
A global framework for transnational education engagement

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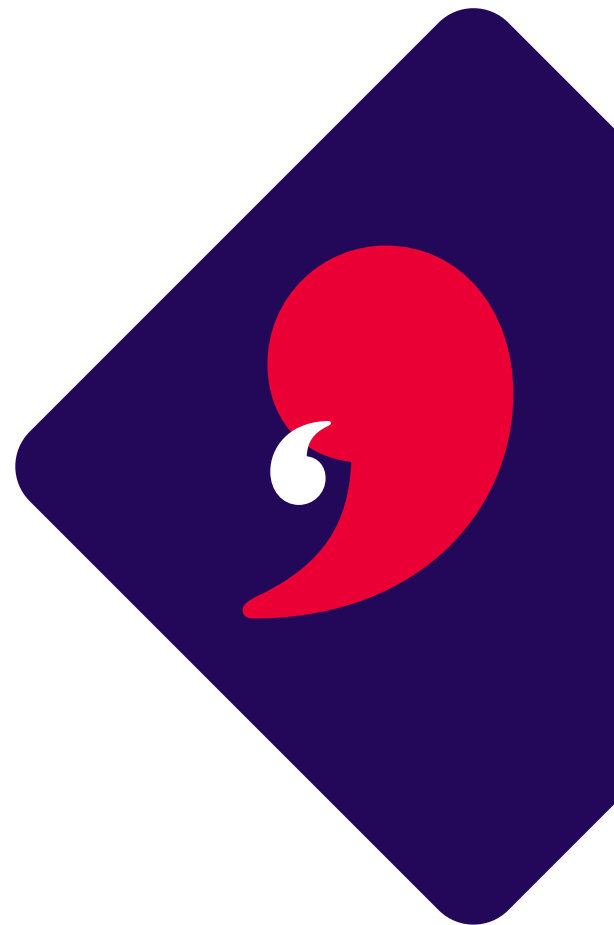
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1. Context

As the UK's cultural relations organisation, the British Council believes that education is a major vehicle for building connections, understanding, and trust between people in the UK and countries worldwide. An important part of its work in higher education is to promote and support global engagement through transnational education (TNE) partnerships that deliver equal benefits to the UK and partner countries.

In November 2023, the British Council launched its [Transnational Education Strategy](#)¹. This research draws on the British Council's knowledge and experience of working closely with overseas national and institutional stakeholders over several decades. The strategy is based on the collection of evidence on current global TNE approaches, local higher education contexts, and the local policies that shape higher education partnerships. It aims to further knowledge about TNE, advance research and contribute to a shared understanding of the global role and impact of TNE engagement.



1 <https://www.britishcouncil.org/sites/default/files/transnationaleducationstrategy.pdf>

2. Aim of the global framework for TNE engagement

Working with the Quality Assurance Agency for higher education (QAA) and Education Insight, the British Council has developed a Global framework for TNE engagement.

The purpose of the framework is to underpin the TNE strategy by analysing and describing national environments for TNE. Specifically, the framework aims to:

1. Facilitate TNE engagement globally, and further the understanding of the local context and educational priorities.
2. Develop a consistency of language and

better data to support global analysis and understanding of TNE.

3. Situate and position a country's TNE within the broader global landscape.

The development of the TNE framework draws on four main actions articulated in the British Council TNE strategy.

These actions draw on a partnership approach to TNE engagement. Table 1 shows how the framework supports the British Council's TNE strategy.

Table 1: British Council TNE strategy actions and TNE framework outputs

British Council TNE strategy actions	TNE framework outputs
Action 1: Contribute to better data and insight on TNE.	Output 1: Data collection with a view to building a time-series that allows for tracking TNE conditions over time.
Action 2: Contribute towards the creation of an enabling environment and promote the quality of TNE.	Output 2: Identification of factors enabling equitable TNE engagement.
Action 3: Contribute to a better understanding of the local context and facilitate a regulatory and operational environment to best support TNE partnerships.	Output 3: Better supporting and encouraging opportunities for TNE partnerships to deliver impact in local contexts.
Action 4: Support TNE to contribute to the transformation of local education systems and contribute to the SDGs ² .	Output 4: Articulation of the contribution of TNE to the SDGs, sustainable development and engagement, capacity building and equitable access to higher education.

² See <https://sdgs.un.org/goals>.

3. Methodological approach to the development of the global framework for TNE engagement

The global framework for TNE engagement aims to provide contextual information and data to guide the stakeholders who are interested in and responsible for the development of TNE.

Important considerations for the global framework are to:

- Reflect on the local context and the (educational) needs of countries.
- Serve as a resource that informs TNE partnerships.
- Be used as a vehicle by regulators and policymakers to communicate policy priorities and educational objectives.
- Identify likely future trends.
- Capture the local impact of TNE and its contribution to the SDGs.
- It should be sustainable and scalable – i.e., it should support the British Council’s aspiration to create a global consensus on TNE in which policymakers and higher education stakeholders will contribute to and use the framework.

To best achieve this, the data in the global framework is structured into two categories:

- I. Development of **quantitative** indicators that capture secondary data about:
 - a. The local context and its impact on education, and assess the socio-demographic conditions to engage in TNE.

- b. The scale of TNE. Initially, these indicators are based on UK TNE data. As data collections globally improve, the TNE framework will become more representative of global TNE.

- III. Primary data collection from local policymakers and regulators. This data captures the regulatory environment and national priorities for TNE, and is collected through the following:

- a. A TNE forum with national-level stakeholders from ministries of education, quality assurance agencies and equivalent bodies, and regulatory agencies. An online survey with national agencies, regulatory bodies and quality assurance agencies.
 - b. Semi-structured interviews with national stakeholders to best understand the priorities for TNE engagement and how the TNE framework can best support them.

We have outlined an infrastructure to facilitate these developments, sustain the primary data collection over time, and maintain the framework’s relevance. See the ‘Next steps’ section (Chapter 7) for details.

4. The TNE framework

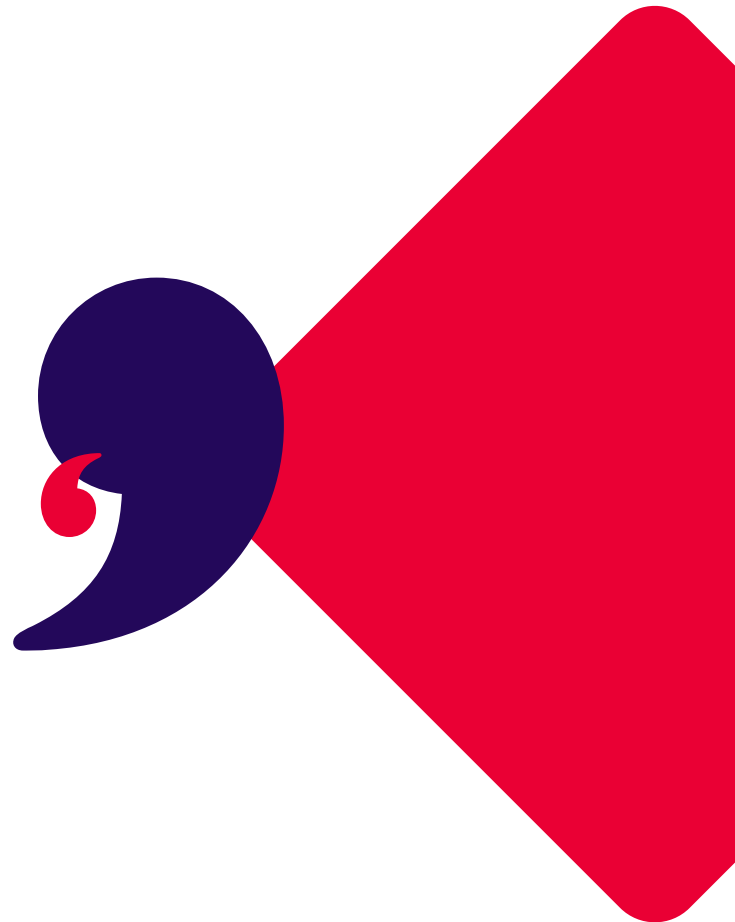
This section presents the conceptual TNE framework and details its main components. These are contextualised to show how they relate to the maturity of TNE in different geographies.

4.1 Conceptual development of the global framework for TNE engagement

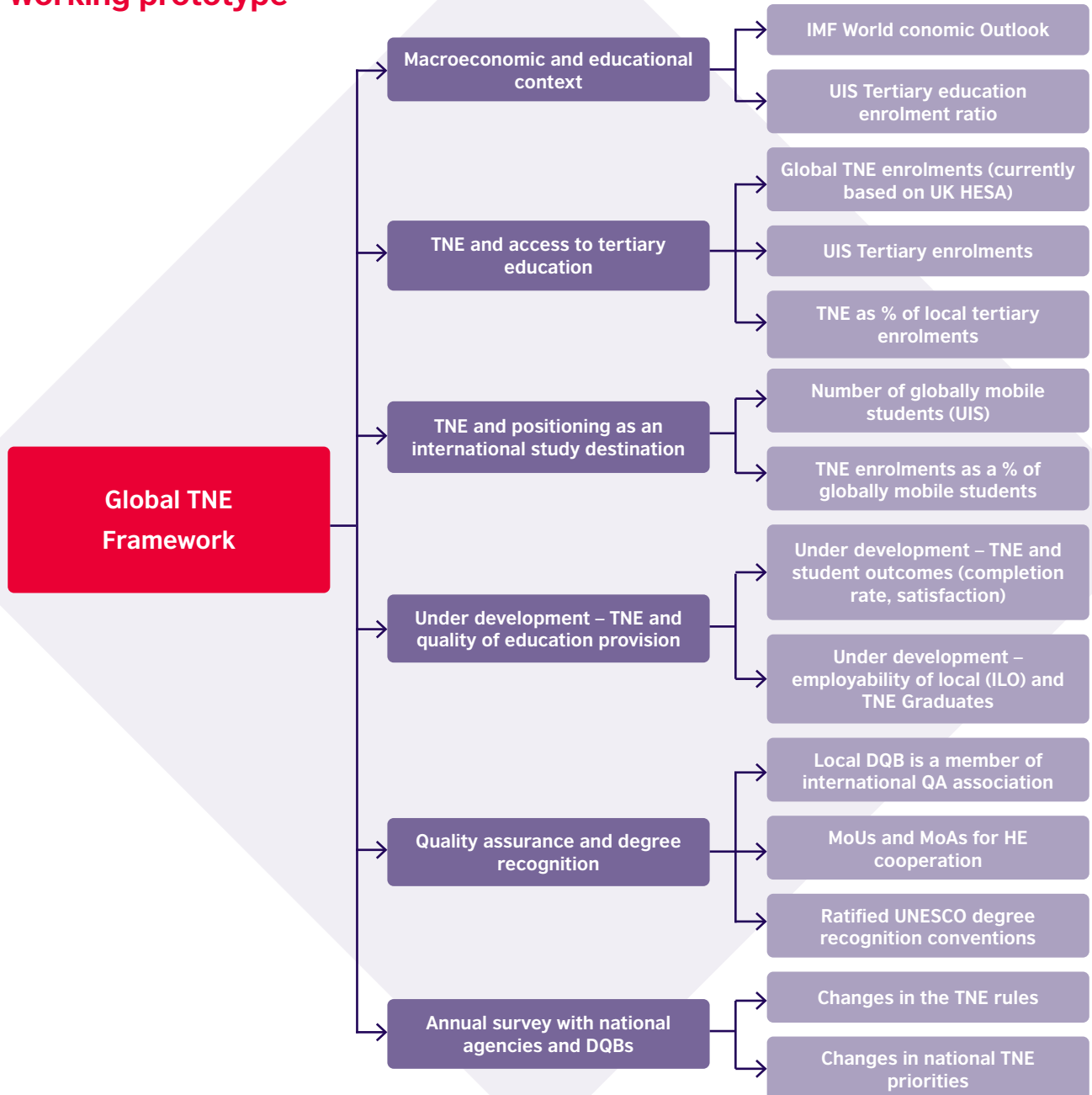
The global framework for TNE engagement draws on contributions from secondary and primary data sources. These are structured in the following categories:

- Macroeconomic and education context
- TNE and access to tertiary education
- TNE and internationalisation of local tertiary education
- TNE and the quality of local tertiary education
- Quality assurance and degree recognition
- Annual survey with local quality and regulatory bodies.

The detailed framework is presented below. It is a process reflecting the evolution of TNE engagement. This working prototype is likely to evolve and change, and new categories will emerge to reflect the new realities.



Global framework for TNE engagement: Working prototype



Glossary:

UIS	UNESCO Institute for Statistics
HESA	Higher education Statistics Agency
ILO	International Labour Organisation
MoA	Memorandum of Understanding
DQB	Designated Quality Body

Each component of the global TNE framework is detailed in the sections below.

4.1 Quantitative measures of the local education context

The global framework is designed to evolve over time to reflect the changing nature of TNE and how it adapts to respond to the local priorities. It offers a longitudinal perspective of the evolution of national educational systems. These developments are contextualised within the broader macroeconomic context.

This section focuses on secondary data collections that show how TNE is likely to contribute to local higher education (HE). It draws on statistical data collections and policy documents related to the regulation of tertiary education worldwide. It includes the following measures:

- Macroeconomic and educational context
- TNE and widened access to tertiary education
- TNE and internationalisation of education
- Quality assurance
- Capturing local TNE priorities.

4.1.1. Macroeconomic and educational context

Over the past decades, TNE has emerged from a side activity of international higher education and has become mainstream. While UK TNE activities date back to the 18th century, the first data collection was documented in 2007. Globally, most countries do not systematically collect such data. Even when the programmes require local

accreditation, countries' higher education data collections often do not capture the data on TNE programmes and enrolments.

The most complete datasets typically relate to international branch campuses (IBCs). Whether set up as independent entities or in collaboration with local institutions or investors, they are treated as local higher education institutions, and their activities are reported to the respective ministries of education or similar bodies.

The first notable expansion of TNE was after the East Asia currency crisis in 1997, when local currency depreciations significantly reduced disposable income and negatively impacted the number of scholarships for overseas study. At that time, Malaysia, Hong Kong and Singapore were among the UK's top non-EU source countries for international students. The limited affordability of the UK as a study destination meant that local options were in high demand. The currency crisis also contributed to the liberalisation of higher education in the region, including regulatory support for transnational education. An example of such support is the Malaysian government's invitation to the University of Nottingham to establish an overseas campus in the country, formally announced in 1998³.

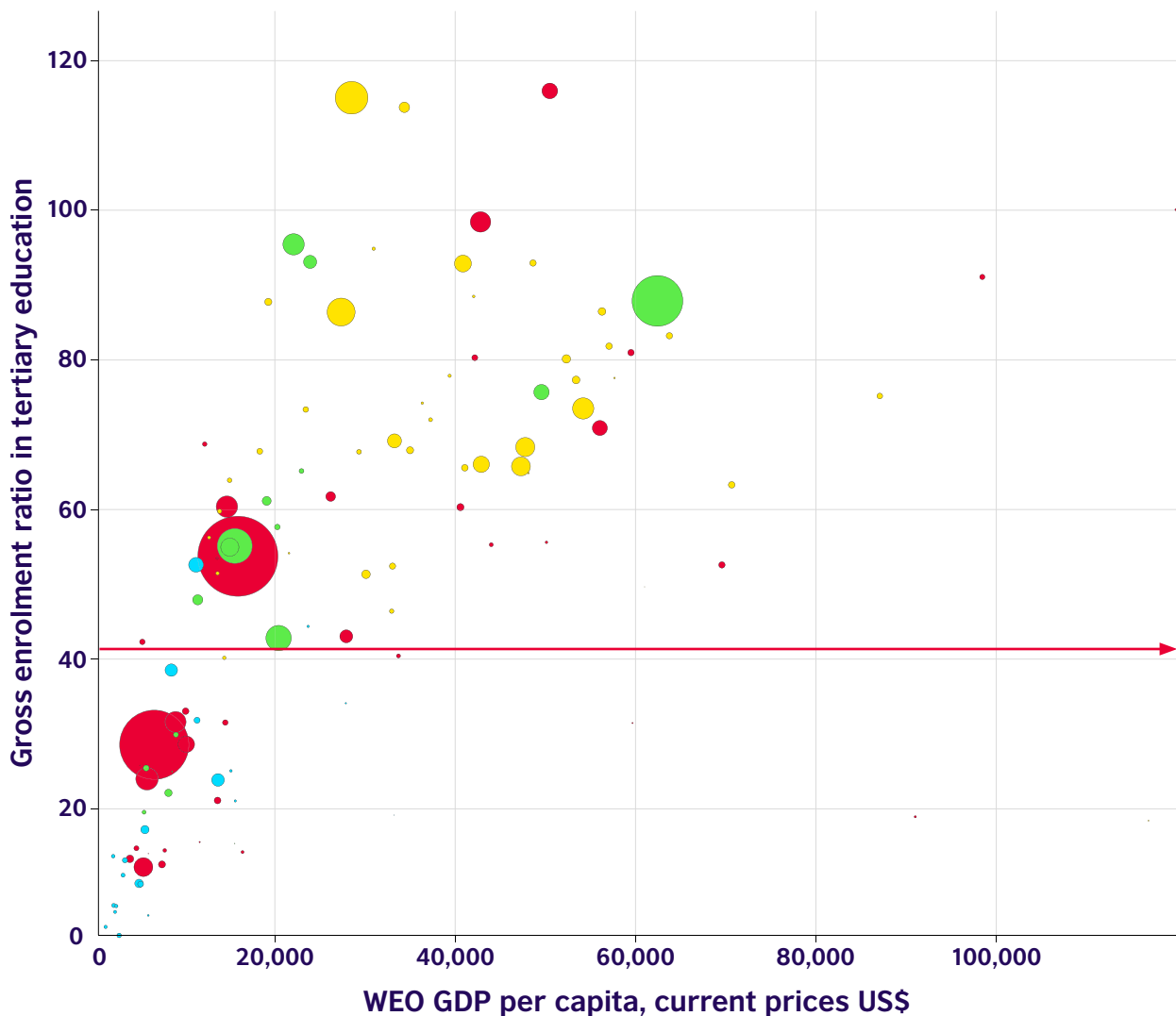
In many contexts, the development of transnational education activities has been guided by local demand for higher education. To close the gap between the demand for and supply of higher education, national government policies focus on expanding their domestic systems' capacity.

3 See www.nottingham.edu.my/AboutUs/History/MalaysiaHistory.aspx.

A range of macroeconomic and education indicators draw on previous research that shows a strong positive relationship between economic growth, measured by gross domestic product (GDP) per capita and local tertiary enrolments. Increases in the GDP per

capita have led to the expansion of domestic education provision over time. The **red horizontal line** in the chart below shows the world average gross enrolment ratio (GER) in tertiary education.

Economic growth and tertiary education enrolments by country, 2019



Source: This chart draws on the UNESCO Institute for Statistics data and the IMF World Economic Outlook (WEO).

The dots on the chart are the HE systems of different countries, the size of the bubble being proportionate to the number of tertiary education enrolments. China and India are the two largest bubbles. The colour indicates the continent of the respective countries:

- green is the Americas
- yellow is Europe
- red is Asia and Oceania
- blue is Africa.

Countries with GER below the world average of 40 per cent are likely to be preoccupied

with growing their HE capacity. TNE activities that involve widening access to tertiary education are likely to enjoy regulatory support.

One such example is India, where the National Education Policy, published in 2020, aims at 50 per cent participation in tertiary education in 2035 (India is illustrated as the large red bubble under the red line). Shortly afterwards, in 2022, the much-awaited regulations for academic collaborations between Indian and foreign higher educational institutions were released by the University Grants Commission (UGC)⁴. These were described as a positive development and ‘another example of Indian government’s serious intent to implement the vision of the National education policy 2020 to internationalise and support the Indian [higher education institutions] to improve in global rankings.’⁵

A sustainable expansion of TNE can be supported by a well-informed TNE regulatory framework that is transparent and clearly communicated.

4.1.2. TNE and wider local access to tertiary education

Across many countries, TNE has expanded alongside the growth of private education institutions. Recent examples where TNE engagement was encouraged through regulatory provisions aiming at the creation of an enabling environment include India and

Nigeria⁶. Both countries have ambitious higher education participation targets, and TNE can support achieving these.

For students, TNE can widen access to higher education. It extends the opportunity for underrepresented groups of students to obtain a higher education degree. TNE is often perceived as an affordable and cost-effective route to an overseas qualification compared with studying abroad. The British Council’s ‘Value of TNE partnerships’ report illustrates how TNE can widen participation in HE for underrepresented groups⁷. It shows how TNE helps overcome barriers to higher education for students from disadvantaged socioeconomic backgrounds, women, and underrepresented ethnicities.

This is achieved through initiatives like low-cost online programmes, partnerships with institutions serving disadvantaged communities, and scholarships. For example, Glasgow Caledonian University partners with organisations in South Africa and Bangladesh to offer programmes for low-income workers and women in rural areas. In Hong Kong and Singapore, TNE provides second-chance opportunities for students who missed out on traditional university placements.

4 See https://www.ugc.gov.in/pdfnews/4555806_UCG-Acad-Collab-Regulations.pdf.

5 See <https://opportunities-insight.britishcouncil.org/news/market-news/new-indian-transnational-education-guidelines-are-released>.

6 See ‘Academic collaboration between Indian and foreign higher educational institutions to offer twinning, joint degree and dual degree programmes regulations of 2022’, issued by the University Grants Commission. These regulations aim to streamline and facilitate collaborations between Indian and foreign higher educational institutions – see www.ugc.ac.in/. For Nigeria see www.nuc.edu.ng/wp-content/uploads/2023/12/GUIDELINES-ON-TRANSNATIONAL-EDUCATION-IN-NIGERIA1.pdf.

7 See British Council (2022), The Value of TNE Partnerships, https://www.britishcouncil.org/sites/default/files/value_tne_fullreport.pdf.

TNE can increase female participation in higher education, especially in regions where cultural norms restrict women from studying abroad.

TNE caters to diverse needs, including mature students, individuals with disabilities and refugees, by offering flexible learning options and specialised programmes.

4.1.3 TNE and internationalisation of education

Once demand pressures subside, the focus of TNE shifts from the quantity to the quality of education provision. It can fulfil other functions, such as internationalising domestic HE, improving international competitiveness and building a research profile of the local HE system. Many countries perceive TNE as a catalyst for internationalising their institutions and signalling the quality of domestic HE programmes for international students. Often, collaboratively developed courses are taught in English and appeal to local and global student audiences. Equally, greater cooperation between local and international faculty has a positive impact on research outputs, which also leads to improved performance in the university league tables.

Additionally, the presence of international institutions can attract foreign investment and boost local economies through the cultivation of local talent⁸.

TNE leverages the branding and reputation of the foreign universities involved in TNE as the host country grows its visibility as a destination for international students. This draws on partnerships between local and foreign universities, which can improve the quality of education. For instance, TNE partnerships facilitate the transfer of best practices in teaching, curriculum design and assessment between higher education institutions (HEIs). This process can help elevate the standards of HEIs in the host country and make them more competitive on a global scale⁹.

International partnerships play a significant role in faculty professional development and upskilling, the design of new programmes and aligning them with global standards¹⁰. Often, this is in response to the needs of local businesses, and the resulting education provision is more relevant and beneficial to local contexts. Such initiatives not only enhance the capabilities of local institutions but also ensure that they can sustain these improvements over time.

8 See <https://www.britishcouncil.org/education/he-science/knowledge-centre/transnational-education/local-impact-TNE-Europe>.

9 See <https://www.britishcouncil.org/education/he-science/knowledge-centre/transnational-education/value-transnational-education>.

10 For example, postgraduate programmes that aimed to develop local faculty were developed in the Philippines through a joint programme of the British Council and the Philippines' Commission on Higher education. See details at <https://www.britishcouncil.ph/tne/about>.

In addition to collaborative teaching, TNE often leads to joint research projects, which can significantly enhance the research output of local institutions.

4.1.4 Quality assurance of TNE programmes and degree recognition

This section captures national commitment to engage in the quality assurance process, and draws on two groups of indicators:

- National commitment to internationalise higher education through bilateral and multilateral agreements (e.g. memoranda of understanding and of agreement) for international cooperation.

- Monitoring the student experience and graduate outcomes of TNE students. This section is under development, and the framework will evolve as new data collected by national authorities is identified and incorporated (see Section 7).

4.1.5 International cooperation in higher education for quality assurance and degree recognition

This section considers the propensity of national agencies to cooperate internationally. This can be used to contextualise the environment further for the internationalisation of higher education in countries and attract support from policymakers.

At present, the following questions are considered as means to measure the commitment to international cooperation in higher education for the purpose of quality assurance and degree recognition.

Quality assurance and international practice	
Local designated quality body is a member of an international quality assurance association	Yes/No
The country has signed or ratified the UNESCO Convention for degree recognition (or any of the regional conventions)	Yes/No
Bilateral or multilateral memoranda of understanding (or memoranda of agreement)	Yes/No

4.2 Primary data collection on local TNE priorities

This section draws on primary data collections that capture government priorities for TNE. It also draws on changes in the rules for TNE worldwide.

Under this study, the following data collections took place:

- Quality and regulatory bodies that have responsibility for TNE were surveyed.
- The UK Quality Assurance Agency convened a partner forum with sister agencies. As part of the forum, several focus groups were facilitated to gauge participants' perceptions about the purpose and drivers of TNE in their home nation.

- Semi-structured interviews were carried out with quality and regulatory bodies to better understand the local HE context.
- Case studies were developed to highlight the local impact of TNE and how it responds to national priorities.

This study proposes that the survey with quality and regulatory bodies be carried out annually, to maintain an up-to-date record of TNE priorities and monitor regulatory changes. This will ensure the global TNE framework is current and that overseas stakeholders – governments and higher education institutions – can use it to gauge their TNE activities.

The survey was tested with the participants to ensure that the questions were simple and well understood, and to verify the relevance of the information collected.

The following questions were tested with the participants.

Primary research data collection from designated quality bodies	
Are inbound IBCs allowed?	Yes/No
Are inbound international programmes allowed?	Yes/No
Is online learning and teaching allowed?	Yes/Partly/No
Are there licensing accreditation requirements for TNE?	Yes/Partly/No
Were there regulatory changes in the past year?	Yes/No
What are the priorities for TNE in your jurisdiction?	Drop down menu of options

The global framework provides a baseline measurement against which TNE developments and changes will be benchmarked. The first iteration, therefore, generates the outputs for Year 0 and the baseline analytical findings. This study uses the 2021–22 academic year as the baseline year. Where data was available, time-series datasets were constructed to track the evolution of TNE.

4.3 Data limitations

There are significant data gaps in the secondary and primary sources of information. This study uses international data collections like the UNESCO Institute of Statistics, World Economic Outlook, World Bank and the UK's Higher Education Statistics Agency. However, some countries with limited statistical resources collect data through periodic surveys, which may take place every three to five years. There is limited information on global TNE activities beyond those of UK institutions, and some data from Australia and Germany. Given the growing prominence of the recognition of degrees and qualifications acquired through TNE, a growing number of countries are regulating the TNE activities of international universities. Sometimes, the data gaps can be significant and may lead to policy decisions made on assumptions, not data.

At a national level, there can be significant limitations to TNE data (sometimes including no mandatory capture of TNE in either the originating or the host country), inconsistent definitions of TNE, regulatory differences from country to country, and varied levels of understanding relating to all these points.

Mindful of these limitations, future collections and surveys will reflect on the lessons learnt and aim to close the gaps in the collective understanding of TNE, which is thereby expected to improve.

5. Analytical findings from the primary data collection

This section draws on policy developments in the regulation of TNE, and summarises the main analytical findings from the following qualitative data collections:

- QAA International Partner Forum
- online survey with quality and regulatory bodies.

Building on this, the British Council may look to host a Global TNE framework forum on an annual basis.

5.1 Analytical findings from the QAA Partner Forum

An aim of the global framework is to help situate UK TNE within the global landscape and identify future trends in TNE.

QAA's International Partner Forum was held in November 2023 in partnership with the British Council.

The forum brought together decision-makers from funders, regulators, and partner quality bodies worldwide, along with British Council colleagues from international offices, to discuss what frameworks exist to facilitate high-quality partnerships between higher education institutions in different countries.

Key areas of focus for the forum included the importance of TNE in different jurisdictions, the varying functions of TNE in countries and territories around the world, policy changes that have impacted the growth of TNE, and

data being collected on TNE in partner countries.

The forum was attended by stakeholders in the following territories:

- Bangladesh
- Chile
- China
- Cyprus
- Ghana
- India
- Kuwait
- Malaysia
- Mauritius
- Pakistan
- Sri Lanka
- Taiwan
- Ukraine.

5.1.1 Drivers for TNE

It is important to note that perspectives shared during discussions are framed by the stage of TNE development. Countries and territories with a more mature TNE market often experience different levels of awareness and engagement, and provision usually fulfils a different function compared with locations where TNE is new or smaller. Equally, several highly context-dependent drivers for TNE were identified during discussions.

TNE can play a crucial role in bridging the gap where supply is insufficient to cover demand. Similarly, TNE can support the diversification of local provision, supplying courses that are not available locally.

TNE can also play a strategic role at institutional and country level. It can be a very important pillar of institutions' internationalisation strategies. TNE partnerships facilitate collaboration with other institutions globally and open doors to broader cooperation, such as research and student and staff mobility.

One of the participating agencies in the forum signalled that the internationalisation of higher education would play an essential role in new accreditation standards that have been developed. Institutions with greater levels of internationalisation would achieve higher scores. This can act as a TNE driver, with institutions searching for international partnerships to enhance their domestic accreditation.

At a national level, TNE is an essential component of a country's strategy to become an education hub and to draw in international students from other countries. TNE partnerships can enhance the quality of local provision and positively contribute to the appeal of local HE.

5.1.2 Challenges and opportunities in TNE

Several challenges restrict the growth of TNE. Many of these are also opportunities, if they can be overcome.

Local perception of TNE degrees is one such challenge, which is often linked to the maturity of the TNE market – in some locations, usually where TNE is less well established, it is not widely understood as a study route

by employers, parents, and students. This means students are less likely to choose TNE degrees, as they do not have the status or value that students are looking for compared with domestic provision or studying abroad, or they are unaware that this is an option. Awareness raising can, therefore, play an essential role in overcoming this challenge. Through engaging with employers, parents, and students, stakeholders can elevate the profile of TNE and make it a study route of choice. This goes together with increasing demand and growing the market overall.

However, some harder barriers have a significant impact, such as jurisdictions where TNE degrees are not recognised for government and other public sector jobs. It is essential to ensure that TNE provision is of high quality, no matter how and where it is delivered. Some locations report that overseas partners are not always fully compliant with local accreditation requirements, which can impact the local recognition of TNE degrees. This can feed into the perception that TNE degrees are of lower quality, which may affect demand. Sometimes, local universities can see TNE as competition and, as in one case raised at the forum, will actively prevent TNE from growing. As these institutions compete for students, there are concerns that the market might become over-saturated.

Other challenges related to online learning. Degrees delivered fully online are often not recognised. The pandemic has brought many changes in this space, such as legislative changes to allow hybrid delivery. Visas for academic staff are another barrier restricting the growth of TNE, with immigration rules often not conducive to enabling flying faculty, and academics from some countries and territories unable to access visas at all.

Partnerships are essential for the successful delivery and growth of TNE. However, establishing long-term, sustainable and equitable partnerships can be challenging. At the partnership forum, a country with successful TNE partnerships over several years stated that its focus was shifting towards progressing partnerships beyond teaching. Multifaceted partnerships that involve research and mobility as well as teaching and delivery can often be long-lived.

Another takeaway was that TNE can often be more accessible in countries that are linguistically, economically, or culturally closer to the originating country. This highlights the challenge that intercultural communication and language barriers can exert on TNE and partnership growth.

5.1.3 Policy changes

Another area of focus during the QAA International Partner Forum was the role that policy changes can play in facilitating TNE. It was noted that there is often a disparity between the announcement and implementation of policies. This gap can be relatively wide, with governments setting out political ambitions but failing to create the enabling environment to support the policies. Similarly, policymakers can often be disconnected from the market and what

is required to support market growth. Many countries and territories are ambitious to become education hubs, serving neighbouring countries and beyond. However, these ambitions are not fully realised as policies fail to consider the broader cross-governmental changes needed to support this aim. For example, a more open approach to visas and immigration is generally required to grow as an education hub welcoming international students and faculty.

Interestingly, it was also noted that policy and regulatory change can often be driven by the sector rather than the government, with institutions taking it upon themselves to develop partnerships and internationalise, influencing government decisions and policymaking. Indeed, some jurisdictions have a robust regulatory framework for TNE, and others have no framework at all – and the sector itself can frequently drive these changes.

6. Using the TNE framework to better understand the local TNE context: Emerging themes

This section applies some of the early analytical findings of the education and macroeconomic indicators. It uses publicly available data to examine the state of global tertiary education, and attempts to capture the impact of TNE. It revisits the categories of the global framework for TNE engagement, discussed in Section 4, and identifies areas of impact. We use case studies methodology to evidence impact, which include the following:

- Widened local access to higher education (case study on Sri Lanka).
- Enhanced quality of higher education (case study on Vietnam).
- Supporting internationalisation of higher education (case study on Dubai).
- The changing role of TNE over time – a dynamic perspective (case study on Thailand).

6.1 TNE and widened local access to tertiary education

The International Higher Education Commission report on TNE shows that enrolments in tertiary education will increase by 30 million by 2035¹¹. This growth will be mainly attributed to countries in South Asia, such as India and Pakistan; and also some of Africa's largest countries – Nigeria and Ethiopia – where the GER is approximately 12 per cent.

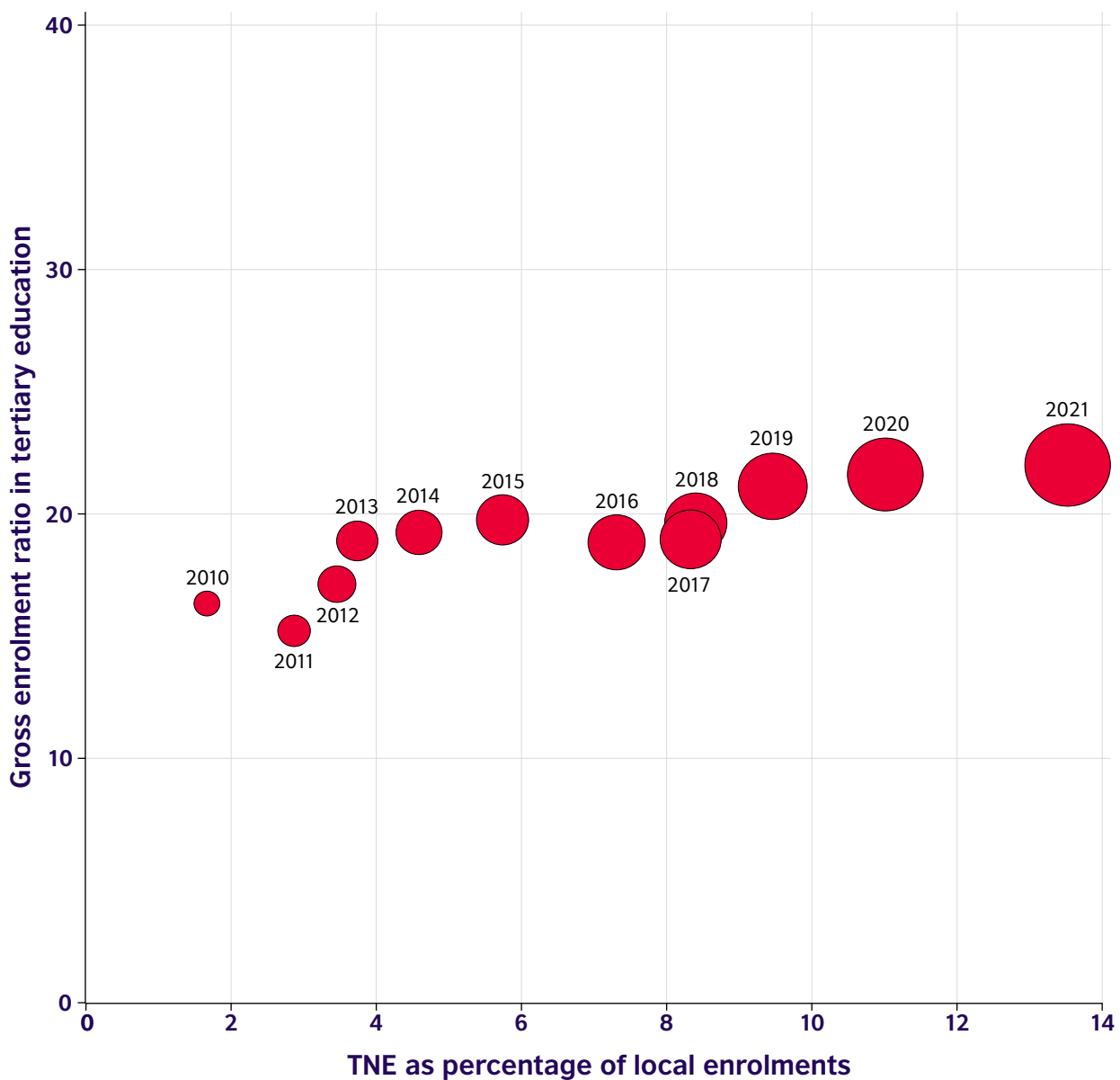
The case study below draws on the expansion of TNE in Sri Lanka and compares it with the growth in the domestic higher education system. The rapid expansion of TNE has raised concerns about whether the quality of education was maintained.

11 See https://ihecommission.uk/wp-content/uploads/2023/12/IHEC_TNE-report_13_12_2023.pdf.

The chart below shows how TNE has expanded in Sri Lanka – the size of the bubble signifies the number of enrolments, the horizontal axis shows TNE as a percentage of local tertiary enrolment, and the vertical axis shows the gross enrolment ratio in tertiary education. The bubble chart shows how TNE as percentage of local enrolments has changed

between 2010, when it was 2 per cent, through to 2021 (13.5 per cent). The chart shows that while GER is relatively unaffected over the past decade, TNE has absorbed the increases in demand for tertiary education. As a result, its percentage of local enrolments has increased by almost sixfold.

The expansion of TNE in Sri Lanka: TNE as a percentage of local enrolments vs gross enrolment in tertiary education 2010 to 2021



Addressing unmet demand in Sri Lanka through TNE

Author: Pat Killingley with contributions from Hamzi Haniff, Education Programmes Manager, British Council, Sri Lanka, and Gamindu Hemachandra, Chief Academic Officer, Asia Pacific Institute of Information Technology Sri Lanka, Honorary Secretary, Sri Lanka Association for Non-State Higher education Institutes.

Case Study

The lack of capacity to meet student demand in its state universities is a major challenge for Sri Lanka – and the situation has grown markedly worse over the last two decades. While the country has a secondary school enrolment rate of 99 per cent and one of the highest literacy rates in South Asia, the GER for state sector higher education is only 9.2 per cent. The demand for places has grown significantly, but this has not been matched by a corresponding growth in the state university sector. Undergraduate admissions increased from 11,805 in 2000 to 43,568 in 2022. However, the number of admissions as a percentage of students satisfying the minimum criteria for university admission only increased from 13 per cent to 25 per cent.

Currently there are 20 state universities, with a total enrolment of 156,000 students on undergraduate and 52,000 students on postgraduate programmes (including 33,000 students enrolled in the Open University of Sri Lanka)¹². In 2022, only 43,568 (25 per cent) students were selected for admission to state sector universities out of some

170,000 who qualified for university entrance. There is little immediate prospect of increased capacity in state universities. In 2020, the former Chairman of University Grants Commission (UGC) commented that ‘the state sector [will] not be able to cater to the shortfall in university places in the foreseeable future.’¹³

As a result, there has been exponential growth in the non-state higher education sector. There are over 70 non-state universities with an estimated annual enrolment of 30,000 students. The private secondary education sector produces more than 6,000 London A-Level qualified students per annum. The British Council estimates that nearly 29,000 students study overseas annually and another 60,000 engage in various type of courses and academic programmes mostly delivered through TNE by the private higher education sector¹⁴. More than 20 private HEIs are offering local degrees approved by the Ministry of Higher education or UGC, and more than 50 offering TNE provision with foreign universities.

TNE has been actively encouraged by

12 See https://www.ugc.ac.lk/index.php?option=com_content&view=article&id=2490%3Asri-lanka-university-statistics-2022&catid=55%3Areports&Itemid=42&lang=en.

13 https://www.britishcouncil.lk/sites/default/files/transform_sri_lanka_research_report_final.pdf.

14 See <https://opportunities-insight.britishcouncil.org/blog/growth-of-sri-lanka%E2%80%99s-private-higher-education-sector>

Addressing unmet demand in Sri Lanka through TNE (continued)

Case Study

the government and has a long history in the country. UK vocational and professional qualifications grew from the 1970s. Current estimates point to around 10,000 students enrolled on Pearson BTEC Higher National Diplomas, plus significant numbers registered on study programmes leading to Chartered Institute of Management Accountants, British Computer Society Chartered Institute of Marketing and Association of Chartered Certified Accountants, UK qualifications. The University of London and Manchester Metropolitan University began offering distance education programmes and franchised degrees respectively in the 1990s. UK TNE provision now accounts for 11 per cent of Sri Lanka's provision, with over 50 UK HEIs offering both top-up and full degrees through franchise arrangements¹⁵. There are also between five and eight Australian HEIs offering TNE with local institutions, at least one Malaysian university, (Management and Science University,) and one Indian university (Manipal University).

The Sri Lankan government continues to strongly endorse TNE as a way of

meeting unmet student demand and also of developing a highly qualified workforce. IBCs and partnerships between foreign universities and local providers are seen as an important tool in Sri Lanka's economic recovery plan¹⁶. The government's commitment is evidenced in recent plans to attract a foreign university to set up in Colombo Port City¹⁷. In February 2024, plans were also revealed to establish three IBCs – the Indian Institute of Technology Madras in Kandy, and others from the USA and the UK¹⁸.

A recent British Council report (August 2024) notes the government's commitment to incentivise and support a growing and more robust TNE sector¹⁹. This includes developing a coherent quality assurance system and better data collection. The report highlights TNE's major role in building the capacity of Sri Lanka's higher education sector, enabling it to meet the demands of students and employers and to contribute to the economic recovery of the country.

15 See chart showing GER and TNE in Sri Lanka.

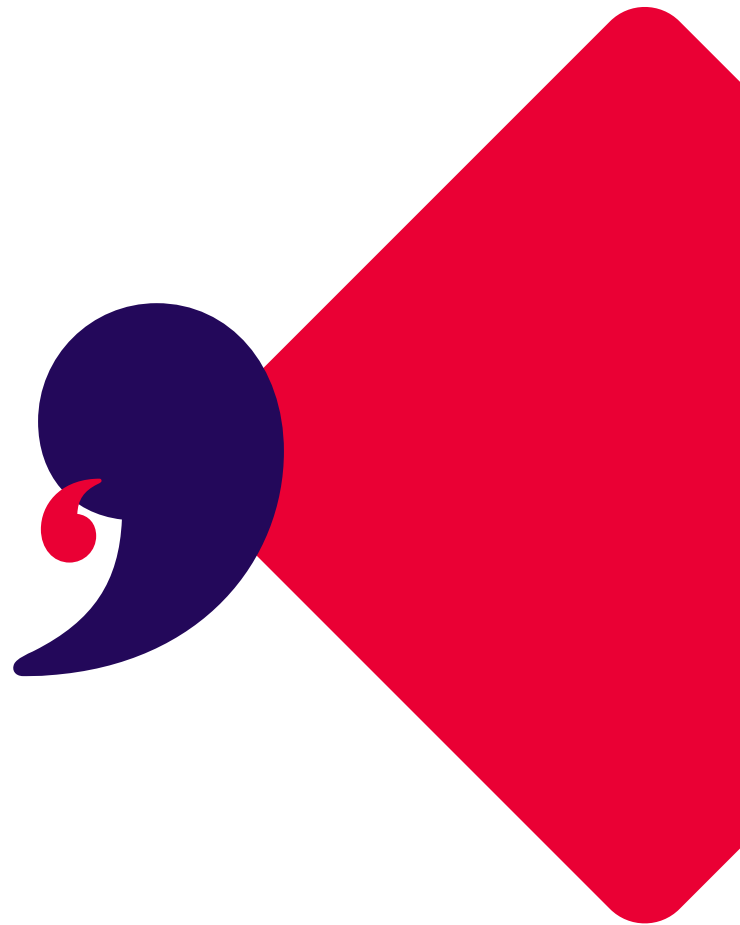
16 See <https://www.hesa.ac.uk/data-and-analysis/students/where-from#tne>.

17 See <https://www.orfonline.org/expert-speak/budget-2024-sri-lankas-road-to-economic-recovery>.

18 See <https://asianmirror.lk/focus/item/36620-three-international-universities-to-start-operations-in-sri-lanka-state-minister-unveils-ambitious-plans-to-transform-higher-education>.

19 See <https://www.tneimpact.org/>.

Another case study focuses on Pakistan. It provides a strong example of how TNE contributes to national priorities for higher education. While the environment is complex, and the primary focus is on widening access to education, TNE plays a role in internationalising higher education provision, strengthening its quality, and supporting the capacity building of domestic institutions. One of its most prominent roles is widening access for underrepresented student groups. This is documented in a case study by the Millenium Universal College and its partnerships with overseas universities.



A holistic approach to widening participation through TNE in Pakistan

Author: Eduardo Ramos

Case Study

In recent years, Pakistan has witnessed a significant transformation in higher education. With a GER of just 9 per cent, Pakistan is the third largest country by university age population (18– to 22-year-olds). Despite significant progress, the country still lags in certain human development index indicators, such as gender parity (second lowest globally at 0.0679). There are significant challenges in access and gender disparity that TNE could contribute to improving.

The launch of a revised quality assurance framework, 'Pakistan Precepts, Standards and Guidelines for Quality Assurance in Higher Education (PSG-2023)', and later on the development of a policy on Transnational Education reflect a strategic vision focused on quality enhancement, internationalisation, and economic development²⁰.

The Pakistan regulator, the Higher Education Commission, outlines four main drivers in the development of TNE policies:

1. TNE policies are driven by the desire to **internationalise** the higher education sector, providing students with exposure to diverse perspectives and fostering a globally competitive workforce.
2. TNE is seen as a means to bring international best practices to the local academic landscape, elevating the overall **quality** of education.
3. Collaborations with foreign universities can contribute to **capacity building**, allowing for the expansion of educational opportunities without compromising on quality.
4. TNE policies aim to attract foreign investment in the education sector, with partnerships being viewed as potential contributors to **economic growth** and innovation.

²⁰ The preparation of the case study involved referencing various documents, including PSG-2023 and other pertinent materials. Additionally, it was facilitated by leveraging advanced language model technology.

A holistic approach to widening participation through TNE in Pakistan (continued)

Case Study

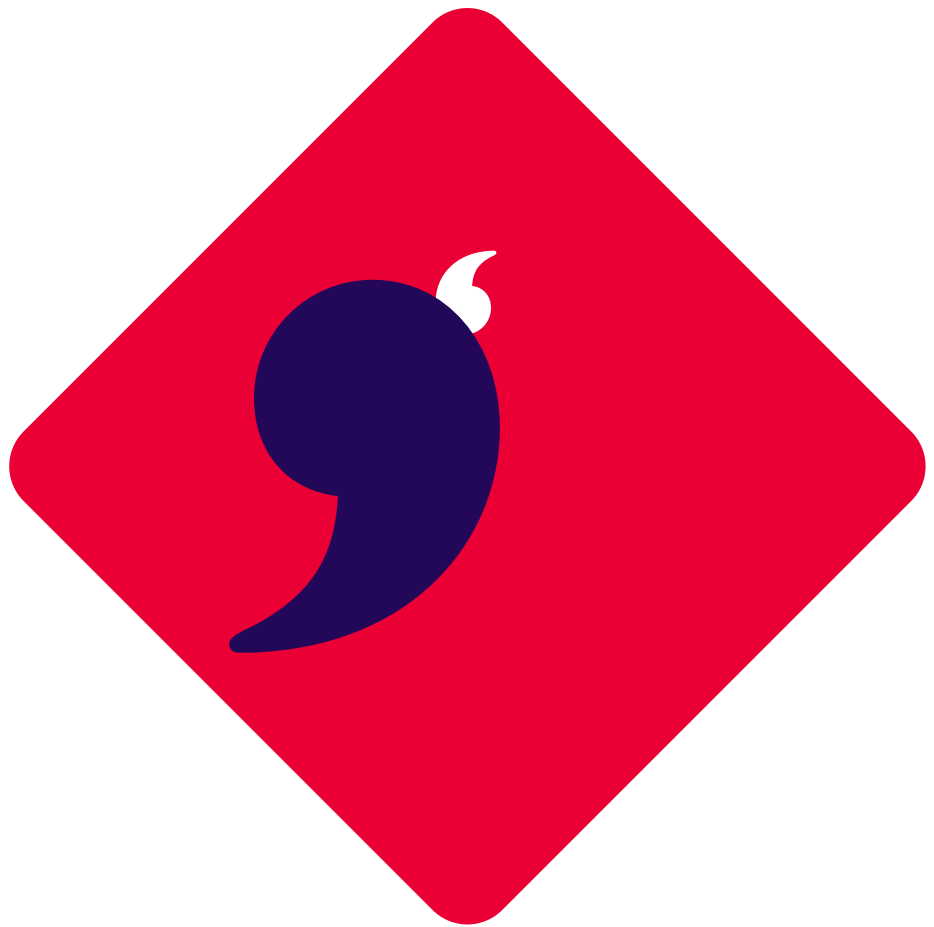
Interestingly, widening participation among underrepresented groups (notably women and girls) and employability are not explicitly mentioned by authorities as drivers. There has been a marked growth of validated and franchised provision operated in partnership between UK universities and local (private) providers (a 19 per cent annual increase to 10,065 students in 2021–22), but it is unclear whether this has led to the rise in total GER, or more importantly in participation among demographic groups traditionally excluded from higher education by a protected characteristic.

Meanwhile, authorities are mainly concerned with the quality of provision in TNE and with ensuring a level playing field for local and international institutions, arguably showing a degree of resistance from local providers. For instance, a 'no objection' certificate is required for local providers but not for overseas institutions wishing to operate in Pakistan.

Authorities seem generally aware of the underlying tensions between protectionist policies and the benefits of high-quality TNE, and their approach is to provide public reassurance that the investment in education is of high quality and enhances rather than detracts from local providers.

6.2 The role of TNE in enhancing quality

Once the main pressures on the capacity of the higher education system are resolved, the primary focus of TNE shifts onto other functions, such as strengthening the quality of higher education provision. An example of this is provided by Vietnam, where participation rates in tertiary education are now above the world average of 40 per cent.



Enhancing quality through TNE in Vietnam

Author: Eduardo Ramos

Case Study

Vietnam's GER increased from 29 to 41 per cent in a decade, and UK TNE has been developing there since the 1990s. During the period from 2009 to 2017, 531 TNE higher education programmes were legally approved in Vietnam. At present, the UK has the largest number of partnerships, with 101 programmes in place, followed by the USA, with 59 programmes. There is continuous growth in UK TNE programmes in the country; 80 per cent of TNE students in Vietnam were studying as part of a collaborative provision arrangement in 2020–21. This number has increased by 61 per cent from 2,515 in 2018–19 to 4,050 in 2020–21. Franchised degrees are the main form of transnational education partnership in Vietnam.

While the government is keen to expand TNE, its success has been limited to partner-supported programmes. Significant regulatory barriers have prevented the growth of online provision and IBCs. Expanding access and TNE follow reforms to promote internationalisation and grant autonomy to higher education providers. Decree No. 86/2018/ND-CP introduced a framework for establishing and approving joint programmes with foreign institutions, mandatory accreditation

for Vietnamese higher education institutions, and regulations for online and blended learning.

TNE students are attracted to a modern study style and the opportunity to study part of their programme in the UK. This provides a cost-effective means of acquiring a UK degree. 28 per cent of all Vietnamese entrants to first-degree programmes in the UK started their course in Vietnam and then articulated to complete their degree in the UK²¹.

The main challenges are to improve the quality of provision to respond to a rapidly growing economy. Capacity building and quality enhancement are the main drivers for allowing and incentivising international TNE partnerships. However, some policymakers perceive a mismatch between what the market is delivering, and the development needs of the country.

21 See https://www.britishcouncil.org/sites/default/files/transnational_routes_to_on-shore_uk_he_study_-_2020-10-23_final_v2.pdf.

Enhancing quality through TNE in Vietnam (continued)

Case Study

The issues indicated by authorities include:

- Partnerships are excessively driven by financial motives, leading to choices based on short-term rather than sustainable benefits.
- The discipline mix is concentrated in easily scalable subjects such as economics, business and information technology, which leads to market saturation and recruitment issues in some cases.
- Research-intensive universities in developed countries tend to be less interested in setting TNE programmes, and when they do, their standards and cost may be difficult for Vietnamese providers to match.
- Finally, given recent reforms introducing institutional autonomy, providers have yet to implement independent internationalisation strategies.

In sum, in Vietnam policy reforms show a clear commitment towards institutional autonomy and quality education, but they are coupled with issues at the implementation level, including financial (cost and motivation), social (subject demand and language proficiency), and positional (relative perceived prestige of partners). This demonstrates that quality enhancement is a long-term process that requires buy-in from a diversity of stakeholders beyond policymakers and institutional leaders.

6.3 The role of TNE in supporting International Higher education hub aspirations

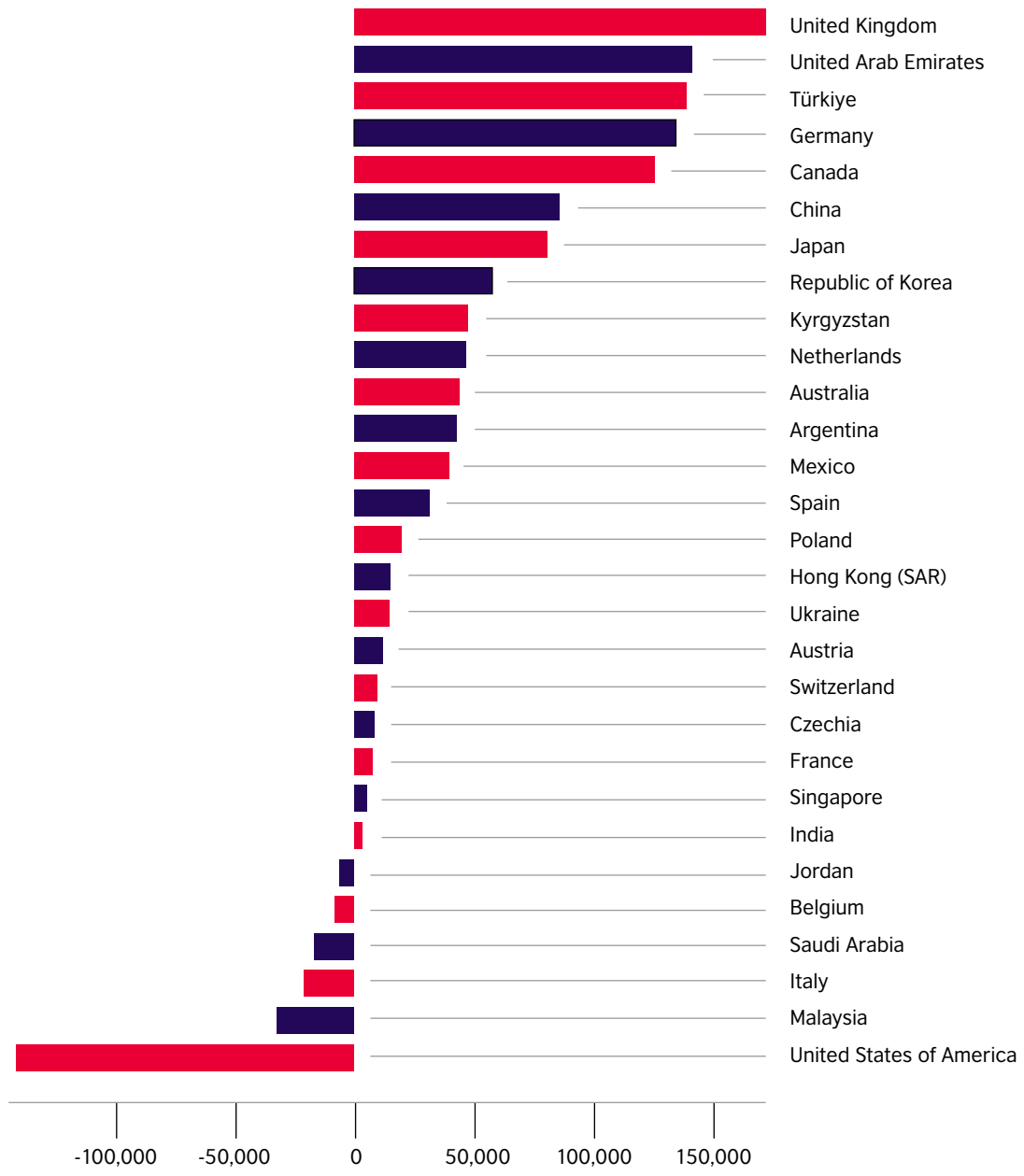
Most of the UK's TNE provision is in the English language. This supports the quality oversight of education provision and ensures there is a good pool of external examiners to ensure that standards are consistently maintained. While this has enhanced the quality aspect of TNE, English-taught programmes can

be attractive to students beyond the host country's national borders.

While the number of globally mobile students has increased significantly over the past three decades, the dominance of the main global study destinations of the USA, UK, Australia, Germany and France has been challenged by the emergence of new players.

The chart below shows the countries with the largest market share of internationally mobile students at the tertiary level.

Growth in inbound international enrolments 2016–2021

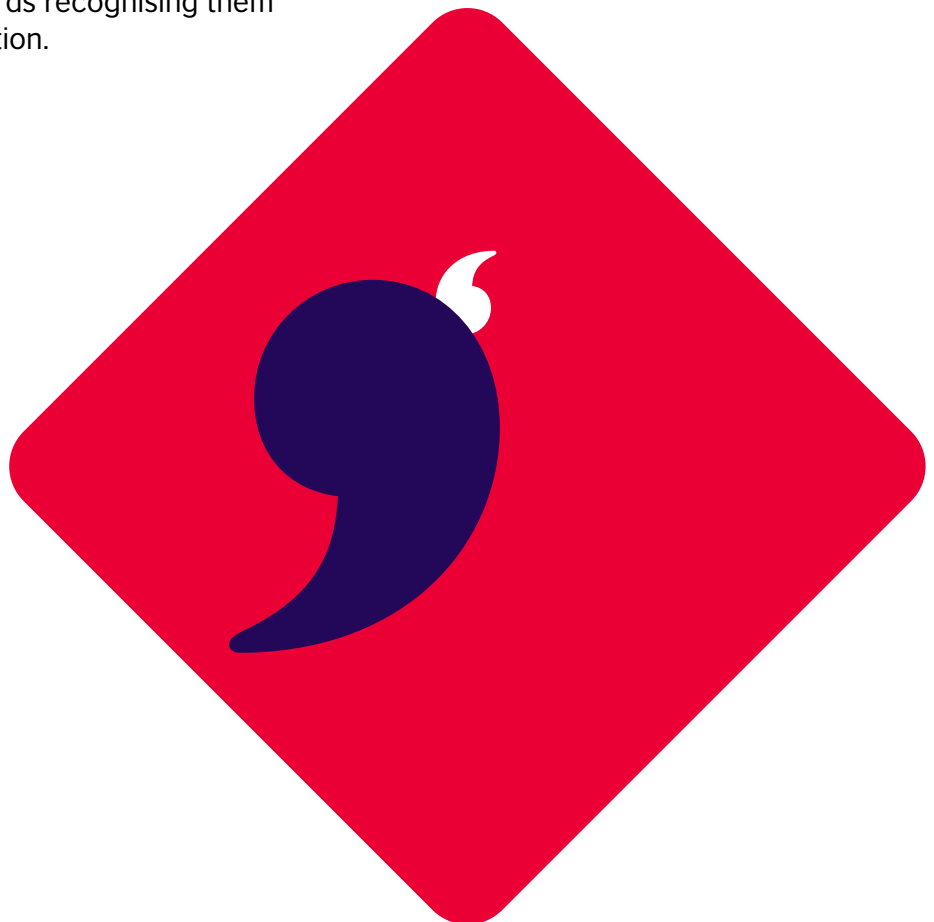


Source: Analysis of UNESCO Institute for Statistics data on internationally mobile students. Data extracted on 12 Dec 2023 at 16:37 UTC (GMT) from UIS.Stat

However, considering countries' growth in international students shows that the UK had the most significant increases. These are mainly attributed to the country's open borders during the pandemic and the reintroduction of post-study work rights.

The UAE marked the second largest absolute increase over the studied time – it grew its student numbers by 138,512, representing a 179 per cent growth.

TNE also accelerated shifts in student mobility, such as increases in international student mobility within geographical regions and preferences for shorter and more flexible ways of study. TNE offerings continue to expand and enable HEIs to reach students who, for various reasons, cannot travel to the UK. This broader adoption of online learning and TNE has been facilitated by regulatory and policy shifts towards recognising them as legitimate forms of higher education.



Development of a global education hub through TNE in Dubai

Authors: Nitesh Sugnani, Knowledge Human Development Authority (KHDA), and Janet Ilieva, Education Insight.

Case Study

The rise of the UAE to become one of the world's largest host destinations for higher education is evidenced by the 344 per cent growth in its international students since 2011. Over the past decade, the number of international students in the UAE increased from 48,653 in 2011 to 215,975 in 2020, ranking it ninth behind Japan and China. Dubai, one of seven emirates that form the UAE, is a prominent example of a talent hub and one of the world's highest concentrations of IBCs.

Dubai's expatriate population accounts for approximately 87 per cent of the overall population. Almost two decades ago, policymakers became aware of the net loss of talent if Dubai did not cater to the needs of its international workforce. Liberalisation of international education provision became a policy preoccupation and a top priority for the KHDA, Dubai's regulatory body for the quality of the overall provision of education.

In the early 2000s Dubai adopted an economic diversification strategy to reduce dependence on oil's contribution to its GDP. This started with the development of economic free trade zones to attract direct foreign investment. Dubai Internet City and Dubai Media City were among the first free trade economic zones set up, for the IT and media sectors respectively. This was followed by Dubai Knowledge Park (formerly Dubai Knowledge Village) in 2003. This was the world's first dedicated free trade zone for education purposes.

Free zones enable ease of doing business, 100 per cent foreign ownership and other exemptions from federal regulations. A second free zone for education, Dubai International Academic City, was created in 2006.

Public higher education in the UAE is governed and regulated by the Ministry of Education. All federal universities and UAE-based institutions are licensed by the ministry and accredited by the Commission for Academic Accreditation. However, private higher education institutions are regulated by each emirate. In Dubai, KHDA regulates all institutions in the free trade zones. There are a total of 38 higher education institutions in the free zones in Dubai, of which 33 are IBCs from the UK, USA, Australia, India, France, Germany, etc.

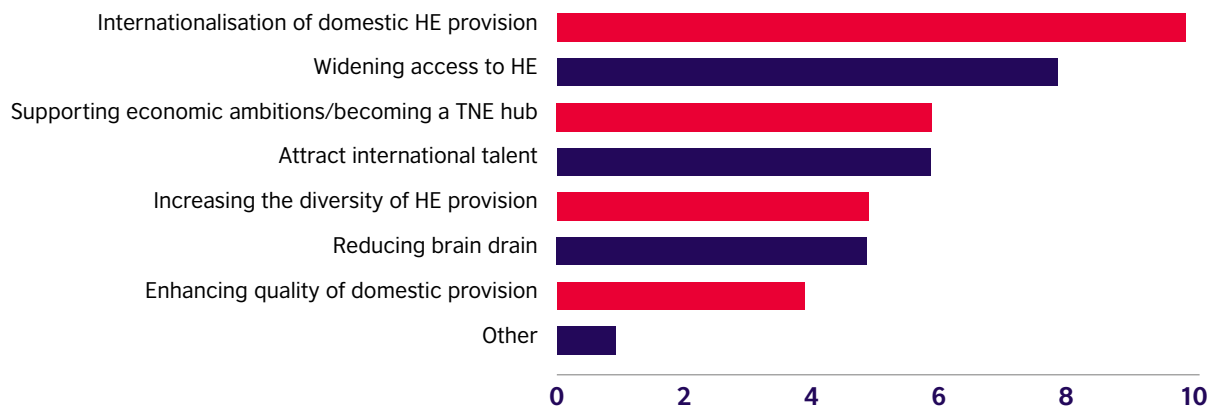
Free zone institutions can be fully owned by the parent institution and they can repatriate profits to the home country. Institutions outside the free zones are required to have a local (UAE-wide) partner that will own a majority stake in the business (51 per cent). The UAE has recently introduced corporate tax, which will apply to all institutions within and outside the free zones. Education institutions had no tax obligations until 2023.

Dubai hosted over 34,000 students at its 33 IBCs in 2023, all located in the free zones. Dubai also aims to increase the proportion of international student enrolment from the current 33 per cent to 50 per cent by 2033.

Relatedly, the internationalisation of higher education is another area that is very popular with policymakers. The UK QAA convened a partnership forum with sister organisations in May 2024, where participants were asked about the role of TNE in their country or territory. 19 organisations took part. The most popular responses, as indicated by the chart below, are the following:

- The internationalisation of HE was the top priority stated by 10 out of 19 agencies. Becoming an international TNE hub was also mentioned.
- This was followed by widening access to HE and strengthening the quality of education provision.
- Attracting international talent and reducing brain drain also attracted votes.

What purpose does TNE serve in your country/territory?



Source: QAA Partner Forum, May 2024.

The QAA partners were asked an open question about the purpose that TNE serves in the respective country or territory. Similarly, internationalisation of higher education attracted most mentions, followed by the quality of education provision. The free text provided by the participants is summarised in the word cloud below.



Source: QAA Partner Forum, May 2024.

6.4 Dynamic view of TNE and its changing roles over time

This section studies TNE over the decades and shows how its priorities have evolved over time to cater to the needs of the maturing higher education system. The case study in

this section focuses on Thailand. It tracks TNE back to its roots in the 1990s, in response to the liberalisation of higher education in the country. As HE in Thailand evolved, TNE priorities reflected these developments.

TNE in Thailand

Authors: Dr Pred Evans, Assistant Dean for International Affairs and Director of BA in Social Policy and Development International Programme, Faculty of Social Administration, Thammasat University, Thailand.

Case Study

TNE in Thailand is gradually expanding, shaped by three pivotal periods in its history.

The neoliberal reforms of the 1990s and the National Education Act of 1999 transformed the higher education sector. Decentralisation, competitive market forces and the privatisation of higher education saw an explosion in international programmes (internationalisation at home) and international academic partnerships with overseas institutions²².

The establishment of the Association of Southeast Asian Nations (ASEAN) Economic Community in 2015 saw further concerted efforts by the government to liberalise its education sector. Support for regional student mobility programmes through organisations such as the ASEAN University Network, driven by Thailand's long-held wish to become a higher education hub within the Southeast Asia region, resulted in a sharp increase in credit transfer programmes.

More recently, in 2017, 'Thailand 4.0', a flagship government drive to boost productivity for a highly skilled, technology-oriented economy, has targeted the establishment of foreign branch campuses in three provinces that comprise the 'Eastern Economic

Corridor'. Incentives range from exemptions on corporate income tax and restrictions on foreign land ownership to relaxed visa measures and lower rates of income tax for employees²³.

While TNE provision is still relatively limited, it continues to show potential for expansion. In 2019, 135 registered international academic programmes, including 87 joint, double and dual degree programmes, offered teaching in science and engineering (50 per cent), business (20 per cent), and languages and literature (13 per cent). Currently, three foreign education institutes have a presence in Thailand: two in Bangkok (CMKL University established in 2017 and Amata University in 2018) and one in Chonburi (Asian Institute of Hospitality Management, established in 2020)²⁴.

Chinese students currently account for over 60 per cent of all international students enrolled in Thai undergraduate programmes. However, faced with the challenges presented by an ailing Chinese economy, fewer Thai students (due to steady demographic decline), and increasing competition, Thai institutions are shifting marketing efforts to potentially high-growth markets such as the EU²⁵.

22 See Evans, Pred (2024), 'Competition versus collaboration: The internationalisation of higher education in Thailand' (Doctoral thesis, Chulalongkorn University).

23 See <https://www.qaa.ac.uk/docs/qaa/international/country-report-thailand-2019.pdf>.

24 See <https://www.qaa.ac.uk/docs/qaa/international/country-report-thailand-2019.pdf>.

25 See <https://monitor.icef.com/2017/10/thailands-growing-supply-demand-gap-higher-education/>.

7. Implications of the TNE framework and next steps

This study develops a draft global framework for TNE engagement. It structures existing data collections to capture the impact of TNE provision systematically. The current framework uses the UK Aggregate Offshore Record as a proxy for TNE. Currently, there is limited systematic data collection on TNE activity from the perspective of both the host and export countries. Over time, such data is expected to improve, which will result in better capture of the impact of TNE. Using the global framework advanced in this study, the following impacts can be captured.

7.1 Measuring TNE impact

The drivers for TNE are highly context-dependent. Where the supply of higher education is insufficient, TNE can bridge the gap and support the diversification of local provision. It can also support local access agendas and serve as an important pillar in institutional and country-level internationalisation of higher education strategies. An example of how TNE can widen access to higher education is Sri Lanka, where frugal funding for higher education since the pandemic has significantly slowed down higher education expansion. However, this rapid expansion has raised concerns about quality control.

TNE can enhance the quality of higher education provision. In Vietnam, TNE has grown alongside reforms promoting internationalisation and institutional autonomy. However, challenges related to financial motives, subject mix, and flexible student and academic visas present a barrier for international students and academic flows into the country.

Many jurisdictions use TNE to internationalise their higher education and to support their student hub aspirations. TNE can

support a country's ambitions to become an international education hub. Dubai is a prime example, having experienced significant growth in international students. Supportive policies and the establishment of education hubs have facilitated the growth of international branch campuses.

The role of TNE can change over time in response to the evolving needs of a country's higher education system. In Thailand, TNE has gone through three pivotal periods, shaped by neoliberal reforms, the establishment of the ASEAN Economic Community, and the Thailand 4.0 initiative.

Policy and regulatory changes can play a crucial role in facilitating TNE. However, there is often a disparity between policy announcements and implementation. Disconnection between policymakers and the market can hinder TNE growth. Successful implementation requires cross-governmental support, including a more open approach to visas and immigration. In some cases, the sector itself drives policy and regulatory changes.

However, TNE has ongoing challenges, related to perceptions of its quality. In locations where TNE is not well established, this can be addressed through awareness-raising initiatives among employers, parents, and students. Other challenges can include the lack of recognition of TNE degrees for government jobs, and barriers related to online learning.

This study highlights the complex and dynamic nature of TNE and its potential to address varying educational needs and priorities locally.

The proposed TNE framework aims to facilitate a better understanding of these complexities and support informed decision-making in TNE engagement.

7.2 Developing data capture infrastructure and collective understanding of TNE

This study developed a global TNE framework, which can be applied at a country level to better understand the dynamics and the role of TNE provision locally. A global consensus on the importance of TNE data collection is required to successfully implement the proposed global framework. This will ensure there is an ongoing effort to share best practices and engage with TNE developments at the policy and practice levels. The following annual activities are proposed:

- An annual survey of TNE policy developments and main policy objectives for TNE engagement.
- Annual updates to the TNE framework through quantitative and qualitative data collections.
- An annual TNE forum to share best practice and lessons learned.
- An international steering committee that oversees data collection and is involved in the TNE forum.

The global TNE framework aims to contribute towards an improved collective understanding of TNE, measuring TNE impact and gauging how it can best support local HE priorities.

The global framework also shines a light on areas of higher education that are likely to experience fast-paced growth, and identify areas where TNE can make a significant contribution. A notable example is the rapid expansion of higher education happening in Asia over the next 10–20 years. Asia stands out as the home of the world's largest tertiary education systems, and also those set to undergo a fast-paced growth. If India alone is

to meet its National Education Policy objectives of 50 per cent participation in higher education by 2035, this would mean an additional 30 million learners joining the country's higher education in the next decade. Pakistan is likely to undergo a similarly ambitious expansion. Such developments highlight that TNE can support local HE expansion, and more importantly, contribute to the capacity building and staff development that are required to facilitate such expansion. This will be shaped as institution-to-institution partnerships, and double PhD and master's training. It will also require greater credit, degree and qualifications recognition to enable students to study flexibly and at a variety of local and international education providers.

Similar developments are likely to occur in Africa.

This study proposes the development of an online portal where stakeholders can access custom higher education data, TNE data and national-level information on priorities for TNE. The authors recognise that this is an ongoing process, requiring a collective effort to collect and disseminate information, identify best practice and adapt local regulation of TNE to best support national education priorities and students. University partnerships and collaborative teaching drawing on the strengths of the institutions involved are central to these endeavours. Creating the right environment for these partnerships to flourish is essential, and requires understanding and cooperation of the agencies and regulatory bodies overseeing these activities in the host country and the home jurisdictions of the institutions exporting TNE.

British Council 2024

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