in a collaborative programme, foreign HEIs need to first reach agreement with a local HEI and then to submit an application to the Ministry of Education. Applications require a high level of detail about exactly how the collaborative programme will operate and how responsibilities will be shared. Once approved, programmes are licensed for five years and then need to re-apply.



Both partner HEIs need to be accredited and to have passed through a recognised quality assurance process. Chinese authorities are willing to accept approval by agencies such as QAA in the United Kingdom and TEQSA in Australia but are extremely wary of HEIs from economies where quality assurance regimes are perceived to be less rigorous. The rule of thumb is that the quality of programmes from foreign HEIs needs to be demonstrably equivalent or higher than the quality of similar programmes in China.

Despite the existence of several foreign campuses in China, new approvals are slow but are occurring. The experience of New York University Shanghai (see Figure 3) indicates why this might be the case, with the evolution of the campus highlighting the detailed and lengthy process required to establish a foreign campus in China. It involved ambassadorial visits, meetings with ministers, an initial visit from an evaluation team, the submission of detailed plans, a second visit from an evaluation team and final sign-off. The Shanghai Government provided considerable financial support. To reach agreement all parties needed to be prepared to compromise in some areas.

## Indonesia

Indonesia has a growing economy and a young population, and therefore a pressing need to expand higher education capacity. At present the higher education sector consists of more than 3,000 HEIs with around 5.9 million students. Participants in this study suggested that for Indonesia to increase higher education participation it requires a further 100 public HEIs and a further 3,000 private HEIs. Clearly this provides an opportunity for foreign HEIs.

The Indonesian Government has nevertheless been extremely cautious about throwing open its doors to foreign HEIs and has a policy environment which enables some forms of institutional mobility while constraining others. Instead, its focus lies squarely on developing the Indonesian higher education system to meet demand, with input and assistance from foreign HEIs where appropriate.

In 2012 the Indonesian Government passed a new higher education law.<sup>31</sup> One of the key objectives was to 'increase the national competitiveness in the face of globalization in all sectors' while another was to 'achieve affordability and equal distribution of good quality higher education relevant to the public interest in development, self-reliance and welfare'.

Part 14 of the law specifically references international cooperation which is defined as 'a process of interaction in integrating international dimensions into academic activities to contribute to international relationships without prejudice to Indonesian values'. Specific mention is given to various forms of international cooperation such as local and foreign HEIs forming relationships to provide higher education and joint research centres.

In 2014 the Ministry of Education and Culture released Decree number 14, which further develops conditions for cooperation among HEIs. Article 7 lists a number of ways in which HEIs can cooperate, including through providing education, research and community service, twinning programmes, joint and double degrees, student exchanges and the shared use of resources.<sup>32</sup>

Since 2012 the accreditation system for HEIs in Indonesia has also been overhauled to move from voluntary to compulsory accreditation. Not all programmes are accredited and around five per cent of those that go through accreditation fail. Accreditation puts programmes and HEIs into one of three categories. Category A can compete at the international level, category B can compete at the national level and category C is the minimum standard. Category C accredited programmes and HEIs are not allowed to engage in collaboration with foreign HEIs.

Collaborative programmes and the mobility of students and researchers are extremely common, with most major Indonesian HEIs with level A and B accreditation having these in place. HEIs who wish to establish collaborative programmes with foreign HEIs need to submit a proposal to the ministry for review and approval. This can be quite laborious but recent mechanisms have been introduced to facilitate the process.

The Indonesian Government places a significant emphasis on reciprocity in all forms of higher education mobility. A situation in which similar numbers of researchers and students travel from Indonesia to other economies as in the opposite direction is regarded as optimal but this remains some way off. For collaborative programmes, the quality assurance and accreditation status in the home economy is considered to ensure that the partner HEI is equivalent or better than the Indonesian partner.

## Figure 5: The University of Melbourne in Indonesia

### The University of Melbourne in Indonesia

The University of Melbourne has been active in the Indonesian higher education context since 1998. The role of its foreign representative office was initially to recruit Indonesian students to study at the University of Melbourne. This function has since expanded to encompass the coordination of institution relationships.

The University of Melbourne has relationships with three of the top institutions in Indonesia – Institut Teknologi Bandung, Universitas Gadjah Mada in Yogyakarta and Universitas Indonesia.

Activities include dual undergraduate programmes with Universitas Indonesia in the fields of medicine and business, and a dual postgraduate programme with Universitas Gadjah Mada in the field of management. A significant challenge faced in these programmes is that the cost of study in Australia is prohibitive for all but the wealthiest Indonesian students unless students are able to gain scholarships. While Indonesian students are keen to study in Australia it is not currently possible to ensure equal flows of students due to limited demand among Australian students to study in Indonesia.

To enhance the quality and capacity of HEIs in Indonesia the government sponsors a large number of PhD students to foreign HEIs. A growing number of PhD students at Indonesian HEIs are also given the opportunity to gain some international exposure during a period of research at a partner HEI in another economy. For those research students who complete a PhD in another economy, an important consideration is to provide good research facilities when they return to Indonesia so that their skills can contribute to economic development. Partnerships with industry remain undeveloped but are one way to achieve this.

The emphasis on reciprocity can also be seen in the Indonesian approach to campuses of foreign HEIs. The Ministry of Education in Indonesia is wary of allowing foreign institutions to establish campuses without a high level of cooperation with a local institution. The 2012 Higher Education Law identifies the requirements for any foreign institution which wishes to provide higher education in Indonesia.

Requirements include that foreign institutions are accredited in their home economies, must obtain a licence from the government, must be based on a non-profit principle, must cooperate with Indonesian HEIs and must prioritise the hiring of Indonesian teaching academics. The Higher Education Law further states that the Indonesian Government will determine the focus and type of study programmes which foreign institutions can offer. While the non-profit status of foreign institutions has been strongly debated in the higher education sector in Indonesia, this remains a key policy principle.



While the law theoretically enables foreign institutions to establish campuses, in August 2012 the Indonesian Directorate General of Higher Education imposed a moratorium on the establishment of new HEIs in Indonesia until August 2014. The objective was to enable the Ministry of Education and Culture to carry out the elements of the new law around restructuring existing institutions and assuring their performan<sup>33</sup>. Even when the moratorium is lifted, participants in this study do not anticipate a large number of campuses from foreign institutions.

The moratorium does not restrict the ability of foreign HEIs to establish collaborations with Indonesian institutions. One option – which is popular among foreign institutions – is to establish a ‘foreign representative office’. This must be headed by a resident of Indonesia (local or foreign) and cannot generate revenue in Indonesia, instead being limited to liaising between institutions and organising events to further collaboration.<sup>34</sup> Examples are the foreign representative offices of the University of Queensland and the University of Melbourne in Jakarta.

Such foreign representative offices often coordinate activities between institutions in the host and home economies. For example the University of Queensland has established ‘Indonesia Partnership Awards’ which create collaborations around research and teaching across different disciplines. Award recipients in 2013 included partnerships with Surya University on research into agricultural feedstock, with the Indonesian Institute of Science on research into civil militias, and with Universitas Indonesia on teaching and research collaboration in corporate sustainability.<sup>35</sup>

Other forms of institution mobility include cooperation between the Lone Star College System from Texas and the Putera Sampoerna Foundation. These institutions are collaborating on a two-year associate degree based at Universitas Siswa Bangsa Internasional in Jakarta.<sup>36</sup> This is the first United States accredited associate degree programme in Indonesia and students will be able to transfer to a university in Texas if they wish. There is also a German-Swiss University in Jakarta.<sup>37</sup>

Many such partnerships develop over time. In 2010 the United States Department of State’s Bureau of Educational and Cultural Affairs funded a two-year United States–Indonesia Partnership Program which brought six HEIs from Indonesia and six from the United States together to develop bilateral partnerships.<sup>38</sup> The initial focus was on student exchange programmes. This has now developed further to include the formation of the USIPP Consortium. This has a broader focus than student exchange alone, and incorporates ongoing institutional partnerships and collaboration, including around research and teaching staff.<sup>39</sup>

## Malaysia

The 2013 Malaysia Education Blueprint (2013–2025), prepared by the Ministry of Education, emphasises the importance of education, describing it as ‘a major contributor to the development of our social and economic capital ... [providing] our youth with the necessary skills to be able to compete in the modern labour market; and is a key driver of growth in the economy’.<sup>40</sup> A key way for Malaysia to reach its ambitious goals is to draw on educational excellence around the world.

The Malaysian Ministry of Education’s National Higher Education Strategic Plan (2006) emphasises the importance that Malaysia places on HEI mobility as a way of contributing towards the goal to establish Malaysia ‘as an international hub of excellence for higher education’. One of the seven thrusts within the strategic plan is the intensification of internationalisation. This incorporates collaborations with foreign HEIs, attracting international students, achieving a target of 15 per cent of teaching staff from other economies at research universities and student mobility.<sup>41</sup>

The 1996 Private Higher Educational Institutions Act<sup>42</sup> (supplemented by the 2009 Private Higher Educational Institutions Amendment Act<sup>43</sup>) sets out the requirements for establishing a private HEI (whether local or foreign). This includes capacity to provide adequate educational facilities, capacity to provide adequate and efficient management and administration, adequate measures to determine and maintain educational standards, and good governance. For foreign HEIs it is also necessary to be incorporated as a company locally.

### Figure 6: Monash University Malaysia

#### Monash University Malaysia

Monash University from Australia has established a campus in Kuala Lumpur in collaboration with Sunway, a successful Malaysian construction company. A total of 6,700 students are enrolled, about 10 per cent of who are postgraduates. About two-thirds of students are Malaysian and one-third are from a range of economies including Indonesia, Sri Lanka and Bangladesh. Faculty are 60 per local and 40 per cent expatriate. Monash Sunway comes under quality assurance agencies in both Australia and Malaysia but has achieved a self-accrediting status in Malaysia.

The Monash Malaysia campus grew out of a twinning programme between Monash University and Sunway College, a personal connection between the former Vice-Chancellor of Monash and the president of the Sunway Group, and support from Monash University alumni in Malaysia.

Monash Malaysia aims to be highly embedded in the local context and hopes to expand its research and industry collaborations with local partners into the future.

Monash University is also highly committed to an international strategy, with another campus in South Africa and strategic alliances with HEIs in other economies, such as with the Indian Institute of Technology in Mumbai, and with Warwick University in the UK. Monash views its international strategy as one with multiple benefits, including international opportunities for students and opening up research collaborations.

Overall, Malaysia has a welcoming yet rigorous policy environment that encourages the mobility of foreign HEIs as long as they meet local requirements. The number of foreign HEIs with campuses in Malaysia exemplifies the impact of this approach on the higher education sector. These include Curtin University of Technology, Monash University and Swinburne University of Technology from Australia; and Newcastle University, the University of Nottingham, the University of Southampton, Heriot-Watt University and the University of Reading from the United Kingdom. Beyond this Anglo-focus the campus of a Chinese HEI has recently received provisional accreditation to operate in Malaysia.



There has however been a moratorium on the establishment of new HEIs (both local and foreign) in the last two years. A moratorium on the development of new programmes has also been in place, partly driven by a desire to manage the number of graduates in certain disciplines. For example new programmes in nursing and law are not able to be established due to an oversupply of law and nursing graduates for the local employment market. Despite the moratorium, outstanding foreign HEIs that wish to establish a campus in Malaysia may still be considered.

The private higher education sector in Malaysia is significant. In November 2014 there were 419 private HEIs, 73 of which were universities. Private HEIs tend to be more open to mobility as they have greater financial independence and flexibility than public HEIs. All HEIs need to be registered and to gain approval from the Ministry of Education before they can conduct or teach a course in the English language. Moreover, all private HEIs are required to teach general studies. This policy applies to all foreign HEIs with campuses in Malaysia. All teaching staff require a permit to teach.

One of the major foci (Thrust 5) of the National Higher Education Strategic Plan is to intensify internationalisation. Targets include collaborative networking with foreign HEIs, a figure of 200,000 international students by the year 2020, ensuring that public universities enrol 10 per cent of international students on average, and ensuring that 15 per cent of the teaching staff at research universities are from foreign economies. The underlying goal is to enhance the quality of higher education provision in Malaysia and to attract foreign students from around the world. Key source regions are South–East Asia and the Middle East.



The emphasis on quality means that foreign HEIs that wish to operate in Malaysia must have gone through a rigorous quality assurance process in their home economy, and also meet Malaysia's quality assurance standards. The higher education sector is driven by compliance and the Ministry of Education has a high degree of oversight of the operations of HEIs. Collaborative programmes must be approved by the Ministry of Education and go through a quality assurance assessment before being allowed.

Campuses of foreign HEIs that have been established in Malaysia for some time have become self-accrediting. This reduces the degree of oversight but they are still visited each five years by the Malaysian Qualifications Agency and remain subject to national requirements. Newer campuses are subject to a higher degree of oversight.

## **Mexico**

The higher education sector in Mexico is very large and highly complex with approximately 3,548 HEIs divided into 12 key types depending on the type of education they offer and whether they are public or private. The two key drivers of policy in the higher education sector, and the economy more generally, are capacity and knowledge creation. Mexico is moving from a manufacturing base to a knowledge economy and has a great appetite for enhancing the skills and knowledge of its population to achieve further economic growth through innovation. A key need is to enhance the English language skills of the population.

International education is regarded as an important element in achieving these goals. As such, the Mexican Government is strongly in favour of enhancing international connections at the

higher education level. The government has signed a number of multilateral and bilateral agreements on international education and has committed to the GATS on higher education. It has also signed a number of bilateral agreements on education mobility (for example with Australia, France, Canada and Spain) and participates in regional higher education institution recognition with Latin American economies. Moreover, it is very welcoming to any foreign HEIs that wish to engage in Mexico.

Despite this open and welcoming policy context, HEI mobility is somewhat limited in Mexico for a number of pragmatic reasons. There is a very large number of HEIs in Mexico, around three-quarters of which are private. A big push to increase the capacity of the higher education sector has resulted in a context in which it is relatively easy to establish a HEI and around 1,000 HEIs are less than 10 years old. The growth of HEIs is continuing with a target to increase the total number of higher education students from 3.4 million (33 per cent) to 4.4 million (40 per cent) by 2018.

In this context, and despite the progress made in recent years in terms of accreditation of academic programs (such as by CONACYT,<sup>44</sup> CIEES,<sup>45</sup> COPAES,<sup>46</sup> and other bodies), greater attention is paid to higher education capacity than to higher education quality. In general it can be concluded that the government takes an 'arms-length' approach to the higher education sector, trusting HEIs and their associations to ensure that higher education is provided responsibly. Unfortunately rapid expansion has led to a profusion of poor quality (or, as they are termed locally, 'duck') universities, and students from low socio-economic backgrounds are particularly vulnerable to their sometimes misleading promises.

Quality assurance of HEIs is the responsibility of the 31 states but participants report that while there are laws in place, these are not rigorously applied due to a lack of staff to undertake quality assurance activities. In many cases graduate outcomes are used as a proxy of institutional quality – if graduates are able to find employment then this is regarded as a sign that their higher education must have been successful. Naturally, potential international collaborators are wary of the lack of rigorous quality assurance in the Mexican higher education system and this means that opportunities to collaborate are more limited than they otherwise might be.

There are 43 autonomous public HEIs. Although this is a relatively large number it only represents 4.4 per cent of all public HEIs in Mexico. Autonomous HEIs are responsible for their own quality assurance. Private HEIs come under associations such as the Federation of Private Mexican HEIs (FIMPES) that undertake quality assurance and accreditation of their member HEIs. FIMPES, for example, covers just under five per cent of private HEIs (113 in total) but these are the largest, accounting for almost 51 per cent of the total number of students attending private HEIs (1.1 million). This means that more than half of private education students are attending HEIs that are accredited or working towards that end under the FIMPES accreditation system.

Accreditation is voluntary and there are 28 accrediting bodies. The Council for the Accreditation of Higher Education (COPAES) supervises the activities of these accrediting bodies but so far only 350 HEIs are accredited. This means that approximately half of higher

education students in Mexico attend higher education programmes which are not accredited. Again, foreign HEIs are only interested in collaborating with accredited HEIs.

### Figure 7: Tecnológico de Monterrey

#### Tecnológico de Monterrey

Tecnológico de Monterrey is an autonomous, private, not for profit HEI which is the most internationally engaged in Mexico. International engagement has developed over almost 20 years and is a key part of its strategy.

Its focus is on educating future leaders who are entrepreneurial, internationally competitive and also have an understanding of multiple cultures so that they can exercise social responsibility at the global level.

Tecnológico de Monterrey has more than 500 agreements with HEIs in more than 50 economies and offices around the world located in top universities, including Yale, British Columbia, Laval, Politécnica de Cataluña, Hull and Fudan. Tecnológico de Monterrey also has multiple collaborative programmes at both the undergraduate and postgraduate levels, such as with the University of Texas.

Half of all students undertake a summer semester or a year at a foreign partner university and by 2017 the aim is for this to rise to 75 per cent, with an ultimate goal of all students engaging in exchange by 2020. About 60 per cent of students go to Europe, 25 per cent to other parts of North America and 10 per cent to Asia. In addition, approximately 4,500 students come from other economies each year. Not only does Tecnológico de Monterrey encourage student mobility, it also attempts to validate scientifically the outcomes of foreign experiences through the Global Perspective Inventory and other data gathering instruments.

The higher education sector in Mexico as a whole is interested in international collaboration but the implementation is patchy. Some HEIs (both private and public) have very active programmes of internationalisation while others are much less active. Highly internationally active HEIs include the University of Guanajuato, Benemérita Universidad Autónoma de Puebla, San Luis Potosi, Colima, Universidad Autónoma Metropolitana, Universidad Iberoamericana, De La Salle and Instituto Tecnológico Autónomo de México. Neither private nor public HEIs require government permission to engage in research or student exchange activities with HEIs from overseas.

As with all other economies, international collaborations are driven by personal contacts between faculty in different economies. If faculty have been educated in another economy and have international connections, they bring these with them to an HEI and may encourage institutional leaders to reach out internationally. In smaller HEIs where faculty have not had international exposure, there does not tend to be a high level of international engagement. The level of international engagement is also discipline dependent, with greater international cooperation found in areas such as mechatronics, aerospace engineering and renewable energy, particularly around research and postgraduate studies.

The students who attend the less internationally-focused HEIs (particularly public universities) tend to have insufficient economic resources and English language skills to engage in international exchange. At the same time many HEIs lack the funds to engage in collaborative research with foreign HEIs. Exceptions can be found among the large public HEIs such as the Universidad Nacional Autónoma de México, which is the most internationalised public university in Mexico.

Large HEIs such as the Universidad Nacional Autónoma de México and the private Tecnológico de Monterrey are granted an autonomous status. This means that they are free to establish collaborative programmes with foreign HEIs without needing to seek government permission, although they are expected to inform the government of new developments. Given the high level of autonomy there is currently no policy specifically to cover collaborative programmes.

Credit transfer processes are established by HEIs and students are informed which courses or subjects at foreign HEIs will be recognised by their own HEI. It is up to HEIs to determine equivalency and to establish credit recognition agreements. Collaborative programmes are more common at the postgraduate level because the length of time students need to spend overseas is shorter than at the undergraduate level.

The National Association of Universities and HEIs (ANUIES) is providing assistance and capacity building to help HEIs which are not internationally engaged to become more so. ANUIES is also working on a platform that will help track the international capacity of its member HEIs and will provide useful information to support future developments.

There are currently two small campuses of HEIs from the United States in Mexico (Alliant International University and Endicott College) and for-profit groups such as Apollo, Laureate and Phoenix are also active in Mexico, commonly through the acquisition of an existing HEI. The Mexican Government's policy is that foreign HEIs are encouraged to establish a campus in Mexico and they would welcome further developments in this area. Participants report, however, that there is not a great deal of interest from HEIs outside Mexico.

The University of Arkansas is planning to establish a campus in Querétaro, one of the most developed regions of Mexico, in late 2015.<sup>47</sup> Several factors have led to this development: the Governor of Querétaro was educated in the United States and many multinationals are located in the state and are demanding highly skilled graduates. The campus that Arkansas University will occupy will be provided by the Association for the Advancement of Education in Mexico as a contribution to enhancing higher education capacity in Querétaro. To attract the foreign campus the government is also providing tax breaks.

Some Mexican HEIs teach online courses and are exploring opportunities to collaborate with foreign HEIs in online teaching and learning, but this is not yet well developed other than in professional education. In addition to its role in expanding capacity in higher education in general, technology is seen as a way of expanding access to international education to reach students beyond the elite group, as a form of 'internationalisation at home'. A framework to accredit online and blended programmes is currently under development.

## Peru

The Government of Peru passed University Law No. 23,733 in 1983, with later amendments in 1996 (Promotion of Investment in Education Decree, number 882) and 2009 (Law on Higher Education Institutes and Schools, number 29,394). Under this legislative framework universities in Peru were placed outside the control of Ministry of Education, although technological institutes have been under ministry control.

Instead of government oversight, the National Assembly of Rectors (ANR) – an independent publically funded body – has coordinated and guided university activities in Peru. The ANR has responsibility for university administrative regulations, including approving degree programmes at all 76 of Peru’s universities, managing the budgets of the 31 public universities, allocating student identification cards and supporting other university administrative activities.<sup>48</sup>

In June 2014 a new university law came into force after taking more than 15 years to pass Peru’s parliament.<sup>49</sup> This resulted in closing ANR and replacing it with a new body, the National Superintendency of University Education. The National Superintendency commenced operations on 3 December 2014 and is responsible for approving HEI licences and monitoring education quality. Part of the reason for the change has been a proliferation of what are regarded as low quality universities in Peru and the government’s desire to exercise greater control over the quality of HEIs.

This situation means that there are few policies to shape the higher education sector in Peru in general. When it comes to cross-border institutional mobility, there are currently no policies to influence activities. This means that HEIs are currently free to establish their own international connections and that no restrictions exist on HEI mobility. Developing policies in this area will be one of the key roles of the new General Director of Higher Education, who will come under the Vice Ministry of Educational Management.

### Figure 8: Pontificia Universidad Católica del Perú

#### Pontificia Universidad Católica del Perú (PUCP)

The Pontifical Catholic University of Peru is ranked highest of all Peruvian HEIs. It is a private university with 20,000 undergraduate and 19,000 postgraduate students.

PUCP has academic agreements with 298 foreign HEIs. One of its most internationalised areas is in mining engineering. As many students have come from the private school system their English language skills tend to be better than their peers, and they are required to have good English skills to graduate.

The combination of language skills and disciplinary focus mean there is a great deal of joint research and the exchange of both students and faculty with a number of European and American universities. There are also reciprocal agreements such as with the Colorado School of Mines and with Mining Education Australia, which incorporates Mining Engineering programmes at the Universities of Queensland, New South Wales, Adelaide and Curtin.



While it could be expected that the policy vacuum in Peru around HEI mobility would have resulted in a significant influx of foreign HEIs, this has not been the case. There are currently no foreign HEIs with campuses in Peru and the number of collaborative degrees is extremely limited, although there is growing interest from HEIs in economies such as Australia, Canada and the United States in making connections with Peruvian HEIs. Some foreign HEIs, such as the Tecnológico de Monterrey from Mexico, have also established offices in Peru.

The research undertaken in Peru for this study suggests that limited HEI mobility is due to a number of key factors. First, all key participants commented on the very poor English language skills of most students and faculty in Peru, which rules out their participation in HEI mobility unless the language of instruction is Spanish. Participants highlighted poor English skills as a major obstacle to all forms of cross-border mobility in higher education in Peru and the enhancement of English language skills is a key government priority.

Second, there is not much of a tradition of international mobility among Peruvian faculty, meaning that they lack the international linkages that form the foundation of provider mobility in all the other economies included in this study. In addition, many faculty are employed on a casual basis and work at multiple HEIs. These factors mean that faculty have limited capacity to establish collaborative programmes with HEIs in other economies.

Third, there are significant concerns, within Peru and externally, about the quality of Peruvian HEIs. Entrance requirements are low and research activity is extremely limited, particularly as a consequence of long-term under-investment in research infrastructure. This means that Peruvian HEIs do not rank highly internationally—the Pontificia Universidad Católica del Perú (Peru's top university) was ranked 30<sup>th</sup> among universities in Latin America by QS World University Rankings, and is the only Peruvian university in the top 50.<sup>50</sup> Given that much provider mobility is driven by a desire to establish research collaborations, and particularly with high quality HEIs, the level of interest from foreign HEIs is consequently limited.

Fourth, the level of income in Peru is low (with a GDP per capita of US\$11,100 a year) and there is a high degree of income inequality. While the economy is experiencing relatively strong growth the current situation limits the size of the middle class in Peru. Those who can afford to do so typically attend one of the 45 private HEIs in Peru (many of which are extremely small). There is limited demand for international education among local students and any foreign HEIs undertaking a market analysis are likely to conclude that the potential to recover set-up costs is limited if they were to open a campus. Nevertheless, there are signs this situation is changing and it is possible that 'early adopter' foreign HEIs will establish themselves in Peru in the near future.

Despite this context, participants in this study estimated that approximately half of all HEIs in Peru have international links. The majority of these focus on student exchange but some HEIs in Peru do collaborate in HEI mobility. Those HEIs which are research active tend to have established international connections with HEIs around the world in areas of shared research interest, particularly mining, food security, biodiversity and health. There is also cooperation at the ministerial level, such as with India around joint research into climate change.

## **The Philippines**

The Philippines Commission on Higher Education released a Manual of Regulations for Private Higher Education in 2008. Article 15 refers to international linkages and twinning programmes and section 74 states that 'it is the policy of the commission to internationalise higher education in the economy in order to facilitate the development of a human resource base that will be responsive to the demands of the 21<sup>st</sup> century'.<sup>51</sup>

Article 16 specifically refers to transnational education as 'a matter of critical public interest in terms of relevance of content to national needs and the need to safeguard the interests of legitimate education HEIs and the general public. Quality assurance, audit, accreditation and similar activities protect the interests of various stakeholders in transnational education'.<sup>52</sup>

As of 4 September 2014, the Philippines had forged 41 bilateral agreements on educational cooperation with 30 economies. Article 16 further states that the Philippines is committed to bilateral, regional and multilateral agreements and that 'the provision of transnational education services shall be in accordance with the Commission's policies, standards and guidelines'.

Despite this welcoming policy context, the Philippines is currently developing a sustainable international higher education strategy and HEI mobility remains limited. This is partly because the more dominant policy focus is on assuring the quality of local HEIs. Once quality assurance systems are in place, the Philippines will then be able to engage in greater internationalisation.

There are 2,376 HEIs in the Philippines<sup>53</sup> (including 576 campuses) and 106 degree programs with policies, standards and guidelines issued by the Commission on Higher Education. There is a total of 3.56 million students as of the 2013–14 academic year.<sup>54</sup> There are no authorised foreign HEIs with campuses in the Philippines. Allowing their establishment in the economy would require a constitutional amendment and this is not on the immediate horizon despite a great deal of interest from higher education stakeholders.

Further, rules relating to foreign direct investment in HEIs specify that Filipino partners must comprise 60 per cent of any joint venture, which may deter prospective foreign HEIs. The government may reconsider this policy, but constitutional change would be required.

Despite limited HEI mobility, the Philippines is placing greater emphasis on 'internationalisation at home' or 'campus-based internationalisation'. This focus promotes internationalisation from within to raise standards and is part of the objective of becoming a centre for quality higher education provision in the South–East Asian region. A key element of this strategy is the establishment of a quality assurance framework and processes that strengthen the quality, effectiveness and efficiency of the economy's HEIs. A second element is the establishment of an appropriate environment for international exchange and collaboration to build a sustainable international education sector. Thirdly, there is a focus on enhancing the economy-wide and regional mobility of students, faculty and staff.

Participants emphasised that international engagement is regarded as a tool to enhance the quality of HEIs in the Philippines. Nevertheless the government emphasises the need for international engagement to be done correctly. The Commission on Higher Education has issued rules on the offering of transnational education and a moratorium was in place pending the rules and regulations on the operations of HEIs engaged in transnational education. The moratorium has recently been lifted.

There is also concern in the Philippines that while some of its HEIs are world class, quality is uneven and a proportion do not meet global standards. All academic programs are reviewed and monitored for compliance to the quality standards set by the Commission on Higher Education. In addition, to ensure that graduates have appropriate skills and knowledge for professional practice, there is a strong focus on requiring graduates to sit licensing exams.

The Professional Regulation Commission manages the licensing and regulation of 46 professions and all graduates are required to pass a licensing exam before they are allowed to commence practice in their field. Ongoing professional development is also required and all professionals have to renew their license every three years.

The dominant role of licensing exams in the Philippines is partly a legacy of American control and partly a reflection of the fact that human resources are the Philippines' largest export, with Filipino nurses, for example, commonly found all around the world. The Philippines is

also looking to foreign economies to help ensure quality in its key professional disciplines. In regard to nursing for example, a number of nurse educators have been trained by Monash University in Australia and a bridging course is now being piloted.

### Figure 9: Mapua Institute of Technology

#### Mapua Institute of Technology

Mapua Institute of Technology has established three collaborative programmes at the Masters level with Chia Nan University of Pharmacy and Science in Chinese Taipei, and its faculty engaged in joint research programmes with faculty from its Chinese Taipei partner. The collaborative programmes have grown out of individual relationships between faculty members and through a long history of collaboration.

Mapua Institute of Technology also has partner HEIs in the Czech Republic, India, Japan, Malaysia, Sweden and Thailand around student and faculty exchange, and is interested in scaling these up to develop future collaborative programmes. As part of its international strategy students also go to other economies to undertake internships. Together, these activities ensure that graduates can work as global professionals and that Mapua is able to attract talented students from around South–East Asia, rather than losing its best students to HEIs in other economies.

The number of HEIs that engage in collaborative programmes is not known due to incomplete data. However, the number is thought to be extremely low. Perhaps because of this limited uptake, there are no regulations or policy to frame how collaborative programmes are implemented. Once the Philippine Qualifications Framework is complete this is likely to facilitate an expansion in collaborative programmes in coming years.

The government is concerned to ensure that only those HEIs that are ready should be allowed to engage in collaborative programmes and is working to identify which Filipino HEIs are suitable candidates for international engagement. The government's 'Policies and Guidelines in the Implementation of International Linkages and Twinning Programs' states that only Philippine HEIs that have at least level 2 accreditation (according to Commission on Higher Education standards) may enter such arrangements.

At the same time, the government wishes to ensure that all parts of the archipelago are served by international education and that opportunities are not limited to HEIs in metropolitan areas. As such, there are ideas in place to develop internationalisation hubs throughout the Philippines.

Despite this limited international collaboration there are some activities in place, although most evidence is anecdotal. A number of HEIs have collaborative arrangements with HEIs in other economies. For example dental and medical schools at The University of the Philippines and De La Salle University have sister schools at HEIs in Japan, Thailand and the United States which enable the exchange of students and faculty. In addition, the Philippines is increasingly a receiving economy for students from South East Asia given that higher education is taught in English and it is a low cost destination compared to other English speaking options.

## Singapore

Singapore has established itself as a regional and international hub for higher education, despite being a relatively small economy, both in population size and geographic area. This largely derives from Singapore's position as a service-driven economy, relying heavily on skilled human capital for its economic wellbeing. As it moves to a knowledge-based economy this demand is intensifying, as is competition for skills from other economies.

Singapore has five autonomous HEIs – the National University of Singapore, Nanyang Technological University, Singapore Management University, Singapore Institute of Technology and the new Singapore University of Technology and Design. There are currently 319 private education HEIs in Singapore, 172 of which offer post-secondary certificates, diplomas and degree programme.<sup>55</sup>

The Global Schoolhouse project—established in 2002 to leverage education provision as a source of income for Singapore while developing the local workforce—aimed to position Singapore as an education hub.<sup>56</sup> It built on Singapore's location in a region with a rapidly growing market for higher education and the economy's status as a 'gateway to Asia'.<sup>57</sup>

Foreign HEIs that have established a presence in Singapore include the University of Chicago Booth School of Business, INSEAD, the New York University Tisch School of the Arts, and the S P Jain School of Global Management. There are also numerous collaborative programmes between the five autonomous HEIs in Singapore and foreign partners.

### Figure 10: The National University of Singapore

#### The National University of Singapore

The National University of Singapore (NUS) positions itself as 'a leading global university centred in Asia, influencing the future'. It aims to bring the world to NUS and take NUS students to the world, and has a highly developed strategy to achieve both goals. NUS students and faculty come from 100 economies, with 18 per cent undergraduates and 60 per cent graduate students from other economies. Almost 70 per cent of undergraduates spend some of their study time overseas.

The establishment of Yale College NUS creates the first liberal arts college in Singapore and reinforces NUS's strategy to be 'a leader in global education'.

NUS has 70 collaborative programmes with overseas HEIs including the Duke–NUS Graduate Medical School; an alliance with MIT; a Masters in Public Policy with Colombia, the London School of Economics, Sciences Po and Tokyo University; French–NUS double degree programmes with seven Grand Ecoles and a programme in actuarial studies with the Australian National University. NUS also has reciprocal student exchange agreements with 300 HEIs in 40 economies, as well as eight overseas colleges including in Silicon Valley, at Fudan University, in Stockholm and in Israel, which provide entrepreneurship education for students.

The goal was to attract 100,000 full-fee paying international students and 100,000 international executives.<sup>58</sup> But the policy driving this initiative has changed tack. After the Private Education Act was introduced in 2009 there was a period of consolidation resulting in a halving of the number of private HEIs in Singapore and a drop in international student enrolments. Since 2009, the Global Schoolhouse initiative has shifted its focus to 'building industry-relevant manpower capabilities and helping to attract, develop and retain talent for our economy' rather than student numbers or income.<sup>59</sup> There is a focus therefore on areas such as logistics, aerospace engineering and corporate training.

New initiatives clearly reflect policy imperatives. For example a 2008 report<sup>60</sup> identified the desirability of introducing liberal arts education in Singapore. This is now being offered by Yale-NUS College at the National University of Singapore (see Figure 10). Similarly, the same report recognised that programmes which produce graduates for strategic sectors of the Singapore economy, and which are not offered by publicly funded degree programmes, could be offered by foreign HEIs.

The activities of private education HEIs, including those that offer degree programmes in collaboration with foreign universities in Singapore, are overseen by the Council for Private Education, a statutory body that regulates private education HEIs.<sup>61</sup> The council makes sure that all HEIs meet regulatory requirements prior to registration and monitors ongoing activities.

The activities of private HEIs are governed by the Private Education Act which stipulates that 'no registered private education institution may offer or provide, whether in Singapore or elsewhere, a course leading to the award of any associate, undergraduate or graduate degree or any other degree that is conferred in its own name without the permission in writing of the Minister'.<sup>62</sup> The Enhanced Registration Framework specifies the requirements of registration of private education HEIs in Singapore.<sup>63</sup>

## **Viet Nam**

The Government of Viet Nam has a desire to use HEI mobility to help it achieve its national objectives. It balances this with an emphasis on ensuring that only high quality programmes are offered. There is currently only one international provider with campuses in Viet Nam – RMIT University from Australia has campuses in both Ho Chi Minh City and Hanoi. In addition, Tokyo Viet Nam Medical University is due to establish a campus in the future.<sup>64</sup> British University Viet Nam was also established in 2009 in Hanoi but this is a slightly different model as is explained below.

A more common model of provider mobility in Viet Nam is collaborative programmes. There are two key types – the first where students study in Viet Nam only and the second where students study partly in Viet Nam and partly in a foreign economy. In total there are 436 licensed collaborative programmes (345 of which are currently active), almost two-thirds of which are at the bachelor level. In total there are 10,000 graduates in Viet Nam from collaborative programmes at the bachelor level and 17,000 from collaborative Masters programmes.

The Minister of Education and Training must approve all collaborative programmes. The only exceptions are those established by Viet Nam National University, the University of Thai Nguyen, the University of Hue, the University of Da Nang and Hanoi University of Science and Technology, where university presidents have the discretion to determine collaborative activities. The qualifications of distance (online) learning programmes are only recognised when the programmes are accredited in the home economy and approved by the Viet Nam Ministry of Education and Training (Decision No. 77/2007/QD-BGDĐT released on 20th December 2007).

While Viet Nam is happy to enable international HEIs to develop collaborative programmes with local HEIs, the government is keen to ensure that graduates are gaining skills in areas of key economic importance. The fields of business and finance are very popular among students but the government is trying to limit the number of graduates in these areas and to encourage students to focus on technology, engineering, medicine and related fields.

### Figure 11: RMIT University Viet Nam

#### RMIT University Viet Nam

RMIT is a major Australian university with a longstanding engagement in Viet Nam. It was established as a stand-alone HEI (without a local partner) 12 years ago by the former Australian ambassador to Viet Nam.

In its early years RMIT Viet Nam received substantial support from the Australian and Vietnamese governments as well as philanthropic support. This allowed the establishment of an initial campus in Ho Chi Minh City followed by one in Hanoi four years later.

RMIT Viet Nam enrolls a total of 6,000 students, almost all of whom are Vietnamese, with the largest programmes in the commerce field. It offers courses that are developed in Australia and replicated in Viet Nam, as well as courses which are developed in Viet Nam. There is a high degree of integration with industry and this ensures that graduates are very attractive among local employers.

All of its courses are approved and accredited by the Vietnamese Government and quality assurance is undertaken by TEQSA in Australia. Both Australian and Vietnamese students can transfer from one campus to another during their studies but few come from Australia.

RMIT has an explicit global strategy and also has campuses in Singapore and Barcelona. The strategy is multifaceted to reinforce the high standing of RMIT as well as attracting new cohorts of students and opening up global research opportunities. Viet Nam was particularly attractive as a destination for a campus due to limited competition from other foreign HEIs. Further expansion in Viet Nam is regarded favourably, as is collaborative research with local partners.



The Vietnamese Government released Decree 73 in 2012.<sup>65</sup> This focuses on ensuring the quality of collaborative programmes and has established a number of requirements for foreign HEIs. These include that HEIs and programmes must be accredited in their home economy and that the degrees offered must also be recognised in their home economy.

The intention is to ensure that HEIs that are highly ranked and can demonstrate high quality are able to collaborate with Vietnamese HEIs, while those that do not meet these standards are prevented from doing so. Moreover, special subjects must be taught in a foreign language (with interpretation not allowed) and academic entry requirements (as well as language requirements for entry) must be appropriate.

If a foreign HEI wishes to establish a campus in Viet Nam it will be subject to Vietnamese law and must secure a minimum investment of approximately US\$8,000 per student, with a total minimum investment of US\$15 million. Once approved they are licensed to operate for a maximum period of 50 years, with the length depending on the HEI's intention. Alternatively a foreign HEI may establish a representative office in Viet Nam, with a license for five years, and can then apply for an extension.

Once a collaborative programme is given permission to operate in Viet Nam it receives a license for five years and can apply for an extension. There is a requirement to register for programme accreditation every five years. For the first three years a collaborative programme is quality assured by the home economy of the international HEI and this responsibility then moves to the Vietnamese quality assurance system. Collaborative programmes use curriculum either developed by both Vietnamese and partner HEIs, by partner HEIs only or by

the Vietnamese HEIs only. Degrees may be awarded by the foreign HEI, by the Vietnamese HEI or by both partners.

Faculty who teach on collaborative programmes must have at least five years of experience and 80 per cent must have postgraduate qualifications. Foreign teaching staff must have at least five years of teaching experience in a relevant discipline. All teaching staff in collaborative programmes must hold a level C1 or higher in the Common European Framework of Reference for Languages. The government encourages Vietnamese teaching staff to learn from foreign teaching staff and take over from them eventually. This is regarded as an important form of knowledge transfer but is not a regulatory requirement.

In addition to campuses of foreign HEIs and collaborative programmes, Viet Nam has also chosen to establish a number of quite unique HEIs, known as 'new model universities'. Examples are the Vietnamese-French-University<sup>66</sup> and the Vietnamese-German-University.<sup>67</sup> which are international public universities supported by the Vietnamese Government, foreign governments and international organisations. Viet Nam has received significant loans from the World Bank and Asian Development Bank to establish these.

The aim is to establish high quality universities that give Vietnamese students the opportunity for internationalised experience which meets the needs of the Vietnamese economy. A UK-Viet Nam Institute was recently set up in Da Nang as the first stage of Viet Nam-UK University. Three other universities: Viet Nam-Japan, Viet Nam-Russia and Viet Nam-United States are due to be established in the future.

In contrast, the British University Viet Nam<sup>68</sup> is a private international university with 100 per cent international funds. The university offers courses that can lead to a degree from an official recognised university from the UK. The University of London and Staffordshire University are partners in the British University in Viet Nam to provide programmes and award degrees. This model means that tuition fees are higher than at the Vietnamese-German-University and the Vietnamese-French-University.



## Evolution of cross-border mobility and its implication for policy

The previous section has looked in detail at the policy context around HEI mobility in each of the eight APEC economies included in the study. This section draws the insights together to highlight the key themes that the study has uncovered. It illustrates the step-by-step approach to cross-border mobility that is common in nearly all cases and considers the policy requirements at each stage.

Once again it is important to note that this section is based on findings from interviews with participants, and policy analysis on the context, in eight APEC economies. As such it should not be assumed that these findings are equally applicable to other APEC economies. Nevertheless, it is hoped that the insights gained from this study will illustrate themes which may be of interest to the broader APEC community and which could inform future collaboration around HEI mobility.

### Step-by-step approach to cross-border mobility

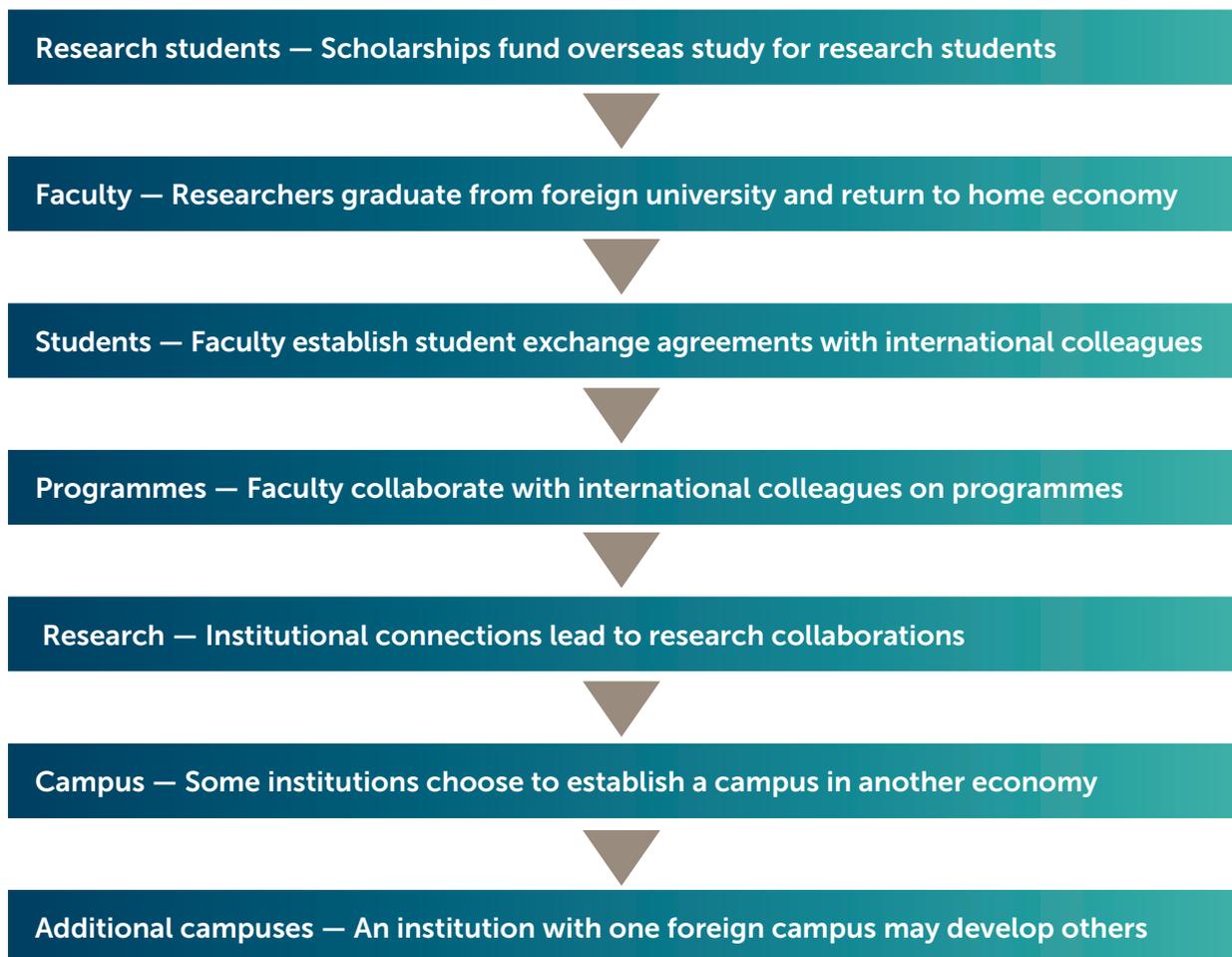
In every economy included in the study it is clear that cross-border HEI mobility has developed gradually and in a consistent progression. It is very unusual to see HEI mobility that has arisen out of a vacuum. Instead, the common pattern is to start small and grow bigger over time.

This is an important finding because it suggests that efforts to encourage greater HEI mobility require attention to the other forms of mobility on which it is built, and the policies that constrain or support them. Of course, given the scope of this report, it cannot be assumed that this pattern is common to all APEC economies.

Nevertheless, participants from HEIs from Australia and the United States who were present in the economies included in this study confirmed this progression. And this indicates that it may have broader applicability.

Figure 12 indicates the step-by-step progression of cross-border mobility. Each stage is explored in more detail below, together with the policy required to support it.

**Figure 12: Step by step progression of cross-border HEI mobility**



This progression suggests that policy which focuses solely on facilitating HEI mobility while disregarding other forms of mobility may be limited in its impact. Instead, policy can more usefully focus on establishing a coherent, multi-faceted and consistent approach to cross-border mobility as a whole.

Drawing on the experience of those economies included in the study which have the most mature manifestation of cross-border HEI mobility, it is possible to suggest policies which tend to facilitate cross-border mobility generally, and the conditions for cross-border HEI mobility specifically. While unlikely to be fully comprehensive in their coverage, these indicate ways in which economies can optimise the benefits which cross-border mobility can generate while retaining control of quality over educational provision and outcomes.

## Researcher mobility

- > Encouraging joint-supervision arrangements.
- > Funding for short-term international mobility.

Interviews with participants made clear that an important pre-condition for mobility of all kinds, including HEI mobility, is the internationalisation of faculty. In most cases provided by participants, personal relationships between faculty were at the foundation of mobility in the higher education sector.

As participants recounted, student mobility was most likely to arise from an agreement between a faculty member in one HEI and their counterpart in another. This was equally the case for faculty mobility and the two tended to lay the groundwork for HEI mobility. This bottom-up approach to mobility enabled trusted relationships to be built between HEIs over time, and for small-scale collaboration to grow into large-scale schemes when HEIs were comfortable with each other.

Faculty relationships across borders are best engendered during research studies, when post-graduate students are able to spend some or all of their degrees in foreign HEIs. It is noteworthy that almost all participants in this study—from policy makers to key institutional staff—had themselves undertaken a sustained period of study or research in another economy.

Previous research has pointed to the importance of post-doctoral researcher mobility in establishing fertile conditions for internationalisation<sup>69</sup> in future careers. Beyond establishing networks, when a critical mass of faculty at an HEI has been exposed to an international higher education environment this tends to have a profound impact on their outlook towards, and interest in, cross-border mobility. International exposure also enables faculty to gain new knowledge and skills. These can be applied to their home economy to stimulate development. They also enable international research collaborations.

Taken together, these are three important factors in support of HEI mobility, which call for policy that supports the mobility of researchers. One of the most common ways to foster relationships between faculty in different economies is for scholarships to be provided to support high achieving students to undertake postgraduate studies in another economy. This policy is in place in all economies included in this study, commonly with a focus on disciplines of key strategic importance to the economy.

Scholarships are very expensive however. This inevitably limits their availability and calls for additional policy approaches. An alternative, and one which is applied rather inconsistently across the economies included in this study, is to encourage as many research students as possible to have some degree of joint supervision from a researcher in another economy.



Joint supervision does not require that students travel overseas (although an international sojourn is desirable) but may simply require arrangements around advice and support through online media. It may be in the interest of economies to introduce policies that encourage cross-border supervision of research students and provide opportunities for research students to spend a short period of time in a foreign HEI with their co-supervisor. This can lay the groundwork for international mobility to become an assumed part of HEI activities in future years.

A further element is to address the visa requirements for researchers. Researchers commonly fall under 'business' categories when applying for visas, which are an awkward fit with the research activities they conduct. Overcoming such restrictions would facilitate greater researcher mobility.

## Faculty return

- > Establishing research centres of excellence.
- > Cost-sharing models to fund research infrastructure.

A key concern for economies in providing financial support for research students to study in another economy is that the student may choose not to return home. For wealthier economies this is not seen as a significant problem and some participants in this study referred to a 'lose one, gain one' pattern. For less wealthy economies, and for those without the ability to attract replacement talent, the brain drain of foreign-educated faculty is regarded as a significant problem.

Returning researchers tend to be the major players in enabling HEI mobility so it is essential that economies find ways to attract home those researchers they have supported to study overseas. Participants in this study pointed to three key policy approaches to tackling this issue.

One approach is to set a condition on scholarships that requires recipients to return to the funding economy for a set period of time. While this approach is used in some economies it is compliance driven. It does not necessarily establish a positive environment in which faculty have an intrinsic motivation to contribute to their economy. Indeed, some participants in this study reported the existence of a cadre of frustrated and resentful faculty who had studied overseas and were now forced to remain in their home economy but were neither motivated nor able to fulfil any more than the basic requirements.

Participants suggested that a key reason why researchers who are obliged to return home may feel frustrated is that their home economy lacks suitable research infrastructure. This prevents them from applying the skills and knowledge that they have gained overseas. The absence of suitable research infrastructure also tends to be a major factor in dissuading other foreign-trained researchers from returning home.

Cost factors mean that it is rarely possible for every higher education in an economy to have world-class research facilities, particularly in emerging economies. An alternative is to invest in national centres of excellence. This enables research infrastructure in key areas to be centralised, although participants emphasised that it is important to ensure that centres of excellence are geographically dispersed to ensure maximum benefit.

Participants expressed interest in funding improved research infrastructure through connections with industry partners. Cost-sharing models to fund research facilities are already in place in some economies. These can be helpful in attracting highly skilled faculty to return home, bring their expertise gained at foreign HEIs and apply it to the benefit of their home economy. The connection with industry can also enable these benefits to stimulate further innovation and economic growth.

## Student mobility

- > Reciprocal student mobility programmes.
- > Global classrooms.

The first step in international engagement between HEIs tends to be student mobility. Crucially, student mobility programmes build levels of trust between HEIs, which set the scene for expanding to HEI mobility. Student mobility also introduces institutional stakeholders to cross-border education, with foreign students acting as ambassadors for international collaboration.

All of the economies included in this study already have some degree of outward student mobility. Some of this is funded by government scholarships but much is personally funded, meaning that most outwardly mobile students are from elite groups. Many participants were keen that this level of support be expanded to give opportunities to students from a broader range of social backgrounds.

All economies included in the study also have some evidence of inward student mobility but this tends to be much less pronounced than outward mobility. Malaysia is a significant exception, having an almost equal balance of inbound and outbound students.<sup>70</sup> Most participants expressed a desire to move towards equal flows of outward and inward student mobility, both at the economy and also at the institutional level.

Participants noted that achieving balanced inward and outward flows of student mobility requires policies which both support outward, and encourage inward mobility, and crucially are as cost effective as possible to open opportunities for participation beyond the elite group.

Policies that support establishing reciprocal arrangements between HEIs—arrangements in which tuition fees are waived and accommodation is provided—can help to rebalance student flows. They can also help make student mobility a more affordable option for students.

No matter how sophisticated the student mobility policy, it is inevitable that most higher education students will not experience mobility during their degrees. This highlights the need for policies that encourage forms of mobility that optimise the information technology which a growing number of students have access to.

Some participants in this study reported that they had started experimenting with 'global classrooms', in which students in equivalent classes at HEIs in two or more economies experience shared online learning, often in real time, and undertake shared projects. This is an idea that could yield significant benefits for students and is something which would benefit from policy support to develop further.

## Collaborative programmes

- > Agreements on credit recognition and quality assurance.
- > Support for language enhancement.

This study has shown that collaborative programmes are the most common form of HEI mobility in the eight economies focused on in this document. Collaborative programmes also tend to precede the establishment of foreign campuses. Collaborative programmes often start informally as faculty in two HEIs who have personal connections and then start to collaborate in teaching students. Once they gather momentum these programmes often become institutionalised.

The research undertaken for the study made clear that each economy has a unique approach to policy around collaborative programmes. In some cases HEIs are free to set up collaborative programmes without reference to government oversight. In other cases there are rigorous policies for approving and monitoring collaborative programmes. Each suite of policies has been developed to suit local contexts and continues to evolve over time to meet new demands.

There is no one-size-fits-all approach to policy around collaborative programmes. Nevertheless, there are common areas of concern, which can be ameliorated by well-designed policy approaches. Participants reported that the biggest challenge which HEIs face in establishing and implementing collaborative programmes is around the identification of equivalency. To overcome this, and to support HEI mobility in the form of an increased number of collaborative programmes, economies could pursue multilateral and bilateral agreements around credit recognition and quality assurance.

In many economies the language skills of students prevent them from participating in collaborative programmes, even when they have been established. In most economies where this has been identified as a problem, language learning is a major policy objective.

It is important to note that for students to have sufficient proficiency in a language to undertake higher education studies, they need to start learning that language as early as possible. Policies to support this (which are already in place in many economies) include language training for primary and secondary teachers and community classes which students can take outside of school hours.

## Research collaboration

- > Bilateral and multilateral agreement on research priorities.
- > Preferential funding for international collaborations.

Collaborative programmes frequently lead to, or evolve alongside, research collaborations. By this stage HEIs are familiar with each other's strengths and weaknesses and are able to identify common areas of interest and potential benefits from research collaboration. This may include the exchange or co-supervision of research students, which neatly circles back to researcher mobility.

Participants from every economy in this study emphasised the need to stimulate research in their own context through cooperation with researchers and HEIs in other economies. They noted that the desire to collaborate on research is becoming one of the driving forces of HEI mobility.

A key policy initiative to support research collaborations is the establishment of bilateral and multilateral agreements on research priorities. These help economies to work with others to focus their research activities on areas of most significance to their national interest as well as sharing expertise to solve mutually relevant challenges. Approaches such as the Global Knowledge Initiative, the links between HEIs in Universitas 21 and the cooperation in research fostered by the Association of Pacific Rim Universities<sup>71</sup> indicate how this can be achieved.

In many economies the government provides competitive research funding to HEIs. Participants suggested that encouraging international research collaborations could be as simple as rewarding applications which include international partners above those which do not. Such an approach can rapidly lead to a paradigm shift around the need for cross-border approaches to research problems.

## Foreign campuses

- > Inducements for foreign HEIs.
- > Quality assurance agreements

In many cases HEI mobility does not progress beyond collaborative programmes. This may be appropriate to the local context. Interestingly however, most of the participants in this study predicted that foreign campuses would become increasingly prevalent in the future.

In situations where the international drive of an HEI and the policy context of a host economy are aligned, a foreign HEI campus may be established. In nearly all cases examined—both for practical reasons and policy requirements – foreign HEIs partner with local HEIs to develop their campuses.

Economies included in the study which have attracted foreign HEIs to establish campuses have done so with a multifaceted policy approach. This includes providing of infrastructure, implementing policies which facilitate collaboration between local partners and foreign HEIs, and a bureaucratic system which encourages rather than blocks applications from reputable foreign HEIs. These are policies that need to be developed in line with the specific needs of the local context.

It can be difficult for government and local HEIs to determine the quality of foreign HEIs, and this issue came up frequently in interviews for this study. One way to overcome this is to move towards bilateral and multilateral agreements around mutual recognition of quality assurance. This can help overcome this complexity and facilitate greater international engagement between HEIs of similar standing. But it is important to first understand what is best practice around the world and how this can be implemented on a voluntary basis in a way which fits the specific needs of the context.

## A summary of policy imperatives

As the preceding section indicates, cross-border mobility tends to evolve incrementally, at least for the economies included in this study. This implies that each stage in mobility is important to facilitate the mobility of HEIs. This doesn't mean that cross-border mobility arises in the same way in all economies at all times, but does indicate that policies to facilitate mobility between economies may need to be in partnership with policies to encourage other forms of mobility, rather than in isolation. Figure 13 summarises the key areas of policy importance which have been discussed above:

**Figure 13: Policy priorities to encourage cross-border HEI mobility**

<b>Researcher mobility</b>	<ul style="list-style-type: none"> <li>&gt; Encouraging joint-supervision arrangements</li> <li>&gt; Funding for short-term international mobility</li> </ul>
<b>Faculty return</b>	<ul style="list-style-type: none"> <li>&gt; Establishing research centres of excellence</li> <li>&gt; Cost-sharing models to fund research infrastructure</li> </ul>
<b>Student mobility</b>	<ul style="list-style-type: none"> <li>&gt; Reciprocal student mobility programmes</li> <li>&gt; Global classrooms</li> </ul>
<b>Collaborative programmes</b>	<ul style="list-style-type: none"> <li>&gt; Agreements around credit recognition and quality assurance</li> <li>&gt; Support for language enhancement</li> </ul>
<b>Research collaboration</b>	<ul style="list-style-type: none"> <li>&gt; Bilateral and multilateral agreement on research priorities</li> <li>&gt; Preferential research funding for international collaborations</li> </ul>
<b>Foreign campuses</b>	<ul style="list-style-type: none"> <li>&gt; Inducements for foreign institutions</li> <li>&gt; Quality assurance agreements</li> </ul>

Essential elements which run through this progression, and which were consistently emphasised by participants, are sustained engagement, building trust, cautious growth, a search for high quality and a desire to enhance the experience of students, researchers and HEIs. As participants reflected, a progression such as this may take up to two decades to evolve. And this is of great significance for HEIs with an interest in increasing their future international mobility.

In working closely over a long period of time HEIs are able to demonstrate their commitment to each other and to the communities they serve. In the careful construction of HEI relationships to sustain cross-border mobility there are few overnight successes. Participants in all economies included in this study, even those with an urgent need to increase capacity of the higher education sector, reported that they treat any HEIs which express a short-term perspective with caution. Instead, participants reported seeking partners that were prepared to make a meaningful, sustained and long-term commitment to an economy and to educating its students and improving its research capacity. The experience of foreign HEIs that successfully established themselves in the economies in this study shows that a significant resources and funds are required over a long period before costs can even begin to be recouped.

Participants in this study were clear that HEI mobility should be a long-term investment that reaps dividends in many ways for many stakeholders. HEIs that are embedded in overseas locations see themselves as an important part of the higher education community. Any surpluses tend to be reinvested in that economy as part of their commitment to ongoing engagement. Moreover, all participants from foreign HEIs with international campuses described plans for deepening their engagement in the research and teaching community of their host economy into the future.



## Multilateral approaches to remove barriers to institutional mobility

The flip side to policy that facilitates HEI mobility, is that which impedes it. This study highlighted a number of policy impediments to HEI mobility, ranging from a moratorium on the establishment of new HEIs to restrictions on faculty employment.

As participants highlighted, policies that impede HEI mobility emanate from concerns about quality. Host economies are determined to retain control over the quality of higher education. They wish to avoid the possibility that HEIs offer education that does not meet acceptable standards. And those whose regulations have been lax are now working to ameliorate past problems that have arisen.

The greatest challenge for economies in determining the quality of a foreign HEI or its programmes is that there is no international or regional standard against which to do so. Most of the economies included in the study have qualifications frameworks but these do not tend to be linked to each other. In addition, most of the eight economies have quality assurance processes for HEIs. But again, the lack of mutual recognition between many of these impedes cross-comparison.

Given the focus of this study on removing barriers to HEI mobility, participants were asked to suggest how APEC could help its members collaborate to enhance provider mobility. Responses highlight several mechanisms and those with knowledge of mobility literature will not be surprised that the majority refer to multilateral approaches to programme and institutional recognition.

This section considers multilateral approaches to enable APEC economies to achieve similar policy objectives without imposing the current restrictions. These are discussed in the order of importance indicated by participants.

### Quality assurance agreement

Participants emphasised that a rigorous quality assurance mechanism is the only way economies can exercise control over HEI quality. Some economies have extremely advanced quality assurance mechanisms. Those most commonly referred to were the British Quality Assurance Agency for Higher Education (QAA), the Australian Tertiary Education Quality Standards Agency (TEQSA) and the Malaysian Qualifications Agency (MQA). These agencies tend to have bilateral agreements with each other which greatly enhances quality recognition and institutional mobility.



Host economies without strong quality assurance processes of their own tend to use well-known processes as a proxy. Participants reported that British and Australian HEIs that wish to engage in mobility tend to be welcomed as they are known to have undergone a rigorous quality assurance process in their home economy. Nevertheless, there remain widespread doubts about whether the education they offer in another economy lives up to the standards of the home HEI.

In many economies, including some in this study, the quality assurance process is less developed or defined. This inevitably limits HEI mobility as potential host economies have no frame of reference against which to assess the quality of educational provision. Many of the impediments to mobility arise from exactly this issue, with economies understandably wary of allowing an HEI of dubious quality to operate. As participants reported, the wariness is reinforced with incidents of HEIs caught trying to offer inferior higher education without permission to do so.

Quality assurance was the most frequently discussed issue by participants in this study. Fortunately there are a number of ways in which impediments to HEI mobility—and concerns about quality assurance—can be addressed under the APEC umbrella.

While there is significant appetite among participants in this study for the development of a regional quality assurance system, the synergies that can be gained from building on extant initiatives needs to be examined, rather than reinventing the wheel by developing new versions of these from scratch.

Many APEC economies are already part of regional quality assurance mechanisms. Examples of most relevance to the economies in this study include the ASEAN Quality Assurance Network (including the APEC economies of Indonesia, Malaysia, the Philippines, Singapore and Viet Nam)<sup>72</sup> and Alfa Puentes (including the APEC economies of Mexico, Peru and Chile).<sup>73</sup> In addition, international approaches incorporate many APEC economies. These include the International Network for Quality Assurance and Accreditation in Higher Education (INQAAHE) – an association of over 200 quality assurance agencies.<sup>74</sup>

APEC economies can also draw on the examples of regions of the world with a high degree of quality assurance coordination. The ultimate example is the European Union. The ENIC-NARIC website (established by the European Network of Information Centres and the National Academic Recognition Information Centres) enables a search of current information on quality assurance and qualifications recognition in each member economy to encourage mobility of students and faculty.<sup>75</sup> This shows how greater cooperation and mutual recognition can be achieved without needing to replace national systems, or seek perfect qualification harmonisation across the globe.

Another initiative from the European Union is the European Association for Quality Assurance in Higher Education. This is relevant to APEC as it acts as an example of an umbrella organisation that promotes cooperation around quality assurance and ‘foster[s] the European dimension of quality assurance’.<sup>76</sup> This includes the development of standards and guidelines for quality assurance among European member countries. This could be of particular pertinence in facilitating knowledge transfer to APEC economies that do not yet have a rigorous quality assurance process in place.

Overall, it is clear from the interviews undertaken for this project that greater coordination around quality assurance in APEC economies could yield significant dividends in terms of reducing the barriers to HEI mobility. It is important to acknowledge however that this might not be relevant to all APEC economies and that any approach should be flexible enough to enable each economy to tailor it to the needs of their specific context.

## **Credit recognition**

After quality assurance, the second most important area mentioned by participants in this study was credit recognition. Most participants remarked on the difficulty of being able to recognise students’ academic outcomes from foreign HEIs (or even other HEIs in their own economies). As participants reported, this makes it very difficult to compare programmes at different HEIs, to understand what students have studied elsewhere and to facilitate student mobility and collaborative programmes.

Recognising the credits which students gain from a programme of study is made more complex by the absence of standardised qualifications frameworks across APEC economies. In some of the economies included in this study these are currently under development and in several they are already well entrenched. A 2009 APEC report indicates the variations among APEC Economies.<sup>77</sup>

It is important to note that a national qualifications framework is not essential in demonstrating that HEIs offer high quality education. In the United States, for example, there is no national qualifications framework.

Nor does the absence of a standardised qualifications framework preclude HEI mobility. As participants mentioned, HEIs are often free to establish their own collaborative relationships with foreign HEIs and work out equivalency between each other's programmes, with oversight from local authorities.

Despite these considerations, participants were strongly in favour of having some kind of system in place among APEC economies to reduce the difficulty of determining the equivalency of different programmes at different institutions, both to make HEI mobility more straightforward and also to facilitate greater student mobility. The objective would be to facilitate the international recognition of qualifications, improve transparency of qualifications and enhance the mobility of students and workers.

As with quality assurance, it is more efficient to build a qualifications recognition initiative on what is already in place. For example, a number of APEC economies including Australia, China, the Republic of Korea, the Russian Federation and the Philippines are parties to UNESCO's 1983 Regional Convention on the Recognition of Studies, Diplomas and Degrees in Higher Education in Asia and the Pacific. China and the Republic of Korea have also signed the 2011 Revised Asia–Pacific Regional Convention on the Recognition of Qualifications in Higher Education.<sup>78</sup>

It may also be of interest for APEC economies to develop an initiative similar to the European Qualifications Framework although this approach may not suit the enormous diversity among APEC economies and the variation in their governance structures.<sup>79</sup> An alternative approach is to develop a 'diploma supplement' for higher education students to accompany their degree certificate. This has been investigated for use between APEC member economies with endorsement of a voluntary, non-binding template and agreement with principles around its use.<sup>80</sup>

Moving towards an APEC approach to mutual credit recognition would be another way of reducing barriers to HEI mobility. This can be approached at a system-wide level and there are a number of models in place for how this could be achieved. One example is the European Credit Transfer and Accumulation System, which is based on learning outcomes and workload.<sup>81</sup>



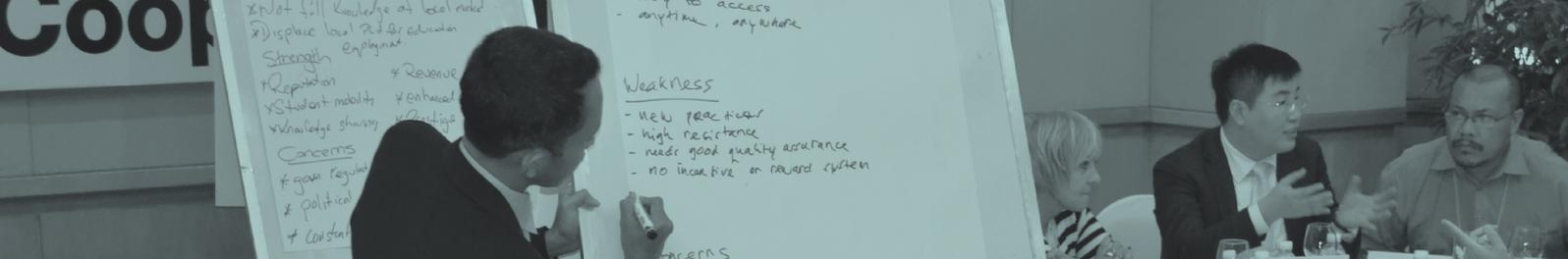
### **Information sharing and advocacy**

In addition to providing a forum to develop shared approaches to reduce barriers to HEI mobility, participants in this study felt that other action could be taken at the multilateral level to enhance HEI mobility.

One of the barriers to mobility is a lack of understanding of the higher education systems in each economy. Participants urged APEC to provide a clearing house which links to key information on the higher education system in each economy as well as details on each economy's quality assurance, accreditation and credit frameworks.

Participants suggested that this should also include information for prospective partners in how to engage in HEI mobility in each economy. In addition, participants would like to see a space for HEIs and faculty to register interest in collaborating with overseas partners on specific areas of study.

It was also felt that APEC should advocate for cross border education, for example by providing guidelines, collecting and analysing data, sharing good practice, hosting international forums and bringing together representatives from economies to enhance collaboration on HEI mobility.



## Conclusion

This report has brought together a wealth of information from a wide variety of sources. While each participant in each of the economies studied had a unique perspective on cross-border HEI mobility, there were clear commonalities.

All participants recognised the value for students, faculty, HEIs, economies and the region more generally in facilitating HEI mobility. This was tempered however by concerns about ensuring high quality education provision, and the threat posed to students by HEIs operating outside of accepted parameters on quality.

The combination of positivity about—but caution towards—HEI mobility is reflected in the policies that economies have put in place. These vary widely from one economy to the other, reflecting an array of interests and contextual factors as well as social and economic interests.

To enhance higher education provider mobility among APEC economies it is necessary to build on the existing positivity towards international education and the recognition of the need for students to be exposed to global experiences. This is in parallel with economies' desire to learn from the best practices of their neighbours and to collaborate to solve regional challenges.

To some extent this can be achieved by advocacy about HEI mobility and the sharing of good practice and information. But this will not be sufficient if some of the major structural barriers to provider mobility are not overcome.

This study has made clear that two key priorities for the APEC community are to work towards collaboration on quality assurance and credit recognition. Without advances in each of these areas, economies will continue to use policy to protect themselves against the unknown. There are already established mechanisms which can be built upon, and there is significant interest in moving ahead in both areas.

Another area that requires attention is the level of awareness of different forms of HEI mobility. As this study has made clear, little is known about the extent of HEI mobility at the international level, and also at the national level in many economies. Without efforts to determine the pattern and scale of collaborative programmes, much provider mobility will continue to take place under the radar. This prevents good practice from being shared and relevant policy from being developed.

Finally, online modalities in HEI mobility remain largely unexplored. While there are some initiatives within economies, and blended forms of learning are increasingly common, there are few to no advances in online learning across borders, certainly among the APEC economies in this study.

There have been great advances in all forms of higher education mobility in the region. But the number of students enrolled in HEIs has risen significantly at the same time. This means that most higher education students do not have the opportunity to engage in mobility, to participate in a collaborative programme, or to attend a satellite campus of a foreign HEI.

If APEC economies are serious about preparing the next generation of students for the realities of a more mobile global era, then finding ways to extend cross-border mobility to as many higher education students as possible in all APEC economies must be a priority. For cost reasons, the only feasible way of doing so is to tap into the opportunities provided by online modes of learning. To fully optimise the human capital growth potential of cross-border mobility, the development of new forms of collaboration through online communications should be an urgent priority.



## Appendix A – Research participants

Economy	Name	Position and institution
China	Lin Mengquan	Director, Evaluation Department, China Academic Degrees and Graduate Education Development Center
China	Dong Xiaoyu	Evaluation Department, China Academic Degrees and Graduate Education Development Center
China	Liu Baocun	Director, Institute of International and Comparative Education, Beijing Normal University
China	Qiang Liu	Associate Professor, International and Comparative Education Centre, Faculty of Education, Beijing Normal University
China	Gong Wan	Deputy Director General, Chinese Service Center for Scholarly Exchange, Ministry of Education
China	Xiong Xing	Deputy Director, Overseas Academic Credential Evaluation Office, Chinese Service Centre for Scholarly Exchange, Ministry of Education
China	Zong Wa	Deputy Secretary General, China Education Association for International Exchange
China	Zu Yuanyuan	Department of Quality Assurance in Cross-Border Education, China Education Association for International Exchange
China	Dr Liu Jianfeng	Vice President, National Institute of Education Sciences
China	Catherine Wang	Director, National Institute of Education Sciences
China	Qingtao Meng	Department of International Cooperation, National Institute of Education Sciences
China	Yu Lizhong	Chancellor, New York University Shanghai
China	Joanna Waley Cohen	Provost, New York University Shanghai
China	Kevin Lin	Director, International Office, The University of Nottingham, Ningbo

Economy	Name	Position and institution
China	Catherine Xu	Director of International Relations, SHU-UTS SILC Business School, Shanghai University
Viet Nam	Timothy Costigan	Head of Department, Professional Communication, Centre of Communication and Design, RMIT International University Viet Nam
Viet Nam	Hoang Van Anh	Assistant Director, Higher Education and Skills, British Council Viet Nam
Viet Nam	Ta Thi Hong Lien	Assistant Director, Education Services, British Council Viet Nam
Viet Nam	Nguyen Thi Thanh Minh	Deputy Director General, Viet Nam International Education Development, Ministry of Education and Training
Viet Nam	Tran Thi Phuong	Deputy Head, Project Division, Viet Nam International Education Development, Ministry of Education and Training
Viet Nam	Thai Thi Cam Chi	Business Development and Programme Coordination, Representative Viet Nam, Institute of Continuing and TESOL Education, The University of Queensland
Viet Nam	Nguyen Vinh Hien	Vice Minister, Ministry of Education and Training
Viet Nam	Pham Quang Hung	Deputy Director General, International Cooperation Department, Ministry of Education and Training
Viet Nam	Tran Hong Ly	Officer, International Cooperation Department, Ministry of Education and Training
Viet Nam	Quach Ngoc Minh	Officer, Division of International Education, Viet Nam International Education Development, Ministry of Education and Training
Viet Nam	Tran Van Nghia	Deputy Director, General Department of Educational Testing and Quality Accreditation, Ministry of Education and Training
Viet Nam	Vu Thi Phuong Hien	General Department of Educational Testing and Quality Accreditation, Ministry of Education and Training
Viet Nam	Nguyen Duc Manh	Program Manager, La Trobe University–Hanoi University Joint Business Programmes, Hanoi University
Viet Nam	Nguyen Ngog Tan	Director of International Office, Hanoi University
Philippines	Teresita Manzala	Chairperson, Professional Regulation Commission
Philippines	Jose Cueto	Member, Professional Regulatory Board of Medicine, Professional Regulation Commission
Philippines	Melinda Lopez-Garcia	Member, Board of Dentistry, Professional Regulation Commission
Philippines	Reynaldo Vea	President and CEO, Mapua Institute of Technology
Philippines	Lily Freida Macabangun Mila	Director 111, International Affairs Services Commission on Higher Education

Economy	Name	Position and institution
Philippines	Romulo Agatep	Former Chairman and President, Institute of Electronics Engineers of the Philippines
Philippines	Alvin Culaba	Executive Director, Office of External Relations and Internationalisation, De La Salle University
Malaysia	Roziah Binti Omar	Deputy Director General, Private Higher Education Management, Ministry of Education Malaysia
Malaysia	Zita Hj Mohd Fahmin	Deputy Chief Executive (Quality Assurance), Malaysia Qualifications Agency
Malaysia	Najmi Haji Mohd Noor	Director, Institutional Audit Division, Malaysian Qualifications Agency
Malaysia	Siti Hamisah	Deputy Director General (Public Sector), Department of Higher Education, Ministry of Education Malaysia
Malaysia	Christine Ennew	Pro-Vice Chancellor and Provost, University of Nottingham Malaysia Campus
Malaysia	Helen Bartlett	President and Chief Executive, Monash University Malaysia
Malaysia	Gavin Gomez	Director, External Relations Development and Alumni, Monash University Malaysia
Indonesia	Paulina Pannen	Special Advisor, Directorate of Institutional and Collaboration Affairs, Directorate General of Higher Education, Ministry of Education and Culture
Indonesia	Purwanto Subroto	Deputy Director, Directorate of Institutional and Collaboration Affairs, Directorate General of Higher Education, Ministry of Education and Culture
Indonesia	Illah Sailah	Director of Learning and Student Affairs, Directorate General of Higher Education and Student Affairs, Ministry of Education and Culture
Indonesia	Dwiwahju Sasongko	Secretary, National Accreditation Agency for Higher Education
Indonesia	Denok Sri Sukartinah	Country Manager (Indonesia), The University of Melbourne
Singapore	Anne Pakir	Director, International Relations Office, National University of Singapore
Singapore	Pericles Lewis	President, Yale–NUS College
Singapore	Brandon Lee	Chief Executive, Council for Private Education
Singapore	Remy Choo	Director, Assessment Registration Monitoring and Investigation, Council for Private Education
Mexico	Rodrigo Guerra Botello	Secretary General, Federation of Mexican Private Higher Education Institutions
Mexico	Juan Carlos del Castillo Vazquez	Technical Director, Council for Accreditation of Higher Education

<b>Economy</b>	<b>Name</b>	<b>Position and institution</b>
Mexico	Hector Arreola Soria	Director, General Coordination of Technical Universities and Polytechnics, Higher Education Ministry
Mexico	Ivan Omar Zapata de Santiago	Deputy Director of International Cooperation
Mexico	Valerie Cardenas Dugal	Director of Institutional Engagement, National Association of Universities and Higher Education Institutions
Mexico	Jaime Escalera Jimenez	Director of Corporate Engagement, National Association of Universities and Higher Education Institutions
Mexico	Joaquin Guerra Achem	Vice Rector Internationalisation, Tecnológico de Monterrey
Mexico	Tim George	Australian Ambassador to Mexico
Mexico	Arturo Velazquez Jimenez	Advisor, Ministry of Higher Education
Mexico	Rainer Matos Franco	Advisor, Ministry of Higher Education
Mexico	Lucero Lozano Vilchis	Advisor, Ministry of Higher Education
Peru	Sofia del Pilar Wong Ortiz	Director General of International Relations and Cooperation, Asamblea Nacional de Rectores
Peru	Javier Verastegui Lazo	Deputy Director of Science, Technology and Talent, Director of Policies and Programmes of Ctel, National Council of Science, Technology and Technological Innovation
Peru	Jose Luis Solis Veliz	Director, National Programme of Science and Materials Technology, Director of Science and Technology, National Council of Science, Technology and Technological Innovation
Peru	Carmen del Rocio Azurin Araujo	Minister, Deputy Director of APEC
Peru	Rocio Cathia Casildo Canedo	Advisor on APEC Policies
Peru	Maribel Guzman	Mining Engineering, Department of Engineering, Pontificia Universidad Católica del Perú
Peru	Silvia Rosas	Mining Engineering, Department of Engineering, Pontificia Universidad Católica del Perú



## Appendix B – Interview questions for officials

These questions formed the basis of interviews with policy makers, accreditation agencies, quality assurance agencies and associated bodies involved in the governance, regulation and oversight of the activities of foreign institutions in their economies.

### Foreign higher education institutions

- > How many foreign higher education institutions are currently active in your economy (for example through branch campuses, franchises, dual and joint degrees and online courses)?
- > (If present) which economies are they from?
- > Which factors do you think (might) attract foreign higher education institutions to operate in your economy?
- > Do you think that there are any factors which (might) discourage foreign higher education institutions from operating in your economy?
- > (If present) in which ways does your economy benefit from the presence of foreign higher education institutions?
- > What action (if any) does your economy take to attract foreign higher education institutions?

### Forms and functions of incoming higher education institutions

- > What are the most common types of activity of foreign higher education institutions in your economy?
  - Do they tend to collaborate with local institutions or operate alone?
  - Do they tend to have a physical presence or is their presence online only?
  - Do they tend to focus on teaching or research or both?
  - (If teaching) do they tend to teach undergraduates or postgraduates or both?
  - Are there particular discipline areas that they are concentrated in?
- > What is your economy's main objective in allowing foreign higher education institutions to be active here?

- > Would you like to have a greater number of foreign higher education institutions in your economy?
- > (If yes) what activities would you like them to undertake?
- > Do you have any concerns about foreign higher education institutions operating in your economy?
- > (If yes) what are these concerns?

## **Policies to manage the activities of foreign higher education institutions**

(If you have written policy papers which answer these questions, please could you provide them to me to help in writing the report)

- > What policies and procedures do you have in place to manage the establishment of foreign higher education institutions?
  - Do they have to have a local partner which is accredited in your economy?
  - Are there limits on foreign direct investment?
  - Does there have to be equal academic participation by foreign and local partners?
  - Are franchise arrangements allowed?
  - Are particular areas of study or disciplines encouraged or restricted?
  - Do they need to be accredited in their home economy?
- > What policies and procedures do you have in place to manage the operations of foreign higher education institutions?
  - Are there restrictions on the use of educational materials (physical and online)?
  - Are there quotas for the number of students they can enrol?
  - Are there controls around the fees they can charge?
  - Are there quotas for the number of local and foreign staff they can employ?
  - Are there limitations on the repatriation of earnings?
  - Are there controls over their ability to award degrees?
- > Do these policies and procedures vary in your economy, e.g. by state or province?
- > (If yes) what are the main differences?
- > What changes (if any) have been made to these policies and procedures in the last five years?
- > (If relevant) what was the objective of these changes?

## **Quality assurance and accreditation of foreign higher education institutions**

- > Do foreign higher education institutions which operate in your economy need to be accredited in their home economy?
- > Do foreign higher education institutions also need to be accredited in your economy?
- > (If yes) do you have the same system for accrediting local and foreign higher education institutions or are they accredited under separate systems?
- > (If separate) in what ways are they different? What would be required to bring these accreditation systems together?
- > Do you have the same quality assurance requirements for local and foreign higher education institutions?
- > (If not) in what ways are they different? What would be required to bring these systems together?
- > Is your quality assurance system linked to the quality assurance systems in other economies?
- > (If yes) what international linkages does your quality assurance system have?
- > Does your quality assurance system include distance education and online education?
- > (If no) what would be required to expand your quality assurance system to include these modes of education?
- > Do you have a national qualifications framework?
- > (If yes) is this linked to the national qualification frameworks in other APEC economies?
- > What processes does your economy have in place to ensure that qualifications earned at foreign higher education institutions are recognised by local institutions and by employers?

## **Collaboration to enhance the mobility of higher education institutions**

- > Are there any forms of collaboration with other APEC economies that would encourage greater mobility of higher education institutions between APEC economies?
- > What do you think that your economy could teach other APEC economies about how to encourage and manage the activities of foreign higher education institutions?
- > What do you think that your economy could learn from other APEC economies about how to encourage and manage the activities of foreign higher education institutions?
- > Are there any areas around the management of foreign higher education institutions that you think require technical assistance or capacity building to improve?

- > What other forms of cooperation between APEC economies do you think would increase the mobility of higher education institutions?
- > What do you think is the best thing that APEC can do to encourage the mobility of higher education institutions?

[OPTIONAL SECTION – IF TIME]

### **Outgoing higher education institutions**

- > Are any higher education institutions from your economy active in other economies? (If yes) in what ways are they active in other economies? (If yes) how many are active in other economies? (If yes) in which economies are they active?
- > (If yes) in which ways does your economy benefit from higher education institutions from your economy being active in other economies?
- > What action (if any) does your economy take to encourage local institutions to become active in other economies?



## Appendix C – Interview questions for foreign institutions

These questions formed the basis of interviews with foreign institutions active in the economies included in this study.

### Overview

- > How long has your institution you been active in this economy?
- > What is the form of your activity (local partner / standalone, undergraduate / postgraduate, teaching / research, etc.)?
- > Does your institution have a presence in any other foreign economies?
- > (If yes) which ones?
- > What is your institution's main objective in having a foreign presence?

### Policies and procedures

- > Which factors attracted your institution to establish in this economy?
- > Which factors facilitated your institution's mobility to this economy?
- > Which factors made establishing your institution in this economy challenging? How did you overcome them?

(If you have written policy papers which answer these questions, please could you provide them to me to help in writing the report)

- > What kind of policies and procedures controlled your institution's establishment in this economy?
  - Did you have to have a local partner which is accredited in this economy?
  - Were there limits on foreign direct investment?
  - Did there have to be equal academic participation by foreign and local partners?
  - Were franchise arrangements allowed?

- Were particular areas of study or disciplines encouraged or restricted?
- Did your institution need to be accredited in its home economy?
- > Which kind of policies and procedures control your institution's ongoing operations in this economy?
  - Are there restrictions on the use of educational materials (physical and online)?
  - Are there quotas for the number of students they can enrol?
  - Are there controls around the fees they can charge?
  - Are there quotas for the number of local and foreign staff they can employ?
  - Are there limitations on the repatriation of earnings?
  - Are there controls over their ability to award degrees?
- > Do these policies and procedures vary by area (e.g. by state or province)?
- > How do these policies and procedures vary from those in place in other economies?
- > Does your institution find any of the policies and procedures to be burdensome? If so, in what ways?
- > What changes (if any) have been made to these policies and procedures in the last five years?
- > (If relevant) what has been the impact of these changes?

### **Accreditation, quality assurance and qualifications recognition**

- > What accreditation regimes does your institution fall under?
- > (If more than one) what are the differences between them? What complexities (if any) do these differences cause?
- > What quality assurance regimes does your institution fall under?
- > (If more than one) what are the differences between them? What complexities (if any) do these differences cause?
- > Are the qualifications gained by students at your institution recognised by other institutions in this economy and by employers in this economy?
- > (If not, or not entirely) what could be done to remedy this?

## Enhancing the mobility of higher education institutions

- > What could be done to make it easier for foreign institutions to establish themselves in this economy? What changes would need to be made for this to occur?
- > Are there any elements of higher education policies and procedures around mobility in this economy which could be improved through collaboration with other economies?
- > (If yes) what are the areas in which collaboration would make a difference?
- > Are there any elements of higher education policies and procedures around mobility in this economy which could be improved if the economy was given technical assistance or capacity building support?
- > Based on your experience in this economy, do you anticipate that your institution will be interested in establishing a presence in any other economies in the future?
- > (If yes) what lessons has your institution learnt from its experience in this economy which would inform that decision?
- > What do you think is the best thing that APEC can do to encourage the mobility of higher education institutions?



## Appendix D – Plain language statement

Thank you for agreeing to participate in this project.

### Organisations involved

The project is an initiative of APEC's Group on Services, which forms part of the Committee on Trade and Investment. The Group on Services is interested in exploring ways to increase the mobility of higher education institutions between APEC economies. The project is managed by the Australian Department of Foreign Affairs and Trade.

The Australian Council of Educational Research (ACER) is an independent, not-for-profit, educational research organisation. ACER has been contracted by the APEC Secretariat to undertake this project.

### Methodology

Research for this project involves conducting interviews with a range of key informants in eight APEC economies (China, Indonesia, Malaysia, Mexico, Peru, the Philippines, Singapore and Viet Nam). In each economy interviews will be undertaken with policy makers, representatives from foreign providers and other key informants with an involvement in provider mobility.

### Objective and output

The aim of the project is to gain as good an understanding as possible of the context around higher education provider mobility in each economy. A particular focus is on the policies and procedures which facilitate and manage the mobility of higher education institutions. In addition to interviews the research will also involved a review of policy documents.

This project will generate a report for the APEC secretariat which summarises what has been learnt from the interviews and from policy documents. The report will be disseminated among all APEC economies. The report may also be discussed at an APEC workshop in late 2014.

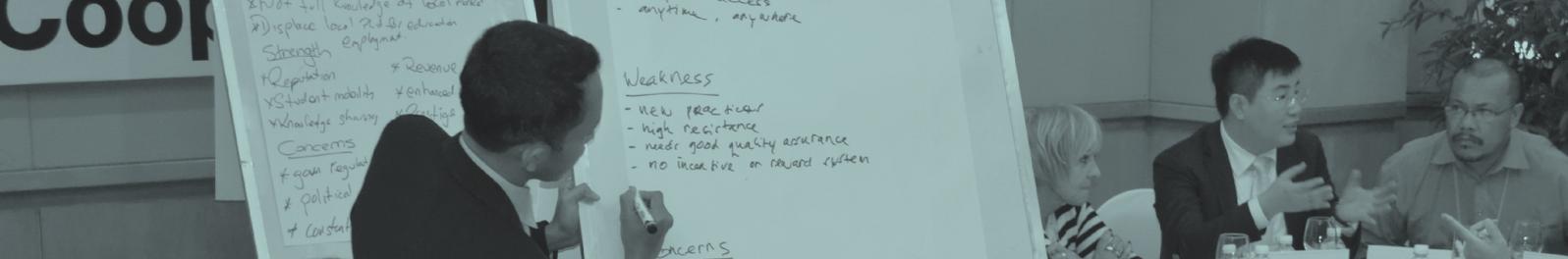
## Identification

The report will include an appendix which lists all the people interviewed for this project. It will identify their names, positions and the organisations they work for.

The body of the report will not identify any individuals. It will not contain any information (e.g. about where individuals work), which could allow someone reading the report to identify an individual. Every possible effort will be made to protect individual anonymity, but this cannot be guaranteed.

## Questions

If you have any questions about this project please contact Dr Sarah Richardson  
[sarah.richardson@acer.edu.au](mailto:sarah.richardson@acer.edu.au)



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