



Abstract

Transnational education (TNE) has become a core activity for many UK higher education institutions, and supply-side and demand-side factors continue to support its growth. TNE lifecycle starts with filling the gaps in the supply of local higher education before its focus shifts to diversifying local provision, enhancing its quality and developing its capacity in niche subject areas. As a result, TNE generates substantial local impact and explicitly responds to the sustainable development agenda.

The Future of UK Universities' Transnational Education Engagement

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For many United Kingdom (UK) universities, transnational education (TNE) has become a core activity. Between 2016 and 2021, the number of UK higher education institutions (HEIs) engaging in TNE activities increased by 22 percent (from 138 to 168 HEIs), and the number of TNE students grew by 30 percent. TNE is slowly becoming more evenly distributed: There were 94 HEIs with 1,000 or more TNE students in 2021, vs. 74 in 2016.

UK TNE Trends Overview

UK TNE has been expanding steadily, reaching more than 530,000 students in 2021. In the same year, HEIs attracted approximately 680,000 international students to the United Kingdom. The 30 percent increase in TNE over the previous five years was primarily driven by growth of collaborative TNE.

Specifically, collaborative forms of TNE currently account for 67 percent of overall UK TNE activity, compared with 64 percent five years ago. In this article, the term “collaborative TNE” includes partnerships between two or more HEIs with franchise or validation arrangements, educational progression of students, and programs leading to dual and joint degrees.

In comparison, international branch campus activities remained stable and accounted for 7 percent of overall TNE activities during the studied period. The share of online and flexible learning activities declined from 29 percent in 2017 to 25 percent in 2021.

Will TNE Continue to Expand?

Evidence gathered over the past 30 years shows what TNE lifecycle looks like. Initially, TNE evolved to absorb the unmet local demand for higher education. Thus, its primary remit was to support local higher education provision. As local higher education systems expanded, TNE helped improve access to international degrees and contributed to several United Nations Sustainable Development Goals. Thanks to this, global mobility of higher education programs helps counter brain drain and generates positive impact locally.

While tertiary education participation rates have increased over the past decades, TNE has evolved to serve continuously changing local higher education systems. China is a good example of such change, evidenced by an eightfold increase in its tertiary

education gross enrollment rate—from 8 percent in 2000 to 64 percent in 2021. While TNE continues to expand, its primary focus has shifted from expanding higher education provision to strengthening quality, as well as providing training in niche subject areas and research. Another hotspot for TNE programs is Malaysia, which has also attracted reputable international universities to set up branch campuses. TNE has helped elevate the global appeal of higher education and strengthen the competitive ability of the country's higher education system. TNE activities in both China and Malaysia continue to expand, and they have been the United Kingdom's top host countries for over a decade.

A similar lifecycle is observed in Greece. TNE emerged in Greece in the early 1990s to fill the supply gap of in local higher education provision. At present, Greece is one of the nations with the highest tertiary participation rates, yet TNE continues to grow.

Globally, TNE will continue to evolve over the years to boost the diversity of local higher education and improve the local students' chances for pursuing international programs. For HEIs globally, TNE offers a means to reach students in remote locations with a minimal environmental impact. Models that rely heavily on physical mobility of academic and administrative staff are replaced by those where teaching and student support are provided locally. The latter takes the form of global education hubs, where multiple foreign universities operate using common local infrastructure to provide TNE programs efficiently and effectively. One example is the [Metropolitan College Global University Hub](#) in Greece.

TNE is also best suited to address the fast-paced workplace-related changes and the demographic challenges of lower-middle-income countries. New forms of TNE, yet to be captured in the existing data collection structures, address the need for continuous professional development and lifelong learning. For example, online microcredentials, executive education, and technical courses attract thousands of students, especially from mature age groups.

If these activities are taken into account, one can understand that TNE constitutes the driving force of market development and innovation in global higher education.

Developments in Regulatory and Policy Contexts

For TNE to fully benefit HEIs, their students, and local communities, a supportive policy framework is required. [Recent research](#) across multiple countries indicates continuous improvements in the regulatory and policy environment for TNE. A growing number of countries are liberalizing their legislative provision to encourage greater TNE activities. Examples of such changes over the past five years include:

- Egypt's [Law No. 162 Of 2018 On the Establishment and Organization of International Branch Campuses](#).
- India's [UGC Regulations to Offer Twinning, Joint Degree and Dual Degree Programmes with Foreign Higher Education Institutions](#) from 2022.
- Indonesia's [Regulation for International Universities in Indonesia](#) by the ministry for research, technology and higher education from 2018.
- Pakistan's [Policy for Pakistani Higher Education Institutions Offering Degree Programs in Collaboration with Foreign Universities](#).
- The [Transnational Higher Education Act in the Philippines](#) in 2019.

These five countries account for 23 percent of the world's tertiary education population, with over 54 million tertiary learners.

In addition to regulating TNE engagement, some governments fund and proactively support those types of TNE that benefit their youth. Examples of such government-led initiatives include:

- The creation of designated areas for international branch campuses, such as Egypt's [New Administrative Capital area](#), India's [Gift City initiative](#), and Indonesia's [Special Economic Zones](#).
- Funded schemes, such as those run in collaboration between the Philippines Commission for Higher Education and the British Council, e.g., [Joint Development of Niche Programmes through PH-UK Linkages](#) and [Access and Competitiveness through Internationalisation of Higher Education](#).

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Conclusions

An ever-growing number of HEIs have embraced TNE as one of their core activities. Both supply-side and demand-side factors continue to stimulate this trend.

Policy makers increasingly support such engagement by liberalizing their regulatory and policy frameworks. However, an area that continues to generate controversy is the government-backed elitist approach to international collaboration. Several countries have tied their regulatory TNE frameworks to international universities' performance in global rankings. It is not clear how well this provision serves the purpose of international collaborations. Similarly, at HEI level, the global engagement agenda and choice of partners are often limited to resource-related criteria that may disadvantage smaller but good-quality partner institutions overseas.

TNE generates substantial local impact and explicitly responds to the sustainable development agenda. For example, TNE has evolved to cater to the needs of atypical student populations, such as mature learners or those with work and family commitments, disabilities, or financial constraints. As a result, it has widened access to education for populations that might have been unable to access it otherwise. This significant contribution is underreported and often neglected in the public discussion about TNE. A dedicated online portal has been recently developed to capture this impact.

The recent market, regulatory, and policy developments indicate a phase in the TNE lifecycle where the emphasis shifts to quality, impact, and multilayered collaborations. With the right policy framework and partners, TNE engagement creates opportunities for universities to develop their global presence in an impactful and environmentally sustainable way. ▲

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