Australian education providers have been involved in transnational education (TNE) delivery for decades. While there is extensive research addressing the value of TNE, there are few reports currently available that highlight the nexus between Australian TNE delivery and any subsequent international student flows to Australia. The aim of this research digest is to take the first steps in identifying what data sets are available, what the data currently indicates and where there may be gaps. It also provides recommendations for future research to better understand the value TNE delivery contributes to international student numbers in Australia.

Austrade’s recently released report Australian International Education 2025 draws on an earlier report entitled Growth and Opportunity in Australian International Education. This research, conducted by Deloitte Access Economics and EduWorld, suggests that “for the 29 key source markets, Australia’s onshore international education sector is capable of increasing from 650,000 enrolments in 2015 to 940,000 by 2025.”

This ambitious target will require, as the National Strategy for International Education 2025 suggests, “innovation, key partnership development and effective management” to achieve such growth.

TNE delivery will be an important strategic component in the mix for many institutions. The significance of this particular study for Australia is to develop knowledge on the contribution that TNE makes to onshore international student flows and to uncover if there is a nexus. Assuming this to be the case, then a greater focus may be required by policy makers and stakeholders to ensure the transition of these students is seamless. We also need to ensure the policy levers are relevant and responsive to encourage students who study in Australian TNE programs to choose Australia as an ongoing part of their higher education study experience.

BACKGROUND

Australia’s first National Strategy for International Education 2025 highlights the importance of offshore provision of education across all sectors as an opportunity for growth. However, it can be argued that it does not go far enough to highlight the significance of international student flows to Australia as a consequence of targeted TNE delivery. The Deloitte report suggests anecdotal evidence collected through consultation with the higher education sector to reveal “Australian universities establish offshore campuses for a variety of commercial reasons. While some are expected to be profitable ventures on their own account, others serve a more strategic purpose to attract greater numbers of students to higher margin onshore programs in Australia.”

This report identifies the importance of TNE as an integral part of a university’s international recruitment strategy, noting that some institutions appear to be prepared to operate at zero or negative margins as loss leaders for assured pipelines of students from transnational operations as a pathway to onshore courses. What is not reported, however, is the dollar value of those students that flow on to Australian campuses as a result of offshore TNE delivery.

The aim of this research is to take the first steps in identifying what data sets are available, what the data currently indicates and where there may be gaps. It also provides recommendations for future research to better understand the value TNE delivery contributes to international student numbers in Australia.

The offshore-onshore nexus in the UK

A report released by the UK Higher Education Funding Council for England (HEFCE) in 2015 revealed key findings on the number of international students who used an offshore pathway to start their first degrees in England. The analysis was based on individualised student records for 2013–14, as reported to the Higher Education Statistics Agency (HESA). It used the entrant student population versus the overall student enrolments and covered first degree entrants.

Key findings in the report were as follows:

- One-third of all first degree entrants in 2013–14 (17,140 entrants) began their first degree through the means of a transnational pathway. These students are referred to as ‘transnational students’. Students from China and Malaysia made up 70 per cent of all entrants. More than half of the first degree entrants from China and Malaysia started their course outside the UK.
- Students studying business, management and admin studies courses have the highest propensity to use transnational pathways. Almost half of the entrants in these subject areas had started their studies overseas.
- Students starting their first degree through transnational pathways were found to have much higher progression rates into postgraduate study than other international students. About 64 per cent of the Chinese transnational students who commenced their first degree program in 2011–12 were found on postgraduate programs in 2013–14.

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4 Australian Government (2016)
6 Ibid (p.24)
The UK Department for Business, Innovation and Skills (BIS) commissioned research to improve its understanding of the range, extent and value of activity by UK institutions, and how this varies for each main delivery mode. This study used a census survey and the aggregate offshore record published by HESA. Unlike the HEFCE study, the BIS research calculated the value of TNE activity. It notes:

- A university’s in-country TNE presence is also thought to increase the number of those who study as international students at its UK campus. This ‘halo effect’ is thought to be worth over 40 million pounds annually to the UK, and is greatest where there is branch campus activity.
- Articulation is extremely important as a pathway for international students to access undergraduate level study at the UK campuses. It is estimated that 711 million pounds of the UK’s income from international higher education study in 2012/13 resulted from articulation arrangements. Currently this is strongly dependent on Chinese partnerships.

Australia: what we know and don’t know

In 2015, the Australian Government’s Department of Education and Training (DET) identified there were 498,155 international students studying on a student visa in Australia with the largest share enrolled in the higher education sector. According to the data, these students had not studied in any other sector (53.9 per cent).

Further, students from China contributed 27.3 per cent of all international students in Australia, the highest of any nationality. The department also produces data on the number of international students per sector and the pathways they studied in Australia prior to entering higher education. However, what is not revealed is the particular pathways and the number of students who studied in an Australian TNE program before entering an onshore higher education course of study.

Data produced by DET also shows that in 2014, there were 85,873 students studying in Australian higher education institutions in offshore ‘campuses’, with 67.7 per cent studying at bachelor level and a further 21.1 per cent undertaking coursework master degrees. The most popular TNE disciplines studied were: management and commerce (58.6 per cent), engineering and related technologies (8.1 per cent), society and culture (7.0 per cent), information technology (6.8 per cent), and health (6.1 per cent).

However, the data does not identify those students who study an Australian TNE course through an overseas partner institution or third party provider. It only identifies where students have studied at the offshore campuses of an Australian-registered higher education provider. It is also unlikely that this data would capture student numbers of private higher education providers delivering in transnational environments, unless they were identified to be studying at their own campus overseas. This raises the point regarding a need for further clarification on the definition of ‘campus’ as part of a further study to inform future practice in data collection. The existing TNE data collection for Australia is based on a narrow definition, which makes it hard to track students beyond the branch campuses.

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Universities Australia (UA) further reported in 2014 that there were 821 transnational programs offered by Australian universities offshore, delivered almost exclusively for a duration of between six months to five years.

UA’s website notes:
- Most universities provided undergraduate courses as part of their offshore program portfolio
- 10 universities provided offshore programs by distance education
- Five universities were exclusively dedicated to offshore delivery of postgraduate coursework
- The vast majority were delivered in partnership with an international institution
- There were 31 offshore Australian university campuses, and
- There were four countries where the majority of offshore programs were delivered Malaysia (24 per cent), Singapore (20 per cent), China (11 per cent) and Hong Kong (11 per cent).

In the same year (2014) that UA identified there were 31 offshore Australian university campuses, the Australian Tertiary Education Quality and Standards Agency (TEQSA) reported that there were 39 registered higher education providers (including both public and private) delivering Australian higher education courses offshore, which constituted 24 per cent of all providers.

The variance between the figures from UA and TEQSA is presumably because there were eight non-university, higher education registered providers recorded to be engaged in TNE. It is unlikely that students enrolled in these Australian transnational programs would be reported in the DET data unless, of course, the additional eight higher education registered providers were identifying students at an offshore campus. The current TNE data collection does not count students in partnership arrangements which appear to be the area where the majority of TNE activity occurs for Australian institutions.

In summary, the current data collection identifies two distinct cohorts: onshore international students and offshore students studying in an Australian higher education provider’s campus. Given the data collection only identifies students studying at a campus of an Australian higher education provider, the risk of missing critical data from both public and private Australian higher education providers where students study in a non-campus TNE environment is high. This is discussed in more detail in following sections.

Given the data collection only identifies students studying at a campus of an Australian higher education provider, the risk of missing critical data from both public and private Australian higher education providers where students study in a non-campus TNE environment is high.

Difficulties in definition and data limitations

There are two concerns with the current collection of the data. One is the definition of what constitutes a ‘TNE student’; the other is the interpretation of what constitutes an Australian registered higher education provider ‘campus’. Both require agreement by the sector to develop parameters for future recording of data to capture the complete data sets of those students who flow into Australia as a result of study in an Australian transnational education program.

In a recent report, Jane Knight (2016) states that there are two major categories in a TNE framework: collaborative and independent TNE provision. Knight notes the collaborative category means that foreign HEIs have a local partner or a counterpart with whom they are cooperating in terms of the delivery of the academic program. She goes on to say that this form of twinning program arrangement is internationally co-developed or co-founded between institutions and that joint/double/multiple (JDM) degree programs are the most common examples of collaborative TNE.

The second category that Knight refers to is what she describes as ‘independent or stand-alone’ TNE activities. In such circumstances, no local HEI or provider is normally involved in the design or delivery of the academic programs. Knight cites examples including international branch campuses, franchise universities or distance education programs. Further, Knight notes “The distinction between the two categories of TNE activity has important implications for regulations and policies related to registration, quality insurance, degree recognition, availability of scholarships, and data collection for both host and sending countries.”

In 2013, TEQSA proposed a definition for transnational education as “an arrangement whereby a course of study that leads to a regulated higher education award is provided either partly or fully outside Australia by either

a) a registered higher education provider (irrespective of the provider category in which they are registered), or
b) through collaboration between a registered higher education provider and one or more third parties noting other terms commonly used include ‘cross-border education’ or ‘borderless education’.”

This definition broadens the scope of transnational education to address the gap in the data sets cited earlier and concurs with Knight regarding the implication for data collection against varying transnational education categorisations.

**Recommendations for (expanded) scope and study limitations**

This digest has not considered students who are enrolled in distance education courses through an Australian provider in an overseas location who may become part of international student flows if they come to have a study period in Australia. This is important to add to the data sets.

This current research also does not address:

- onshore international students who have transferred from an Australian VET TNE program into an Australian higher education onshore program
- onshore international students who have transferred from an Australian ELICOS program delivered offshore into a higher education program onshore:
- onshore international students who have transferred from Australian schools curriculum delivered in a TNE environment
- those students who have studied an Australian undergraduate higher education program delivered offshore and who have transferred into a postgraduate program onshore with any higher education provider
- those students who have been enrolled in an overseas institution’s course who have received credit for study into an Australian higher education course onshore (articulation students).

All of these various student cohorts should be considered as part of any future research concerning international students who study in Australian higher education onshore courses. Collection of this data would also allow for cohort comparative studies and benchmarking with counties such as the UK.

**International student data sets**

The methodology involved in undertaking this research digest involved an extensive desktop review of available data sets that captured international student numbers in Australia. It also involved an interview with representatives from the Commonwealth Department of Education and Training and the Austrade Beijing office. Anecdotal advice was also received from a small number of higher education providers. The current data sets available that record international student numbers are as follows:

**Provider Registration and International Student Management System (PRISMS)**

This dataset records information relating to international students studying in Australia on a student visa. While PRISMS does have the capacity to record Recognition of Prior Learning (RPL), data entry is not mandatory, and may not be recorded if the information is not readily available. As this database does have some capacity to record RPL, this presents an opportunity for the future if it is deemed that reporting on international student flows onshore from transnational education pathway programs is a valuable undertaking.

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Making the RPL data field a mandatory entry requirement will allow for greater data capture on previous study patterns and, with some modification, may have the capacity for wider reporting. Importantly however, data will only be valuable if definition around what constitutes RPL is included. For example, to capture the full data picture, it will be important to differentiate between transfer students (those who have been enrolled in an Australian education provider’s course overseas) and articulation students (those who have been enrolled in an overseas institution’s course and are receiving credit for prior learning). It will be also important to consider how to record twinning students and joint master degree students (those who have been enrolled in an overseas partner institution but have studied an Australian higher education provider’s curriculum delivered as in Knight’s definition of a “collaborative” partner arrangement).

Higher Education Information Management System (HEIMS)

Some informal interrogation of HEIMS by the Department of Education and Training found that only 1–2 per cent of onshore international students in one year had records of any prior offshore transnational education study in the previous two years. Only 5–7 per cent of onshore international students in one year appeared to have claimed any course credits for ‘recognition of prior learning’. While there is some capacity to record the transfer of students onshore from an Australian university’s offshore campus, anecdotal evidence suggests the available data is unreliable and does not capture the full picture. For example, the data set would not identify if a transnational student was studying at a partner institution’s campus even though they were enrolled in an Australian higher education award. As TEQSA noted in 2013, most transnational engagement was undertaken through partnership or other third-party arrangements, and third parties may not necessarily be higher education institutions.\(^\text{17}\)

Given this statement, it is likely that the HEIMS data collection would not adequately capture the full extent of offshore transnational higher education enrolment. The data capture would also not identify a student who had studied and completed an Australian undergraduate transnational education course and later enrolled in a postgraduate program at a tertiary institution in Australia. It would also not identify those students studying under a “collaborative” articulation or twinning model through overseas partnership institutions.

Australian Bureau of Statistics (ABS)

The ABS also collects international student data. This set of data is aimed at identifying the economic value of both transnational education offshore and onshore international students as two separate cohorts. It does not consider the offshore–onshore nexus value.

The initial review of data sets concludes there are a range of reports available that note in varying degrees international student data, but none identify the connection of offshore to onshore numbers. In addition to PRISMS, HEIMS and ABS data, further information is also available through Universities Australia, in Auditor General Reports, through the Australian Productivity Commission Reports and annual reports produced by institutions.

Rather than labelling all offshore TNE students in the same category, identifying and recording separate classifications of student cohorts – similar to the methodology used by the UK Higher Education Funding Council for England (HEFCE) – would allow for a clearer understanding of the mix of international students who choose to have a study experience in Australia. Importantly, broadening the classification of ‘campus’ to include study at third-party providers or overseas partners would also allow for clearer data capture on transnational education delivery.

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\(^{16}\) Australian Government, Department of Education and Training (2016). Higher Education Information Management System (HEIMS) data. unpublished initial interrogation of systems.

FUTURE CONSIDERATIONS

If further research reveals, as it has done so in the UK, that student flows to Australia resulting from transnational offshore activity are significant, there are a number of issues to be considered to ensure these cohorts of students continue to grow. The following list is not exhaustive, but presents some key considerations.

(a) Policy

Former Minister for Tourism and International Education, Richard Colbeck, notes in the National Strategy for International Education 2025 “the Government must ensure that where there are interacting policy levers, such as with student visas and settings in trade agreements, our policies are mutually compatible and internationally competitive”. This is critical to ensure Australia continues to be attractive and competitive. The process of applying for and receiving student visas must be seamless and timely. The ability to work part-time while studying and post-study work rights are also critical.

ICEF Monitor reported in November 2015 that country-level and institutional policies affect the popularity of destinations where students choose to study. Further, the report highlighted that students are often influenced by the relative cost of living and tuition in a country (which may be affected by currency fluctuations) as well as the availability of internships and post-study work and immigration opportunities.

According to McNamara, “what you can’t measure, you can’t improve”. Policy makers need to be informed by reliable data about the extent and nature of TNE. This would enable long-term planning and development of education policies and regulations that have due regard for this increasingly important component of the higher education system.

This research digest suggests that, for Australia, the current collection of data capturing on-flow of international students as a result of TNE delivery is inconclusive. As McNamara suggests, the absence of reliable data sets makes it difficult for long-term planning and policy making.

(b) Quality in transnational education delivery

The quality and reputation of Australia’s education services are critical factors that will affect the demand by international students for courses delivered both in Australia and overseas. Agencies such as the Australian Tertiary Education Quality and Standards Agency (TEQSA) play an important role in assuring the quality of Australian higher education providers’ delivery of courses, both in Australia and overseas.

According to a British Council report, the countries faring well in delivering TNE programs and quality assurance are Australia, Germany, Malaysia and the United Kingdom. Bi-lateral agreements between the host and home country quality agencies can streamline some of the progressions between the respective countries’ systems.

Quality is also an issue raised by Choudaha, who notes that many countries now view rankings as equating to quality, which can result in limiting the choices for both institutions and students. This can be demonstrated when national governments and scholarship agencies make choices on institutions and courses based on world ranking scales.

23 See: TEQSA international engagement activities at http://www.teqsa.gov.au/about/international-engagement
(c) Seamless transition: what does it mean?

In order to grow the number of international students coming to Australia as a result of study in TNE programs, or as a result of recognition of previous study overseas, institutions will need to ensure the transfer or articulation onshore for TNE students is as seamless as possible. One consideration to remain competitive is to limit any unnecessary additional time required to complete courses onshore. This is particularly relevant in the case of some majors such as accounting, engineering and science streams where not all subjects may be available in all semesters, resulting in additional time required to complete courses onshore. The more structured the program is with pre-requisite subject requirements, the more the transfer or articulation opportunity becomes less seamless.

Tsiligiris talks of “flipped TNE”, a two-way model allowing the contextualisation of learning factors such as program content and the language of delivery that lead to improvements in learning outcomes. Exporting and importing institutions work together on content and approach to ensure they are suited to students’ prior knowledge, educational experience and perceptions about teaching and learning. As Tsiligiris suggests, working together in the offshore delivery of courses gives institutions an opportunity to ensure student transition onshore requires less adjustment to different teaching and learning styles, minimising disruption to study patterns. However, it should be noted this is not always possible in offshore environments.

(d) Mutual recognition of qualifications across borders

The National Strategy for International Education 2025 states there is a responsibility of government at all levels to engage with regional bodies and work collaboratively to solve some of the emerging issues of recognition of qualifications across borders. This will ensure that an Australian qualification continues to have legitimacy and accreditation globally, even where teaching and learning styles are different.

Collaboration on the development and harmonisation of country specific qualifications frameworks will be an essential part of this, and Australia already participates in the ASEAN-Australia-New Zealand Free Trade Area (AANZFTA) Economic Cooperation Work Programme (ECWP) as well as in the development of the ASEAN Qualifications Reference Framework (AQRF). The British Council reported in 2016 that another area which requires further development is the recognition of TNE degrees, including those obtained in third countries. At present, a small number of countries have formal measures in place at a national level to recognise such degrees.
(e) Competitive price and product

Tsiligiris (2015) stated “transnational education should be able to be responsive, innovative and flexible enough to address changing student expectations and market conditions.”

With the Commonwealth Government’s National Science and Innovation Agenda launched in December 2015, and the clear link of the national agenda to higher education policy, there is an opportunity for government at state and federal level as well as institutions, to link TNE study flows onshore with policy. This could be supported through the establishment of scholarships and visa categories that promote studies and work in STEM related disciplines. In the US, the Student and Exchange Visitor Program (SEVP) August 2015 quarterly report revealed that 40 per cent of students from China in 2015 were studying in science, technology, engineering and mathematics (STEM) disciplines; 81 per cent of India students were also engaged in STEM related studies.

At the Sino–Australia Forum on TNE and student mobility held in Beijing in March 2015, Chinese national and provincial education officials noted that the structure of the Chinese economy had changed significantly in recent years and that new skills and disciplines were now needed (a shift from rapid growth to sustainable growth – the “new normal”). Australian transnational educators were encouraged to work with prospective partners to develop a new range of programs that meet the changing skills and professional needs of the Chinese economy. What is evident is that there is demand for a new era of TNE.

Dr Jason E Lane, senior associate vice-chancellor and vice provost for academic planning and strategic leadership at State University of New York (SUNY) said “it is hard to predict how TNE will grow because it will evolve, especially as branch campuses mature and spin off into something new”.

The challenge for Australian institutions is in how to continue to maintain competitiveness and to assure quality at a competitive cost, while taking into consideration new technologies and growing demand for STEM related qualifications. Blended learning models offer opportunities to manage cost escalations, but anecdotal evidence suggests there is a continued preference for face-to-face teaching. In many cases, the preferred model is for staff from the home campus to be teaching as a component of TNE delivery in offshore sites.

Cost associated with STEM delivery offshore will be expensive given the requirements of laboratory based classes and smaller numbers of students. This is in contrast to management and commerce related disciplines that have been the mainstay of historical transnational course delivery. While STEM are strategically important, management and commerce subjects lend themselves best to TNE delivery (or being partly delivered through TNE), as indicated by data from the Department of Education and Training. The most popular TNE discipline was management and commerce, representing 58.6 per cent of students enrolled in Australian transnational programs in 2014.

Hubs and regionalism

As Asian countries expand and improve their higher education systems, it is likely that mobility patterns will become more diverse. Research has indicated that as the quality of institutions improve in Asia, study within the region is becoming more attractive. ICEF Monitor reported that Japan has a goal of hosting 300,000 international students by 2020. Similarly, Malaysia has a target of 250,000 international students as a result of having more of its universities in the world rankings by 2025. This report also notes that China has attracted increasing numbers of Indonesian and Korean students. The number of Indonesian students in China has grown by an average of 10 per cent each year since 2010 to reach a total of nearly 14,000 students.\(^{36}\)

As well as being a host nation of TNE, China has also embarked on its own TNE strategy with Soochow University establishing an offshore campus in 2012 in Vientiane, with ambitions of further expansions in Laos. Kunming University of Science and Technology (KUST) operates an offshore program based on the Laotian campus of Thailand’s Dhurakij Pundit University. Xiamen University opened a campus in Malaysia in 2015 with an estimated start-up cost according to an ICEF report of RMB 600 million (about US$98 million).\(^{37}\)

All of these developments highlight the intensely competitive environment that is evolving in TNE. Australian higher education providers have an opportunity to continue to be at the forefront of delivery and quality, but critical to engagement is knowledge on trends that only reliable informative data on international student flows can deliver.

SUGGESTIONS FOR FURTHER RESEARCH

In the absence of complete sets of data, this research digest has highlighted significant gaps in knowledge on the contribution of TNE delivery to onshore student flows in Australia. The following suggestions are not exhaustive, but could be considered for further research.

A census of Australian higher education providers

The UK’s HEFCE interrogated the HESA’s Individual Student Record to identify data “irregularities”. The methodology considered such things as:

- new entrants who appear in the onshore record in Year 2, Year 3 or Year 4 of program
- unusual course duration (e.g. first degrees shorter than 3 years)
- specific course titles
- students who were reported to be studying on collaborative programs between UK and overseas HEIs.

The methodology was then further refined by follow ups with the respective providers to establish the accuracy of the data records.\(^{38}\)

It is suggested that Australia should explore a primary data collection method, similar to that in the UK, such as a census to capture the nexus of offshore to onshore student flows. This data would provide critical information to determine the extent of international student flows onshore as a result of offshore TNE provision. It presents an opportunity to shape what and where Australian higher education providers may choose to deliver in the future.

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36 ICEF Monitor (Nov. 2015)
37 Ibid.
A census of Australian TNE pathways providers: VET, ELICOS, Schools

A cross sectoral research study is also suggested to gain a broader picture of TNE student pathways. This would help determine the nexus between offshore provision by higher education providers and onshore student flows. Such a study should also explore onshore flows to higher education from vocational education (VET), English language course provision and the school sectors. This would enable greater capacity to track and understand cohorts that contribute to the number of international students studying in Australia.

Future data collection

It is suggested that a working party be established to explore opportunities for expanded data collection through the current data platforms. It is recommended the working party defines what constitutes a ‘transnational education student’ for the purpose of a broader data set collection, noting also the site field should be broader than the current narrow ‘campus’ focus. While the data is currently collected on the numbers of students in distance education programs, this important cohort also requires further examination.

CONCLUSION

This initial study is not exhaustive but presents some opportunities that can be considered for future research. Anecdotal evidence suggests that students who have had some connection either through a TNE program, or an articulation arrangement offshore, will have a greater desire at some stage over their career for an onshore study experience.

Reliable data capture is critical for policy makers in their long term planning to ensure the sector can remain competitive and responsive to global market changes. As McNamara noted, “what you can’t measure, you can’t improve.”

Expanded data collection will equip higher education institutions with the ability to capitalise on shifts in global higher education needs. As countries witness a rise in middle class wealth, expanded data collection will inform decisions on location and disciplines for TNE delivery as well as facilitate a better understanding of students and their needs.

Further research is required and changes to data capture platforms will be critical to ensure the sector remains competitive and responsive to national and global priorities.

ieaa.org.au/research-digests

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Australian Government
Department of Education and Training

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Peter has also held academic and administrative positions with universities including Bradford, Deakin, RMIT and Macquarie. He has also worked on higher education and VET development projects with AusAID, World Bank and the Asian Development Bank.

Robyn Phillips has been involved in international education over a period of 28 years. This has included working at director level at two Australian universities and as a senior manager in a third. Robyn has identified, developed and managed transnational education program delivery across seven countries (Singapore, Malaysia, Thailand, Vietnam, Indonesia, New Zealand and extensively in China). She has represented a number of Australian universities at senior level in a range of countries to develop and manage relationships with partner institutions, government agencies and with key in-country industry partners.

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Robyn has co-authored publications that have included being part of a comparative study of selected higher education systems in Asia. Robyn is currently a member of the Editorial Board of the Bulletin of Higher Education Research (BHER) in Malaysia (honorary position).
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