

ISTC and International Higher Education

August 2008

Introduction

Discussions began in 2006 with the transition of ISTC to a sector association as to how ISTC could expand and develop its involvement in the growing market of international higher education. This was viewed as a shift from a focus on travel products and policy matters affecting the global student travel retail network and back toward a focus on ISTC's original mandate to facilitate international travel and study opportunities for students. Between late 2006 and early 2008, David Jones researched the topic of international higher education and drafted several papers that presented to the ISTC board a general overview of the topic, including growing demand by institutions and students, the main types of programmes available, the network of commercial agents involved, and possible opportunities for ISTC to become involved.

It is clear that there is currently a strong and growing demand by institutions of higher education to "internationalise" their campuses in all aspects, be it programmes, students, faculty, research partnerships, or commercial activity. It is quite common that universities and colleges have developed policies and initiatives aimed at "globalising the campus" and increasing the international profile of the institution and its graduates. Hand in hand with this demand by institutions is the strong interest of young people to learn from and become "global citizens" through international experiences within the context of their post-secondary academic careers. In some countries, demand for international higher education is expected to exceed the supply in the future.

This dual demand dynamic has in turn created a space for an industry of third-party intermediaries known as "education agents" to emerge. Such agents are providing specialised marketing and recruitment services on behalf of educational institutions and assisting students in achieving their study abroad goals. The level of use of agents within the higher education sector differs by country. It has been embraced and become highly developed in some places while remaining controversial and generally frowned upon in others. The presence of third-party agents acting within the higher education sector has brought more attention to ethical and legal questions related to the individual student and institutional liability. At issue in some countries are ethical concerns regarding commissions paid as part of student recruitment efforts. There are also a variety of legal concerns specific to each country.

The fourth player in this scene is government and state wide policies and initiatives that countries are developing to support their educational systems, enhance international educational opportunities for students, and even diversify the activities of their national tourism boards.

With a growing demand from institutions and students, the strategic support of governments, and an already established network of education agents servicing the demand, where exactly can ISTC members fit in?

Market Demand

The international higher education market is expected to grow to more than 7 million students by 2025, according to IDP's report *Global Student Mobility 2025*. Within English speaking countries alone, demand for international education is predicted to increase to 2.6 million student spaces by 2020, according to the report *Vision 2020* which was produced by the British Council, Universities UK and IDP. Significant growth was also predicted in IIE's study *Exploring Host Country Capacity for Increasing US Study Abroad* where 98% of institutions of higher education participants reported that they have plans to increase their international student enrollments and that many have set targets for growth of their international student enrollments, typically between 10-20%.

Agents and Recruitment Fees

The number of international students placed by agents has grown in the last several years and is predicted to continue increasing. The Agent Barometer Study released by i-graduate at the end of 2007 reported that the participating 880 agent respondents collectively placed more than 60,000 students in overseas institutions during 2006 and many expected to send more in 2007 than they did in 2006.

An "education agent" is defined as "an individual, company, or organisation that provides educational advice, support and placement to students in a local market who are interested in studying abroad." (source: De Luca)

There are three main types of education agents:

1. Educational referral agents- represent a selected number of institutions, often specialising in certain programmes and destinations.
2. Study abroad advisors- generally work from advising centres, provide general information and advice about study abroad options.
3. Travel agents with education divisions- sell educational programmes as well as other travel packages.

Commissions are the most common form of compensation for education agents. According to De Luca, the percentage of commission paid for university/college, vocational, and business training is lower than that paid for shorter language programmes offered during vacation periods.

Other compensation schemes are also used:

1. Agent receives percentage of commission on the tuition fee (average of 10% on first year's tuition and 15-25% for short term programmes).
2. Agent receives a set fee per head recruited (example noted in one article was \$1,200 per student after 1st semester tuition paid by student) (source: Darrup-Boychuck).
3. Agent is paid a retainer fee for representation over a set period of time.
4. Agent charges the student an advising fee, which is worked into a package that includes the fees of the institution- and may also include travel arrangement fees, insurance, visa assistance, and/or accommodations, etc.

At institutions in countries where it is possible to charge higher fees for non-resident students, more US students are sought because they bring additional revenue. However, IIE suggests that such institutions are equally, if not more, interested in leveraging reciprocal financial incentives for their own students who study in the US as part of "tuition swaps" or institutional partnerships. The UK's Education Counselling Service (ECS) has described in its strategy to develop the use of agents by UK higher education institutions that some educational

institutions have arranged “agent-style” partnerships with overseas institutions. Such arrangements involve both student and faculty “swaps” and funds paid in lieu of commissions being set aside for support and development of such programmes and related activities (staff development, scholarships, cultural activities, etc). Thus in such swapping models, the institutions themselves act as “agent- recruiters.” While it is unclear exactly how much university “swapping” occurs currently, this may be a trend to watch over the next years.

Considering that many institutions from IIE's study reported that US students on their campuses increased the institution's global competitiveness and helped to strengthen ties with US institutions via research partnerships and collaborations, it is clear that institutional level interests, such as research and development, within a competitive global economy are driving factors in the internationalisation of campuses all over the world. The financial interests associated with internationalising the campus are perhaps more long-term when viewed within the scope of the build up of institutional reputation in research & development and innovative, unique entrepreneurial efforts. Over the long term these are the activities that will result in an increased “global competitive edge” and financial security and success for a university, rather than the immediate revenue generated by individual international students who may pay higher tuition fees. “Knowledge development and the commercialization of that knowledge in the international context are seen as the primary work of 21st century universities,” according to Van Wood in his article “Globalization and Higher Education: Eight Common Perceptions from University Leaders. (source: IIE Network)

Global Flow

Destinations

The top five host destinations of international higher education students, according to IIE's *Project Atlas 2007* data, are:

- United States
- United Kingdom
- France
- Germany
- China

The top five English-speaking host countries, according to the British Council's *Vision 2020* study, are:

- USA
- Australia
- United Kingdom
- New Zealand
- Canada

Recruitment Targets

Non-US institutions attempting to internationalise their campuses often focus on specific sending countries to achieve such goals.

IIE identified the following countries as top sending countries where non-US institutions focus recruitment efforts:

- US
- China
- India
- Canada
- Russia

World regions were also targeted by institutions in their international education initiatives. In order of priority, they are:

- Latin America
- Middle East
- Europe
- North America
- East Asia
- Southeast Asia
- Eastern & Central Europe
- South Asian

(source: IIE, "Exploring Host Country Capacity for Increasing US Study Abroad")

Regarding the popularity of the US as a sender and host, IIE's study respondents reported that hosting students from the US helped to increase their institutional global competitive edge and "expand their joint research opportunities with US sending institutions." However, when looking at individual host country targets, the US as a recruitment target often slips from the top position. For example:

Australia

1. China
2. India
3. US
4. Malaysia
5. Germany

Finland

1. China
2. Russia
3. US
4. Germany
5. India

Origins of Source Market Demand

The top five places of origin of "internationally mobile students" in 2000/01 were:

- China
- South Korea
- India
- Japan
- Greece

(source: IIE, Atlas of Student Mobility)

The highest demand for international higher education within English speaking countries is predicted to come from Asia in the coming decade, according to *Vision 2020*. By the year 2020, the UK expects to host 131,000 Chinese students alone. Globally, Asia is predicted to demand over 1.8 million international higher education student places within English speaking host countries by 2020.

The Middle East is also expected to be the high growth region with both hosting and sending countries. ICEF reported in its Bulletin in May 2008 that the Middle East is contributing a "growing share of the world's international students" and becoming a focus of marketing efforts of top study destination countries. While the US, UK, and Australia are top destinations for international students from this region, Asian destinations such as Malaysia, China, and India were cited as emerging host countries.

Saudi Arabia is predicted to be, if not already, a market hot spot due to population growth and a higher education system in need of expansion to accommodate the population growth and work force needs. The Saudi government is investing in new higher education institutions (12 new universities since 2004) and supporting this development of the Saudi higher education sector with scholarship programmes for Saudi students. The King Abdullah Scholarships Programme and further governmental support of Saudi institutional partnerships with foreign

institutions is expected to result not only in institutional development, but also more opportunities to send Saudi students abroad. Australia reported a 500% increase in Saudi Arabian enrollments between 2002-2007 and the US a 130% increase from 2006-2007. Also of note is that more Saudi students are studying abroad at the undergraduate level rather than the post-graduate level as was the case in the past.

Governmental Initiatives

Competition for the best brains within the global knowledge society is increasing as more countries see the benefit in developing and marketing higher education to overseas students. Governments increasingly view international higher education as a valuable export product to be developed, branded, promoted and protected. The “competition for brains” is one of the most important factors driving governmental initiatives in higher education, according the Franziska Muche of the Academic Cooperation Association in Brussels. The desire and need to build an “international quality profile,” improving global understanding, shaping future foreign policy and generating much-needed income from fees that international students pay, as well as the money that they bring into the general local economy, are also important factors driving national policies and marketing initiatives. What follows are brief snapshots of country-specific information regarding that state of international higher education and current initiatives:

United Kingdom

The Prime Ministers Initiative “PMI” in the UK is a strategy to “secure the UK’s position as a leader in international education and sustain the managed growth of UK international education, delivered both in the UK and overseas.”

Top non-EU sending countries (2005/06):

- China
- India
- USA
- Malaysia
- Nigeria

Top EU sending countries (2005/06):

- Greece
- Ireland
- Germany
- France
- Cyprus

Top Areas of Study for International Students Studying in the UK (2005/06):

- Business & Administration
- Engineering & Technology
- Social, Economic & Political Studies
- Computer Science
- Language

International students made up the following student segments in the UK (2005/06):

- 11% of full-time first degree students
- 65% of full-time taught postgraduates
- 48% of full-time research degree students

Top University Recruiters of International Students (2005/06):

<u>University</u>	<u># Students</u>	<u>% Students Who Are International</u>
University of Warwick	7,670	25%
University of Manchester	7,325	18%
London Metropolitan University	7,275	24%
University College of London	26,880	32%

(Source: UK Council for International Student Affairs)

Australia

Demand for international higher education in Australia is expected to exceed the supply by 2020, according to IDP. IDP further predicts that Australia's international higher education programmes will largely be from only a few markets.

The top five source countries of international students in Australia:

China	36,478
India	18,463
Malaysia	12,529
Hong Kong	8,593
Indonesia	7,170

45% of international student visas in Australia were in higher education in 2006.

IDP Survey of International Students in Australian Universities reported the following for semester 1 of 2007:

Total enrolment international students: 210,956 (an increase of 3.5% from previous year)

International students represent approximately 17.3% of the total population of Australian university students.

Hong Kong

The education system in Hong Kong will make several structural changes in the coming years that will have effects on international higher education. Hong Kong's secondary education will transition from seven years to six years and three-year degrees will move to four-year degrees by 2012.

Access to higher education in Hong Kong is low at 18% compared to 53% in Australia, thus students must consider higher educational opportunities abroad.

The 2000 Atlas of Student Mobility estimated that 26% of Hong Kong tertiary students studied overseas in the following top destinations:

UK	33%
USA	30%
Australia	26%
Canada	9%

(Source: Alan Olsen and Peter Burges, "Education Reforms in Hong Kong: Threats and Opportunities for Australia" August 2006)

China

The China Scholarship Council reported in November 2006 that Chinese language studies are on the rise along with the number of foreign students coming to study in China.

<u>Year</u>	<u>Number Foreign Students Studying in China</u>
1991	11,000
2000	20,000
2005	140,000
2006	160,000

(Source: Cui Xiliang, "Chinese Language Learning Booms as World Enters New Era" November 1006, People's Daily Online)

United States

Each year, over 223,000 US students study abroad for academic credit and this number is expected to at least double in the next ten years. Most US students tend to choose short-term study abroad options, often non-degree study. (source: IEE Study Abroad White Paper *Exploring Host Country Capacity for Increasing US Study Abroad*)

Within the US, international students tend to be concentrated at large doctoral research institutions located in 13 of the 50 states. International students in the US are mainly studying

in the areas of business management and engineering. Growth areas of study were reported to be physical/life sciences and English language. (source: Chin)

Top international enrollment numbers for 2005/06 academic year in the US:

University of Southern California	6,881
Columbia University	5,575
Purdue University	5,540
New York University	5,502

In the US there has been a drop in total international enrollments after 30 years of steady growth in enrollments. Various reasons for this drop have been cited, including strict post 9/11 visa review procedures, the highly de-centralized US education system, a lack of national-level educational policies, the price of tuition at American universities and colleges, and alternative methods of earning degrees such as distance education and branch campuses abroad (source: Chin, "The New Landscape of International Student Mobility").

Saudi Arabia

King Abdullah Scholarships Programme (KASP), established in 2005, will fully fund 5,000 students per year for studies in the US, Canada, Australia, New Zealand, Korea, China, and India. Also, a newer programme will be established to fund an additional 15,000 scholarships for Saudis going to the US and 3,000 to Asia.

Clearly there are opportunities all over the globe to service the demand by students, educational institutions, and governments for international higher education. Along with these opportunities comes the investment and responsibility of working not only with individual educational institutions, but also within national-level policy initiatives, which bring along with them specific regulations, laws and cultural ethics.

Legal and Ethical Considerations in Context

A variety of legal and ethical concerns regarding international higher education exist within the context of each sending and hosting country. The idea of education as a "public service" for the good of society coupled with the increased presence and use of commercial, third-party education agents within the domain of higher education has caused considerable debate around the commercialisation and privatisation of education, resulted in legal questions and violations, and the development of standards and best practices codes. We can likely expect that the growing demand for higher education and the rise of commercial agents to service this demand will continue to bring more attention to such ethical and legal questions, particularly related to the treatment of students and also institutional liability. Because of the increasing involvement of commercial third-parties, there is perhaps more attention given to these issues than was ever given in the past when institutions themselves handled such recruitment activities internally.

The use of third-party education agents within the education sector differs by country and may be accepted and encouraged in one while being viewed with scepticism in another. Countries with established free or low-cost state education systems with high access rates may have less of a need to work with education agents. In countries where the demand for higher education has historically been unmet domestically and access is low, study abroad advisory services may be considered a logical and essential route for students and their families to take. With the demand for higher education increasing in general and public spending in this area decreasing, privately funded private education is increasingly an option that must be considered by students.

At issue in some countries are ethical concerns regarding commissions paid as part of student recruitment efforts. In the US context, the legal concerns are rooted in the reality of the American higher education landscape, namely federal and state funding schemes and regulations. Of importance to educational institutions and education agents in the United States is the fact that Title IV of the Higher Education Act (HEA) specifically prohibits commission being paid in order to recruit domestic students. In 2004, The University of Phoenix, a private American institute of higher learning, was fined \$9.8 million (USD) by the

United States Department of Education for violations against the student recruitment practices outlined by the Higher Education Act. An interesting caveat is that Title IV in the USA does not apply to the recruitment of “foreign students residing in foreign countries who are not eligible to receive title IV, HEA program funds” (source: NAFSA’s Marketing and Recruiting Network Practice Resource “Working with Agents,” various authors). Debate on the lack of clarity of the legality of this issue has been spawned by higher educational professional associations who require their members to adhere to “good practice” codes. An example is the National Association for College Admission Counseling’s (NACAC) Statement of Principles and Good Practice which states that members may not “offer or accept any reward or remuneration from a secondary school, college, university, agency, or organisation for placement or recruitment of students” (source: NAFSA’s “Working with Agents”).

The ethical concerns of the American higher education sector with regard to working with commission-based agents are quite difficult to change, suggests Mitch Leventhal, Vice Provost of University of Cincinnati. However, Leventhal highlights the existing framework for institution-agent recruitment relationships in the Australian system, which is emerging as an “international standards of best practice, consumer protection, and ethical practice.”

Within the Australian context, an education market that is in many ways at the opposite end of the spectrum from the United States, the Australian Educational Services for Overseas Students Act (ESOS Act) of 2000 was developed as a legal response to ethical issues emerging from the recruitment of foreign students in Australia in the 1990s. Leventhal notes that ESOS is criminal code legislation, a legal status which he believes helps assure quality and the protection of consumers and the reputation of Australia’s education export industry. This relationship between best practice code and a desire to maintain product reputation makes sense given that international education is Australia’s fourth largest export industry at \$11.3 billion AUD (2006/07). (source: IDP, *Global Student Mobility: An Australian Perspective Five Years On*, 2007)

Also coming at international higher education as an export commodity with a quality reputation to be developed, marketed, and protected is the United Kingdom. The Prime Minister’s Initiative for International Education, also known as “PMI 2” is a governmental strategy intended to “secure the UK’s position as a leader in international education and sustain the managed growth of UK international education, delivered both in the UK and overseas.” PMI 2 was launched in 2006 after a successful “PMI 1” initiative to increase international student enrolments. PMI 2 is composed of four core areas: UK positioning and branding; ensuring the quality of the student experience; strategic partnerships and alliances; and diversification and consolidation of markets. Targets set for 2011 include: the addition of 70,000 international students to higher education, improving student satisfaction ratings and growing strategic country-specific partnerships. The use of education agents is being developed and encouraged through the PMI with a number of resources and initiatives. Seminars and training workshops for institutions, institutional familiarisation visits for agents, a searchable “agent zone” for institutions and students, and a guide to good practice for agents are all part of the PMI’s strategy. The “standard of conduct” that tops the seven point guide to good practice emphasizes the objective of maintaining a quality image and reputation of UK higher education:

“Agents shall at all times conduct themselves with integrity and in a manner that will reflect positively on the image of their profession and of their partner (UK) institutions as reliable and trustworthy providers of high-quality education and training.

This standard of conduct underpins the others that follow and encompasses all aspects of agents’ activities.”

While the above cases represent only a few of the more developed English-speaking international education markets, there are of course specific legal and ethical considerations in any country that is sending or receiving international students. The growing demand for international educational spaces will certainly in the future highlight more legal and ethical challenges in new markets developing across the globe.

Opportunities and Challenges for ISTC Members

There are certain opportunities and challenges to entering the international higher education market that ISTC members should consider and evaluate in light of their own businesses.

Competition in Established Agent Network

The competition among agents with well established reputations presents a challenge for new agents trying to enter. The UK, US, Canada, and Australia are top English-speaking destinations that are similarly attractive to agents and students, thus institutions and agents must carve out market unique programmes and services in order to compete in this arena. New agents with specialty knowledge of emerging markets may find opportunities to work with established agents and/or educational institutions given that they can provide valuable local knowledge along with agent services.

Deep Knowledge

It is necessary to have deep and thorough knowledge of the educational institutions represented and the structure of their academic testing and credit requirements. Familiar knowledge of ethical standards and guidelines and the current state of play in the international higher education recruitment arena are crucial. Institutions new to working with agents will look for those who have trusted reputations and excellent references.

Institutions may have recruitment goals that mesh with their network of global branch campuses and research partnerships. Significant time and effort is needed to build good, trustworthy working relationships between institutions and agents. In regions where working with agents is not yet an established practice, finding marketing methods that work for a mainly non-commercial sector will be necessary. Joining local professional associations that have established and reputable standards and practices may be useful to gain entrée to local networks and build your business' reputation as an education agent.

Global and Local Political and Economic Conditions

Education agents must be well versed in changing immigration and visa-related policies. The ability to provide accurate, clear, and timely information services with regard to travel, study, accommodation and work regulations is of high importance and value to students and their families. Institutions that participated in IIE's study reported that such services required to host international students posed challenges to their efforts, thus this knowledge and the related services are greatly needed and of high value to both institutions and students. On the other hand, this body of knowledge and services requires significant investment to be kept up-to-date and delivered to clients successfully.

Market and Product Specialisation

Expertise and familiarity with local markets and the ability to represent an institution in your local market is attractive to universities looking to work with agents. Student support services are often noted as one of the most important provisions to market international education and provide to international students. ISTC members already have such market knowledge and services to offer. However, as already noted, in some countries, applying commercial marketing techniques to non-commercial institutions may require some refinement in order to meet in the middle. In other countries it will be necessary to follow guidelines and satisfy requirements outlined by governmental education initiatives.

Institutions participating in IIE's research reported that the largest area of growth was in exchange agreements. Following this area in terms of prospective growth was degree study. A number of institutions also reported that dual and joint degree programs could attract more international students to their campuses.

Small, private institutions are more likely and willing to experiment with recruitment in emerging markets. They may have less developed recruitment and marketing initiatives, thus agent services may be of considerable interest to them. Working with such smaller institutions may be a good approach in building up your business and reputation as an education agent.

IIE's research identified a potential supply-demand conflict in the case of sending US students abroad. Most US students tend to choose short-term study abroad options, often non-degree study. This has been identified as a possible problem as the room to accommodate more US students abroad in the future is predicted to be in areas of long-term degree study for multiple terms and/or academic year-long programmes rather than short term non-degree programmes. IIE suggests that this conflict is further fueled by national governmental level policies (outside of the US) that promote and fund longer-term study programmes. The Erasmus/Socrates model in Europe is an example. Institutions have built up the capacity to host long-term exchanges within this model over many years, thus the focus for them is not on offering short-term exchange programmes. However, IIE notes that given this conflict of interest and demand, this identifies a possible market opportunity for institutions who desire to attract more US students- develop short-term or summer programs.

Institutions hoping to attract more US students face their own challenges, some of which ISTC members may be able to provide assistance with. Institutional challenges were noted to be: space limitations, lack of courses in English, language deficiencies of US students, and support services needed to host. Offering programming in English is especially a challenge for institutions in non-Anglophone countries- surpassing the challenge of space limitations (source: IIE White Paper 2). Institutions that are targeting enrollment of US students often wish to develop specialised, targeted marketing for this group. Other outreach strategies used to attract more US students include: joining a consortia or developing partnerships with specific institutions, building relationships through educational fairs/conferences, offering short-term/summer programmes, pursuing institutional links via faculty exchanges, web marketing, and diversifying programming by offering more internships and practical experiences (source: IIE White Paper 2).

New Models of International Education

The trend toward more commercial-academic partnerships will contribute to changing the possibilities in international higher education options. Also to consider is the growth of "branch," "satellite" and "outpost" campuses abroad, particularly in areas of business and technology degree study. New models in education, particularly distance learning and university-industry partnerships, will shape the future landscape of international higher educational experiences and the global flow of students. Interestingly, there are currently three main funding models for development of branch/satellite campuses:

1. an institution funds the project itself
2. a host government funds the project in the host country
3. other entities in the host country, such as commercial businesses, fund the project.

The trend is more toward the last two models, according to InsideHigherEd.com (Feb 15, 2007 "Overseas Outposts"), which of course suggests that commercial-academic partnerships are increasingly common, probably not without considerable debate to come in the future. If such education-commercial cooperative efforts continue to grow, this will perhaps also positively affect the acceptance of utilizing commercial education agents in areas where it is currently treated with skepticism.

Conclusion

It is clear that there is a growing demand for international higher education and the services related to fulfilling that demand. In servicing this demand, there are opportunities to work with students and their families, educational institutions and national education policy initiatives. The investment to provide such services requires careful consideration of laws, ethical questions, political and economic interests, and the capacity of your organisation to successfully and effectively manage such a wide array of factors. It is clear that educational institutions and governments are increasingly looking to market their educational services and attract the brightest students from across the globe. More and more they are deciding to work closely with third-party education agents to achieve their recruitment goals and provide international students with needed services. It is likely that the increasing involvement of such commercial third-party education agents with students, education providers, and governments will draw more attention to related legal and ethical issues in the years to come.

Appendix A: Selected Associations & Organisations

Association of International Educators “NAFSA”

Academic Cooperation Association (ACA)

British Council

Canadian Federation of Students

College Board

EducationUSA

European Association for International Education (EAIE)

Federation of Education and Language Consultant Associations (FELCA)

German Academic Exchange Service (Deutscher Akademischer Austausch Dienst/“DAAD”)

Global Education Services (GES)

ICEF (International Consultants for Education and Fairs)

IDP (Australia)

Institute of International Education (IIE)

Nuffic (Netherlands Universities’ Foundation for International Cooperation)

Observatory on Borderless Higher Education (UK)

Strategy Policy and Research in Education Ltd (Hong Kong/ Australia)

USJournal of Academics

World Education Services (WES)

Appendix B: Key Guides to Best Practices

[Guide to Good Practice for Education Agents](#) (UK)

[National Code of Practice for Registration Authorities and Providers of Education and Training to Overseas Students](#) (Part of the Education Services for Overseas Students (ESOS) Act 2000 in Australia)

UNESCO- [Council of Europe Code of Good Practice in the Provision of Transnational Education](#)

The Code of Good Practice defines a number of terms and relationships related to international higher educational experiences, including:

Transnational arrangements

An educational, legal, financial or other arrangement leading to the establishment of (a) collaborative arrangements, such as: franchising, twinning, joint degrees, whereby study programmes, or parts of a course of study, or other educational services of the awarding institution are provided by another partner institution; (b) non-collaborative arrangements, such as branch campuses, off-shore institutions, corporate or international institutions, whereby study programmes, or parts of a course of study, or other educational services are provided directly by an awarding institution.

Transnational education

All types of higher education study programmes, or sets of courses of study, or educational services (including those of distance education) in which the learners are located in a country different from the one where the awarding institution is based. Such programmes may belong to the education system of a State different from the State in which it operates, or may operate independently of any national education system.

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