

**THE INTERNATIONALISATION OF HIGHER
EDUCATION: EXPORTING EDUCATION TO
DEVELOPING AND TRANSITIONAL ECONOMIES**

IDS WORKING PAPER 75

Paul Bennell with Terry Pearce*

SUMMARY

This paper presents and discusses recently undertaken research that seeks to assess the extent to which higher education in Australia, the United Kingdom and the United States has been internationalised in two key areas; namely the growth in foreign students studying for qualifications in these countries and the growth of foreigners studying in their own countries for qualifications by higher education institutions (HEIs) in the North. The rapid emergence of overseas-validated courses as part of collaborative links between HEIs in the North and the South is analysed, drawing in particular on survey results from the UK and Australia.

* We are very grateful to all the universities in Australia and the UK who agreed to participate in the survey.

1 INTRODUCTION

The internationalisation of higher education provision, especially among universities in developed industrial countries, has been consistently identified as a major trend since the late 1980s. This process of internationalisation is manifesting itself in a variety of ways. Not only are exchanges of faculty and students becoming increasingly common,¹ but universities are striving to respond to the needs of the rapidly globalising economy by internationalising their curricula. Differences in national education policies have also narrowed significantly during the last decade, in particular among poorer developing countries where the global policy prescriptions of the World Bank hold sway (see McGinn, 1997). Equally significant, universities in the North are seeking to attract much greater numbers of foreign students to their campuses as well as establish collaborative links with institutions in developed but especially developing and transitional economies that enable foreign students to study for their qualifications. Both these modes of study of foreign students generate much needed income for universities as well as foreign exchange and comprise the bulk of education exports in most countries.

The value of education exports from some, but certainly not all, developed industrial economies has grown exponentially during the last decade as education institutions as well as governments themselves have increasingly recognised the enormous potential of overseas markets for a range of education and training services. By 1997, the value of education exports from the United Kingdom was estimated to be over £9 billion.² Similarly, in Australia, in the mid 1990s, education services earned at least A\$2.0 billion per annum in foreign exchange. This exceeds the total value of wheat exports from Australia which, traditionally, has been one of the country's staple exports.³

Research in this area remains limited, but it seems reasonable to hypothesise that the recent rapid growth in education exports is part and parcel of the increasing internationalisation of education (and, in particular, higher education) provision which is largely the consequence of the rapid reduction of trade and communication barriers and other globalising tendencies. With the rapid acceleration in continental and global economic integration, global qualifications will become increasingly important, particularly in areas of knowledge and skill that are needed by transnational corporations and the business community at large. While the MBA acquired at leading business schools in Europe and North America has, in many ways, become the quintessential global qualification, in many other areas of management and technical competence, internationally recognised and negotiable qualifications are needed for recruitment and promotion purposes.

As international economic advantage becomes increasingly linked to knowledge-based sectors, tertiary education which generates much of this knowledge is being rapidly 'reconceptualised in tradable terms' (Rudner, 1997:1). However, in common with other on-going debates about globalisation, little hard evidence has been produced that allows robust conclusions to be drawn about the extent to which higher education has become internationalised and what future trends are likely to be. At best, only very fragmentary data, has been presented.

This paper presents and discusses recently undertaken research that seeks to assess the extent to which

higher education has been internationalised in two key areas, namely the growth in foreign students studying for qualifications in the North and the growth in the number of foreigners studying in their own countries for qualifications offered by higher education institutions in the North and elsewhere. Attending universities in Western Europe, North America and, up until the late 1980s, the socialist bloc countries has traditionally been the main route for individuals from developing countries to acquire foreign degrees. However, it is clear that a rapidly growing number of individuals are studying for foreign qualifications without travelling overseas. This can be done on their own by enrolling on pure distance education courses or, increasingly, by studying (on a full or part time basis) at local public or private education institutions which have established collaborative links or partnerships with one or more universities/colleges overseas and/or have been accredited by overseas examination bodies.

These overseas collaborative links take a variety of forms, but essentially they are based on validation agreements whereby "a degree awarding body judges a programme of study offered in another institution overseas to be appropriate to lead to a qualification of that degree awarding body" (UK Council of Validating Universities, 1996). Just as the Coca-Cola and McDonald corporations award franchises to companies and entrepreneurs in overseas countries to produce their products under tightly defined and rigorously enforced conditions, so too are a rapidly growing number of universities franchising other overseas institutions to offer their degrees and other qualifications. Foundation link courses also enable students to take courses in their own countries that allow them to be directly recruited to degree courses at collaborating universities overseas. Similarly, twinning courses enable overseas students to complete the first and sometimes the second year of the degree programme of an overseas university in their own country before proceeding overseas to complete their degrees.

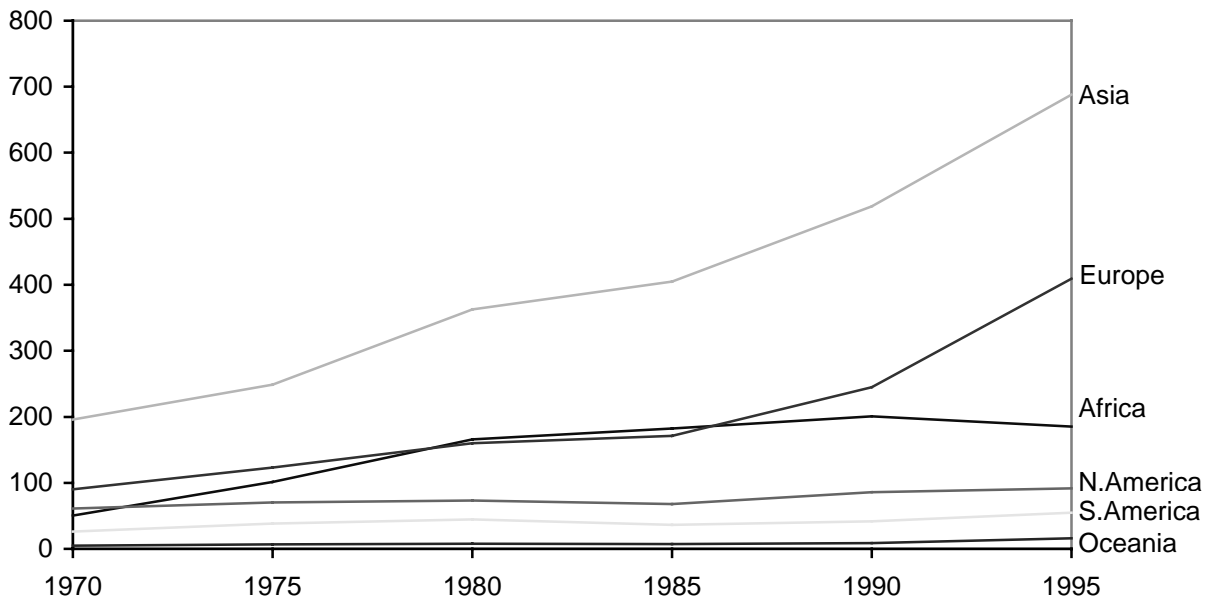
Since the late 1980s, universities in Australia and the United Kingdom have been especially successful in recruiting overseas students and have also become clear 'market leaders' in developing overseas validated courses (OVCs). Our research has focused, therefore, on these two types of education exports in these two countries. In addition, however, we have attempted to obtain both primary and secondary data that enables an assessment to be made of how universities in the United States, the world's largest and mostly richly endowed higher education sector, have tried to exploit education and training markets overseas and what are likely to be the major trends in the future.

The discussion is structured as follows. In section 2, global trends in overseas student enrolments are analysed. Section 3 then presents the results of surveys of OVCs at Australian and British universities. Section 4 assesses the limited evidence that is available on similar links between US universities and higher education institutions overseas. Section 5 examines other non-university provision, in particular the size of the overseas markets for UK professional and sub-professional qualifications. Section 6 discusses the main factors that have collectively fuelled the growth in overseas education and training markets during the 1990s. Finally, in Section 7, the prospects for internationalisation of tertiary education are discussed, and in particular the likelihood that other developed countries will follow the lead of universities and examination bodies in Australia and the UK.

2 OVERSEAS STUDENTS

Between 1980 and 1995, the numbers of overseas students world-wide grew from 0.93 to 1.5 million, an increase of 60.8%. Figure 1 shows that students from two regions accounted for most of this increase - Asia (52%) and Europe (42%). Elsewhere, the numbers of foreign students have either declined (Africa) or stagnated at low enrolment levels (North and South America).

Figure 1: Overseas students by region of origin, 1975-1995

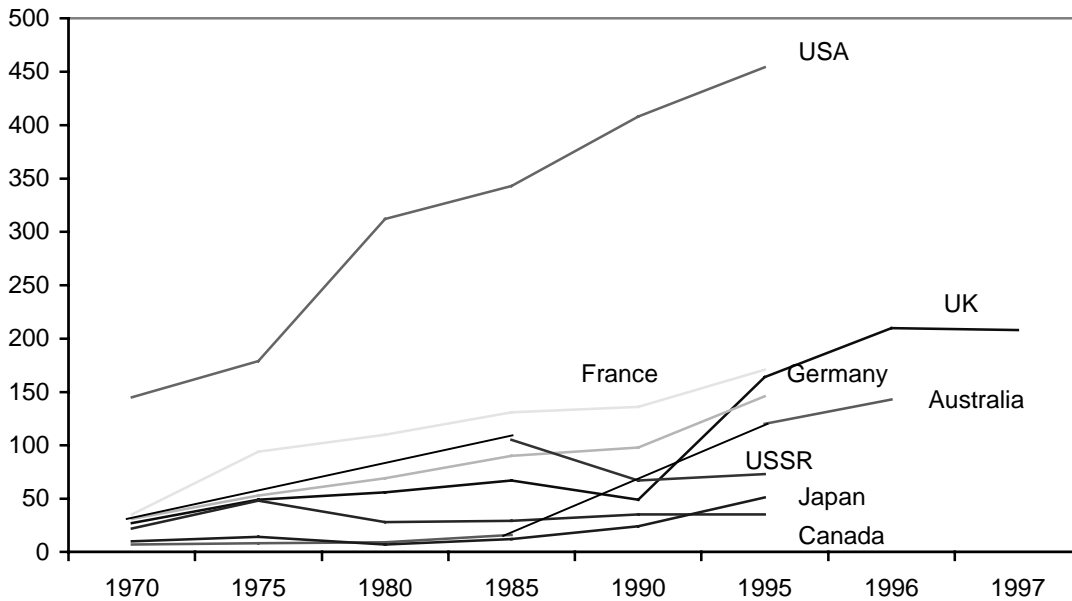


Source: UNESCO, Statistical Yearbooks, various

Lack of domestic higher educational capacity, coupled with the adoption of aggressive human resource development strategies by governments and a clear recognition of the critical importance of 'learning from foreigners' fuelled the rapid growth in overseas students from the tiger economies (studying mainly in the UK, US and Australia) during the 1980s up until the advent of the 'Asian crisis' in late 1997. The impressive growth in students from EU countries studying overseas since the mid 1980s has been largely due to increased student mobility between member countries. For example, students from EU countries studying in the UK increased from just 7200 in 1984-85 to 65332 in 1994-95 (see British Council, 1996).

Despite its demographic and economic size, the numbers of students from South America have remained relatively very small. Language, the depth of the economic crisis in the 1980s, and relatively well developed higher education sectors in many countries have been key factors that have dampened the demand for overseas education and training. The decline in students from Africa has been largely due to the decline in donor support for higher education scholarships and the impact of the protracted economic crisis in the continent as a whole.⁴

Figure 2: Foreign students in host countries



Source: See Figure 1

Figure 2 shows that the United States continues to be by far the largest destination for overseas students, accounting for 30% of all students in 1995. However, with average annual rates of enrolment growth among foreign students of only 3.5% between 1985 and 1989 and 2.1% between 1990 and 1995, there is no evidence to suggest that the student body in the US is becoming increasingly international.⁵ Growth rates for overseas students have only increased markedly in Australia and the UK. By 1996, overseas students enrolled in UK tertiary education institutions were 238% higher than in 1985. In Australia, this increase was even more spectacular - nearly 800% during the same period (although this was from a considerably smaller base than in the UK).

While total overseas student enrolments have increased by slightly more than a half since the mid 1980s, in global terms, the relative importance of overseas students has not changed significantly. Overseas students accounted for just 1.5% of world-wide tertiary education enrolments in 1985 and, by 1995, this had only increased fractionally to 1.8%. And, as can be observed in Table 1, only in Australia and the UK was there noticeable increases in the proportions of overseas students. In France, the relative size of foreign student population actually declined and it remained at around 3% in the US. With regard to the regions of origin of overseas students, only in Europe did the share of overseas students in the total tertiary education student population increased noticeably, but this was still only 1.9% in 1995.

Table 1: Relative importance of overseas students in main recipient countries and regions of origin, 1985 and 1995

Recipient country	1985	1995	Region of origin	1985	1995
United Kingdom	6.8	11.6	Africa	8.3	4.8
United States	2.8	3.1	Asia	2.0	2.2
Australia	4.3	14.8	America	0.5	0.6
France	10.8	8.2	Europe	1.0	1.9
Germany	4.3	6.8			
All countries	1.5	1.8			

Source: See Figure 1

3 OVERSEAS VALIDATED COURSES

Up until recently, the only alternative to overseas study (which has always been very costly and disruptive) was to enrol on distance education programmes offered by higher education institutions and other examination bodies in developed industrial economies, and especially the UK. Given the difficulties of studying on ones own without formal tuition for relatively long periods of time, the numbers of individuals successively completing full degree programmes has always been relatively small. Since the late 1980s, however, the rapid growth in OVCs has resulted in a marked increase in the opportunities for successfully acquiring foreign, internationally recognised qualifications.

3.1 Distance Education and OVC Surveys in Australia and the UK

3.1.1 Survey design

In order to analyse the development of distance education and OVC provision, all universities in Australia and the UK (numbering 124 and 36 institutions respectively) were requested to provide basic information for 1997 on the number of individuals in overseas countries who were formally enrolled for their degrees and other qualifications either as distance learning students or as students on validated courses at local higher education institutions. The UK survey was undertaken first and colleges of higher and further education as well as universities were asked to complete a simple one-page questionnaire. This mainly entailed listing each OVC, including the name and ownership status of each link institution and initial and 1997 enrolments. The Australian survey was confined to universities only and was further simplified in order to maximise the response rate.⁶ Universities were only asked to provide information on the total number of students overseas studying as part of validated collaborative links, the country breakdown, and total OVC enrolments in 1990 and 1994.

Given the possible commercial sensitivity of the information being requested, all respondents were assured that all information would be treated in strictest of confidence. For this reason, the identities and specific activities of individual universities and colleges cannot be revealed.

3.1.2 Other data sources

Where appropriate, survey data was supplemented with information from other sources. Details of all OVCs was published by the Australian Vice-Chancellors' Committee (AVCC) for 1996 and 1997, but enrolment data for each course was not collected. In the UK, the Council of Validating Universities (CVU) has undertaken annual surveys of all member universities since the late 1980s in order to collect basic information on the number of validated courses and (full time equivalent) enrolments, both in the UK and overseas. The UK Council on Overseas Student Affairs (UKCOSA) also undertook a survey of OVCs at British universities in early 1996. However, only 23 universities provided information.

3.2 OVC Enrolments

3.2.1 Overall numbers

The survey response rates were 62% and 61% for UK and Australian universities respectively.⁷ Seventy eight British universities satisfactorily completed the questionnaire. Additional data on link enrolments for universities which did not participate in the survey⁸ was incorporated from the above-mentioned CVU and UKCOSA sources for another 31 institutions. Consequently, enrolment data for the period 1995-97 has been collected for 109 out of a total of 124 universities in the UK. For Australia, 22 universities out of 36 participated in the survey. No other data on link enrolments was available.

It can be observed in Table 2 that 84 (74.8%) UK universities had at least one OVC in 1996/97 and that total OVC enrolments were slightly over 100,000. This includes nearly 18,000 overseas students who were registered for external degrees with the University of London. While the University of London does not have formal partnership links with overseas institutions, many of its external degree students overseas do enrol at some stage of their studies at usually private training centres in their own countries.⁹ Furthermore, the University of London has 'informal relations' with the largest of these overseas centres.

Table 2: OVC enrolments at UK universities

Source	Number universities	Nil returns	Total enrolments			
			Old	New	OU	Total
1997 survey	77	25	10183	21614	25120	
1996 UKCOSA survey	14	0	6066	3749	-	
1994/95 CVU returns	17	2	3493	12506	-	
Totals	108	27	19742	37869	25120	
University of London External Degrees †	1	0	17856	-	-	
Grand totals	109	27	37598	37869	25120	100587

Note: OU = Open University
 † = Overseas students only

For a number of reasons, even the figure of 100,000 link enrolments is likely to be a serious underestimate, and total OVC enrolments for all UK universities were probably in the region of 135-140,000 during the 1996/97 academic year.¹⁰ Not only is the magnitude of this form of education provision very impressive in absolute terms, but OVC enrolments were equivalent to two-thirds of the overseas student population in the UK in 1996/97. Taken together, the total number of overseas students either studying in the UK or as part of OVCs comprised 19.2% of all (i.e. nationals and foreign) students registered on UK university courses in that year. With virtually no OVCs in the mid-late 1980s, this figure was 3.8% in 1990. We can conclude, therefore, that the pace of internationalisation of university education provision in the UK has indeed been extremely rapid during the 1990s.

Both the absolute and relative size of OVC and distance education enrolments at Australian universities in 1997 was considerably smaller than in the UK. The survey enumerated a total of 14,650 overseas students studying as part of validation/twinning arrangements among the 23 universities who provided information.¹¹ Only three universities stated that they had no OVCs. These 23 universities accounted for 65% of the 506 OVCs listed in the ACVC survey of partnership provision. Assuming, therefore, that average enrolment per OVC was the same among the non-responding universities, total OVC enrolments for all Australian universities were around 22,500 in 1997 which was equivalent to 16% of the total population of overseas students in the country in 1996/97. Foreign students studying in Australia and as part of OVCs accounted for 17.1 % of the total student population at Australian universities in 1996. The average number of OVC enrolments at UK universities was nearly double the number of enrolments at Australian universities in 1997 (1150 compared with 625).

3.2.1 University involvement

In the UK, it is the universities which were created from the old polytechnics in the early 1990s that have taken the lead in developing collaborative links with overseas institutions. Excluding the Open University and University of London External degree courses, these new universities accounted for 65.0% of all OVC enrolments enumerated in the 1997 survey. In marked contrast, many of the older universities (including Oxford, Cambridge, Durham, Edinburgh) had no OVCs which can, no doubt, be largely attributed to a desire on their part to maintain the international status and exclusiveness of their qualifications.

Figure 3 shows the distribution of OVC enrolments among UK and Australian universities. Around 40% of British universities had relatively small link programmes with less than 100 student enrolled in 1996/97. Over half of all universities had more than 200 students overseas. 20% had more than 1000 link students and 6% had enrolments exceeding 5000. This latter group includes the Open University which had slightly more than 25,000 OVC students in over 10 overseas countries, but excludes the University of London external degree students studying overseas. The distribution of OVC enrolments among Australian universities is slightly different than in the UK, with a higher of proportion of universities with enrolments in the 100-1000 size categories, but with no universities where OVC enrolments are greater than 5000. Although average enrolments per OVC were considerably smaller among Australian universities than in the

UK, the number of OVCs per university tend to be much higher at Australian universities (see Table 4).

Figure 3: OVC enrolments by university (percentages)

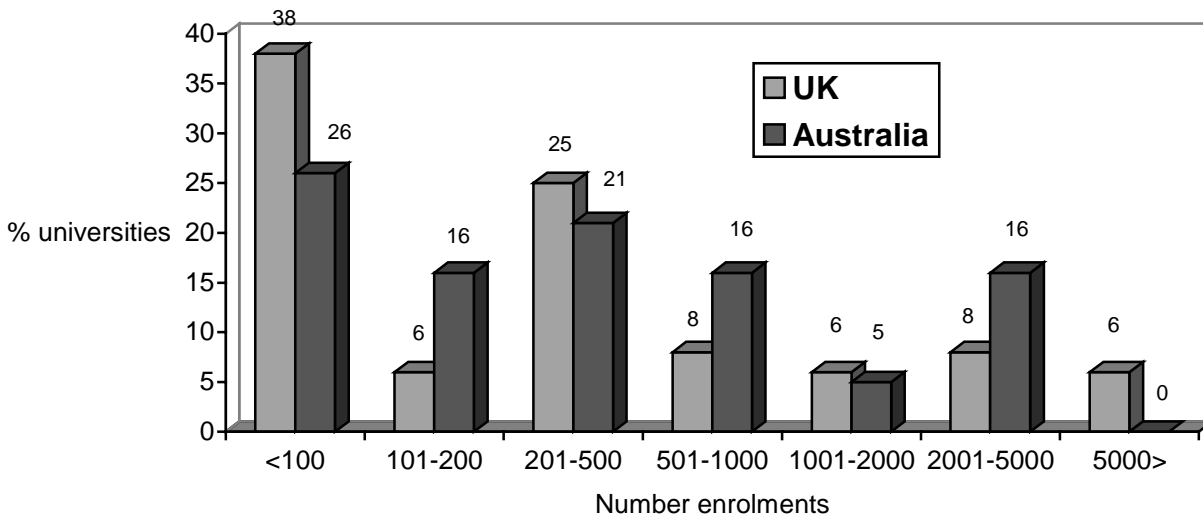
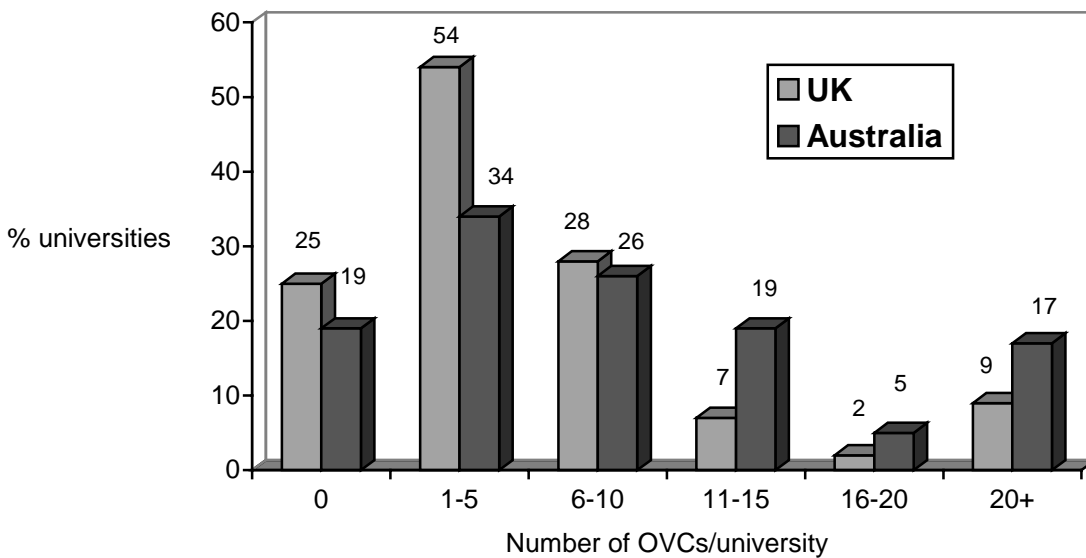


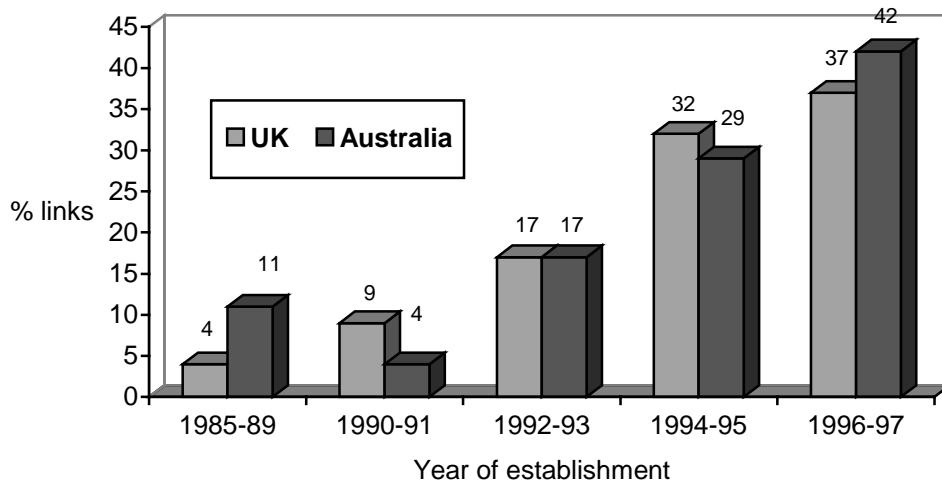
Figure 4: Number of OVCs by university (percentages)



3.2.3 Growth in OVC Provision

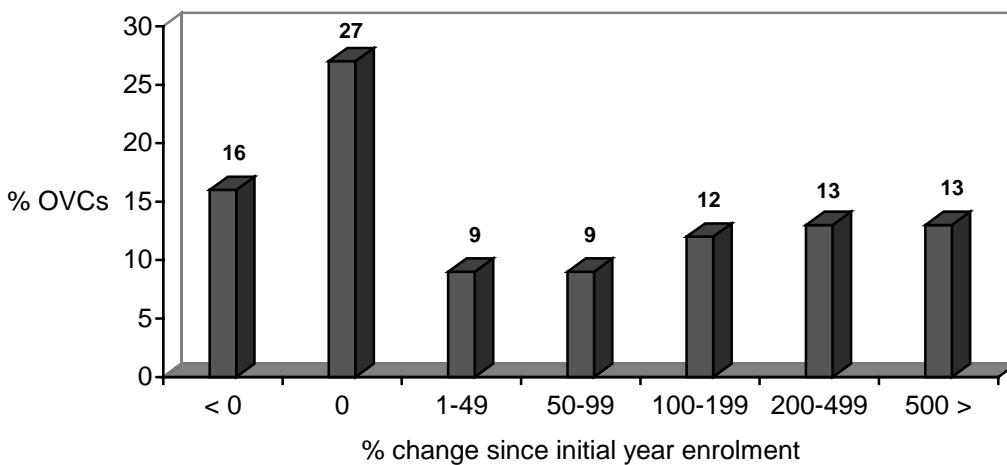
Fewer than 20% of OVCs were established by UK and Australian universities before 1992. Since then, however, the growth in OVCs has been spectacular with over two-thirds of all courses being established between 1994 and 1997 (see Figure 5).

Figure 5: Date of establishment of OVCs at UK and Australian universities, 1985-1997 (percentages)



Enrolments on the majority of OVCs sponsored by UK universities have also expanded very rapidly. Figure 6 shows that initial OVC enrolments had at least doubled by 1996/97 for nearly 40% of all courses. Given that most links were only established after 1994, this was extremely rapid growth. OVC enrolment growth among Australian universities has been equally spectacular - increasing from just 390 in 1990 among the 22 survey universities to nearly 14,650 in 1997 i.e. a nearly 40 fold increase.

Figure 6: Growth of OVC enrolments with UK universities



3.3 Regional and Country Distribution

3.3.1 Overview

In 1997, British and Australian universities had established OVCs in 69 and 18 countries respectively. Three quarters of universities in both countries had OVCs in two or more countries, and 40% and 30% of universities in the UK and Australia respectively had OVCs in five or more countries (see Figure 7).

Figure 7: Number of collaborating countries per university (percentages)

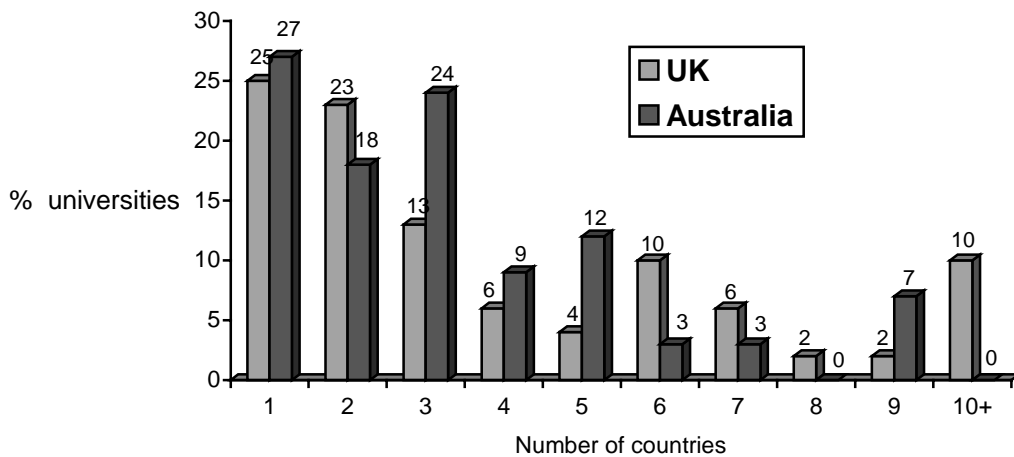
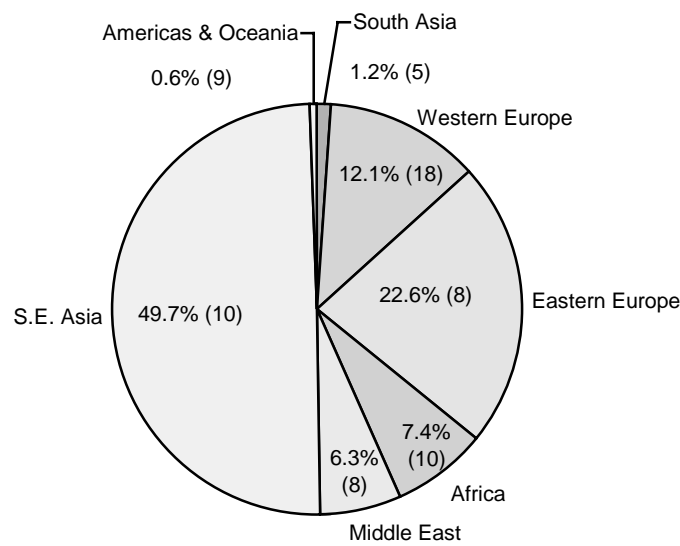


Figure 8 presents the regional breakdown of OVC enrolments with UK and Australian universities. Among both groups of universities, three South-East Asian countries, namely Hong Kong, Malaysia and Singapore, occupied a dominant position in the global market for OVCs in the late 1990s. Australian universities are particularly reliant on these three countries which, between them, accounted for 92% of total link enrolments. China is also fast emerging as a major market with over 8000 students enrolled on UK university degree and diploma courses in 1997.

The complete absence or very limited involvement in OVC provision among higher education institutions in the other "tiger economies" is striking. In the case of South Korea and Taiwan, government prohibition on overseas distance education and validated courses has been a critical constraint. In South Korea, this restrictive policy was reversed in 1996 so, once the current economic crisis has ended, South Korea is likely to emerge as a major market for OVCs. Despite their very large populations, link enrolments in South Asian countries were relatively insignificant.

Figure 8: OVC enrolments at UK universities by region, 1996-97



Note: Figures in () = number of countries with links

Language has also been a critical factor in determining the spread of OVCs. With UK and Australian universities taking the lead during the 1990s, it is clear that training institutions in countries where English is either the official medium of instruction or is widely used at the secondary and tertiary education levels have been relatively well placed to establish collaborative links. In countries, on the other hand, where English is not widely used in tertiary education, (most notably in South and Central America and Francophone Africa), there has been much less scope for establishing OVCs with English as the medium of instruction.¹²

Compared with Australia, the geographical distribution of OVC enrolments at British universities is considerably more global, with students in Eastern and Western Europe and Africa and the Middle East accounting for almost half of the total. Although there were only a relatively very small number of validated courses in Eastern Europe, OVC enrolments were still double those in Western Europe which is a clear indication of the enormous demand for foreign training and education in the transitional economies. Other key countries are Israel (6% of total enrolments), South Africa (5.5%) and Greece (4.2%).

3.3.2 *Malaysia and Singapore*

Malaysia and Singapore are prime examples of countries where the supply of public sector tertiary education has been unable to keep pace with the growth in demand for post secondary-education by populations who are renowned for the extraordinarily high value they attach to education and training. Faced with this situation, both governments have, as a matter of policy, allowed foreign universities to take a leading role in overcoming shortfalls in domestic provision.

Up until the late 1980s, this dependence took the form of students from Malaysian and, to a lesser extent, Singapore being sent to study at universities overseas. Since then, however, OVC enrolments have

played a key role in helping to overcome the shortfalls in national higher education capacity. Out of a total of 367,000 higher education students in Malaysia in 1995, 51% were enrolled at public education institutions, 35% at private sector institutions, and 14% were studying overseas.¹³ Between 1992 and 1996, the number of registered private sector colleges in Malaysia doubled from 156 to 354. A survey of 122 of these colleges in 1997 found that, of the 477 programmes/courses on offer, 19% involved twinning/credit transfer arrangements with overseas institutions and another 11.5% were other OVCs courses of one sort another (see Lee, 1998).

A British Council survey undertaken in 1997 of twinning/collaborative programmes between UK and Malaysian higher education institutions also highlights the importance of OVC provision. A total of 87 UK universities (28 old and 59 new) had 227 validated courses with 56, mainly private training centres in Malaysia (see British Council, 1997). Three large consortia of British universities (12 northern universities, 18 universities in BCHEM¹⁴, and 10 Scottish universities) had been established by 1997 in order to more effectively exploit market opportunities for OVCs in Malaysia. Over 90% of these courses were foundation and twinning courses.

In 1996, the Malaysian government announced a major change in higher education policy and foreign universities are now being encouraged to establish branch campuses in-country rather than rely on arms length collaborative links with local, mainly private institutions. Growing concerns about the maintain high, internationally acceptable education standards in the face of extremely rapid growth in link enrolments has clearly been a major factor leading to this change in policy.

Approximately 40% of all part-time courses taken by adults in Singapore in 1996 originated overseas (31% UK, 6% Australia and 3% US) (see Singapore Press Holdings, 1997). Thirty UK and 15 Australian universities had a total of 40 and 30 institutional links respectively. In addition, links had been established with four universities in the US, and single links with higher education institutions in Canada, Ireland, and the Netherlands giving a total of 52 overseas link partners (see British Council, 1997). Private training education and training centres in Singapore were estimated to have enrolled 149,000 students in 1996, with at least 100,000 of these students studying for foreign qualifications¹⁵.

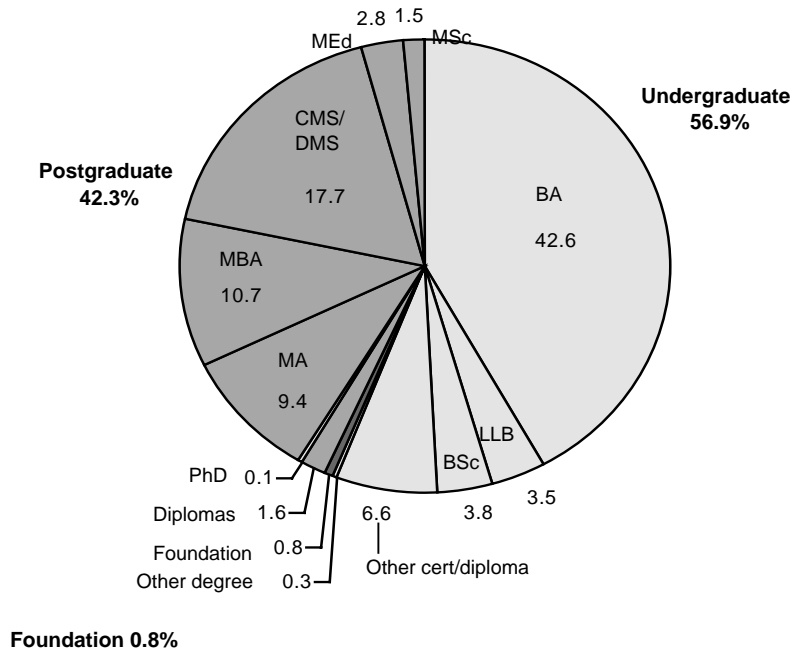
3.4 Type of Courses and Partner Institutions

Almost 60% of all OVCs offered by UK universities were at the undergraduate level in 1996/97 (see Figure 9). Foundation/twinning courses comprised an important segment of the undergraduate OVC market in a number of countries (most notably Malaysia). Unfortunately, however, they were not separately delineated by most of UK university respondents so reliable estimates of the total number of individuals enrolled on these type of courses are not available.

At both undergraduate and post graduate levels, most OVCs have a strong vocational orientation. Three broad subject areas predominated among undergraduate courses, namely business, computing and accountancy. At the postgraduate level, management courses, and in particular the Masters in Business Administration accounted for over two-thirds of all enrolments. Although universities in Australia were not

requested to provide information on enrolments disaggregated by subject area, an analysis of the OVCs listed in the 1996 and 1997 ACVC surveys suggests that much the same pattern of course provision prevails as in the UK.

Figure 9: OVC enrolments by main type of courses/programmes



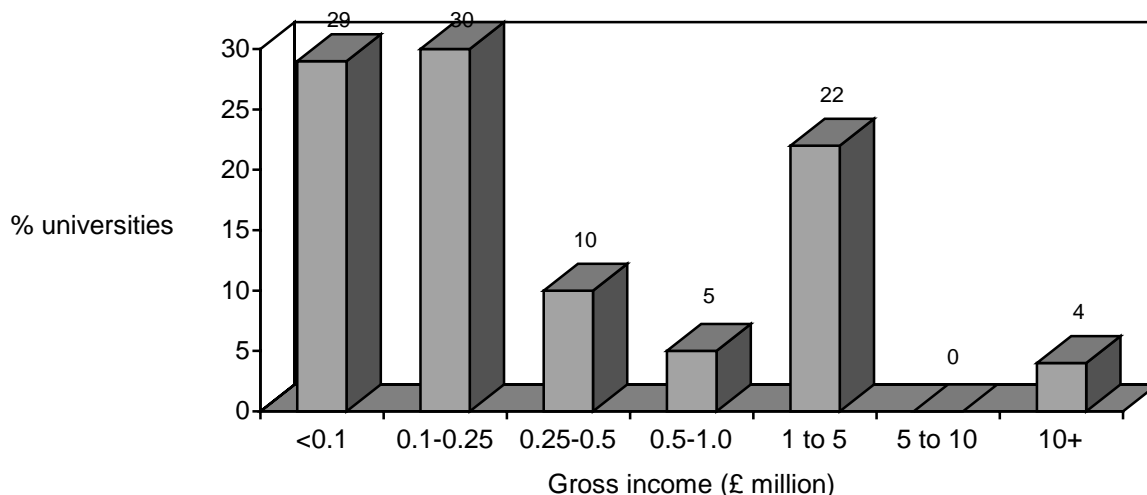
Note: Includes foundation and twinning courses

Over three quarters of link partners in Asia, the Middle East and Africa were private training institutions. This proportion was around 50% for OVCs in European countries. As will be discussed in section 6, it has been the mushrooming of private sector training institutions in developing and transitional economies since the late 1980s that has been of such decisive importance in spread OVC provision world-wide.

3.5 Income

For most universities, the primary motivation for establishing OVCs has clearly been financial. However, given the commercial sensitivity of this information, UK university respondents were merely requested to indicate which one of six fairly wide income ranges they fell into with respect to gross income earned from OVCs. Figure 10 shows that 59% of universities with some link involvements indicated that they earned less than £0.25 million in 1996/97 from these activities and that only for 26% of universities did this income exceed £1.0 million. On the basis of these figures, the median income per OVC student was in region of £500 (which for most degree courses was around only 10% of the tuition fees for full time overseas students) and the total income from OVCs would have been around £75-100 million in 1996/97. However, an analysis of university financial statements suggests that the total income from OVC was, in fact, closer to £250 million per annum.¹⁶

Figure 10: Gross annual incomes by university, 1997 (percentages)



4 OVERSEAS PROVISION BY US UNIVERSITIES

The higher education system in the United States is highly decentralised with only limited federal government control over individual institutions. Federal programs promoting international education are relatively small and are confined mainly to encouraging student and faculty exchange focusing on collaborative research and training. The United States Information Agency administers the two largest programmes, namely the College and University Affiliations Program and the Trilateral University Affiliations Program between universities in Canada, Mexico and the US. While the implications for higher education of closer economic integration in North America (particularly as a result of the North American Free Trade Association) are increasingly recognised as being of major importance, a variety of bureaucratic, cultural, linguistic barriers have so far prevented emergence of more than a handful of joint degree programmes between the NAFTA countries (see Clement and Sparrow, 1998).

Deans of international education programmes at 60 major state and private universities in the US were asked to provide basic information on distance education, direct provision and VCLs for overseas students. The overall response rate was very low (less than 10%) which is probably indicative of the minimal involvement of US universities in these areas of education provision. Among the universities that did respond, the only type of overseas provision reported were university-run campuses or other facilities with fewer than 500 overseas students enrolled. As noted earlier, only four US universities had OVCs in Singapore in 1997 compared with 28 UK and 18 Australian universities.

A 1992 survey of US campuses conducted by the American Council of Education found that only 4% of four year public and private universities had overseas branch campuses catering for foreign nationals and only 13% had overseas study programmes for overseas students (see ACE, 1992). Unfortunately, the most recent ACE annual surveys have not collected information on overseas education provision,¹⁷ but there is little evidence to suggest that there has been the same kind of exponential growth in OVCs as has occurred in the UK and Australia. Rather, the emphasis continues to be on attracting foreign students to the US,

despite the fact that numbers have barely increased during the 1990s.

In the UK and Australia, the rapid growth in overseas students and collaborative links with overseas institutions have gone hand in hand with each other as part of concerted attempts by the large majority of universities in these countries to maximise income from overseas markets. In marked contrast, the response of US universities to increasing financial adversity in the early 1990s was to scale down the level of international activities because they were dependent on government grants and/or were not regarded as income-generating (see El-Khawas, 1994).

5 NON-UNIVERSITY QUALIFICATIONS

5.1 Colleges of Further And Higher Education

All 120 colleges of further and higher education in the UK were requested to provide the same information on OVCs as the university sector. However, the overall response rate was somewhat lower (52.5%) which, as was the case with the survey of US universities, is probably due to the limited involvement of these institutions in OVC provision. Among the 63 colleges that did respond, 53 (84.1%) stated that they had no validated courses of any kind. Furthermore, even among the 10 colleges that did have OVCs, only 734 students were enrolled. The lack of international status of the qualifications offered by these colleges is probably the major reason for their limited involvement with OVCs.

The Technical and Further Education (TAFE) colleges in Australia are beginning to penetrate the OVC market in South-East Asia, but as yet the extent of this involvement is quite limited.

5.2 Professional, Sub-Professional and Trade Qualifications

5.2.1 UK Examination Bodies

Demand for qualifications offered by a wide range of professional, sub-professional and trade institutes and examination bodies is, however, growing very rapidly in most English-speaking developing countries in Africa and Asia as well in the transitional economies in Eastern Europe and the former Soviet Union. As with university OVCs, British institutions dominate this type of training provision but, unlike universities, accreditation of the mainly private training centres in developing and transitional economies who offer these qualifications is generally quite lax.

Some of the most important institutes and examination bodies offering these type of qualifications are listed in Table 3. Partial information on the number of overseas candidates or, in some cases, overseas examination entries in 1997 is also presented. Some of the largest examination bodies (such as City and Guilds) do not keep detailed records of overseas examination candidates while others consider this information as commercially sensitive and were unwilling, therefore, to cooperate. Nevertheless, it is likely that at least a half a million individuals in developing countries were studying for these qualifications in 1997.

Table 3: Overseas students registered with selected UK professional institutes and examination bodies, 1996/97

Institute Examination Body	Students/Entries
Institute of Commerce and Management (ICM)	250,000*
London Chamber of Commerce and Institute (LCCI)	200,000
Association of Certified Cost Accountants (ACCA)	70,000
Chartered Institute of Management Accountants (CIMA)	12,796
Chartered Institute of Marketing (CIM)	12,000
Institute of Management Information Systems (IMIS)	6,700
Institute of Bankers	4,400
Chartered Institute of Purchasing and Supplies (CIPS)	2,700
Chartered Institute of Transport (CIT)	724

At least up until the onset of the Asian economic crisis in late 1997, countries in South East Asia accounted for the major share of developing country students registered with UK professional institutes and examination bodies. However, despite low per capita incomes, Sub-Saharan Africa is also a rapidly growing market for many sub-professional qualifications. For example, African countries accounted for nearly half of City and Guild's turnover in 1996/97. A survey of private sector training provision in Zimbabwe in 1996/97 found that well over 15,000 individuals were studying for UK professional and sub-professional qualifications (see Table 4).¹⁸ Similarly in Kenya, "there is a huge demand for short semi-professional vocational courses especially in business and computing. Having a British qualification of any type is seen by families as giving their children an advantage in a very competitive employment market" (British Council, 1997:11). While Kenya and Zimbabwe are, by African standards, relatively large and sophisticated economies, the demand for foreign vocational qualifications is also growing rapidly in low income countries (see Bennell et al, 1998).¹⁹

5.2.1 Corporate and government involvement

A growing number of transnational companies are also showing increasing interest in offering certified training to their employees that is 'portable' from one overseas location to another in order to ensure optimal global deployment of managerial and technical skills. Examination bodies such as City and Guilds are eager to tap this market.

The scope for exporting entire national vocational qualification systems has also begun to be recognised. In late 1997, an International Vocational Training Unit was established by the UK Department of Education and Employment with the overall goal of promoting the use of British National Vocational Qualifications (NVQs) by governments and industries in overseas countries. By early 1998, Oman had already adopted the NVQ system and several countries in South America were reported to be interested.

Table 4: The growth of foreign vocational training courses, 1990-1996

	Number PSTIs		Number students	
	1990	1996	1990	1996
SECRETARIAL				
Pitman	na	180	30,000 ^a	44,000 ^a
COMMERCIAL				
British:				
London Chamber of Commerce & Industry (LCCI)	10	24	726	1,626
Association of Chartered Accountants (ACCA)	0	2	436 ^b	979
Chartered Institute of Management Accountants (CIMA)	1	3 ^c	700	800
Chartered Institute of Purchasing & Supply (CIPS)	0	1	-	-
Chartered Institute of Transport (CIT)	0	1	-	-
Chartered Institute of Marketing (CIM)	0	2	-	284 ^d
Institute of Commerce & Management (ICM)	3	44	52	3,891
Institute of Data Processing Management (IDPM)	0	1	0	73
South African:				
Institute of Marketing Management (IMM)	1	10	1,000	3,000
Institute of Administration and Commerce (IAC)	1	7	500	1,900
Salesmanship Institute			1,367 ^e	2,153 ^e
Institute of Certified Bookkeepers (ICB)	-	-	753 ^f	863 ^f
Other:				
International Air Transport Association (IATA)	-	-	-	-
COMPUTING				
Association of Computer Professionals (ACP)	2	7	120	320
Institute of Data Processing Management (IDPM)	0	2	-	-
National Computing Centre (NCC)	0	1	0	100
TECHNICAL				
City & Guilds of the London Institute (CGLI)	0	5	-	-

- Notes:
- ^a Examinations sat
 - ^b 1994 total
 - ^c Local representative did not know exactly how many PSTIs offered CIMA courses
 - ^d Number of candidates registered between June 1994 – December 1996
 - ^e Number of scripts for the period November 1993 to November 1996 only
 - ^f Total entries for Southern Africa. Students from Zimbabwe account for 95% of students
 - information not available

6 GROWTH FACTORS

There are a variety of factors that have converged to fuel the rapid increase in the use of professional and sub-professional qualification offered by higher education and other organisations in the North in developing and transitional economies. For expositional convenience, these can be divided into supply and demand side factors.

6.1 The Supply of Foreign Qualifications

As public funding has become increasingly inadequate to meet the needs of rapidly expanding higher education systems in the North, universities have sought to find ways to make-up for serious financial shortfalls. Pressures to privatise funding has led to increased cost-recovery from home country students (through the introduction of tuition fees) and the marketing of educational services to new clienteles in both domestic and overseas markets. Given the increasingly hegemonic role of English as a global language, universities in English-speaking countries clearly have a strong comparative advantage in exploiting the rapidly growing trade in educational services.

At the same time, major reforms and other changes have occurred that have transformed the underlying nature of higher education in many developed industrial economies. In the UK and Australia, a key event was the ending of the university-polytechnic binary divide in the early 1990s. With their newly acquired university status, the erstwhile polytechnics have channelled their strong entrepreneurial energies into generating additional sources of income and, more generally, have helped to create a far more competitive environment in the higher education sector. Government reforms have also been introduced that have deliberately increased the competition between universities in accessing public funding for both teaching and research activities.

Whereas many of the older universities have been wary about tarnishing their institutional reputations by collaborating with overseas organisations, the new universities have been more prepared to accept the risks of establishing OVCs and, in particular, the resulting adverse publicity when sub-standard OVCs have been exposed.

Institutional validation as a mechanism for expanding the market for university degrees and other qualifications had already become widespread in the UK by the early-mid 1990s. The number of individuals studying for university qualifications at further and higher colleges of education in the UK expanded over six-fold between 1988 and 1995 - from 30,937 to 203,144. Consequently, the spread of validation/franchise agreements to overseas markets was, for most universities, a logical addition to their income generating strategies. At the same time, there has been a greater willingness by many universities to introduce more flexible forms of course provision that allow greater access by both home and foreign students. The widespread use of twinning arrangements is perhaps the best example of this more flexible approach.²⁰

The value of 'education exports' has also been increasingly recognised by the Australian and British governments during the 1990s. In Australia, in particular, since the late 1980s, the government has given very high priority to attracting overseas students from South East Asia and elsewhere. The AVCC has established an International Development Programme which, as a formally constituted company, has a clear mandate to maximise the provision of education services to overseas clients. And, in contrast to most other aid donors, the bulk of AUSAID's education aid is devoted to overseas scholarships (see Bennell with Furlong, 1998).²¹

In the UK, the British Council has been at the forefront of efforts to promote overseas education and training markets. By 1997, 'education counselling services' had been established in over 40 countries with

the specific aim of marketing educational services provided by over 200 subscribing British institutions both in the UK and in-country. Market plans had also been published for over 30 countries. The Department of Trade and Industry also has a Education and Training Sector Group with a high profile membership drawn from the education sector and industry. Its publication, 'Exporting Education', regularly reports on new developments and opportunities in the provision of educational services overseas.

The absence of tight government regulation has also been an important factor in explaining the rapid growth of OVCs. In the UK, both the CVU and the Quality Assurance Agency have all published guidelines and codes of conduct for OVCs, but none of these are mandatory. The QAA had also audited OVCs in over 20 overseas countries by 1997 (including Malaysia, Greece and Israel). These visits were often been made in response to public criticism in overseas countries about the quality of OVCs. According to Roger Brown, the Director of the Higher Education Quality Agency (which became the QAA in 1997), "overall, the audit findings offer a reasonably reassuring picture of current practice. Programme delivery appears to be generally undertaken with serious regard for quality and standards. At the same time, there is little room for complacency" (Brown, 1997:16).

Finally, the development of OVCs has been greatly facilitated by the very significant reduction in communication barriers between countries since the late 1980s. Link partners can communicate regularly and cheaply by telephone, fax and increasingly e-mail and regular visits can be made to link institutions. Furthermore, the rapid spread of the new generation of information technologies, most notably the internet, will increase enormously the ability to provide high quality education services to a wide range of overseas clienteles in a cost effective manner. To date, most OVCs have not relied heavily on these new technologies, but this is likely to change very quickly as new systems are developed and their potential is fully recognised.

6.2 The Demand for Foreign Qualifications

The rapid globalisation of the world economy is generating massive demand for internationally acceptable and negotiable academic and vocational qualifications both among individuals and the corporate sector. While emergent trends towards the transnationalisation of high level management and professional jobs had already become apparent in the late-mid 1970s (see Bennell and Godfrey, 1983), the pace of global economic integration has accelerated markedly since then.

An increasingly integrated global business community based on a relatively uniform culture, set of business practices and language provides powerful individual and corporate incentives to acquire the essential skills and competencies that will maximise competitive advantage in both national and international product and labour markets. The emergence of tightly integrated regional trade blocs and single markets has also far reaching implications for the operation of labour markets and the education and training of all types of labour. Increasingly homogenous, regional labour markets based on free movement of labour will increasingly require a uniform system of education and training based on a common set of qualifications. As a result, universities and other higher education institutions will be forced to compete with other for students throughout the region.

With rapid globalisation, transnational corporations and other foreign investors must ensure that all their employees world-wide have the same common set of set of skills, not only to guarantee uniformly high product quality in increasingly integrated production systems that straddle national boundaries, but to enable the optimum deployment and utilisation of staff on a global basis. In China, for example, by 1996, employment in foreign companies already totalled 14.2 million. These companies have invested heavily in on- and off-the-job training and rely heavily on internationally recognised qualifications.

Ubiquitous trade liberalisation of goods and services is part and parcel of the process of globalisation. The removal of trade barriers coupled with the increased availability of foreign exchange (particularly in Africa and South Asia) has dramatically improved the opportunities for individuals to study for foreign qualifications, the successful acquisition of which gives them considerable competitive advantage in most national, regional and international labour markets. Studying for a foreign degree or other qualification as part of a OVC is generally much less costly than studying overseas (typically less than half) and for some minority groups (such as the Chinese in most South East Asian countries) provides local access to higher education that is denied to them in government institutions. Governments, particularly in Malaysia and Singapore, have been quick to see the advantages of students studying in-country as part of OVCs. Not only are foreign exchange savings very considerable but, by not having to study overseas, students are less likely to be adversely influenced by 'Western culture' and loss of skilled personnel overseas as part of the brain drain is considerably minimised.²² More important still, for countries such as Malaysia and Singapore that have very ambitious human resource development strategies, importing educational services is indispensable if these strategies are to be successfully implemented.²³

Globally pervasive economic reforms have also resulted in governments actively promoting the development of educational and training services by the private sector. Prior to reform, most governments were suspicious of private sector education and created a strongly disabling environment which effectively stifled the development of this sector. However, most governments now recognise that public sector provision will be simply unable to satisfy the massive popular demand for post-secondary qualifications and that, properly regulated, the private sector can train in an efficient and cost effective manner.

Faced with enormous pent-up demand for higher education, the private sector have been quick to recognise the lucrative market opportunities to be exploited. Education entrepreneurs have looked for products that can most effectively compete with national higher education qualifications. Foreign degrees and diplomas have performed this competitive role extremely well and, in many countries, private sector training centres have been able to offer these qualifications without having to be formally accredited by government as a university-level institution. The value of national higher education qualifications has also become seriously devalued in many developing countries as a result of protracted and chronic underfunding of public higher education institutions with many of most able teaching and research leaving for 'greener pastures' in the private sector and overseas. Not surprisingly, this has further enhanced the attractiveness of foreign qualifications for both individuals and companies.

The universities established by the British during the late colonial period prided themselves on being

on 'the international gold standard of education' (see Ashby, 1960). Sadly, this is no longer the case in many countries and, increasingly, they are losing out to foreign competitors who at least offer the promise of adhering to international standards of higher education. In Sub-Saharan Africa in particular, it is precisely because the decline in education quality has been so dramatic and the expansion of higher education in all its various forms has been so limited in relation to overall demand that the growth in the market for foreign qualifications is growing so rapidly. This is especially so for sub-professional diplomas and certificates which are generally more affordable than degrees and other qualifications offered by recognised universities in the North.

As in the North, governments in developing countries, strongly supported by the global educational policy prescriptions of the World Bank, have forced publicly-funded universities to find new sources of income (see World Bank, 1992 and 1995). Faced with the enormous demand for foreign qualifications coupled with a lack of capacity to deliver high standards of training, public universities in developing and transitional economies are themselves increasingly looking to form partnerships with foreign universities and other examination bodies in order to offer validated courses. Previously, nationalist sentiment would have prevented such links from being established. Once political independence had been achieved, the 'special relationships' that had existed between colonial and metropolitan universities were severed and newly formed professional organisations sought to negotiate accreditation agreements with their metropolitan counterparts. However, as higher education standards have declined and university degrees are no longer recognised by metropolitan professional organisations, the need to establish collaborative links with overseas universities that will allow standards to be improved and, at the same time, help to generate income by charging relatively high tuition fees is becoming an increasingly attractive option.

Another emerging trend is that governments and industrial organisations in the South are also requesting internationally recognised examination bodies to 'benchmark' national qualifications and, in some cases, to import entire training systems.²⁴ Such moves are symptomatic of a clear shift in the relative status of qualifications in the North and the South as governments and industries seek to ensure competitive advantage in global product markets.

7 CONCLUSION

It is clear that the provision of higher education has become increasingly internationalised in both Australia and the UK during the 1990s. and, although OVCs have been heavily concentrated in Hong Kong, Malaysia and Singapore,²⁵ these type of collaborative arrangements are spreading rapidly to other regions of the world, in particular Eastern Europe, Africa and the Middle East. The key question, therefore, is to what extent will higher education institutions in other countries also attempt to internationalise their educational services for monetary gain. We believe that Australia and the UK are indeed market leaders and that the majority of developed industrial economies will follow their lead during the next 5-10 years. There are already clear signs that universities and examination bodies in other countries (most notably Canada and South Africa) are becoming increasingly active in exploiting overseas education and training markets.²⁶

All the demand and supply factors that were identified earlier will continue to fuel the growth in education exports. In particular, trade in knowledge and skills will grow exponentially as the pressures on governments to create 'high skill' societies continue to intensify and trade barriers are eliminated with the widespread enforcement of WTO provisions. Countries, most notably China and India, that hitherto have been relatively uninvolved in OVCs are rapidly opening-up. Direct foreign investment in education and training provision is also likely to become increasingly important as overseas investors establish their own overseas campuses and other facilities. Consequently, governments, especially in developing and transitional economies, will be keen to create enabling environments for overseas educational providers.

The development of effective global regulation of education and training exports is also likely to be an important factor. A Washington-based NGO, the Global Alliance for Transnational Education (GATE) was established in 1996 and quality audits have already been undertaken of universities offering OVCs in Australia and the US. However, more wide ranging intervention by governments is likely to be needed in order for education standards to be effectively monitored and a global system of accreditation of providers to be properly implemented.

Language will remain a critical constraint in this process of internationalisation of higher education provision. However, with English being increasingly used for teaching and research at higher education institutions throughout the world, it is only a matter of time before these institutions will themselves be able to offer OVCs using English as a medium of instruction. And, despite the globalisation of the English language, there are still major opportunities to develop OVCs with French, Spanish, Portuguese and other major international languages as the mediums of instruction, particularly in Latin America and francophone Africa. International consortia of higher education and other institutions are also likely to become increasingly common, especially among countries in increasingly powerful regional economic and political blocs, most notably the EU,²⁷ NAFTA, APEC, and ASEAN.

Finally, the internationalisation of higher education has far reaching implications for the development of higher education in developing and transitional countries. National institutions will be faced with increasingly intense competition from foreign providers which, without appropriate protective measures by the institutions themselves as well as governments, could seriously affect their status and survival in the medium to long term. Just as trade liberalisation has resulted in large swathes of the industrial sector being wiped-out in many countries, as higher education becomes increasingly privatised, then the threat posed by foreign providers becomes equally real. While private sector institutions will continue to be the preferred link partners for most universities from the North, public universities will increasingly seek alliances and other forms of collaboration in order to maintain or achieve competitive advantage.

Another major consequence of the rapid opening-up of national education and training markets to international competition is that the process of qualification escalation that is already rife in most developing countries is likely to intensify considerably. Individuals recognise that acquiring internationally recognised and negotiable qualifications significantly improves their positions in rapidly lengthening job queues and there is a real danger therefore that the increased availability of foreign qualifications will spark off a new wave of credentialism in developing countries.

NOTES

1. The European Union's Erasmus and Socrates Programmes are currently the largest, publicly-funded initiatives in the world to promote international student mobility and faculty exchange.
2. Reliable estimates of UK education exports are not available. The Department of Trade and Industry believes that foreign exchange earnings from educational products and services were at least £9 billion in 1997, up from around £7 billion in 1996. Overseas students (both long and short term) account for around half of all earnings. The ELT (English Language Teaching) market alone is reported to be worth £0.75 billion. Other major sources of income are educational publishing, equipment and overseas consultancy. However, according to the official UK balance of payments statistics, export earnings from overseas students and other educational services were £1.4 billion in 1996, up from £0.4 billion in 1988 (see UK, 1997). Unfortunately, other EU member states do not separately enumerate education exports in their balance of payment statistics which is probably indicative of their relatively minor importance as a source of foreign exchange.
3. Another survey estimated that education export earnings amounted to A\$1.4 billion in 1991. With over three fold expansion in overseas students since then, it is possible therefore that education exports are as high as A\$4.0 billion.
4. France accounted for over 40% of all overseas students from Africa in the mid 1990s. The bulk of these students were funded by the French government.
5. Provisional estimates put the number of overseas students in the US at no more than 450,000 in 1997.
6. Given the quite intense competition that exists between UK and Australian universities (especially in South East Asia), it was felt that, despite assurances of strict confidentiality, Australian universities may be wary about divulging too much information to researchers based in the UK.
7. For universities that did not respond to the initial letter, two reminder letters were sent and at least one telephone call was made.
8. A total of 8 universities in the UK and four in Australia declined to participate. A further 9 and 15 universities in the UK and Australia respectively did not reply at all.
9. In Malaysia, for example, the majority of the 3000 students who are registered for external London degrees attend HELP (Higher Education Learning Programme) training centres (see Lee, 1998).
10. This is because (i) enrolment data is missing for 15% of the OVCs enumerated by the 1996 and 1997 surveys; (ii) the CVU and UKCOSA data is two-three years out of date; (iii) the CVU survey is based on student full time equivalents (rather than actual head counts); and (iv) no information was available from any source for 17 universities (13.7% of the total).
11. Since some universities did not provide complete information on twinning enrolments, the total OVC enrolment figure for these universities may be as high as 17-18,000.
12. Just how common OVCs are among Spanish and French speaking universities is an interesting issue that requires further research.
13. The percentage of overseas students averaged 28% between 1985 and 1992 (see Rudner, 1997).

14. BCHEM stands for British Council for Higher Education in Malaysia.
15. The median number of Malaysian link partners among UK and Australian universities operating in Malaysia were three and two respectively in 1997. In Singapore, the median number of link partners was one for both UK and Australian universities.
16. Interview with Alasdair Somerville-Forde, Institute of Commerce and Management, Bournemouth. One British university offering an MBA degree course in Hong Kong earned in excess of £25 million between 1993 and 1997.
17. The fact that the ACE campus surveys do not request information on overseas collaborative links is again indicative of the relatively minor importance of this forms of education provision among most US universities.
18. These enrolment figures do not include students registered on mainly MBA courses offered by seven UK universities.
19. For example, starting in 1997, a major British examination body began to market its management certificate courses in Francophone African countries.
20. However, it is still the case that UK degree programmes are still widely perceived by overseas students to be a lot more rigid than equivalent degrees in the US which are based on course credits and are not as time bound as in the UK.
21. AUSAID provided 6,000 scholarships to overseas students in 1996.
22. For example, in the mid 1990s, fewer than 20% of students from China and Bangladesh enrolled at overseas universities returned home after their studies.
23. A study by the IDP estimated that the demand for university places in South Asian countries during the period 2000-2020 is likely to be in excess of 20 million.
24. For example, the training boards of some of the leading industries in South Africa (including clothing and textiles and printing) have requested the City and Guilds examinations board in the UK to benchmark the relevant national qualifications available in South Africa.
25. The role of foreign education and training provision in these tiger economies has been critically important in enabling their governments to pursue aggressive human resource development strategies. However, there is little recognition of this contribution to the development process in the extensive literature that has explored the reasons for the East Asian miracle.
26. The Canadian government established seven Education Centres in South East Asia in 1997 and South African professional and sub-professional institutes are aggressively marketing their qualifications in Southern and Central Africa,
27. The EU is currently considering proposals to make student grants portable anywhere in the European Community. The introduction of this measure would lead to a marked acceleration in the internationalisation of higher education provision among the 15 EU countries.

REFERENCES

- Alexander, D. and Fazal Rizvi, 'Education, markets and the contradictions of Asia-Australia relations', *Australian Universities Review*, vol. 36, no. 2, p.16-20.
- Ashby, E. 1960. *Investment in education: the report of the commission on post-school certificate and higher education in Nigeria* (Lagos: Government Printer).
- Bennell, P.S. and M. Godfrey. 1983. 'The professions in Africa: some interactions between local and international labour markets', *Development and Change*, vol. 14, no. 3, July, p.373-401.
- Bennell, P.S. with D. Furlong. 1998. 'Has Jomtien made any difference? Trends in donor funding for education and basic education since the late 1980s', *World Development*, vol. 26, no. 1, January, p. 43-59.
- Bennell, P.S. , S. Bendera, E. Kimambo, S. Kiwia, F. Mukyanuzi, W. Parsalaw, and J. Temu. 1998. *Vocational education and training in Tanzania in the context of economic reform*, forthcoming.
- British Council. 1997. *The promotion of UK education and training services in Kenya: A market plan* (London: British Council).
- British Council, Education Counselling Service. 1996. *Overseas student statistics 1995-96* (London: British Council).
- Brown, R. 1997. 'Developing effective overseas partnerships: lessons from Britain', *Journal of International Education*, vol. 8, no. 1, spring, p.15-21.
- Clement, N.C. and G. Sparrow (eds.). 1998. *Integrating higher education in North America: from Wingspread to San Diego*. Institute for Regional Studies of the Californias (San Diego: San Diego State University).
- El-Khawas, E. 1994. 'Toward a global university: status and outlook in the United States', *Higher Education Management*. Vol. 6, No.1, March. p. 90-97.
- El-Khawas, E. 1992. *Campus Trends 1992*. (Washington: American Council on Education).
- Higher Education Quality Council. 1996. *Code of practice for overseas collaborative provision in higher education*' (London: HEQC).
- Lee, M.N.N. 1997. 'Private higher educational in Malaysia: international linkages'. Paper presented at the Oxford Conference 'Education and Geopolitical Change. Oxford, September 11-15 1997.
- McGinn, N.F. 1997. 'The impact of globalization on national education systems'. *Prospects*, Vol. XXVII, No. 1, March. p. 41-54.
- Rudner, M. 1997. 'International trade in higher education services in the Asia-Pacific region: the ASEAN experience and the role of APEC', *World Competition*, September.
- UK, Department of Trade and Industry. *Exporting Education*. Newsletter of the Education and Training Sector Group. (London: DTI).
- UK Office for National Statistics. 1997. *United Kingdom Balance of Payments 1997* (London: HMSO).
- World Bank. 1992. *Higher Education* (Washington: World Bank).
- World Bank. 1995. *Priorities and strategies for education* (Washington: World Bank).