

# Transnational education in the Philippines **Opportunities and challenges**

December 2016

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# Executive summary

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## Context

In the past few years, there has been growing acceptance of transnational education (TNE) amongst individuals, students, educational institutions and governments; TNE has become an integral part of the internationalisation strategy of universities worldwide. Currently, there are more international students studying for a UK qualification outside the country than in the UK itself.

Growth in TNE, which is expected to continue its upward trajectory, has inspired the emergence of numerous approaches, including but not limited to international branch campuses (IBCs), twinning programmes, articulation programmes, joint degrees, and online courses. It is becoming increasingly apparent, however, that in order for a programme to succeed it must be contextually appropriate and as a result, numerous factors must be taken into consideration when developing such TNE partnerships.

The Philippines is located in Southeast Asia and is home to just over 100 million people, over half of whom are under the age of 25. The official languages of the Philippines are Filipino and English and English is the medium of instruction at public universities in the country. The Commission on Higher Education (CHED) governs most of the higher education sector, including transnational education.

In 2015, a moratorium on the opening of new TNE programmes was lifted as CHED reiterated that they needed to be open to borderless teaching and learning, and that with proper oversight TNE programmes could benefit Philippine students and universities. The economy of the Philippines continues to grow, with GDP per capita (PPP) rising to US\$ 7,300 in 2015, making it an attractive market for collaboration for investment.

This research presents the findings of a multi-pronged study on the opportunities and challenges of TNE programmes in the Philippines. The study made use of desk research, interviews with institution representatives in the Philippines, data from focus groups and the British Council's Student Insight survey on prospective undergraduate and postgraduate students interested in TNE.

## Key findings

- All the elements are in place for a receptive TNE environment in the Philippines: a growing population (especially amongst the youth) and economy, a high level of proficiency in English, and a good regulatory framework is in place, headed by CHED.
- CHED plays a pivotal role in the future of TNE as well as for individual universities. Higher Education Institutions (HEIs) which have achieved autonomous status are thereafter granted more self-governance over their TNE activities.
- The K to 12 basic education programme intends to enable students to gain a greater command of basic skills and competencies, study some subjects in more depth, enhance employability, increase earning power and improve the country's GDP. This year's a two-year additional gap, that the K to 12 Transition programme hopes to fill by developing higher education institutions and up-skilling their staff in the Philippines – an opportunity for training by UK partners.

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- Demand for TNE in the Philippines is very much present and set to grow according to institution representatives interviewed for this research, as well as the HESA and Student Insight survey data.
  - Philippine higher education institutions are not necessarily looking for top-tier UK higher education institution partners, but partners who they could collaborate with, and whose requirements in terms of curriculum and faculty training may not be too stringent or inflexible.
  - According to representatives, the main opportunities that would stem from establishing a TNE programme in their higher education institution were: making their people global citizens, and their institution globally competitive. They would also like to see benefits for their local faculty as well, and new funding streams for their higher education institution.
  - A number of administrative and legislative challenges exist according to higher education institution representatives. Namely, there not being enough trained faculty in the Philippines who could administer or teach the TNE degree or course, processes being too bureaucratic and not streamlined enough. There was also a dearth of information. The fees and infrastructure costs were also a big concern.
  - In terms of delivery mode, a TNE programme or degree that is delivered wholly locally would be preferable due to the perhaps unaffordable nature of living abroad for Filipinos and their reluctance to leave their homes.
  - There is a pervasive lack of knowledge about TNE programmes, their nature and how to access them. A more centralised system should be in place for TNE and for scholarship schemes – a one-stop shop where potential students can obtain all the information they need about TNE and available programmes.
  - Prospective postgraduate TNE students valued the availability of a scholarship the most when deciding on a mode of study. Another very important consideration was the awarding country and its speciality in terms of fields of study.
  - The opportunity to obtain an accredited degree from an internationally recognised institution is the number one consideration for students. All were very mindful to increase their employability. TNE partners should consider stressing the reputation and accreditation of their higher education institution and in turn the degree that would be awarded when marketing to students.
  - The number one concern about TNE mentioned by students were the high fees and the non-regulation of the TNE degree or of faculty teaching the course.
  - Students would very much consider studying on a TNE degree from the UK: the reputation of the UK is highly regarded, and reputation is very important to students. Perceived increased employability in return.
  - There is uncertainty over what fields of study will be in demand in terms of TNE, however students are keen to study on courses that would benefit the Philippines' economy and future development. Interest was also shown for more 'niche' degrees or courses that were currently unavailable locally. Potential TNE partners should possibly focus on the fields of study in demand by students, those which are not currently available through local higher education institutions.

# Introduction

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The Philippines presents a unique environment for TNE providers, as well as unique opportunities and challenges. Its economy and youth population are growing, and the Commission for Higher Education (CHED) provides a supportive regulatory environment for internationalisation. Moreover, TNE is essentially defined as the provision of educational courses to students in another country from that in which the awarding institution is located.

The welcoming TNE regulatory environment, combined with the institutionalised medium of English, the temperate climate, the country's growing population and economy, as well as communications and digital infrastructure, make the Philippines an attractive prospect for TNE providers. However, background research has revealed challenges that providers will need to consider, such as the poor transport infrastructure (especially given the archipelagic geography of the Philippines and its big rural population), economic inequity and perhaps restricting visa requirements for visiting faculty and students.

The goals of this research are to:

- Provide an analysis of the current opportunities and challenges in transnational education (TNE) in the Philippines
- Explore the market context in which TNE programmes exist in the Philippines
- Investigate the legislation and key bodies involved in TNE programmes
- Gauge the level of demand for TNE programmes and identify the respective subjects and levels of study

# Methodology

The methodology adopted a multi-pronged approach. As a first instance, and in order to understand the country's unique and diverse operating environment, desk research of international agency information, statistics and national data, was conducted and compiled. Second, qualitative analyses were conducted. Six representatives from higher education institutions in the Philippines (which may or may not have started the internationalisation process) were interviewed. Focus groups with prospective TNE enrollees at the undergraduate and postgraduate level were also conducted. The dissemination of the British Council's Student Insight survey represents the final, and quantitative, approach adopted for this study. Here, data from Filipino students interested in TNE was collected and analysed.

## Semi-structured interviews with institution representatives

For reference, the broad topics covered in the interview guides were: 1) the level of internationalisation of the institution, 2) the rationale behind the setting up of the TNE programme, 3) the perceived opportunities and challenges (for example administrative, legislative and financial) presented by TNE, 4) potential UK partnership opportunities, 5) future plans and prospects.

### Institution representative profiles

Participant code	Public or private HEI	Role within HEI	Number of years in current role	Level of internationalisation	Makeup of local vs. foreign students within HEI	Autonomous status
I1	Public	Faculty dean	>20	Still developing TNE strategy	Some international students from Asia	Not autonomous
I2	Private	VP for strategic initiatives	<10	Still developing TNE strategy	Some international students mainly from Asia and Africa	Not autonomous
I3	Private	Director for innovation development	>10	Started internationalisation process	Some international students from Asia	Autonomous
I4	Private	External affairs officer	>10	Started internationalisation process	Majority from Indonesia	Autonomous
I5	Private	Vice President	<10	Have not developed TNE strategy yet	Handful of Asian students	Not autonomous
I6	Public	Co-ordinator for graduate programmes	>10	Started internationalisation process	Handful of students from Africa	Autonomous

## Focus groups with students

Three focus groups of Filipino undergraduate and postgraduate students interested in a TNE programme of study were also conducted in the Philippines, with the help of an independent research company. Student profiles of who to target, in terms of age range, location, programmes of study, were drawn up based on Student Insight Survey data (2016) of students from the Philippines interested in TNE.

The aim of the focus groups with students was mainly to understand the decision-making process behind their choice of TNE programme. Other objectives included exploring: 1) their opinion on UK higher education institution partners, 2) information and concerns about TNE, 3) potential opportunities presented by TNE and 4) their future prospects.

Two focus groups took place with prospective postgraduate students interested in TNE. Twelve postgraduate students participated, mostly female, from public higher education institutions, which had achieved autonomous status.

A general lack of information and awareness about the topic meant that only a few school pupils who were interested in TNE at the undergraduate level could be recruited. One focus group took place with students who attended the same private, all-girls school. Two participants were in grade 11 and two in grade 12.

### Basic profile information of potential postgraduate students participating in focus groups

Focus group 1				
Gender	Current degree programme	Name of university	University status	Autonomous status
Male	Double degree in History and Diplomatic studies	Ateneo de Manila University	Private	Autonomous
Female	BA interdisciplinary studies	Ateneo de Manila University	Private	Autonomous
Female	BS Communications Management	Ateneo de Manila University	Private	Autonomous
Female	BA English studies	Polytechnic University of the Philippines	Public	Autonomous
Focus group 2				
Gender	Degree programme	Name of university	University status	Autonomous status
Female	BA Linguistics	University of the Philippines – Diliman	Public	Autonomous
Female	BS Tourism	University of the Philippines – Diliman	Public	Autonomous
Female	BS Business Administration	University of the Philippines – Diliman	Public	Autonomous
Female	BA Broadcasting Communication	University of the Philippines – Diliman	Public	Autonomous
Male	BA Philippines Studies	University of the Philippines – Diliman	Public	Autonomous
Male	BA Sociology	University of the Philippines – Diliman	Public	Autonomous
Male	BA Communication Research	University of the Philippines – Diliman	Public	Autonomous
Male	BA in Organisational Social Systems Development	De La Salle University	Private	Autonomous
Female	Unknown	De La Salle University	Private	Autonomous



## Student Insight survey

Education Intelligence's Student Insight survey explores the decision-making processes of students seeking higher education degrees from countries other than their home country. The longitudinal study has been implemented since 2007 and to date, data from approximately 210,000 students have been recorded globally. In 2016, 107 Filipino students interested in TNE completed the survey: 16 at the undergraduate level, and 91 at the postgraduate.

## Content

The first part of the report presents some background information on the Philippines as well as its corresponding market context in terms of economy infrastructure, geography and legislation as it relates to the topic at hand. The next section provides an overview of the context of TNE in the Philippines, and its current legislation. An analysis of the opportunities and challenges of TNE in the Philippines, as described by institution representatives, is then presented. The report then presents the results from the focus groups with undergraduate and postgraduate students and discusses the Student Insight survey. The last section discusses the results of this research study and its wider implications.

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# Background

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TNE exists in the Philippines in a complex and unique context; the next section will explore this in more detail.

## Economy infrastructure

The Philippines is classified as a lower-middle-income country and has the third-strongest economy in the region, averaging five per cent GDP growth per year over the last ten years. It is driven mainly by the services sector including the booming business process outsourcing industry, and is predicted to rise to 6.4 per cent in 2016 and 6.2 per cent in 2017.

Moreover, the International Monetary Fund predicts strong growth in the country's wealth in terms of GDP to 2021<sup>1</sup>. Over ten per cent of the population are migrant workers,<sup>2</sup> and their remittances accounted for 9.8 per cent of GDP in 2015, higher than in other ASEAN nations and a key driver of private spending.<sup>3</sup> The high volume of migrant workers, many of whom are underemployed abroad, also represents a significant brain drain for the Philippines. The country is characterised by its wealth inequality; advances have been made in poverty reduction though just over a quarter of the population still live below the poverty line, while private consumption among the middle class is a strong driver of economic growth.

In 2015 the labour force numbered 41.37 million. The unemployment rate is 6.3 per cent; underemployment accounts for 18-19 per cent of the labour force and 40 per cent are employed in the informal sector. The youth unemployment rate is particularly high at 15.7 per cent,<sup>4</sup> and is a driver for emigration. Female labour participation is low. Over half of the working population are employed in services (55%), 16 per cent in industry and 29 per cent in agriculture.<sup>5</sup>

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<sup>1</sup> The International Monetary Fund (2016): <http://www.imf.org/external/hs/cs.aspx?id=28>

<sup>2</sup> World Bank Country overview <http://www.worldbank.org/en/country/philippines/overview>

<sup>3</sup> Focus Economics (2016) *Pace of remittances growth accelerates in June*  
<http://www.focus-economics.com/countries/philippines/news/remittances/pace-of-remittances-growth-accelerates-in-june>

<sup>4</sup> UNDP Human development report 2015, *Work for human development*, Briefing note for countries on the 2015 human development report, Philippines  
[http://hdr.undp.org/sites/all/themes/hdr\\_theme/country-notes/PHL.pdf](http://hdr.undp.org/sites/all/themes/hdr_theme/country-notes/PHL.pdf)

<sup>5</sup> CIA Factbook

## Population and geography

At 101 million, the Philippines has the twelfth largest population in the world, and more than half of the country's citizens are under the age of 25. The total population is currently growing at an average rate of 1.62 per cent per annum and is expected to number 148 million by 2050 and more than 168 million by 2100. The youth and working age populations are growing rapidly. In 2015, 31.9 per cent of the population was aged 0-14 and this is expected to be 42 per cent in 2030.<sup>6</sup> Net migration rate in the Philippines has been negative for over three decades, and is expected to do so in the future, albeit at a slower pace<sup>7</sup>.

The Philippines comprises an archipelago of more than 7,000 islands, and a little more than half the population live in rural areas; however by 2030 77 per cent of the population is expected to live in urban areas<sup>8</sup>.

The Philippines had 18 cities with populations numbering more than 300,000 people in 2014. Manila, the capital and largest city by land mass, is expected to number among the world's 41 predicted megacities in 2030 with an estimated population of 16.756 million, up from 12.764 million in 2014. Metropolitan Manila, commonly referred to as Metro Manila, is the most populous region in the country, and is composed of Manila, Quezon City (the country's most populous city), the Municipality of Pateros, and the cities of Caloocan, Las Piñas, Makati, Malabon, Mandaluyong, Marikina, Muntinlupa, Navotas, Parañaque, Pasay, Pasig, San Juan, Taguig, and Valenzuela.

Other major cities include Davao, Cebu City and Zamboanga. Luzon is the Philippines' most populous island. The rural population is predicted to increase by more than 13 million to 68.737 million by 2050, representing growth of 23 per cent.<sup>9</sup>

Transport is a key driver to development, higher education and in turn TNE. The archipelagic geography of the Philippines and its vast rural population makes transport even more crucial in this case. The transport system of the Philippines consists of road, water, air and rail travel. Water transport does play an important role; however road transport is exceedingly the more dominant subsector, accounting for 98 per cent of passenger traffic<sup>10</sup>. Over the years, the Philippines has seen some improvement in the quality of its transport infrastructure, but a large part of the road network remains in poor condition and intermodal integration is generally weak<sup>11</sup>. Indeed, as of 2015 Euromonitor reports that a little less than 32 per cent of roads were paved.

<sup>6</sup> United Nations Department of Economic and Social Affairs World population prospects 2015 Revision, key findings and advance tables

<sup>7</sup> Euromonitor. (2016). Philippines in 2030: The Future Demographic.

<sup>8</sup> Asian Development Bank (2012). Philippines: Transport sector assessment, strategy and roadmap

<sup>9</sup> United Nations Department of Economic and Social Affairs/Population Division World urbanization prospects: The 2014 revision <https://esa.un.org/unpd/wup/Publications/Files/WUP2014-Report.pdf>

<sup>10</sup> Asian Development Bank (2012). Philippines: Transport sector assessment, strategy and roadmap

<sup>11</sup> Asian Development Bank (2012). Philippines: Transport sector assessment, strategy and roadmap

## Communications infrastructure

The Philippines is an avid digital consumer and the government has pushed for digital expansion through their National Broadband Plan (2016) and new laws to form a Universal Access Fund (2015) aimed to fund expansion of broadband services in underserved regions. Mobile telephone subscriptions in the Philippines have exceeded 100 per cent. Estimates vary, but a little less than half the population (44%) use the internet; the second highest proportion in Southeast Asia.<sup>12</sup> Of these internet users, it is said that around 90 per cent own a social media account. Wi-Fi services are abundant and around 48% of the population own a smartphone. However, while smartphone penetration has been increasing, the Philippines still lag behind countries like Malaysia and Thailand in terms of laptop and PC penetration, possibly due to high costs and low rural purchasing power<sup>13</sup>.

Results from Education Intelligence's Student Insight survey show that students interested in TNE used the internet all of the time (39%) or at least four hours a day (44%). Online activities revolved mainly around entertainment, such as listening to music (80%) or watching films (70%) as well as communication like keeping in touch with friends (91%) and e-mailing (77%). A very big proportion (78%) used the internet to do their homework or research. Nearly all the sample (99%) preferred Google as their search engine and Facebook (95%) as their social media site. Other popular social media outlets were YouTube (69%), Twitter (49%), LinkedIn (31%) and Skype (22%). Interestingly, it was mainly postgraduates interested in TNE education who used LinkedIn, compared to undergraduates.

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<sup>12</sup> Euromonitor (2016)

<sup>13</sup> Euromonitor (2016), *Digital Consumer – Landscape: Philippines. Country Briefing*.

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## Language and cultural access

English and Filipino (Tagalog) are the official languages of the Philippines. Although English is not the native language of most Filipinos, English proficiency is generally high among Filipinos and it is ubiquitous in daily life. English is also the official language of instruction at the tertiary level of education.

Moreover, high levels of proficiency in English in the Philippines and the fact that it is already established as the lingua franca for higher education create favourable conditions for foreign providers looking to establish higher education TNE provision in the Philippines. It is worth noting, the acquisition of English language skills is a key driver of both student mobility and the presence of foreign institutions for those countries where English is not dominant.<sup>14</sup> The absence of this need in the Philippines may, at least in part, account for the country's low record of outbound student mobility and so-far limited engagement with TNE providers.

English is the working language of the ASEAN community and the ASEAN Economic Blueprint envisages free movement of skilled labour within the region. The implementation of the Blueprint has fallen behind schedule but, in the long term, Filipino proficiency in English will position its workforce favourably for increased ease of movement across regional borders. It is worth noting here that amongst ASEAN member states, the Philippines is the only country where English is one of the official languages, positioning the Philippines quite strategically.

Furthermore, the Philippines has become an ELT destination,<sup>15</sup> especially for students from Asia who prefer its proximity to home, but the country is also attracting increasing numbers of students from around the world seeking to improve their English. It offers low costs of tuition and living and is therefore providing a competitive alternative to traditional destinations such as the US, where enrolments have seen a big fall, and the UK. There are direct transport links to many regional capitals such as Seoul and Tokyo, as well as warm weather and a relaxed lifestyle and many courses offer a semi-recreational experience while ELT is promoted by the Philippines Department of Tourism.

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<sup>14</sup> APEC (2015) *Enhancing cross-border higher education institution mobility in the APEC region*, APEC group on services research report <http://m.apec.org/~media/Files/Groups/GOS/Enhancing%20crossborder%20higher%20education%20institution%20mobility%20in%20the%20APEC>

<sup>15</sup> *Voice of America Learning English*, April 5, 2015 *Philippines attracts English learners on a budget* <http://learningenglish.voanews.com/a/philippines-attract-eenglish-learners-on-a-budget/2706062.html>

## Context of transnational education in the Philippines

### Higher education infrastructure and the role of CHED

The Philippines Higher Education (HE) sector is larger than that in many of its ASEAN neighbours including Thailand, Vietnam, Indonesia and Malaysia and is characterised by a predominance of private institutions resulting from the commercialisation of the sector.

The Philippines has a gross tertiary education enrolment rate of 28.2 per cent. The proportion of the Philippine population holding bachelors' compared to masters' degrees is 27:1. The University of the Philippines is the country's premiere university and was ranked 70th in the 2016 QS Asia rankings, followed by Ateneo de Manila University in 99th place. Other Philippine universities featured in the rankings include De La Salle University, University of Santo Tomas, Ateneo de Davao University, Silliman University, Xavier University and the University of San Carlos.

The academic year runs from June to March (though some universities including the University of the Philippines and Ateneo de Manila University have begun to shift their timetables to August-May to align better with ASEAN and other global partners).

From a legislation perspective, CHED was created as a result of the Higher Education Act of 1994 and is responsible for the oversight of public and private institutions as well as higher education planning, policy and strategy. In 2010 the Philippines passed the Enhanced Basic Education Act which introduced one year of mandatory universal kindergarten (from 2011) and an extension of basic education from 10 years to 12 years (the K to 12 basic education programme) by the addition of two senior high school years for all those starting primary school from 2012 onwards.<sup>16</sup>

The K to 12 Basic Education programme will have a significant impact on higher education institutions which will face a lag in enrolments between 2016-2018 as the first cohorts benefit from K to 12 and spend two further years in high school and only those students from private schools permitted to fast track the transition will proceed to university. Higher education institutions will suffer a fall in revenue, which is primarily generated by fee income, and are expected to see redundancies in the region of 25,000 jobs. Inevitably there will be an impact on the country's university curricula, principally through a reduction in general education requirements, but also on staff that need to be prepared to teach more advanced and more mature cohorts.

Although the extended years of schooling are designed to 'unclog' the system which, according to CHED, currently delivers a 12-year curriculum in ten, it is also intended to enable students to gain a greater command of basic skills and competencies, study some subjects in more depth, enhance employability,

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<sup>16</sup> Philippine Government The K to 12 basic education program <http://www.gov.ph/k-12/>

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increase earning power and improve the country's GDP.

Over the longer term, the transition should raise standards in universities, which are currently primarily teaching institutions and lag behind their ASEAN neighbours in terms of research publication output. The Philippines currently ranks 69th in the world for research output and has particular strengths in agricultural and biological sciences and medicine. In 2015, 58.25 per cent of research publications were the result of international collaboration (SCImago). To boost the profile of research, the Philippines Journal Citation Index Database (PJCID) was established in 2014. In the same year the ASEAN Citation Index was also established and there are plans to link it with other citation indexes such as SCOPUS. CHED's research strategy to enhance the capability, productivity and dissemination of research in higher education institutions in both a national and international context is outlined in its National Higher Education Research Agenda-2 NHERA 2 2009-2018.<sup>17</sup> Research and development spending is low in the Philippines, at just 0.1 per cent in 2014, and compares poorly to other ASEAN nations.

In parallel, the K to 12 Transition programme is designed to strategically develop higher education institutions and their staff in the Philippines from 2016-2021. The programme includes a number of initiatives including developing transnational links between UK and Philippine institutions. CHED's internationalisation strategy is outlined in the proposed Policy Framework on the Internationalization of Philippines Higher Education and the Higher Education Strategy and Action Plan (HESAP) for ASEAN Economic Cooperation (AEC). CHED has also designed a number of development packages so that staff can benefit from scholarships for graduate studies and development grants, and institutions can benefit from innovation grants, in the interim period when enrolment is low. The proportion of higher education institution faculty holding PhD degrees is planned to rise from 11 to 20 per cent between 2016 and 2021, the proportion holding masters' degrees is intended to rise from 39 to 48 per cent and the proportion holding just a bachelor's degree should fall from 50 to 32 per cent. This capacity building initiative is designed to equip 'a higher education sector able to compete with its ASEAN neighbors' (CHED).

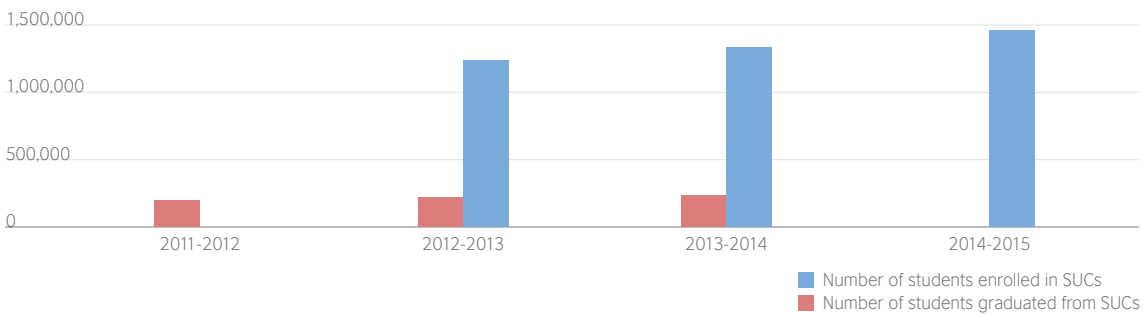
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<sup>17</sup> CHED National higher education research agenda-2 NHERA 2 2009-2018  
<http://www.ched.gov.ph/wp-content/uploads/2013/05/NHERA-2.pdf>

### Key statistics<sup>18</sup>

- The Philippines has a strong tradition of private education in the tertiary sector and in 2014-2015 there were 1,708 private Higher Education Institutions (HEIs) in the Philippines with 2,127,638 enrolments.
- The public sector includes State Universities and Colleges (SUCs), Local Colleges and Universities (LCUs), and others (other government schools, CHED supervised institutions, Special HEI). In 2014-2015 there were 227 public higher education institutions (excluding satellite campuses) with 1,684,088 enrolments.

#### Number of students who enrolled and graduated from State Universities and Colleges in the Philippines



\*empty columns reflect missing data  
Source: Commission on Higher Education (CHED)

- Of all those enrolled on baccalaureate programmes in 2014-2015, 55 per cent were female and 45 per cent were male.
- Science, Technology, Engineering, Agri-Fisheries and Maths (STEAM) subjects accounted for 18.57 percent (707,819) of all baccalaureate students in 2014-2015 with:
  - 52 per cent enrolled in Engineering programmes
  - 23 per cent enrolled in Technology programmes
  - 17 per cent enrolled in Agri-fisheries programmes
  - 6 per cent enrolled in Science programmes and
  - 2 per cent enrolled in Maths programmes
  - At graduate level 18,028 students (9%) were enrolled in STEAM subjects.

<sup>18</sup> CHED <http://ched.ph/central/page/ched-statistics> (accessed 22 August 2016)

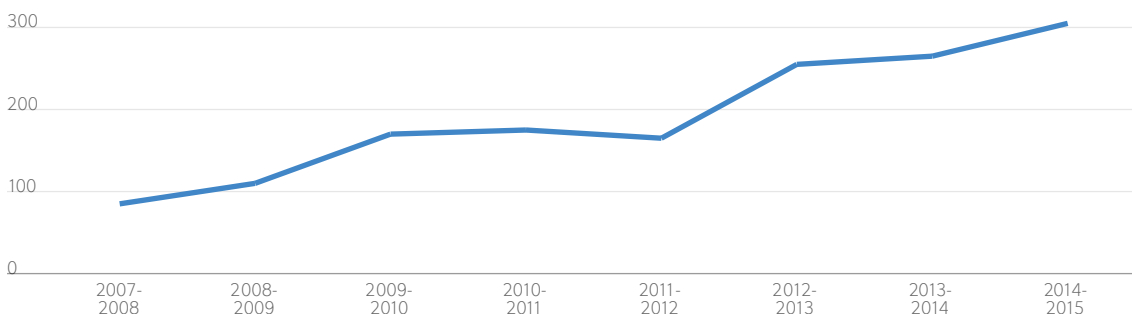


- The following are the country's priority disciplines:
  - Sciences
  - Maritime
  - Medicine and Health Related
  - Engineering and Technology
  - Agriculture, Agricultural Engineering, Forestry, Veterinary Medicine
  - Teacher Education
  - IT Related
  - Mathematics
  - Architecture and Town Planning

## Transnational education in the Philippines today: a brief overview

HESA data from 2014-2015 show that there were 305 Filipino students enrolled onto UK TNE degrees, mainly in taught Masters programmes (N=190) and Bachelor's degrees with honours (N=95). Numbers of TNE enrollees from the Philippines have been gradually increasing over the years.

### Total number of Filipino students enrolled onto UK TNE programmes or degrees by year



Source: HESA Student record 2002/03 - 2014/15

The higher education institutions involved in provision (2014-2015) for taught masters were: 1) the University of Bradford, 2) the University of Liverpool, 3) the University of London, 4) the University of Chester, 5) the University of Leicester, and the University of Cambridge, Robert Gordon University, Roehampton University and the School of Oriental and African Studies. For bachelor's degrees with honours, the main contenders were the University of Chester, Oxford Brookes University and the University of London, respectively.

Currently, there are 13 higher education institutions in the Philippines offering TNE authorised by CHED.<sup>19</sup>

The four categories of TNE models currently available in the Philippines or being delivered through a Filipino partner are:

- International branch campuses (IBCs) – an awarding institution establishes a satellite campus in another country to deliver its courses there
- Franchising – authorisation of an organisation abroad to deliver the programmes of an awarding institution which usually retains responsibility for curriculum, assessment and quality assurance
- Joint degree or twinning – partner universities in different countries provide different portions of one programme; the student spends time at each and attains one award from the mutual providers
- Dual or double degree – as above, but the student receives an award from each institution

<sup>19</sup> Yahoo News Jun 24, 2016 CHED pushes for quality transnational education in Phi  
<https://sg.news.yahoo.com/ched-pushes-quality-transnational-education-00000294.html>

Little research has been carried out on the extent of TNE operations in the Philippines and there is currently no formal data collection on TNE activities, making an accurate evaluation of the TNE landscape difficult. It is clear however that TNE operations are limited in number at present, especially compared to other Asian markets such as Singapore, Malaysia, Hong Kong and China.

As part of its internationalisation initiatives, CHED has recently signed education agreements with:

- Canada
- Czech Republic
- France
- Hungary
- Palau
- Poland
- Spain

CHED is negotiating education agreements with a number of other countries, including the UK. Agreements cover a host of initiatives including faculty and students exchange, scholarships, collaborative research, credit transfer and joint and double degrees.

In August 2016 CHED and the British Council began a process of Joint Development of Niche Programs through Philippine – United Kingdom Linkage to develop niche programmes in subject specialisms that are not offered by Philippine higher education institutions and are key to national and regional development. These include:

- transportation studies
- design engineering
- tropical medicine and public health
- data science
- renewable energy studies/energy security
- climate change
- education (professional education and training/educational neuroscience/educational planning/economics and international development/lifelong learning)
- maritime engineering
- social science
- oceanography
- economics
- agriculture/food security
- digital innovation and creativity

### Quality assurance and standards of TNE and higher education institutions in the Philippines

Quality assurance is well-established in the Philippines and comprises a diversified system under a number of agencies and umbrella organisations. Quality enhancement and standards are at the heart of CHED's recent higher education policies, designed to address concerns brought about by massification of the sector.

CHED grants institutions the right to operate and also oversees their quality via its Office of Institutional Quality Assurance and Governance (OIQAG), whilst accreditation is carried out by the Accrediting Agency of Chartered Colleges and Universities in the Philippines (AACUP). There are four levels of accreditation and higher education institutions which achieve higher levels are entitled to autonomous or deregulated status. Accreditation is voluntary and currently only 484 (21.54%) of higher education institutions (230 public and 254 private) have subscribed to the process. In total, 1,393 programmes in public higher education institutions are accredited, and 1,392 programmes in the private sector (CHED).

- The enhancement of quality standards and promotion of excellence are central to the CHED Strategic Plan for 2011-2016<sup>20</sup> and have included a number of initiatives including:
- scholarships for academic staff to upgrade their qualifications to masters and doctoral levels and pursue Professional Education
- strengthening the capacity of higher education institution managers through management development programmes
- creation of Centres of Excellence and Centres of Development in particular subject disciplines through CMO 38 s. 2015 Designated Centres of Excellence (COEs) and Centres of Development (CODs) for various disciplines<sup>21</sup>
- National Universities and Colleges for Agriculture and Fisheries (NUCAFs)/Provincial Institutes of Agriculture and Fisheries (PIAFs)

Interestingly, 779 substandard or non-compliant programmes have been closed.

Quality and standards are a core requirement of the draft 2016 policies, standards and guidelines for TNE providers and the proposed Policy Framework on the Internationalization of Philippine Higher Education and this area of regulation compares very favourably to the environment in Indonesia or Vietnam, for example.

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<sup>20</sup> CHED Commission on higher education CHED strategic plan for 2011-2016

[http://planipolis.iiep.unesco.org/upload/Philippines/Philippines\\_CHED\\_Strategic\\_plan\\_2011-2016.pdf](http://planipolis.iiep.unesco.org/upload/Philippines/Philippines_CHED_Strategic_plan_2011-2016.pdf)

<sup>21</sup> CHED CMO 38 (2015) Designated centres of excellence (COEs) and centres of development (CODs) for various disciplines

<http://www.ched.gov.ph/wp-content/uploads/2016/03/CMO-No.-38-Series-of-2015-for-COE-and-COD.pdf>

## Student mobility

Student mobility in Asia is increasing and regional destinations are growing in popularity in part as a result of the creation of the ASEAN educational network. Filipino student mobility is lower than other key nations in the region, but it is increasing and being encouraged.

There has been a rise in the number of Filipino students studying abroad at higher education level in recent years, with numbers increasing from 5,500 in 2001 to 11,210 in 2012.<sup>22</sup> However, these numbers are still small compared to its population. Indeed, the UNESCO Institute of Statistics estimated an outbound mobility ratio of 0.4 per cent in 2013, with the highest numbers enrolled in Australia (4,177) and the US (2,959). The UK was the third most popular destination but with significantly fewer numbers enrolled (698). Surprisingly, only 4.43 per cent of outbound Filipinos enrolled in other ASEAN nations in 2012-2013; most of them travelled to Malaysia and Thailand and small numbers enrolled in Brunei.<sup>23</sup>

This lack of mobility also extends to its low inbound student mobility in comparison to its ASEAN neighbours, receiving just 7,785 foreign students in 2012-2013.<sup>24</sup> This is perhaps surprising given the fact that it uses English as the medium of instruction, though the general tendency is for students to travel to institutions in stronger economies where standards are perceived to be higher.

Another reason perhaps for low inbound student mobility was the processing times for international student visas in the Philippines, which is relatively lengthy and bureaucratic. The applications require approval from CHED in the first instance, before being processed by the Bureau of Immigration and Deportation and finally sent to the Department of Foreign Affairs which informs the Philippines Embassy the student's country of origin to issue the visa<sup>25</sup>. Student visas are then only issued to persons over the age of 18, and for non-degree students the short 59-day visa can only be renewed for two months at a time. For visiting academics, as well as researchers whose aim is to maybe take on more long-term employment, document processing is similarly lengthy and demanding.

## Regional initiatives

The internationalisation of the tertiary sector in Asia has fostered competition, with a number of nations – notably Singapore and Malaysia – claiming education hub status.

The Philippines has undertaken several regional initiatives to boost student mobility. As a member of ASEAN, the Philippines is party to the ASEAN Credit Transfer System, the ASEAN International Mobility for Students (AIMS) programme and the ASEAN University Network (AUN). Moreover, the ASEAN AIMS programme fosters student mobility and credit transfer between specific institutions in member countries and includes the five top Philippine universities: University of the Philippines, De La Salle, the University of Santo Tomas, Saint Louis University and Ateneo de Manila. The Philippines is also party to the University Mobility in Asia and the Pacific (UMAP) agreement which promotes exchange, joint programs and research consortia between participating higher education institutions with a corresponding UMAP Credit Transfer Scheme (UCTS).

<sup>22</sup> ICEF Monitor *Outbound mobility gathering steam in the Philippines Oct 17, 2014*

<http://monitor.icef.com/2014/10/outbound-mobility-gathering-steam-philippines/>

<sup>23</sup> *University of the Philippines October 20, 2014 The AIMS programme: UP and the future of student mobility in the ASEAN*

<http://www.up.edu.ph/the-aims-programme-up-and-the-future-of-student-mobility-in-the-asean/>

<sup>24</sup> *Ibid.*

<sup>25</sup> [www.philembassy.no/consular-services/visa/student-visa](http://www.philembassy.no/consular-services/visa/student-visa)

## Affordability

Only very small numbers of Filipinos have sufficient resources to pay for study abroad and the cost of living in the Philippines is much lower than most popular study destinations abroad. Increasing access to higher education is central to Philippine national policies.

The high level of social inequity in the Philippines is illustrated by the numbers having completed tertiary education. According to the British Council, students from high income families have a far higher chance of enrolling in tertiary education and almost 70 per cent of those aged 20-24 in the wealthiest quintile of the population have a tertiary qualification, compared to around 6.5 per cent of the same age group in the poorest quintile of the population.

Tuition fees comprise the primary income for most higher education institutions in the Philippines and these vary widely. Institutions are free to set their own fees according to certain criteria (regional inflation rate, financial standing of the institution, financial capacity of the general student population, impact of force majeure or calamities, quality track record of the school, mission and vision of the institution) and are subject to CHED's approval.<sup>26</sup> For example, the Polytechnic University of the Philippines prides itself on maintaining the lowest fees of P12 per unit in order to maintain access for the poor.

Tuition fees are charged by the unit and the average cost per unit at state universities and colleges (SUCs) in 2014-2015 was P176.00 for baccalaureate programmes, P366.00 at masters' level and P487.00 at doctoral level (CHED). Even though increasing access to higher education has been central to Philippine national policies, total fees are reported to have nearly doubled from an average of between P60,000 and P100,000 in 2015, compared to between P30,000 and P50,000 in 2010. There are concerns that institutions are trying to make up for the shortfall due to lower student numbers caused by the K to 12 changes.

CHED approved the applications of 304 of 1,659 private higher education institutions to increase tuition and other school fees for 2016-2017. Of these 280 will increase tuition fees and 252 will increase other school fees about five per cent this year.

Government student aid packages (StuFAPs) in the form of Scholarships, Grants-in-Aid and Student Loans (such as the Voluntary Student Loan Program of Private Banks Act) are designed to assist poor students. CHED has allocated just under 280,000 StuFAPs for 2016-2017 valued at more than P5.7 billion (CHED).

Competitive full and partial scholarships funded by the Philippine government have traditionally been allocated to subjects in need at home for capacity building and economic development, or unavailable at local universities. Despite these initiatives, the costs of tertiary education remain prohibitive for many Filipinos.

The next section of this report will present the results from the interviews with institution representatives, and relates first-hand evidence concerning the perceived challenges and opportunities of TNE in the Philippines.

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<sup>26</sup> *Rappler Expect higher fees in 304 private colleges in 2016 June 10, 2016*  
<http://www.rappler.com/nation/135927-ched-tuition-increase-private-colleges-2016>

# Interviews with institution representatives

Institution representatives in the Philippines, who were affiliated with a higher education institution which may or may not have started their internationalisation process, were asked to give their perspective on the TNE process. They were also asked about their opinions on the opportunities and challenges TNE may bring about, and the potential partners they would consider. Several broad themes and sub-themes emerged from these interviews.

## How Filipino higher education institutions internationalise

Institutions that already had TNE programmes instated had begun internationalising as early as 2005, several years before CHED's strategic plan for internationalisation 2011-2016. Other institutions, which had not started the internationalisation process, had begun talks in this respect at the start of 2016. The reason for internationalising for some higher education institutions was at times a top-down approach (where it is dictated by the university's vision or administration), and for others a bottom-up one (where market research is conducted in order to evaluate gaps or opportunities in a certain market). Generally, most universities had adopted a top-down approach to internationalisation. This approach is very much synthesised from their institution mission – missions and visions which were very clearly stated on university websites, and reiterated throughout the discussions. Specifically, the TNE initiative was either borne out of the establishment of a new department that would be responsible for such affairs, or the ushering in of a new administration or university president.

Moreover, establishing a new TNE programme in the Philippines seemed to have a lot to do with chance. The reasons for internationalising may have come about due to a chance meeting at a specific seminar or conference or because a current faculty member had graduated from a university abroad:

*"When our president attends international conferences, they bring with them a template of the memorandum of understanding. I think it was during one of those conferences that he met the president of [name of university]. So right there and then they signed the memorandum of understanding."*

Other institutions had adopted a more purposeful bottom-up approach to their TNE programme, identified gaps in the market and decided to deliver a specific TNE programme due to that reason. Many universities had also chosen specific courses or fields of study to internationalise in due to their initial expertise and their desire to utilise it and build upon it:

*"The courses and fields of study that we are seeking to offer are: Quantity Surveying and Arbitration in Construction. At the moment, there is no higher education institution in the country offering these. We have the expertise to do so."*

Generally, there did not seem to be one strict way of going about internationalising, and perhaps points to the ad-hoc nature of these arrangements in the Philippines. Most of the institutions which participated in this research had their students (or potential ones) in mind when setting up a TNE programme. Institutions, or at least their representatives, had acknowledged that we were living in a more globalised world, and they wanted to offer that opportunity to their students, via a TNE programme. Of course, some representatives also recognised the business opportunity that TNE would present, in terms of increased student mobility.

*“The demands of societies these days do not only require university graduates to be academically and professionally competent but also for them to possess multilingual and intercultural skills and attitudes. We are committed to prepare our students with the global competencies and multicultural skills to meet the demands of the world market. The internationalisation program is seen as one of the strategies in addressing the impact of globalization.”*

*“The English programme would be interesting to offer because the Philippines are quite ok with English. That is why a lot of students come to the Philippines currently. So if we were to offer English in the TNE programme then I think we will be able to attract even more students from all over the world.”*

Accounts from representatives of institutions are in line with the background research of this report on the available TNE delivery modes in the Philippines. All pointed to twinning, franchising or branch campuses as preferred delivery modes. Nevertheless, representatives from higher education institutions still at the early stages of internationalisation did not seem to be fully aware of the effect the choice the delivery method might have on the viability of their TNE programme, despite the wide differences between them. However, there was a general feeling that a programme or degree that would be delivered wholly in the Philippines would be preferable, due in part to the high international living costs for Filipinos.

*“We’ve always wanted our students to enjoy the context of international education. But accessibility and the costs involved will always come to the fore of discussions. But as a response to that we are putting up TNE programmes where our students do not necessarily have to fly out there for a long time. But instead take on the course via a twinning arrangement. Some of the professors are being flown over as visiting professors and they manage the course for a semester, until they manage to get the core courses required.”*



## Student recruitment prospects

Most higher education institutions were hoping to attract local students in the first instance, specifically those who were interested in the type of novel and distinctive programme of study they were offering. A second step would be to attract students from Asian countries, and the wider global community finally. Other universities adopted a more practical approach and intended to target students from certain socio-economic backgrounds who would be able to afford the TNE programme that they would be offering.

## Potential TNE partners

Institutions which were in the process of internationalising were either open to any suggestion or a partner that would complement their current curriculum, and who would be able to offer some expertise in terms of curriculum, marketing and promotion as well as in staff and faculty recruitment. They were not necessarily looking for a top-ranked higher education institution to partner with, but one where an equitable partnership could be formed. Moreover, when further prompted about the specific criteria they were looking for in a TNE partner, representatives highlighted several important criteria in their decision-making process, such as the existence of networks, the country, and programme of study. Indeed, across the interviews, there was a strong feeling amongst representatives that they would prefer to consider a TNE partnership that is collaborative and cooperative, where they can contribute their views and opinions, and where their faculty might also benefit.

*“I would like that potential partner to think of three things. 1) To find a way to create that culturally sensitive communication and connection. 2) I hope that they engage with us with the disposition of creating an opportunity. For us first, and secondly bring what opportunity they want to create for themselves as an institution. I understand that there is a business dimension to it but study first what we are really looking for and what we wish our partners to offer us. So more of a collaboration – for them not to encroach or impede on how we see our programme development happening. Instead engage us together. 3) Find the potential. There is much potential in Filipinos that is yet to be discovered, and when Filipinos see that this is going to bring back more opportunities for our fellow citizens we will pull our acts together and say to ourselves that we are going to make the most out of it.”*

## UK partnership opportunities

One of the main purposes of this research is to evaluate the potential viability of UK TNE partnerships – from the perspective of the Philippines. Amongst these representatives, no institution had yet set up a partnership with the UK. Nevertheless, the prospect of a UK partnership was on the whole met with positive reactions. The attractiveness of a UK partner was reportedly centred on its respective standing and historical legacy, as well as its culture. Many representatives mentioned the notion of ‘prestige’ when referring to the UK. Moreover, not only would the UK provide high education standards, but also the opportunity for the institution, its faculty and students to obtain an international outlook. Partnerships may be sought in terms of curriculum development, programme marketing, faculty development, research collaborations, employment opportunities for the graduates as well as immersion activities for students. Hence, Filipino institutions look forward to TNE partnerships with the UK mainly in the form of twinning programmes or faculty exchanges and/or training. On the whole, Philippine higher education institutions were not necessarily looking for a top-ranked UK higher education institution partner: any partner from the UK would do as the country in itself is considered reputable, and all its respective higher education institutions as such.

*“Partnering with the UK is an aspiration. People know that when I get this education from this very rich, culturally diverse and historically enriching environment such as the UK, there’s much I can bring home as an individual or even as a project in coordination with certain agencies which can make a huge dent in terms of the experiences of fellow Filipinos who aspire to have a glimpse of how that education system operates.”*

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## UK partnership challenges

While partnering with a UK higher education institution was regarded very positively, many concerns were expressed, and centred around the equivalence of the UK and the Philippines as partners, as well as the fees that would be commanded and the costs incurred.

Indeed, representatives were concerned that Filipino higher education institutions were just not comparable to their UK counterparts. Specifically, representatives believed that the UK had more advanced and developed curriculums, and a Filipino higher education institution could not significantly contribute in this respect. Moreover, the requirements a UK TNE partner reportedly demands from a Filipino one are said to be unrealistic, especially in terms of faculty training and standards of facilities:

*“The requirements they have set, maybe we can’t really meet at the moment. Such as diversity of faculty, the standards of facilities, the access to research grants and the curriculum. This last point is something all higher education institutions in the Philippines agreed that we have to do some more articulation in our curriculum so that it matches the curriculum of UK higher education institutions. Another issue is the level of fees to be paid.”*

The issue of fees, either to be charged to local students by the TNE partner or in terms of the cost of living that would be incurred should a student exchange take place, was of serious concern. Economic and social disparities widely exist in the Philippines, and according to the respondent, potential UK partners had not taken these points into consideration, either with regard to the fees they are commanding, or the mode of delivery they are suggesting. Filipino higher education institutions would very much consider partners from smaller UK higher education institutions as they would be more comparable in size and other remits.

*“The economic status here is really not comparable to the UK. Students being sent to the UK may not be able to afford that standard of living. The student fees will also be very high, and might only be for very rich students which we don’t have at our university. We are located in an agricultural province, so you just need to look at the level of income of parents who send their children to our school. UK partners do not seem to have a wide range of fees; it was more concentrated on the high end, as it’s usually the top universities in the UK which are engaging. We would like to engage with relatively smaller higher education institutions which might be comparable to our university.”*

## Level of demand for TNE programmes in the Philippines

Institution representatives were asked to gauge the level of demand for TNE programmes in the Philippines, and whether that level was likely to grow in the future. All participants were very optimistic in this respect, with one person adding that the support of CHED was instrumental to its success.

Furthermore, all respondents agreed that the Philippines was a 'fertile ground' for the development of TNE programmes, with some even reiterating the points made in this report about having a dedicated body with a TNE remit (CHED), quality assurances and accreditation, and the recognition of a TNE qualification. Specifically, the widespread use of English in the Philippines, low infrastructure costs, its growing economy and youth population were important factors to the development and expansion of TNE programmes. The opportunities presented by the Philippines' role in the ASEAN region were also mentioned.

*"The Philippines has these important ingredients for TNE. TNE will definitely open the Philippine educational market for innovations in the curriculum, faculty qualifications, applied research, and other forms of internationalisation strategies that shall produce graduates with the global competencies and multicultural skills ready to face the demands of the world market."*

*"Compared with its ASEAN neighbours, the Philippines will undoubtedly offer great opportunities for TNE, particularly in the use of English as the medium of instruction. With the ASEAN integration, TNE and internationalisation shall be an institutionalized internal strategy for higher education institutions, not only in the country but even worldwide. This will ensure global understanding, closer collaboration and partnership between and among nations."*

## Opportunities for institutions and faculty

Amongst the wide-ranging answers given by representatives with regard to the opportunities TNE programmes would bring to their university, the most common were knowledge transfer, increased competitiveness, and putting their institution on the global 'map', differentiating themselves from other local higher education institutions, as well as increased international student mobility. This last point, the influx of non-local students to their higher education institution would reportedly bring about new funding streams, and would raise the 'prestige' of the university. Other opportunities mentioned were linkages with international universities, and the internationalisation and standardisation of programmes and their curriculum. Furthermore, faculty may also benefit from research collaborations and the opportunity to develop their skills and competencies.

*"TNE will usher inter-cultural competence among students and teachers. It will also provide an international branding or acceptability of our programme. The mapping of the international curricula would allow us to align with international universities. It will also increase international student mobility and offer greater prestige to the institution."*

*"TNE will bring about a globally competitive educational programme in the Philippines. It will significantly provide knowledge transfer, skills, and competencies. It will improve the Philippine educational system and make all Philippine higher education institutions on par with the universities worldwide."*

## Opportunities for students

Institution representatives raised two important and distinct points when discussing the opportunities TNE programmes might bring to Filipino students. On the one hand, TNE programmes would allow students to broaden their knowledge and cultural horizons, and on the other these programmes might serve more practical purposes, such as accessing courses and fields of study that would not be available otherwise for example. Moreover, representatives highlighted the fact that obtaining a degree from an internationally recognised higher education institution was an extremely important consideration for students, as well as the opportunity for increased employability in return.

All representatives were very much aware that these programmes would enable students to be perhaps more sensitive to other cultures, and have a better appreciation in turn, on their quest to becoming 'global citizens'.

*"For Filipinos it's a big thing, that their education has been completed elsewhere. But that doesn't mean that the education that they are receiving from our top universities here is not as good. But there's not too many comprehensive programmes here. The people that are able to get the TNE grants are the ones that are quickly moving up in the hierarchy of professionals."*

*"The growing demand for TNE in the Philippines is due to people having more consciousness of the fact that there are opportunities out there for employment, that may need a different delivery mode of their education. If I'm able to get an appreciation of TNE as early as university education, then that's going to better prepare me for better opportunities beyond the country. Or even if I engage in the country, I may find that my TNE experience gets to be credited by the multinational or transnational companies operating now in the Philippines. That's actually rapidly growing."*

TNE might also offer students a chance to obtain a recognised degree at a lower cost (in terms of fees and living) than if they were to undertake a degree abroad. The aforementioned opportunities afforded by TNE programmes, as well as the added benefit for students to be close to home and their families, was very attractive.

## Challenges for TNE in the Philippines

It is important to mention the challenges faced by Filipino higher education institutions, according to institution representatives, for the future success of TNE programmes. When prompted, it would seem the most prominent difficulties faced were in terms of not having enough trained faculty available, and the processes for setting up the TNE programme not being streamlined or clear enough. Many other issues were mentioned, namely in terms of finances, administration and legislation, which will be discussed next.

Concerns in terms of finances were not only mentioned by institution representatives in relation to the possibly high fees to be paid by students, but also by the higher education institution itself for setting up the TNE programme. Indeed, higher education institutions would perhaps need to update their facilities and infrastructure as well as train faculty members according to standards set by the TNE partner.

*“TNE entails a considerable amount of capital to start the initiative particularly on the needs and specifications for the physical facilities, laboratories, on-line services, pay and benefits of the international faculty, school fees charged by the local vis-à-vis the TNE partner and others.”*

Legislative challenges were frequently mentioned: processes for setting up TNE programmes were not streamlined enough, and there was also a lack of clarity from the part of CHED about the frameworks or requirements. This lack of transparency made the local higher education institution experience delays in some cases. Indeed, there still seemed to be some confusion amongst respondents about TNE, pointing perhaps to a lack of knowledge and also confidence. During the interviews it was suggested that accreditation should be streamlined as well.

*“There is an existing Memorandum of the Philippines Commission on Higher Education regarding internationalization however, no clear regulatory framework and processes being given.”*

*“There are still some people who don’t understand what TNE is. Actually right now there are still some areas that I don’t understand. I still don’t know what degree programmes are to be offered, how are we going to go about the mode of delivery, whether it will be twinning or other.”*

Perhaps surprisingly, only one institution representative commented that visa processes being too bureaucratic and lengthy might be a deterrent to international students enrolling onto TNE programmes.

Administrative challenges were also frequently mentioned, and perhaps the biggest was appropriate faculty training (and training them according to CHED’s new curriculum and standards, as well as the TNE partner’s requirements) and meeting the demand. Concerns have been raised by representatives about the lack of appropriately qualified staff and faculty. Especially that CHED was overhauling the way core disciplines, like mathematics for example, are taught. Faculty will hence need to be trained in this respect as well.

## The role of the Commission for Higher Education

The role CHED plays in the implementation and vision of TNE programmes in the Philippines is an important theme to emerge from the interviews. CHED is involved at every stage of the TNE process: it is responsible for introducing and instating a TNE vision for the Philippines, setting quality assurances and minimum requirements, as well as assessing and accrediting higher education institutions. In turn, higher education institutions, according to representatives, had very little control over their TNE activities.

CHED operates accrediting agencies that would visit schools and higher education institutions to assess their quality – in turn they would rate them on a four-point scale. Most importantly for TNE in this case, CHED also rewards high-performing or high-quality higher education institutions with autonomous status. Autonomous higher education institutions have more control over their TNE activities compared to their counterparts, and can govern themselves a bit more in this respect. However, representatives from higher education institutions which have not been granted autonomous status somewhat complained about the lack of control they had over the TNE process, and perhaps being completely at the mercy of CHED. As discussed previously, a lack of information about TNE and its processes is pervasive. Nevertheless it is essential to maintain a good relationship with the Commission for the success of the TNE programme.

*“In the Philippines, there are classifications of universities. One is regulated, which means that they are closely monitored by CHED. The second is deregulated, which means that there is a certain kind of autonomy. One of the privileges of having autonomous status is that you don’t need approval you just need to inform CHED about your TNE programme. It has facilitated the granting of our TNE programme. So it was relatively easy for us to set up and get this permit from CHED.”*

*“They may seem like they are giving us the leeway, but they are controlling us in so many ways too! If they say that we have the liberty to add on an elective then that’s fine, institutions can decide on that but what if they say that we don’t see the configuration of maths in the contemporary world the way you prescribe it to be? There should be a better way to deliver it. On the one hand they’ll say sure because that’s true to your vision, but there’s always a second statement preceded by the word ‘however’. And that means that ‘however’ you need to meet the minimum requirements.”*



## The future of transnational education in the Philippines

When asked about the future of TNE (and its expansion) in the Philippines, representatives were overwhelmingly positive. They believed the country had all the right tools to make this a successful venture. Moreover, one higher education institution representative, who has been in the sector for quite a long period of time, commented that this government administration was quite different from previous ones, and were more proactive and serious about making TNE work in the Philippines:

*“The future of TNE will be successful, there will be plenty of growth in the demand for TNE because of the support from the government, and the agencies, and the universities. We get full support from CHED because our university is under CHED. And all the support that we need they give it to us, all the information they give it to us. Right now we are still in the process of finding out what it is all about, and CHED is closely monitoring this.”*

*“The government has always talked about the meaning of global competitiveness. But it has not really gone too far, at least in the last two or three administrations that I’ve worked with because people are not picking up things. They start here and then they suddenly stop to introduce a new jargon for it, and people start avoiding getting involved because there are too many regulations. So I guess, if we really wish to make our offering competitive and global, it needs to start via TNE. It’s crucial. Because when you cross borders, you cross limitations – limitations in terms of views of the discipline and their applications to industry, views of the learner and the learning environment. Things are going to change.”*

Representatives also offered their advice on how to promote TNE, namely by publicising and getting the message across, as many people seemed to be unaware of such offerings, as well as making their programmes unique and differentiating themselves from other higher education institutions. However, and perhaps disappointingly, only one person managed to determine what the future demand for specific TNE fields or programmes might be in the Philippines. Interestingly, it may be important to focus on what would work for the Philippines economy and its future, such as Agriculture, Business and the Sciences.

*“Maybe we can increase student enrolment by publicising it. Determining the uniqueness of the offering from the institution. Because if the same is offered in other universities then that would not work. So we are looking to see what is not currently offered in other universities. And also our location is great.”*

The interview with higher education institution representatives concluded with ‘What advice would you give a UK university setting up a TNE programme in the Philippines?’ A common sentiment expressed was that the UK partner should make the effort to research Filipino educational laws and policies, and make its offering culturally and economically sensitive and sensible. UK partners need to consider the size of the higher education institution they are potentially collaborating with beforehand.

*“There are several partnership agreements that do not really require faculty members to come to the Philippines, at the same time the Filipinos would have to go to the UK. Because that would be very expensive for us. Finding ways where higher education institutions can collaborate without spending so much on airfare. One would be the publication of papers, another would be a joint sponsorship of an international seminar, mechanisms that can be decided upon by both universities. So my advice is for them to really study well any areas where there can be a fruitful partnership.”*

*“The UK university should be familiar with Philippine laws and policies particularly those affecting the educational sector, Philippine accreditation standards vis-à-vis the UK, school rules and regulations that may be different from UK institutions, and the culture of the country and its people. In order for it to become a successful endeavour, the local TNE partner should be empowered to run the program in the country with close and open cooperative and collaborative efforts from the UK partner. The financials should be realistic and not one-sided. The UK university should charge fees that can make the programme move forward. The sustainability of the programme is important. The UK university should send/ deploy talents to make the offering attractive.”*

# Focus groups with students

As discussed previously, three focus groups with students interested in a TNE programme were conducted, two with students who were interested in a TNE programme at the postgraduate level and one with school pupils who were interested in an undergraduate TNE programme.

However, it proved rather challenging to recruit school students who had a sufficient level of knowledge of TNE and who would then be able to participate in a focus group. A lack of knowledge about TNE programmes was found to be pervasive across the groups and will be an important sub-theme to be discussed in subsequent sections.

## Focus groups with postgraduate students

All participants in the postgraduate focus groups were interested in enrolling onto a TNE programme, albeit to varying degrees. The focus groups themselves were less structured than those with institution representatives, and several distinct themes emerged from the data: 1) the decision-making process surrounding TNE, 2) opportunities afforded by TNE, 3) challenges surrounding TNE, 4) studying on a UK TNE programme.

## TNE student decision-making process

All students in this focus group were currently studying at local universities in the Philippines. None had considered enrolling on a TNE programme at the undergraduate level due to the perhaps lack of information they had received in high school. Another reported reason for non-enrolment was the fact that they perhaps did not feel ready to study abroad for a period of time at such a young age, especially given that potential undergraduate students in the Philippines are younger than the global average due to a shorter schooling system. However, with the introduction of the K to 12 curriculum, pupils will be in school for longer periods.

*"I've already heard about it but not the technical term transnational education. It's taking the units from other universities but I didn't know this meant TNE. When I was in high school, I think we knew about taking units from other universities, but we didn't really know how to go about it, and what to do first, or the process by which we can do that kind of education system."*

*"I was hesitant and I wasn't sure if I was really ready to study abroad at such a young age. I was only 15 or 16 at the time."*

Parents, and parental approval in general, play an important role in the decision-making process even at the postgraduate level. All students generally agreed that it was mainly their parents who influenced their choice of study, and whether they would enrol onto a specific degree or not, TNE or non-TNE, more so than their peers or other social groups. The important decision-making power that their families had was possibly due to the fact that they would be paying for their child's tuition. Furthermore, some students commented that their parents would prefer they stay at home and perhaps enrol onto a TNE degree programme, rather than leave to study abroad:

*"I think it's more of my family than my friends. It's really my parents who chose my degree. Like I think they have the decision-making power."*

*"But then my parents are pretty strict. So if I give them a choice between doing TNE or going to a short study term abroad, I feel like they'd push me towards the TNE."*

More generally, participants started to consider TNE programmes during the course of their undergraduate degree. Most admitted that they had not really actively searched for such programmes, but rather had heard about TNE through a faculty member or a friend who had studied on a TNE degree:

*“When I was in high school a friend did TNE, but he didn’t mention the term transnational education but the description is I think transnational education. So I’ve heard about it from him but the better information about it I heard from our College Dean of our university.”*

Several factors came into play when participants were considering a specific TNE programme or course. Across groups and individuals, the most common answer was the availability of a scholarship and financial accessibility, followed by whether the partner country was reputable in the discipline they would like to specialise in. The institution’s reputation came next, alongside the diversity of faculty, and the uniqueness of the course on offer. For Filipinos, it would seem that the course should really market itself as unique in order to be considered, especially given the possibly higher costs involved, compared to ‘local’ courses. Partner institutions should also be marketing courses that are their country’s specialty field.

*“I think the chances that Filipinos would enrol on a TNE would be very low, unless they come from a privileged family or they will be able to afford it. Like, the only time I think that Filipinos would really be able to consider this is if there are scholarships provided to help.”*

*“The UK would be a good place to take up Sociology, but then let us say I am studying Engineering, I’m not sure if that would be the best place. It also depends on the course, but the country also matters. I would not necessarily go to the UK for urban planning for example. From what I know, Singapore is one of the countries that offers the best programme for that. So, even if there is availability in the UK, what you will be really considering is the scholarship and the specialty of the nation providing the course.”*

## Opportunities afforded by TNE to students interested in postgraduate study

Respondents were perhaps very conscientious and future-oriented when it came to the opportunities that a TNE degree or programme could potentially bring to them. Most importantly, TNE would give them an edge over other Filipinos (who did not perhaps enrol on a TNE programme and receive an international qualification), and increase their employability. Accreditation, and thus obtaining a degree from an internationally recognised institution were extremely important to students, and were frequently mentioned.

*“Compared to those who would just stick to the traditional kind of education system, qualifications are just limited here in the Philippines. Filipino qualifications are not recognised overseas. The TNE programme would really increase my chances of being hired because of the internationally recognised qualifications it would give.”*

*“I would not be limited in the Philippine context only. So if I was working abroad it could be that I would be recognized not just as a graduate from this education system in the Philippines but actually the education system from the awarding country for example the UK, or the US.”*

*“So for us Ateneo University means something. But what’s that for the rest of the world? If you are enrolled on a TNE programme especially with an institution from example in the UK or the US, then it’s better to have on your CV and it’s more recognisable for overseas employers.”*

A student mentioned the hierarchical view employers take when employing students from certain local institutions, such as the University of the Philippines for example. Perhaps TNE would be an added advantage in that case, where local universities are difficult to access. It would also allow the lesser-known, smaller higher education institutions, to benefit from an international outlook.

Some students recognised that facilities, materials and resources available at local universities might be perhaps inadequate at times, and TNE might be able to bring change. Students were particularly interested in having access to a more exhaustive online library. Some students recognised that TNE might be an opportunity to balance work and study.

Otherwise, there are some specialty subjects, such as linguistics, urban planning, ASEAN studies, conflict studies that might be unavailable in the Philippines or may not be as comprehensive:

*“Not just in education but even like Policy, Sociology, Anthropology. Unfortunately Sociology and Anthropology aren’t big here in the Philippines and not every university offers the programme. Even at Ateneo, you don’t offer just a Sociology programme, they combine Sociology and Anthropology for their degree programme but they are different. Like for example for Sociology, it’s like such a lost opportunity because it’s a degree that would be that would be of benefit to the Philippines.”*

Perhaps secondary to all the aforementioned opportunities would be the added benefit of being immersed in another culture. However, this point was only mentioned in the context where it could benefit their education, not their socialisation. This point may not have been mentioned as intensively due to the fact that not many were in fact interested in traveling abroad, preferring to have their degree delivered locally.

*“It’s also a different experience because when you are also immersed in the culture, you have a better understanding why they teach in certain ways. So it’s more immersive if you’re abroad.”*

It is somewhat surprising that having trained faculty from abroad did not figure more prominently in their accounts of benefits of TNE. On the contrary, a few students were a bit apprehensive with regards to having international faculty:

*“So if the international higher education institution will be coming here, then who will be the faculty? The local faculty or the international one? For me I really want to see the concrete TNE aspect of how it will be different from what is being offered by the local higher education.”*

## Perceived challenges with regard to TNE

As discussed previously, the availability of funding was one of the most important factors when students were considering whether to enrol onto a TNE programme or not. In the case where a programme was to be delivered locally by another university, the fees were perceived to be high, or higher relatively to an ordinary degree. On the other hand, many expressed concerns that should the programme be delivered for a period of time abroad, they would not be able to afford the living costs. Some also expressed a sense of guilt at burdening their parents with these high costs.

*“For me it depends if there is a scholarship, I would do it full time because it’s better if you finish as soon as possible. But if I am going to shoulder a part of the expenses, then I would not want to burden my parents with the costs, so I would probably do it part-time.”*

Indeed, obtaining a scholarship was an important decisive factor. However, many expressed concerns that there were not many scholarships available to Filipino students and standards difficult to attain, and that perhaps only the top students from top higher education institutions are eligible for them, many of whom come from privileged families.

*“If you look at the people who are obtaining scholarships, it’s the rich ones who get them in Philippines. It seems that you need to graduate first from a respected university in the Philippines. There’s a lot of criteria and standards to be fulfilled before you can get a scholarship.”*

Another challenge that was mentioned generally was the lack of knowledge and information available, not necessarily limited to TNE, but to the funding options they are eligible for. Some came up with novel solutions to these issues, such as having all the information amalgamated into one site, one that is easy to navigate and in a language that is understandable to everyone. Another way that students would like to obtain information about TNE is through seminars or fairs – basically face to face contact.

*“Actually prior to this research, I always thought TNE referred to an exchange programme.”*

*“I think the problem is that not everyone is informed about TNE. So now we know about it but we are not really able to pursue it because we don’t know exactly what we should do first or the process of how we can do that kind of education system.”*

*“I think that having at least all the information in one site would be good. Now I’m thinking about studying abroad. Even just finding it is hard. I’ve heard there are so many opportunities to get scholarships for masters but I don’t really understand where to look for the information. And it’s kind of a hassle to look at different pages. What universities are involved, what is the programme? Or you have to look at the QS thing.”*

Other than the general lack of information, there was also some apprehension and distrust about the information that was available to them, especially online information. This distrust was also extended to the legitimacy and accreditation of TNE programmes and degrees, possibly stemming from the large number of TNE programmes that had been closed down by CHED in recent years. A few students even expressed their concerns about quality assurances and controls over the faculty teaching them.

*“I think the British Council should have seminars for information dissemination in the universities here in the Philippines because I think it is not enough to just see it online because it’s hard to trust what we get online. We don’t know if it is valid or legitimate so I think it would be smart to do seminars or symposiums to have direct contact.”*

*“At the University of the Philippines, once the professor gets tenured, although after the semester we can give our recommendations and comments, it does not mean that our opinions are taken into consideration. If they are not going to be foreign faculty but local faculties, there has to be a mechanism to make sure that they are teaching well.”*

## Considering United Kingdom TNE programmes

Students were reportedly very positive when asked whether they would consider a UK TNE programme. All agreed that UK higher education institutions had a very good reputation, reputation and standing being factors that came up repeatedly in their narratives. Obtaining a degree from a UK higher education institution would also increase their employability and perhaps their chances of obtaining a job abroad.

*"I definitely would consider UK TNE programmes because of the high reputation of the United Kingdom when it comes to tertiary education. And the UK and US, I think they both great reputations and they are considered as two of the current most powerful and influential countries."*

*"My plans in the future are to teach English in Japan. From what I learned from the internet and JobStreet, I think they are looking for Western teachers teaching the English language. I think having an international qualification that is recognised internationally such as one from the UK or US, it would give me greater edge or it would increase my chances of being hired in such a country."*

English being the language of instruction in UK higher education institutions was also a serious advantage, and that is one consideration when picking a TNE partner. Otherwise, the UK is regarded for its rich history and culture, factors that respondents looked up to. A few students commented that the UK, or obtaining a degree from a UK higher education institution, was 'prestigious'. Others expressed some sort of intimidation with UK culture, it being very different from that in the Philippines. They also acknowledged some sort of hierarchy between the countries:

*"I found British culture very interesting, especially the history. They have had such a huge influence on the world and English is spoken almost everywhere here. I'd like to learn more about British influence, culture and even their reputation and the educational programmes."*

*"I think it would probably be like a different style in education and it might take some cultural factors into consideration like experience from a new culture. You might have classmates or teachers from the UK. You can come out of your comfort zone because you'll realise how the UK is such a different culture. They're not really as open to emotions as like for example Filipinos."*

*"There's also this sense of hierarchy, because if you see in British history, there is this like this nobility and that sort people are a bit hierarchical."*

## Focus groups with students interested in TNE at the undergraduate level

Prior to this focus group, none of the participants had heard of TNE, and a lack of awareness and information was very much expressed. Nonetheless, once TNE had been explained to participants, they were very much interested in pursuing such a pathway. The next sections present the decision-making processes with regard to their programme of study, the opportunities and challenges presented by TNE in their view, as well as their opinion on studying in the UK or obtaining a degree from a UK higher education institution.

### Decision-making process

All of the four students who participated in this focus group were very much decided in terms of the field of study they wanted to pursue. All wanted to obtain a foreign qualification. These included: chemical engineering, agriculture, physics and visual arts, and economics. Interestingly, two of the students mentioned having been influenced to pursue this trajectory due to their parents' experiences, who were either professionals in the field or had studied in that particular country. Much like postgraduates, parental influence was very apparent, especially with choice of field of study or the country to pursue a degree in.

What was certain about all four participants was that they aspired to study a topic that would benefit the Philippines and its people. All seemed to be very attached to their country and home, and most planned to move back to the Philippines after getting their degrees.

*"I am interested in taking up a course in agriculture or in engineering, because I feel like that is what the Philippines needs right now. I am going to study abroad so that I would be able to take in whatever information an international school can give me. So that I would be able to bring it back here and help out with the problems of the country."*

*"My plan is to get education abroad and then come back. I will be working here as a Philippine representative from an international company or working to improve currently existing Philippine companies on agricultural or environmental programs."*

As mentioned previously, none were aware of the TNE options available in the Philippines, although one participant was considering a TNE programme in Singapore. It would seem nevertheless that their decision-making process was very much geared towards the course that was on offer, and the fact that it was not available locally or not to the desired standard. Other factors that would sway their decisions were the quality standards of the actual higher education institution delivering the TNE degree and their reputation. The TNE degree would also need to offer some added value in terms of faculty and facilities.

*"Mine was more a choice on the course offering. I felt that I could get a more rigorous physics programme because physics programmes in the Philippines are not really up to the grade. I felt I could find more research opportunities abroad. The university you graduate from is kind of a big deal."*

*"I feel like also the resources that the partners could provide—the teachers, the materials. I personally would rather go abroad because of the new experience of culture. I would also consider the program here if it can provide the exact same things that can be taken if abroad."*

## Opportunities afforded by TNE

Immersion in another culture was a common desire expressed by students when talking about the advantages of acquiring a foreign qualification. This feeling was especially highlighted by a student who had pursued a short-term programme in Australia, and had reinforced her desire to study abroad in the future.

*"I was chosen for a very short exchange programme to Australia. I stayed with all these different girls, but I had someone, my batch mate, with me. It was very scary at first because it was a new setting. I have never been alone before, without my parents. But when I went, I really enjoyed it there, because that school is known for its wide exchange program, so a lot of the girls there were from abroad, like Asia, Africa. And, I have met so many wonderful people. It opened my eyes to the possibility of studying abroad. So now, I feel that studying abroad can be the opportunity to learn more not only about my desired course but about the different cultures."*

The aforementioned experience is particularly important, as it shows how the prospect of study abroad may be made easier in some cases if a peer or friend was also attending the same programme, and students enrolled were also foreign to the country.

Family was again a very important consideration. When discussing different TNE programmes, one that would be delivered in the Philippines was well received by all of the students, as it would enable them to stay close to home. One student was also keen to enrol on a twinning course (after it was explained to her), as it would enable her to stay close to home for the first two years when she would still be quite young.

*"I think it is a great opportunity for those who want the education from a certain school abroad, and want the comfort of the Philippine setting. Because I understand that there are some people who want to go abroad but they cannot bring their entire family, they cannot migrate, and it is hard for them to go because they are comfortable here or they do not want to be separated."*

*"I would consider twinning because I am still 15 and I would graduate at 17. And I do not really want to leave my parents, since my brother is also working."*

The perception of improved job prospects was another advantage to obtaining a foreign qualification as reported by students.

*"I think that if you go abroad, it would be easier to apply for a job here as compared to if you were to take a university here and apply for abroad. So I think the school itself, the partner school, would be a big help if you were to apply for jobs. So if I were to apply to that kind of program, I would also consider the schools."*

Concerns were expressed about studying abroad in terms of finances and expenses, and that being a detractor. However, when participants understood that they could obtain a foreign qualification but still stay in the Philippines, and it would hence be cheaper than the former, TNE sounded very much advantageous.

*"I am just really shocked by how expensive studying abroad is. I feel that if you have a TNE degree, I do not think that it would be as expensive, first of all. [Agreement from the group]. So, that is a big bonus in itself already. Also, the fact that you get the kind of experience, you get the reputation, it is like an all-in-one mix."*



## Concerns about TNE

The number one concern students expressed was quality controls. Indeed, much like their postgraduate counterparts, a lack of trust and some apprehension with regard to whether the course and degree will be implemented the right way and whether the faculty will also be trained right and qualified was very visible. Students also showed a lack of trust with how processes are implemented in the Philippines, especially after their experience knowing of the K to 12 transition.

*"I think quality of education. [Agreement from other participants] Because we have the partner schools, because we are not sure what exactly is going to happen. Are they going to fly out teachers from there? I think there would offer reading materials and things like that. But, the teaching itself, the staff in the first place."*

*"Because the fear is that what if it is a great course, but it was not implemented right, or it is just not up to the standards of what I was kind of expecting."*

*"How are TNE programmes going to be implemented? That is always a problem in the Philippines, there is always a problem in implementation, just like K to 12."*

Their lack of knowledge of TNE was, as discussed, very pervasive, and probably added to their apprehension. Indeed a student expressed uncertainty over how a TNE degree would be perceived by prospective employers. A more general concern was regarding the lack of dissemination of information with regard to TNE amongst school pupils. Much like postgraduates, they preferred to learn more about TNE options through face-to-face means like school fairs, seminars and career orientation.

*"The only detracting thing there is I am not really sure about jobs. I am not sure about job interviewers would really think of TNE because when you get a degree, you do not get... it is a joint degree, right? So I am not sure how they are going to perceive that. If they would credit it based on the really prestigious school or they credit this as, "oh, is this a new university?" [Agreement among the participants]*

*"There is this organization called CAMP (College Admissions Mentors for Peers) and I have been following this institution for two years now. And, they help students who are interested to study abroad. And every year they hold a conference, like their most recent one was I think last July in ISM. And it was a big conference, they have lots of visiting universities from abroad."*

## UK partnership opportunities

Since this was the participants' first time hearing about TNE programmes in the Philippines, they had not yet considered programmes from the UK. As some wanted to study abroad, options were the U.S. (for the dual-national participant) and Singapore (Yale-NUS programme). Another student expressed a love for French universities; she was looking for liberal arts universities in Hong Kong, Korea, Singapore and the States.

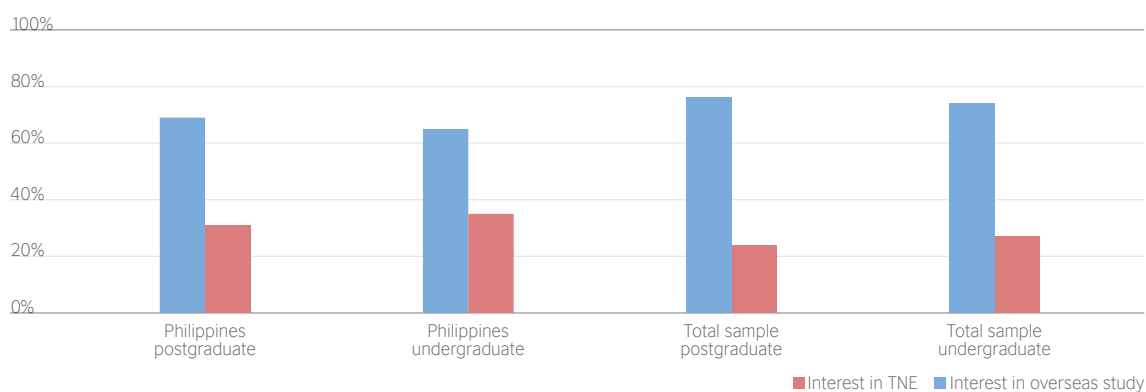
One student expressed confusion and concern about the comparability between UK and Philippines curricula, and whether additional qualifications would be needed to meet the requirements.

*"I do not how I would go get around that. So, you have to go there and take A-levels?"*

# Student Insight survey

Since 1 January 2016, 107 Filipino students interested in enrolling on a foreign qualification entirely in their home country (n=16) or in a combination of the two (n=91) completed the Student Insight Survey. Compared to the total sample of Filipino respondents, since that date, there were more people interested in overseas delivery compared to TNE. However, and interestingly, compared to the total sample of respondents interested in a foreign qualification who participated in the Student Insight survey since 1 January 2016, Filipinos showed a considerably greater interest in TNE.

## Interest in TNE



Source: British Council Student Insight survey

## Demographic characteristics of Student Insight survey sample of Filipino students interested in TNE

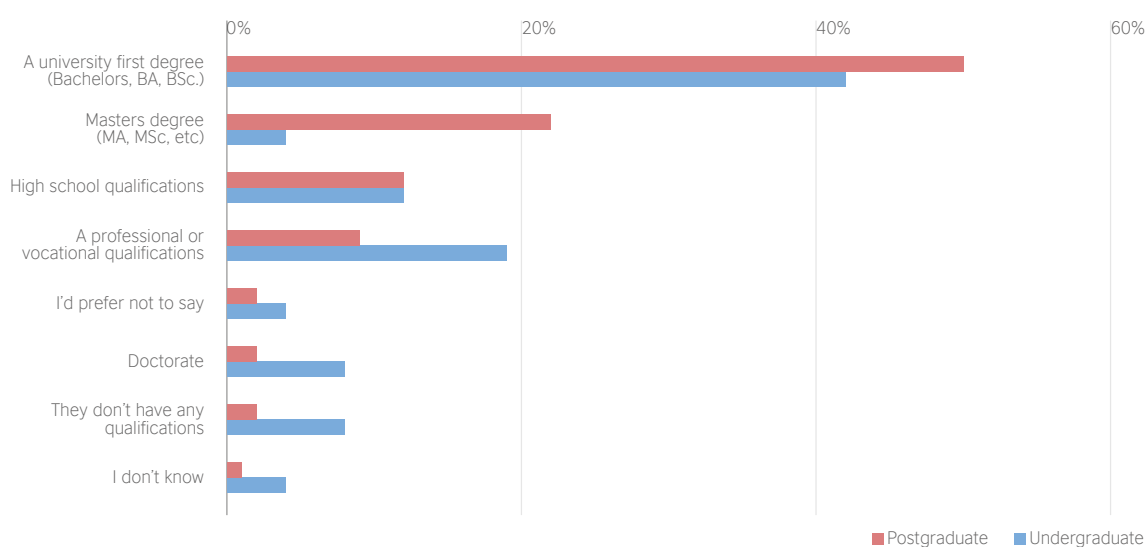
Most respondents were female (70%), mean age 24, were either employed (50%), studying at university (25%) or unemployed (11%). Most respondents (75%) were living in the Metro Manila region of the Philippines and Luzon (17%). Only a small number of participants came from the relatively more rural outlying islands of Mindanao and Visayas.

Much like the HESA sample, most of the sample from the Student Insight survey was made up of individuals who were interested in postgraduate level of study (74%).

Most prospective undergraduates were under the age of 21. The sample of male prospective undergraduates was small, however it would seem that they were relatively older than their female counterparts. Around half of the sample of female prospective postgraduates was between 22 and 26 years of age. The variance spread of men's ages was wider in comparison.

For most participants, their parents had gone to university and had achieved a bachelor’s degree at least. Interestingly, parents of potential postgraduate students were more likely to have obtained a master’s degree compared to their counterparts.

### Parents’ highest achieved qualification by level of study



Source: British Council Student Insight survey

Less than half of respondents interested in undergraduate study had travelled overseas, and 61% of postgraduates had. Very few had studied overseas. Compared to the sample of respondents from the Student Insight Survey who were interested in a TNE programme of study (as of January 2016), it would seem that Filipino students were lagging behind significantly in terms of overseas experience. This may point to relatively lower purchasing power, difficulties in obtaining visas, personal preferences, amongst other factors. In turn, the lack of overseas experience may also be fuelling students’ apprehension towards studying abroad.

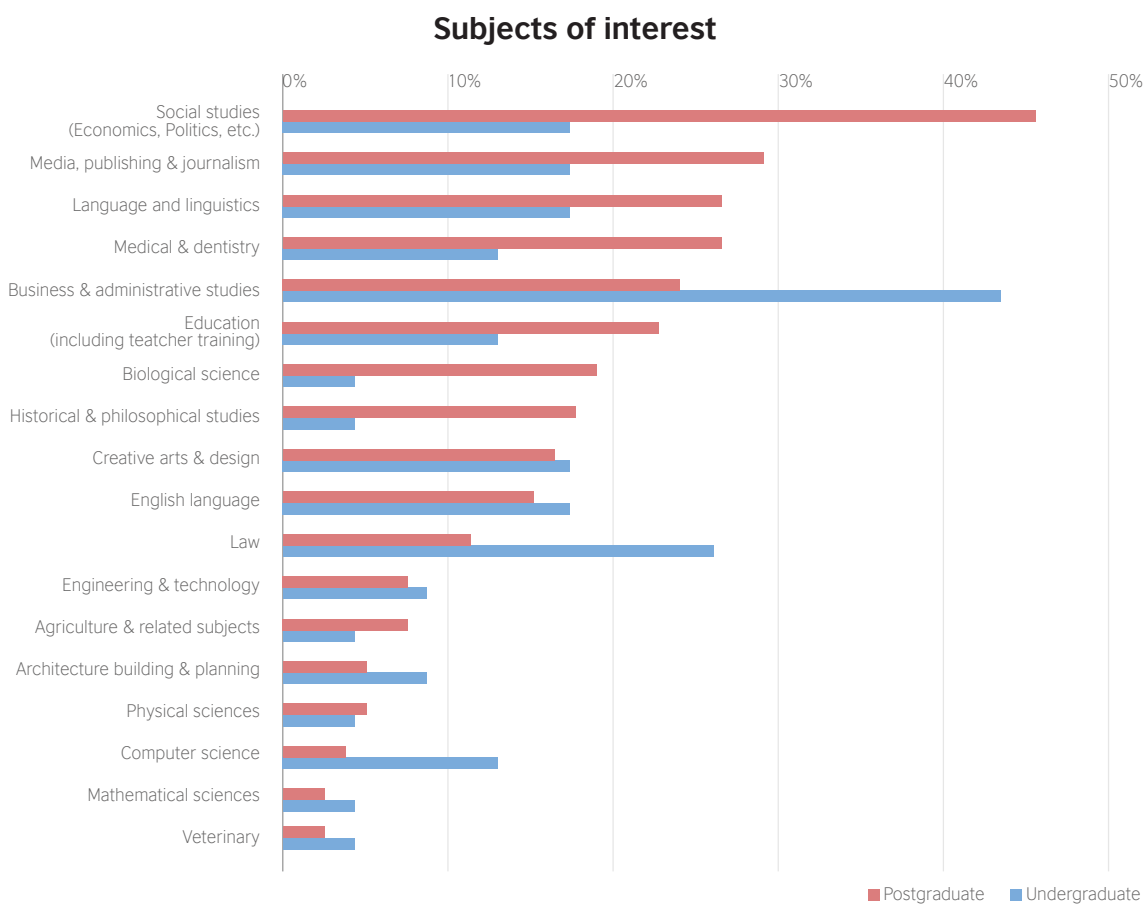
### Previous travel and study abroad experience by level of study

	Postgraduate	Undergraduate	Total postgraduate SIS sample	Total undergraduate SIS sample
Travelled overseas	61%	43%	65%	54%
Studied overseas	13%	0	29%	14%

Source: British Council Student Insight survey

## Subjects of interest

Nearly half of the postgraduate sample was interested in studying the social sciences. Other subjects of interest for these respondents were media studies, languages and linguistics and medicine and dentistry. The most popular subject amongst potential undergraduate students was business and administrative studies, followed by law.



Source: British Council Student Insight survey

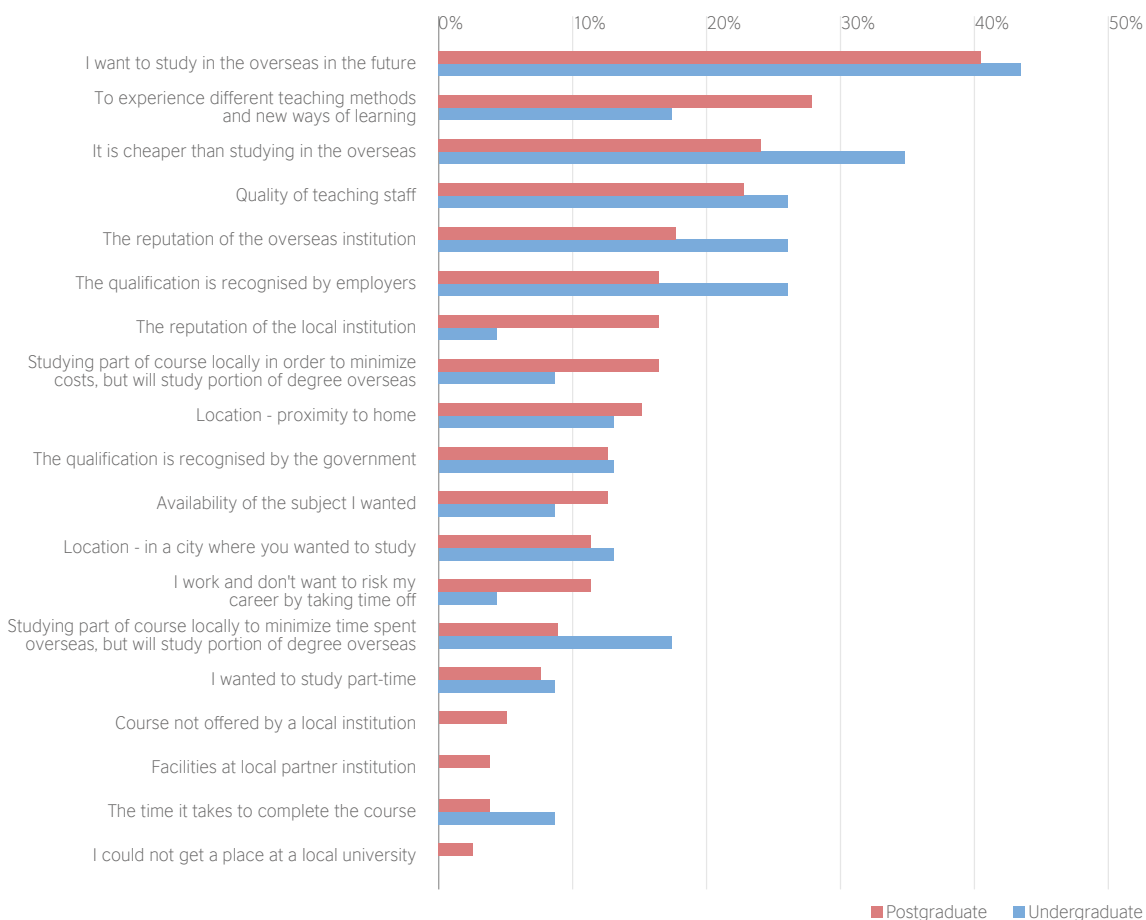
## TNE decision-making process

When asked the country where they intended to study their TNE degree, most potential undergraduates (70%) had replied 'other' - perhaps meaning the Philippines. Other potential destinations of interest were Singapore (22%), Hong Kong (4%) and the U.A.E. (4%).

One of the many aspects that the Student Insight survey explores is the decision-making process behind a participant's reasoning in undertaking a TNE qualification. Interestingly, for undergraduates and postgraduates alike, the main driver was because of their desire to study abroad in the future. For postgraduates, experiencing different teaching methods and the quality of teaching staff were particularly important. The reduced costs compared to studying abroad were extremely attractive to undergraduates, as well as postgraduates. The reputation of the local institution was not as important to undergraduates as that of the overseas one. For postgraduates, both institutions' reputations were of equal concern.

Interestingly, results from this question may also show that undergraduate decision-making processes could be a bit more employer-driven compared to their older counterparts. A desire to minimise their time spent overseas was particularly pronounced amongst the younger sub-sample.

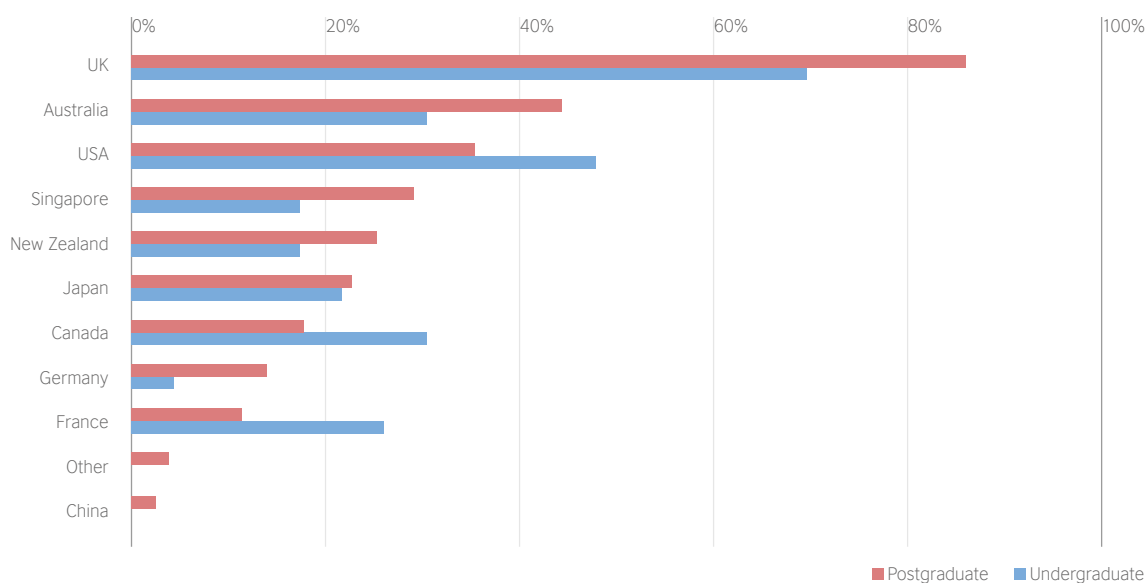
### Most important factors in participants' decision to undertake a qualification in home country



Source: British Council Student Insight survey

Responses from undergraduates and postgraduates were quite similar on what they chose first when deciding on an overseas qualification (awarding country, local institution, course, overseas awarding institution). Much like the results from the focus groups, one of the factors that was decided on first by most undergraduates and postgraduates was the country. Only a very small proportion of participants decided on the institution itself first, whether local or overseas awarding. The number one country being considered by undergraduates and postgraduates alike was the UK. As a second preference, undergraduates and postgraduates differed: the former preferred the US, while postgraduates rated a degree from an Australian institution higher.

### Awarding countries being considered



Source: British Council Student Insight survey

Most participants had sought and found information about potential TNE programmes via the internet, and either on the awarding institution's website or the local one. Word of mouth was also a common means: participants reported hearing about TNE programmes through someone they knew, either a friend or faculty member. This point was also discussed in the focus groups.

### UK quality ratings

Most of the sample of participants gave a good to excellent rating to the quality of UK courses, especially amongst potential postgraduate students (97%); a slightly lower proportion of undergraduates (87%) rated them as such. Quality of UK staff and teaching methods was also positively rated by Filipino participants, but perhaps not as well as the quality of courses. The international recognition of a UK degree and the reputation of institutions was better rated by postgraduates than undergraduates; some undergraduates expressed having 'no opinion' on the matter.

In terms of perceived employment prospects after graduation following a degree from a UK institution, ratings were similarly positive, especially on behalf of postgraduates; undergraduates seemed to be more undecided: 69 per cent of postgraduates and 50 per cent of undergraduates perceived their employment chances as 'excellent' after obtaining a TNE degree from a UK higher education institution.

Most of the sample thought the pricing of UK courses was 'good', 22 per cent of postgraduates rated them as poor to very poor. Moreover, although the option was available, negative sentiments (giving ratings of poor or very poor) were only expressed with regard to the pricing of UK courses and prospects after graduation.

## Country quality comparisons: UK-US-Australia

Respondents' opinions were also sought about the quality of higher education in Australia and the US. It must be noted however that comparisons should be treated with some caution as some sub-sample sizes are small. This point may be further exacerbated by the fact that a quite substantial proportion of the sample had "no opinion" with regards to some questions - especially amongst potential undergraduates - such as institution reputation, international recognition of programmes and employment prospects. It could also be argued that potential undergraduates in this case lack knowledge on these issues. Postgraduate programmes in general were ranked higher than undergraduate ones (except for Australia).

In terms of the quality of undergraduate programmes, Australian institutions ranked highest, whilst American ones scored highly amongst postgraduates. The UK came in second for undergraduates and postgraduates.

Compared to programme quality, teaching was not rated as highly. Teaching quality in the US was ranked as highest compared to the other two countries across levels of study: 56 per cent of undergraduates and 68 per cent of postgraduates rated it as 'excellent'. Teaching quality was perceived as worst in comparison to Australia.

UK higher education institutions were regarded very highly in terms of the international recognition of programmes, ahead of the US amongst the undergraduate sample. Australian programmes were perceived to be the least internationally recognised, with one potential postgraduate even scoring it as 'poor'. Similarly, the UK scored highly on institutional reputation, and was ranked similarly to the US by postgraduates.

The issue of cost incited the widest range of responses. The pricing of Australian courses was rated as the best compared to other countries, especially the UK. For example only seven per cent of postgraduates rated the price of courses as 'excellent', and 22 per cent rated them as 'poor' to 'very poor'.

Employment prospects were deemed to be the highest after graduating from a university in the U.S. amongst potential postgraduates and Australia amongst undergraduates.

Employability, visa issues and sources of funding are potential areas which may have influenced or will influence a student's decision to undertake a TNE degree, as discussed in the background section of this report as well as in the focus groups with students. These topics will be discussed next.

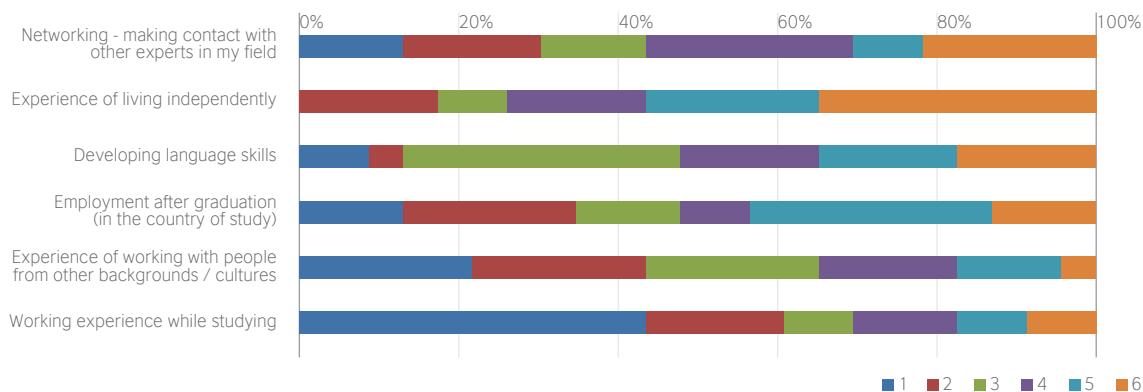


## Enhancing employability

Interestingly, more than half the sample of potential postgraduates believed the top country to get a degree from in order to enhance their employability was the UK. Amongst undergraduates, the UK was also number one yet the rest of the answers were much more varied compared to postgraduates. For 69% and 81% of potential undergraduates and postgraduates respectively, countries that were most frequently chosen had English as their official language. Only 9 per cent and 4 per cent mentioned ASEAN countries.

Undergraduates and postgraduates differed in their views on what aspects (other than the academic side of their qualification) of international study are the most important to enhancing their career prospects. Undergraduates rated working experience while studying, as a top priority, and the experience of working with people from different backgrounds and cultures and employment after graduation in the country of study as joint second. Developing language skills was rated as third most important.

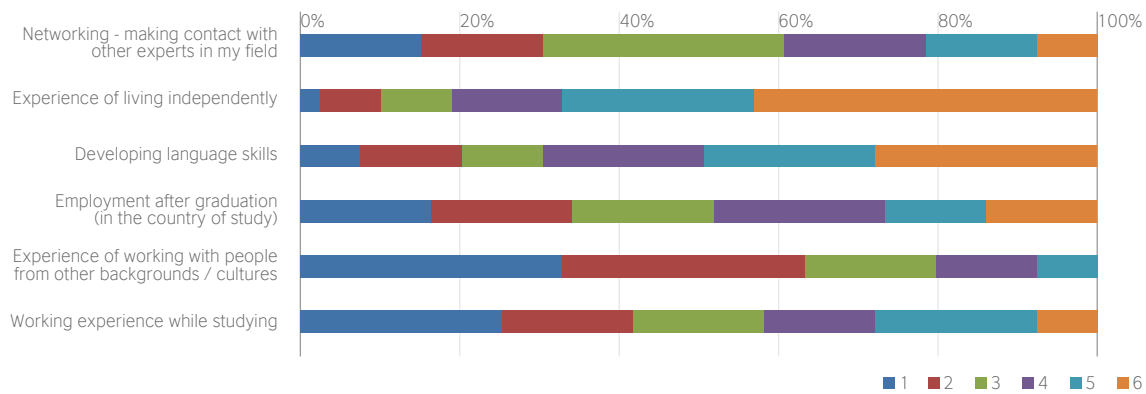
### Undergraduates' views on most important factors towards enhancing career prospects



(1: most important; 6: least important)  
Source: British Council Student Insight survey

Most postgraduates rated experience of working with people from different backgrounds and cultures as the first and second most important factors towards enhancing their career prospects. Networking, or making contact with other experts in their field was the third most important consideration.

### Postgraduates' views on most important factors towards enhancing career prospects



(1: most important; 6: least important)  
 Source: British Council Student Insight survey

### Visa issues

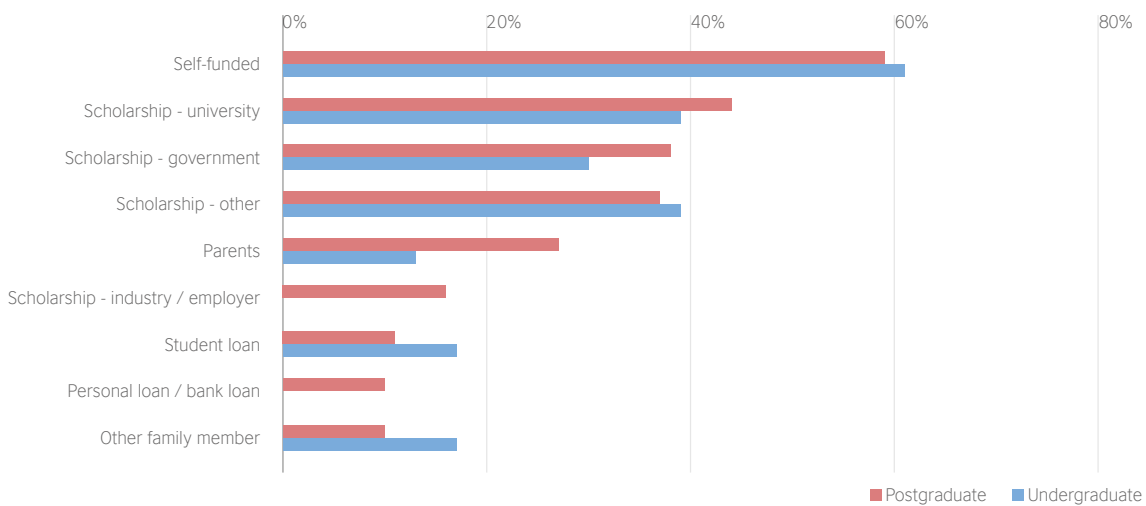
For undergraduates and postgraduates alike, the cost and ease of the student visa application are the most important considerations when applying for a visa for a foreign country. The length of processing time was equally important between the two groups. Another central point was the transparency of the visa process and its evaluation, mentioned by around a quarter of the sample of participants.

Obtaining a student visa from the US was perceived as the most difficult compared to other countries by undergraduates and postgraduates alike. The UK was second to that. Perceived difficulties in those countries were reportedly due to the complexity of the application process, costs, and length of processing.

## Sources of funding

Most of the sample of participants in the survey reported that they would be potentially self-funding (includes part-time work and savings for example) their degree. Other sources of funding were scholarships. Interestingly, only a small proportion of undergraduates and postgraduates mentioned they would ask their families for financial assistance; surprisingly more so postgraduates than undergraduates.

**Potential sources of funding by level of study**



Source: British Council Student Insight survey

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# Discussion

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The Philippines is and will continue to be a fertile market for TNE providers. Its youth population is growing and is set to grow at an exponential rate – the demand for education is thus expected to grow as well. The increasing demand in terms of placements, number of faculty and diversity of programmes may not be met should the Philippines rely solely on its local education infrastructure, and presents unique opportunities for TNE partnerships.

One of the major themes that ran throughout the report was the important role CHED plays in the promotion, support, accreditation and regulation of TNE programmes in the Philippines. In the last few years, CHED has introduced several important initiatives to shake up the Philippines educational system, in order to make it on par with global standards. However, much work still needs to be done in this respect. An adequate number of scholarships and bursaries needs to be delivered and to the right people – some students commented that the conditions for obtaining a scholarship were very stringent, and they were mostly given to students from high-ranking schools or higher education institutions (who did not necessarily need a scholarship). The opportunity for existing faculty members to upgrade their qualifications is also an essential endeavour to attract the right TNE partners, as well as meet the rising demand for higher education and perhaps TNE. An opportunity for TNE partnerships also presents itself during the instatement of K to 12, where universities suffer a lag in enrolments as school pupils spend an additional two years at school. Indeed, TNE may be useful in this respect to train local faculty under the K to 12 Transition Programme.

The apprehension of students vis-à-vis the accreditation of the said TNE degree and associated faculty as well as the information that was available to them was a big concern that needs to be addressed. CHED therefore has a big responsibility here, to support and promote the training of qualified faculty members, make quality assurances transparent to the student population, and also more widely disseminate information about TNE programmes.

Another opportunity presents itself in terms of ELT, due to the high proficiency of Filipinos in English. As a general note, the global ELT market for students studying English in their own countries was reported to be worth over more than US\$50 billion in 2012 and, according to the British Council, the worldwide market for English language study is 1.5 billion learners, with around 1.5 million studying outside their home country and the vast majority studying independently. This market continues to grow and UK institutions are considered best placed to provide niche or high-quality provision.<sup>27</sup> Given the relatively saturated ELT market in the Philippines, providers considering breaking into the market should take this advice on board to find ways to set themselves apart from the competition, for example by offering internationally recognised and accredited courses, but they should ensure competitive pricing.

That being said, the country is also characterised by huge wealth inequalities, with some factions of the population not being able to afford basic education, let alone higher education. More than half of the population live in rural areas, and coupled with its archipelagic geography, the transport and communication infrastructure are crucial drivers to development. Currently, the transport infrastructure in the Philippines is somewhat lagging, especially in the rural areas, making travel from one city to another

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<sup>27</sup> HM Government *Industrial Strategy: government and industry in partnership (2013) International education: Global growth and prosperity* [https://www.gov.uk/government/uploads/system/uploads/attachment\\_data/file/340600/bis-13-1081-international-education-global-growth-and-prosperity-revised.pdf](https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/340600/bis-13-1081-international-education-global-growth-and-prosperity-revised.pdf)

difficult and perhaps expensive at times. Delivering TNE to a more diverse set of higher education institutions, not only the large or top-tier ones may be key, as many students living in rural areas cannot afford to travel and perhaps live in the urban areas. Moreover, TNE degrees or courses should be priced competitively, and take into account the local purchasing power.

Having covered the opportunities and challenges of TNE in the Philippines from a more 'macro' standpoint, the report also brings together essential information in this respect but from the perspective of institution representatives and students.

It is perhaps best to start with the most common ways TNE partnerships are instigated and established in the Philippines. And what rings true for most institutions and their representatives is that many drew from their higher education institution's vision for internationalisation. In all cases, these visions were very clearly stated on their institutional websites. Similarly, another way such an opportunity could come about is in the case of an administration change within the higher education institution, heralding in new 'blood' with a vision for change.

In more practical terms, most potential TNE agreements were discussed after a chance meeting with a TNE partner or seminar about TNE, where foreign higher education institution representatives were present. In one case (in this study), TNE agreements came about through a faculty member who had attended the TNE partner's higher education institution and had made that connection between the two institutions.

From the interviews with institution representatives, it was unclear how delivery modes were decided upon, and whether much thought had been put towards this decision. The evidence from focus groups with potential undergraduates and postgraduates alike point to the fact that a TNE degree that would be delivered entirely in their home country would be the preferred option – as concerns had been raised about the comparatively high living costs abroad as well as a reluctance to leave their home and families.

## Fields of study

Another aspect of TNE that was also perhaps decided upon relatively unsystematically was the nature of the fields of study to be delivered. It is hence interesting to compare the fields of study that potential TNE students would like to enrol on (data derived from the focus groups and survey) with the areas of study suggested by institution representatives in their interviews, and those niche programmes proposed by the British Council and CHED. Out of the 20 subject areas that were mentioned in this study, there were only three that students wanted to study, that institutions were considering delivering, and that the British Council and CHED deemed key to national and regional development: education, social sciences and digital innovation and creativity. Engineering, law, urban planning, languages and linguistics, medicine and dentistry and physics and chemistry were all subjects students intended to study; however no institution representative had mentioned plans for TNE programme delivery in these fields.

This report also listed the 12 areas, as identified by CHED and the British Council, that might benefit the Philippines in the future. However, very few students showed interest in pursuing these areas of study, even though many of them showed a strong sense of devotion and loyalty to their country, and a desire to give back and improve the current situation.

### A comparison of subject areas by information source

Field of study	Student perspective	Institution perspective	British Council and CHED perspective
Transportation studies			✓
Design engineering	✓		✓
Tropical medicine and public health			✓
Data science			✓
Renewable energy studies and energy security			✓
Climate change		✓	✓
Education (professional education and training/ educational neuroscience/educational planning/ economics and international development/lifelong learning)	✓	✓	✓
Maritime engineering			✓
Social sciences	✓	✓	✓
Oceanography			✓
Agriculture/food security	✓		✓
Digital innovation and creativity	✓	✓	✓
Engineering	✓	✓	
Law	✓		
Urban planning	✓		
Languages and linguistics	✓		
Medicine and dentistry	✓		
Business and administration	✓	✓	
Physics and chemistry	✓		
Construction and quantity surveying		✓	

## Information about TNE programmes

A lack of confidence regarding their understanding of TNE programmes and their delivery was not only limited to representatives but to students as well. Indeed, the focus groups demonstrated how little students know about TNE and the options available to them; this is especially true among the younger cohort. Evidence pointed to the fact that had students known about TNE initiatives at an earlier stage, considerations would have been made to study on a TNE degree at the undergraduate level. Better and wider dissemination of information, about what TNE is, and the different modes of delivery, is very much needed.

The focus groups were very informative in this respect, and revealed perhaps lessons and rules on how to successfully deliver information about TNE to prospective students:

- ✓ Different TNE delivery modes should be better defined and explained.
- ✓ Students prefer face-to-face contact where they can ask questions and feel reassured about the legitimacy of the proposed TNE programme. Seminars, fairs and careers orientation are ideal.
- ✓ Quality controls of the TNE programmes should be emphasised and promoted by CHED, the local institution and the partnering institution.
- ✓ TNE partners should market their courses in a way that emphasises their higher education institution's accreditation and international recognition; students place high value on recognised international degrees that would differentiate them from the local population, and increase their employability in their home country and abroad.
- ✓ Information about available scholarships and funding options should be made available and explicit; students were very apprehensive about high living costs and tuition fees.
- ✓ All information that is made available should be in a language appropriate and easy to understand, with minimal use of jargon.
- ✓ Many students said that they would consider a TNE programme if its local equivalent was not available. Potential TNE partners should possibly focus on the fields of study in demand by students, those which are not currently available through local higher education institutions, and possibly market them accordingly.
- ✓ Partner higher education institutions should make it clear to students who will be delivering the courses (local faculty or overseas faculty), how the resources available might change (use of online library, updated facilities for example), and most importantly, how CHED and the partner will be controlling the quality of the course or degree.
- ✓ More information should be made available in schools – very few pupils were aware of TNE options.



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## Opportunities for partnering with a Filipino higher education institution

It is apparent that the opportunities surrounding marketing and how to encourage Filipino students to enrol onto TNE programmes lie in providing them with reliable information from reputable sources about the choices available to them, and making those choices culturally-appropriate. But how should potential TNE partners approach Filipino higher education institutions?

As mentioned previously, institutional representatives were very optimistic about the success of TNE in the Philippines, and very much believed in its expansion. They were also very informative by revealing the secrets to what they were looking for in a TNE partnership.

- ✓ Filipino partners are seeking partners who can be collaborative and cooperative, and take their views and needs into consideration.
- ✓ The costs, in terms of rebuilding local infrastructure, training faculty, or the fees to be paid by students were of great concern, and should be taking into consideration when planning.
- ✓ Potential partners should take into consideration the size of the local higher education institution, its location, and SES of the local population when approaching the institution.
- ✓ Autonomous higher education institutions are different from non-autonomous ones, and the former benefit from more streamlined processing of TNE agreements, as well as more self-governance. Autonomous institutions are listed on the CHED website.
- ✓ Some representatives were a bit confused about delivery modes and what fields of study to offer. Some wanted to build on their existing strengths; for some higher education institutions, CHED had awarded 'centres of excellence'.
- ✓ Filipino higher education institutions are very much interested in partnerships that will benefit them across several areas. They hope that their faculty might benefit in terms of expanding their knowledge base and teaching methods. For their institution they look forward to upgrading their facilities, and hence attract more students, and make their higher education institution renowned locally and worldwide. The education of their students is paramount, to equip them with skills for becoming 'global citizens'. Some see these partnerships as benefiting the Philippines in the long-term.

## The Filipino students potentially interested in TNE

Similarly to representatives, rich information was derived from data by prospective students concerning their identities, and the best tactics on how to approach them.

However, and before getting into the details on the characteristics of individuals who would be interested in TNE, it must be noted once more that parents, or families, play a tremendous role in the decision-making process. In most cases, and as demonstrated in the focus groups and survey, people will be self-funding. The possible lack of scholarships or difficulty in obtaining such financing in the Philippines puts further pressure on families. For many students who participated in this research, the final decision, of what/how/where to study, was very much one that was shared with their parents and families. Overseas study may only be reserved to the privileged few who can afford it – and TNE may be a cheaper alternative in this case as high living expenses will be spared. However, enrolling on a TNE degree would still be more expensive than enrolling on a local one – hence this expense must be further justified.

In terms of demographic characteristics, the average person who would be interested in TNE is female, especially at the postgraduate level. Anecdotally, it may be suggested that females may be more interested in staying in their home country rather than going abroad compared to their male counterparts because they prefer to stay close to their families.

Average age was around 24-20 amongst potential undergraduates and 24 amongst postgraduates. The K to 12 initiative must also be taken into account especially amongst undergraduates, as higher education institutions face lags in enrolments between 2016-2018 as the first cohorts spend two further years in high school and only those students from private schools permitted to fast track the transition will proceed to university.

Individuals interested in TNE also came from, for the most part, university-educated families, especially those wanting to pursue a postgraduate degree. Furthermore, most potential enrollees of TNE lived in metro Manila, or the surrounding area – the most economically viable regions of the Philippines according to the OECD, where labour participation was high, and local infrastructure was comparatively well developed. For example, the proportion of paved roads to total road length was the highest in the capital. These individuals were also very active and were either studying at university or in full-time employment. A little more than half the sample had previously traveled overseas, yet these proportions were still comparatively lower than the total sample of participants in the Student Insight Survey who were interested in TNE study. The social and economic inequity in the Philippines means that a lot of people cannot afford tertiary education. Given the higher cost of TNE compared to local degrees, and in the absence of funding opportunities or scholarships, it would be perhaps advisable for TNE partners to concentrate their marketing efforts on private schools and higher education institutions.

The possibility of sampling bias notwithstanding, it can be suggested that, considering the aforementioned characteristics, potential enrollees of TNE in the Philippines may be from a higher socio-economic strata compared to the rest of the population.

## Useful information for UK partners

Finally, not only does this report present much-needed information to UK stakeholders on how to approach Filipino higher education institutions and students, but also how to present themselves when doing so. Generally, all participants in this study agreed that UK institutions had a very high reputation, and that partnering with such an higher education institution or obtaining a degree from there would be very highly regarded – an aspect that Filipinos valued greatly. The UK is still very much seen as ‘prestigious’. Most participants in this study said they chose the partnering country first when considering TNE, followed by the institution and then the course itself. Hence, UK partners would be very well received in the Philippines in this respect.

However, there are some aspects about the Philippines, alongside the aforementioned, that the UK must pay particular attention to when deciding on how to set up their TNE programme or degree, and who to partner with.

First, some students were very much attuned to the fact that, when choosing a TNE degree, that degree must come from the country that is specialised in that subject.

That is not to say that the lesser perhaps ‘known’ universities in the UK do not stand a chance in the Philippines – on the contrary, many accounts from institution representatives highlight the fact that they would prefer to have a collaborative relationship with their TNE partner.

- ✓ It would be useful for UK partner higher education institutions to present and highlight their strengths in particular fields of study when marketing to students.

Indeed, there was some concern that the UK and Philippines curricula might not match – on the one hand representatives were worried that the former may be too advanced in comparison, whilst students were unsure whether they would have to undertake additional courses or qualifications to be eligible for a UK TNE degree.

- ✓ Curriculum and accreditation are factors that must be decided and clarified from the outset, and the requirements clearly communicated to potential students.
- ✓ Highlight quality controls.

Another very important and recurring concern was fees. Representatives were worried that the fees commanded by UK partner higher education institutions may be too dear for the local population.

- ✓ UK partner institutions must conduct research on the local region and its economic infrastructure, as well as the population that is served by the Filipino higher education institution before deciding on the level of fees.
- ✓ It might be a consideration to model the fee structure on the Australian one – which was considered the best value amongst Filipino respondents of the Student Insight survey.

- ✓ Scholarships and bursaries should be made available where possible.

As mentioned previously, international branch campuses and franchising would be

- ✓ Preferable in terms of TNE delivery modes compared to twinning or joint degrees due to the unaffordable living costs of the UK (compared to the Philippines). Nevertheless, should a UK partner be wanting to deliver the latter two delivery modes in the Philippines, visa considerations must be taken into account.
- ✓ Visa facilitation services must be made available and also communicated to potential students who would be interested in studying in the UK for a period of time.

A common aspiration expressed by students who are considering to enrol onto a TNE degree is to increase their employability.

- ✓ UK partners should consider presenting statistics and figures on employment ratios of students who have graduated from their institution.

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# Conclusion

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The Philippines is on the right track to becoming a burgeoning market for TNE. Its offering, especially compared to the rest of the region in terms of English language capabilities, growing economy and youth population, paired with a regulating authority (CHED) with a strong vision for internationalisation, really make the country unique, and fertile ground for further development in this respect.

All these aforementioned facilitating factors, as well as data collected from various sources in this report show that demand for TNE is set to grow in the Philippines. Indeed, HESA data show sharp increases in TNE enrolment over the years; statistics from the Student Insight Survey demonstrate a strong interest in such programmes in the Philippines compared to the global sample. Interviews with higher education institution representatives confirm this growth, and their pledged support. Finally, the qualitative information from focus groups also reaffirms this hypothesis.

Otherwise, potential TNE enrolees are astute, and know what they want to get out of their education. Despite a lack of pervasive knowledge and awareness about TNE, prospective students seemed very interested in learning more about it and potentially enrolling onto a programme that would hopefully provide them with an accredited degree, which would set them out from the rest of the population, and enhance their employability and their global citizenship. The key here would be to provide appropriate information to them, by way of face to face contact, where they are able to understand the different choices available to them, the diverse modes of delivery and the unique course offerings.

TNE programmes which would be delivered entirely in the Philippines would be preferable to having students go abroad for an undetermined amount of time – as it would save on costs. A degree from a reputable, accredited university is the ultimate goal. Great importance is placed on the country delivering the programme, and whether that country is reputable and specialised in the subject the degree is in. Quality assurances are essential here, and prospective students need to be reassured that the (perhaps rather expensive) degree they will obtain is accredited and recognised internationally. Also, attending faculty need to be of high quality.

Fees were another big issue. As higher education institutions and the local population in the Philippines may have limited resources in this respect, the level of fees and requirements that are to be commanded for TNE should be competitive and possibly means-tested. For the most part, this is to justify to potential students – and their parents – that enrolling on a TNE degree as opposed to a local non-TNE degree is worthwhile. Scholarships and bursaries should also be more readily available.

TNE partners should also come to the Philippines with an open mind as to how things are done. Delays are possible. Institutions which have been qualified by CHED as autonomous, enjoy some degree of self-governance over their counterparts – especially with regards to processing TNE applications and permits.

TNE partners can also look to take advantage of those students who are lagging behind their peers due to the K to 12 programme shift to inform them about the potential of TNE programmes.

Interestingly, accounts from institution representatives and potential students suggest that they might be quite insular in their views. For instance, higher education institution representatives spoke more about how to benefit the Filipino people and their institution via internationalisation rather than wanting to attract international students. Similarly, the cost of living abroad notwithstanding, few students expressed any desire to travel abroad to study. The Philippines should take advantage of its unique aforementioned position, especially vis-à-vis its ASEAN neighbours to attract students to its higher education institutions – and perhaps TNE will be the key driver.

Education Intelligence is the British Council's global higher education service. We provide reliable and accurate research, analysis and data to higher education institutions. Market intelligence is essential to locate effective partnerships, create solid collaborations and make strategic decisions regarding marketing and student recruitment.