TNE Opportunities Matrix

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Objectives

- Develop an analytical framework that determines which countries have the right environments for TNE over the next 2-3 years.
- Cover 25 host countries, selected on basis of existing branch campuses and student mobility rates.
- Don’t rank countries, rather create opportunity groups.
- Check for relationships across the datasets.
- Highlight main trends and examples of innovative approaches

Methodology

- Focus on 3 categories:

Regulatory environment (40%)	Market environment (40%)	Mobility environment (20%)
TNE strategy	Macro/demographic	Student mobility
TNE regulations	Infrastructure / capacity	Branch campus mobility (OBHE)
Quality assurance	Socio-cultural	Programme mobility
TNE recognition	Business environment	TNE students

- **Scoring:**

- Regulatory 13 scoring criteria all qualitative (yes, somewhat, no)
- Market 19 scoring criteria 12 quantitative (number & %) and 7 qualitative
- Mobility 4 scoring criteria all quantitative (number & %)

- **Weights:** 40% 40% 20%

Regulatory environment

- **TNE Strategy**
- TNE promoted by economic development boards as well as MoEs
- TNE not always a national priority
- Host countries don’t publish TNE strategies
- TNE hubs: success, attempts and aspirations
- TNE incentives are important

- **Establishment of TNE**
- Most countries have regulations for IBCs, and those without are working towards
- Variance in clarity of regulations
- Less focus on collaborative programmes
- TNE not dependent on regulations; but regulations important for sustainability
- Host countries publishing lists of partner HEIs; importance of global rankings

Regulatory environment

- **Quality assurance of TNE**
- Experience dividend - Mature markets have well developed QA systems
- QA of collaborative programmes are improving TNE data collection
- International collaboration: regional QA agencies; conference and workshops

- **TNE recognition**
- TNE codes of practice / guidelines not in use
- TNE recognition in Malaysia and Hong Kong; qualification equivalency systems
- International collaboration: focus on national and institutional rather than regional

Regulatory environment

Group 1 **Mean + 1 sd**	**Group2** **Mean +0.5sd -> +1sd**	**Group 3** **Mean +/- 0.5sd**	**Group 4** **Mean - 0.5sd -> -1sd**	**Group 5** **Mean -1sd**
Hong Kong	Bahrain	Botswana	Brazil	India
Malaysia	China	Nigeria	Indonesia	Nepal
Singapore	Mauritius	Oman	Mexico	Poland
UAE	Qatar	Pakistan	Spain	Sri Lanka
	South Korea	Russia		Turkey
		Thailand		
		Vietnam		

Market environment

- **Macro-demographic**
- GDP and Services favour developed countries
- Tertiary education pop (Nepal, Botswana, Pakistan +20%) (Spain 10%, HK 12%)
- **Infrastructure**
- Asian countries dominate: tertiary education spend (Malaysia) tertiary enrolment & private enrolment (South Korea)
- Qualitative: Quality of education (Singapore), Broadband (South Korea, Hong Kong, Singapore).
- **Socio-cultural**
- Brain Gain (Qatar, UAE) Brain Drain (Nepal & Russia)
- Ratio of female to male Vietnam 1:1 Qatar over 5:1 (women) Nepal 3:1 (men)

- Generally good overlap between regulatory and market environments
- A number of countries where market environment scores higher than regulatory environment.

Market environment

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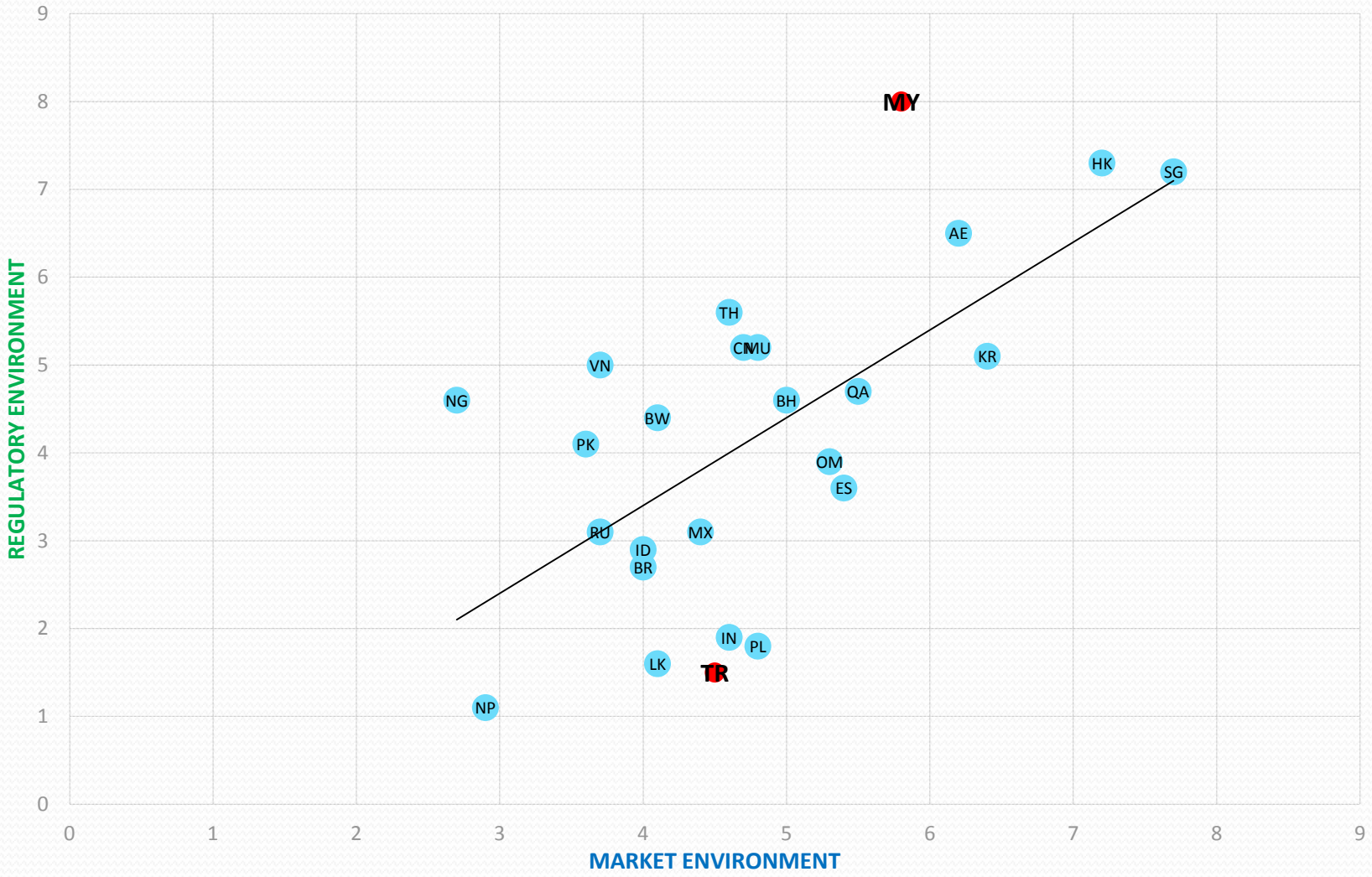
Singapore	Qatar	China	Brazil	Nigeria
South Korea	Spain	Oman	Indonesia	
UAE		India	Pakistan	
		Mauritius	Russia	
		Mexico	Sri Lanka	
		Poland	Vietnam	
		Thailand		
		Turkey		

TNE regulations v market environment



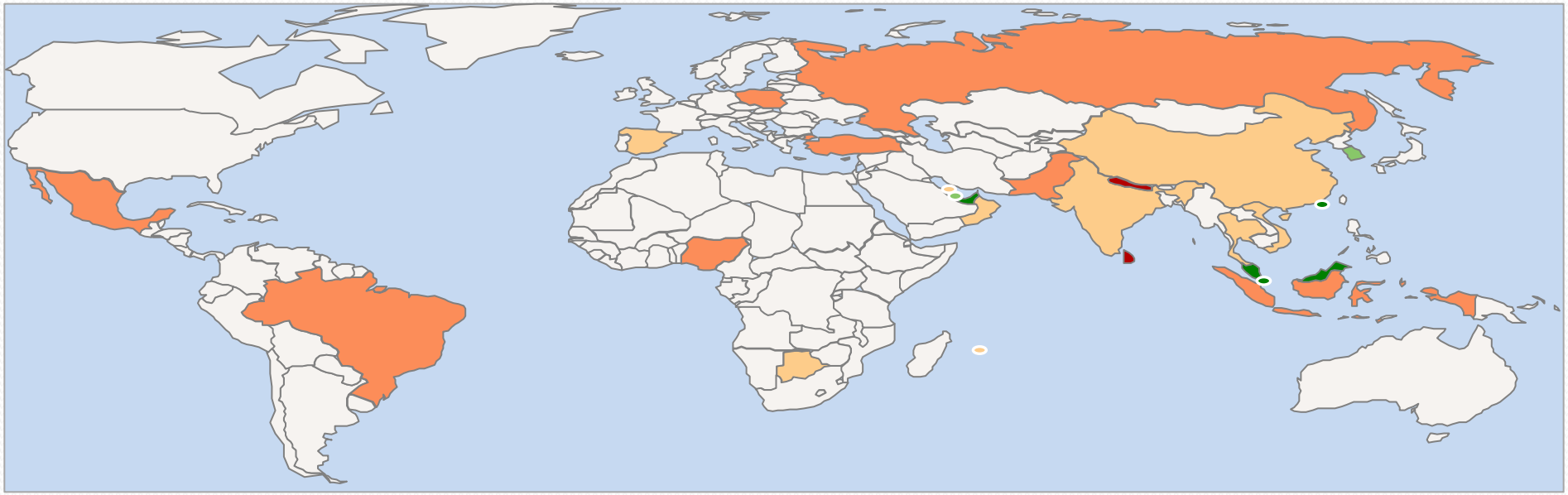
Mobility environment

- Inbound student mobility – usual suspects; small countries dominate
- Outbound student mobility – some new faces and big numbers
- Inbound branch campus - usual suspects
- Outbound branch campus – India the big sender
- Data difficulties – need more TNE programme data

Overall Results

- **Overall opportunity groups**

1. Hong Kong, Malaysia, Singapore, UAE
2. South Korea, Qatar
3. China, Mauritius, Thailand, Bahrain, Botswana, Spain, Vietnam, Oman, India
4. Brazil, Mexico, Pakistan, Russia. Nigeria, Indonesia, Poland, Turkey
5. Sri Lanka, Nepal



Main findings

1. Regulations are important
2. TNE is complex, evolving, and data poor
3. Evidence that national policy objectives of TNE are being achieved
4. Market environment analysis suggests good TNE prospects if regulations are strengthened in a number of countries

- Q & A