

Global engagement in the post-pandemic world: Challenges and responses. Perspective from the UK

Vangelis Tsiligiris¹  | Janet Ilieva² 

¹Department of Accounting and Finance, Nottingham Trent University, Nottingham, UK

²Education Insight, Bristol, UK

Abstract

Higher education (HE), particularly its international mobility element, is one of the sectors that have suffered an immediate and substantial impact by the pandemic. The disruption in international travel and the local restrictions to physical contact has caused disruptions in the academic planning and delivery of higher education worldwide. Many argue that the recent pandemic and the move to online and blended learning delivery will define the future of HE. In this paper, we explore two main themes. Firstly, we explore the pre-Covid trends in international higher education. Using national and international data from UNESCO, OECD and other sources, we analyse the global developments in international student mobility. Secondly, we focus on the UK to study the position, share and interplay between the international student and transnational education (TNE) markets. We reflect on the findings of our analysis and discuss the pivot to online education and its pedagogical and regulatory implications. The role of sustainability as a central strategic objective for HEIs is examined through the lenses of TNE in generating local impact and promoting the United Nations (UN) Sustainable Development Goals (SDGs).

This is an open access article under the terms of the Creative Commons Attribution-NonCommercial-NoDerivs License, which permits use and distribution in any medium, provided the original work is properly cited, the use is non-commercial and no modifications or adaptations are made.

© 2022 The Authors. *Higher Education Quarterly* published by John Wiley & Sons Ltd.

KEYWORDS

transnational education, global engagement, sustainability, international student mobility, online and distance education, SDGs

Η ανώτατη εκπαίδευση και ιδιαίτερα το συστατικό της διεθνούς κινητικότητας, είναι ένας από τους κλάδους που υπέστησαν ένα άμεσο και σημαντικό αντίκτυπο από την πανδημία. Η διακοπή των διεθνών μετακινήσεων και οι τοπικοί περιορισμοί των κατά πρόσωπο επαφών προκάλεσαν σημαντικά εμπόδια στον ακαδημαϊκό σχεδιασμό και την υλοποίησή της ανώτατης εκπαίδευσης σε παγκόσμιο επίπεδο. Πολλοί υποστηρίζουν ότι η πρόσφατη πανδημία και η μετάβαση στην διαδικτυακή και μεικτή μάθησης θα καθορίσουν το μέλλον της Ανώτατης Εκπαίδευσης. Σε αυτή την εργασία διερευνούμε δύο βασικά θέματα. Πρώτον, διερευνούμε τις προ-Covid τάσεις στη διεθνή τριτοβάθμια εκπαίδευση. Χρησιμοποιώντας εθνικά και διεθνή δεδομένα από την Ουνέσκο, τον ΟΟΣΑ και άλλες πηγές, αναλύουμε τις παγκόσμιες εξελίξεις στην κινητικότητα των διεθνών φοιτητών. Δεύτερον, εστιάζουμε στο Ηνωμένο Βασίλειο για να μελετήσουμε τη θέση, το μερίδιο και την αλληλεπίδραση μεταξύ των αγορών της κινητικότητας των διεθνών φοιτητών και της διακρατικής εκπαίδευσης (TNE). Αναστοχάζομαστε στα ευρήματα της ανάλυσής μας και συζητάμε τον ρόλο καθώς και τις παιδαγωγικές και ρυθμιστικές επιπτώσεις της διαδικτυακής εκπαίδευσης. Επίσης, εξετάζεται ο ρόλος της βιωσιμότητας ως κεντρικού στρατηγικού στόχου για τα ΑΕΙ μέσα από το πρίσμα της διακρατικής εκπαίδευσης για την δημιουργία τοπικού αντίκτυπου και την προώθηση των Στόχων Βιώσιμης Ανάπτυξης (SDGs) των Ηνωμένων Εθνών (ΟΗΕ).

1 | INTRODUCTION, RATIONALE AND CONTEXT

Higher education (HE), particularly its international student mobility (ISM) element, is one of the sectors that have suffered an immediate and substantial impact from the pandemic (QS, 2021). Interrupted international travel and the local restrictions to physical contact has caused disruptions in the academic planning and delivery of HE worldwide. In addition, there is a growing focus on considering transnational education (TNE) as an alternative to ISM and offsetting the disruption in international travel. Many argue that the recent pandemic and particularly the move to online and blended learning delivery will change the future model of international HE (Nørgård & Hilli, 2022; Radwan, 2022; Santos & Pinheiro, 2022). At the same time, others argue that several megatrends that existed pre-Covid are more impactful in shaping the future of international HE (de Wit & Altbach, 2021; Ilieva & Tsiligiris, 2021; Tsiligiris, 2020). One of the critical areas of impact is the size and distribution of the global student market, particularly in relation to dominant destination countries, such as the US, UK and Australia.

This study seeks to identify the relative position of the UK as a destination country for international students, the changing role of the UK TNE, and evaluate the impact of the pre-Covid megatrends and the Covid per se.

The research questions (RQs) that this study addresses are as follows:

- RQ1. What are the critical pre-Covid megatrends that shape ISM?
- RQ2. What is the relative position of the UK as a destination country for international students?
- RQ3. What is the interplay between ISM and TNE for the UK?
- RQ4. What is the evolving impact and value of UK TNE to host countries?
- RQ5. How did Covid-19 impact UK TNE?
- RQ6. What are the broader observations that can be drawn regarding the future model of international HE in the UK?

To address the RQs, we conduct secondary data analysis¹ using data from UNESCO, OECD, and particularly for RQ3, we use data from the UK Higher Education Statistics Agency (HESA). These sources of data are considered the most prominent in international HE and are used systematically by policymakers, institutions and researchers.

International students are at the centre of global HE and are attracting the interest of universities, policymakers, researchers and other key stakeholders, such as students' families and employers. Globally mobile students estimated 6.1 million in 2019.

In recent years, with the expansion in the capacity of HE systems in South East Asia and Central Europe, we have witnessed the emergence of new destination countries for international students that challenge the status quo. Significant increases in TNE programmes, new forms of international teaching partnerships and modes of delivery over the past years have strengthened the readiness of HE systems to engage internationally. However, except for a few countries, there is a 'significant lack' of robust data collection and information on TNE (Knight & McNamara, 2015, 2016). In addition, there is a lack of cross-country and inter-regional analyses to understand these emerging trends in international HE. This study seeks to fill this gap by conducting a macro-level time series analysis of critical ISM data.

In addition, dominant destination countries face increasing competition by the emerging study destinations for international students and needs a strategic response. This study aims to identify the characteristics of a sustainable model for global HE that would enable countries like the UK to remain globally competitive.

This paper is organised into six sections. Section two outlines the methods used to address each of the RQs of this study. Section three presents the literature and our secondary data analysis on the pre-Covid trends in international HE. Section four discusses the UK perspective. It analyses the UK's market share and the interplay between the ISM and TNE. Section five reflects on the findings of our analysis and expands the discussion about the future model of global and UK HE in relation to two issues: (i) the role of the online and blended education and (ii) the sustainability agenda as one of the post-pandemic strategic priorities for HEIs. Section six summarises our conclusions and identifies the implications of our study in relation to the Global Delivery Model (Ilieva & Tsiligiris, 2021; Tsiligiris, 2020).

2 | METHODOLOGY

To respond to the RQs outlined above, we use a mixture of literature review, secondary data analysis and primary case studies. This is based on a pragmatic approach using the most appropriate method that addresses best the requirements of each of the RQs (Rorty, 1982).

To identify the pre-Covid megatrends in international mobility (RQ1), we conduct a literature review of publications until 2021 and focus on works that do not consider the impact of Covid. In this way, we seek to establish a pre-Covid benchmark in the future trends for international HE. Then we explore further the trends that emerge from the literature review by conducting secondary data analysis using data from the UNESCO and OECD international HE databases.

To evaluate the relative position of the UK (RQ2), we conduct a time-series comparative analysis using secondary data from UNESCO. We consider the ranking position of the UK as a destination country for international students over ten years.

We use 12 years (2007–2019) data from HESA and UNESCO and perform correlation analysis to identify the interplay between ISM and TNE for the UK (RQ3). In addition, we use correlation analysis to explore the impact of the UK TNE in the inbound mobility of UK TNE host countries.

To evaluate the impact of UK TNE on capacity building in host countries (RQ4), we use the compound annual rate of growth (CARG) and correlation analysis of inbound and UK TNE students for 2008 to 2018. We then use HESA data to identify the share of UK TNE to ODA countries and present two case studies to demonstrate the broader value of UK TNE for host countries.

Although the impact of Covid on UK HE and UK TNE is still ongoing, we present two case studies from Queen Margaret University and Lancaster University, to demonstrate how UK HEIs have responded to the challenges posed by Covid (RQ4).

Finally, we reflect on the findings from RQ1–4. Alongside additional evidence from the literature review, we form our broader observations regarding the future model of international and UK HE.

3 | WHAT ARE THE PRE-COVID MEGATRENDS IN ISM?

This section draws on trends in global student mobility pre-Covid. It attempts to capture shifts in student demand which started before the pandemic and discusses whether they are likely to accelerate. This section looks at the interplay between ISM and TNE.

3.1 | Literature review

3.1.1 | Trends in international student mobility

There was a continuous growth in global mobile students over the past two decades—they grew from 2.2 million in 1998 to 6.1 million in 2019 (OECD, 2020, 2021). The review of the relevant literature suggests that although the number of globally mobile students continues to grow, there are significant changes in the direction of travel of international student demand. More specifically, ISM becomes multi-directional (Cheng, 2021) with a shift away from traditional destination countries, such as the UK (Gümüş et al., 2020) and an increasing preference towards regional mobility (Hou & Du, 2022). Such changes in student mobility flows were observed before the pandemic. East Asian universities' rise in the global league tables, comparatively lower tuition fees, and strong economic growth placed China, Japan, Malaysia, South Korea and Taiwan as attractive study destinations for international students (ICEF, 2019).

Recent research indicates a shift in international student flows. For example, a survey carried out with 2739 students in mainland China and Hong Kong (SAR) showed study abroad preference towards Asian regions and countries, in addition to the US and UK, but away from some major international study destinations like Australia and Canada (Xiong et al., 2020). Another survey with prospective international students carried out by the Graduate Management Admission Council shows 17% of those who considered graduate management programme in 2021 were willing to study closer to home and 14% were prepared to study online (Choudaha, 2021). Research by Study Portals and the British Council found that the most significant increase in English taught programmes occurred in Sub-Saharan Africa and China, where these programmes doubled over the past five years (Study Portals and British Council, 2021). The study concluded that traditional source countries for international students are now becoming study destinations, contributing to a more equal distribution of international student flows. Although these findings could be partly attributed to Covid-19 and its impact on student mobility, the pandemic is likely

to accelerate shifts that are already taking place because of strategic efforts by several countries to emerge as destinations for international students. For example, several countries in East Asia and South-East Asia signalled their ambition to become international student hubs by introducing several policy reforms (e.g., student visa policies) while expanding the academic courses available in English (Beecher et al., 2020). Knight (2018) identifies six education hubs globally, three of which are in East Asia. They include Hong Kong (SAR), Malaysia and Singapore. The expansion of the private HE sector often included incentives for international universities to set up a physical presence in the respective country. The most notable example of such policy is Malaysia, which hosts 14 international branch campuses of foreign universities (C-BERT, 2021). Most recently, as a result of the disrupted international travel, we observe the emergence of a new type of global multi-campus education cities.

A significant shift of ISM towards intra-regional mobility in East Asia occurred in the aftermath of the East Asia currency crisis in 1998 (Thang & Kim, 2016). Allowing for lagged effects, this might have resulted from at least three factors: (a) expansion of the private HE sector to meet the needs of highly diverse student demand; (b) reduced disposable income because of weakened local currencies, which would have impacted the affordability of study abroad and (c) liberalised regulatory framework for TNE, most notably in Malaysia, Singapore and Hong Kong. The latter contributed to a significant expansion of TNE in the region. For example, 31,500 students enrolled in Australian HE programmes in 2001 (McBurnie & Ziguras, 2001). This is attributed to the concurrent expansion of the English language as the language of academic delivery attracted local talent from within the region (Varghese, 2009).

Over the past 20 years, TNE has grown and is emerging as a critical contributor to the capacity building of HE systems around the world. TNE has supported significant improvements in the quantity and quality side of domestic provision of education, resulting in many students choosing to study at home instead of abroad. For example, an increasing number of students from China and Greece are now studying for international degrees in their home countries through TNE (UUKi, 2021).

In addition, TNE is supporting the recruitment of international students. For example, there is evidence that higher education institutions (HEIs) are using TNE as a pathway of international student recruitment (Ilieva, 2015). This type of TNE structure enables TNE students to do a proportion of their degree in their home country and the remaining part in the host country where the respective HEI is based. Although this results in a shorter duration of study abroad, it has widened international HE access to price-sensitive students who would not have been able to afford it financially (Levatino, 2017). Recent estimates from Universities UK and the British Council show that 40% of the Chinese undergraduates in the UK started their degree through a course delivered outside the UK (British Council & Universities UK, 2020). Research for Enterprise Ireland established that 45% of the Chinese undergraduates in Ireland started their bachelor's degrees in China (Ilieva et al., 2017).

The review of the literature reveals four key trends in ISM: (1) a continuous growth in the number and proportion of internationally mobile students; (2) a shift away from OECD to non-OECD countries as destination countries for international students; (3) a growing preference towards regional mobility with particular emphasis in East Asia and (4) the growing importance of TNE.

3.1.2 | Secondary data analysis on the trends in international student mobility

We use time-series data on ISM, to explore the trends in the ISM identified from the literature review in the previous section. More specifically, we explore three trends: (1) the acceleration of the global outbound mobility rate; (2) the shift of mobility to non-OECD countries and (3) the acceleration of regional mobility over the past two decades.

Acceleration of the global inbound mobility rate

As shown in Figure 1, the size of the international student market has grown as a share of the total student population in HE. More specifically, the time-series data analysis on the globally mobile students over the past two decades (1998 to 2019) shows a notable acceleration of the ratio of tertiary education international students. This

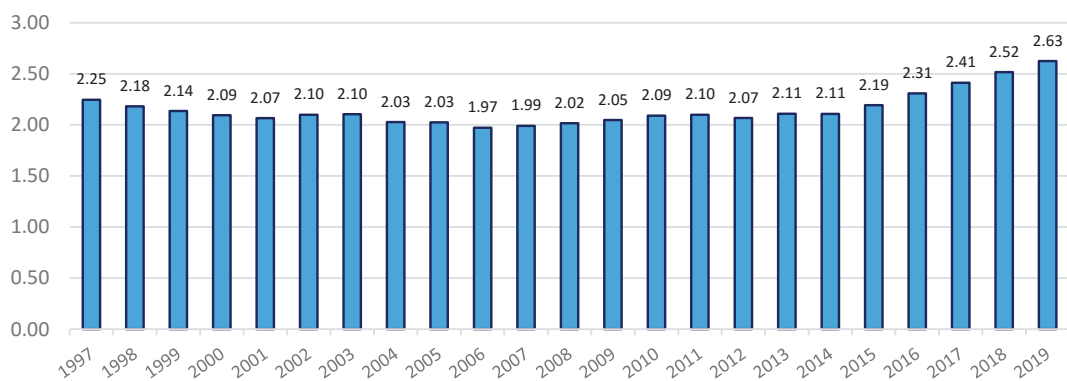


FIGURE 1 Proportion of tertiary students who study abroad (inbound mobility rate, 1997–2019). Data source: (UNESCO UIS, 2021)

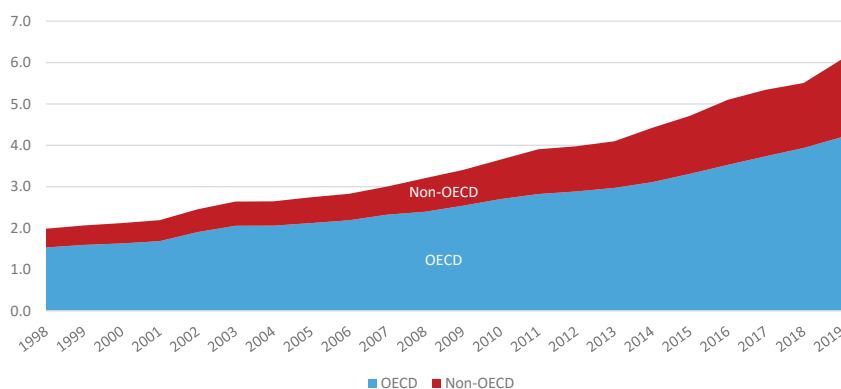


FIGURE 2 International students enrolled in higher education (OECD, non-OECD, total; 1998–2018). (OECD, 2020)

is particularly evident over the past five years, when their proportion increased from 2.11 in 2014 to 2.63 in 2019. This is expressed through the inbound mobility rate, which shows the number of students from studying abroad, expressed as a percentage of total tertiary enrolment in that country.

The main drive of this growth in the global mobility of international students is attributed to student flows to non-OECD countries (OECD, 2021). In addition, Intra-regional mobility, expansion in the supply of HE and low-cost air travel are other factors shaping this trend (Kirloskar & Inamdar, 2021). This growth in international mobility has raised the expectations of market participants such as universities, international student agents and other support services organisations (e.g., student accommodation, marketing and recruitment and EdTech).

Shift away from OECD to non-OECD states

Our analysis of the OECD data for the period 1998–2019, as shown in Figure 2, reveals that the number of international students enrolled in non-OECD countries increased by 7% per year on average compared to 4.9% growth in OECD countries. As a result, the proportion of globally mobile students in non-OECD countries increased from 23% in 1998 to 31% in 2019 (Figure 3). This is the result of several factors with demographics in certain non-OECD countries, such as India, being the main driver for student mobility growth (Kirloskar & Inamdar, 2021).

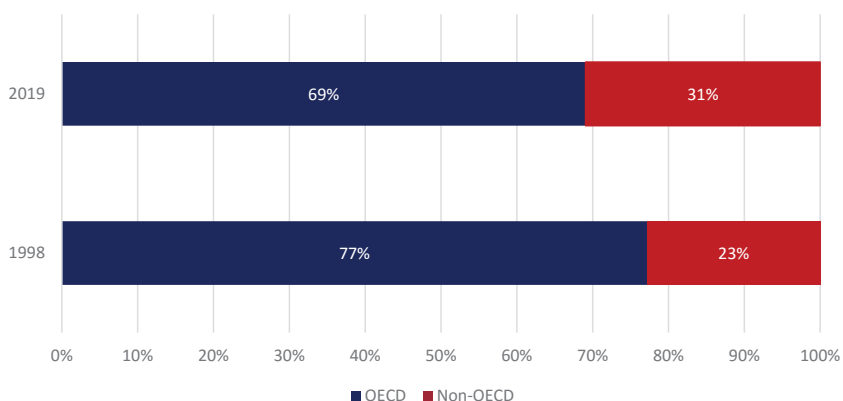


FIGURE 3 Globally mobile students in higher education (%) in OECD and non-OECD countries (1998; 2008). (OECD, 2021)

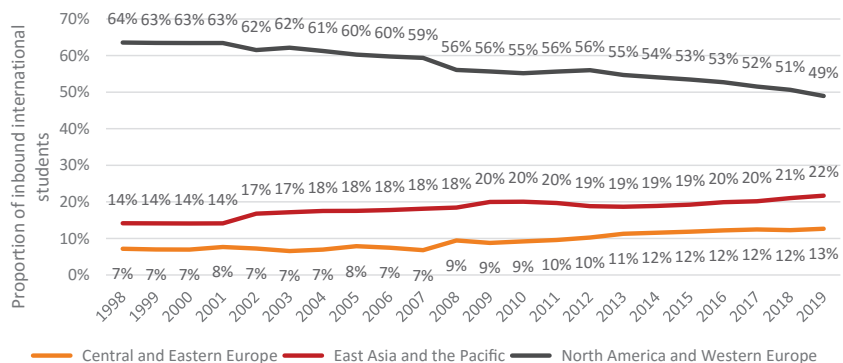


FIGURE 4 Changes in the world regions' share of internationally mobile students (Central Europe; East Asia and the Pacific; and North America and Western Europe. 1998–2019). *Source:* UNESCO UIS.Stat

Acceleration of ISM away from North America and Western Europe

The analysis of the UNESCO data on ISM per region, as summarised in Figure 4 below, suggests that North America and Western Europe hosted almost two-thirds of the globally mobile students in 1998 (64%). In 2019, this was reduced to just under half of the world's international students (49%). In contrast, East Asia and the Pacific regions gained 8 percentage points of the globally mobile students over the same period, and their market share reached 22% in 2019. Central and Eastern Europe market share of international students grew by 6 percentage points and reached 13%.

More broadly, and across other regions, our analysis identifies newly emerging study destinations that, in comparison with traditional study destinations, experience higher annual growth in the number of international students. This suggests a shift away from the North America and Western Europe. As summarised in Table 1, the analysis of 20 years of inbound student data shows that the US and the UK experience substantially lower compounded annual growth rate (CAGR) than countries in the Central and Eastern Europe and East Asia and the Pacific. Specifically, Russia and Turkey experience an annual growth rate of 11% and 12%, respectively. For the East Asia and the Pacific region, the number of inbound students to China, Malaysia and Thailand has been growing at a rate between 13% and 17%. Similar trends are present in other regions, such as the Arab States and Latin America, where UAE and Argentina experience high annual growth in the number of inbound students. Further

TABLE 1 Destination countries of international students per geographical region

Country	Region	2000	2019	CARG
USA	North America and Western Europe	(1999) 451,935	976,853	4%
UK	North America and Western Europe	222,936	489,019	4%
Russia	Central and Eastern Europe	41,210	282,922	11%
Turkey	Central and Eastern Europe	18,662	154,505	12%
China	East Asia and the Pacific	(2006) 36,386	201,177	14%
Malaysia	East Asia and the Pacific	(1999) 3508	81,953	17%
Thailand	East Asia and the Pacific	(1999) 1882	(2020) 25,086	13%
UAE	Arab States	(2011) 48,653	225,339	21%
Argentina	Latin America and the Caribbean	3255	116,330	21%

Note: Compound Annual Growth Rate (CARG) = $\left[\frac{\text{End of period figure}}{\text{Start of period figure}}\right]^{1/\text{years in the period}} - 1$. CARG represents the annual rate of growth over a period of years. In Table 1 we have calculated the CARG adjusting for the differences in the availability of data for each country.

Source: UNESCO UIS.Stat

TABLE 2 Five largest overseas jurisdictions for the UK and Australian transnational education (TNE)

UK	TNE students	% of total	Australia	TNE students	% of total
1. Malaysia	49,120	11%	1. China	26,192	22%
2. China	46,910	11%	2. Singapore	25,598	22%
3. Sri Lanka	30,745	7%	3. Malaysia	19,609	17%
4. Singapore	27,670	6%	4. Vietnam	8217	7%
5. Hong Kong (SAR, China)	22,260	5%	5. India	5578	5%
Total	443,385		Total	116,678	

Sources: HESA (<https://www.hesa.ac.uk/data-and-analysis/students/where-from>); Australian Government, Department for Education, Skills and Employment (<https://internationaleducation.gov.au/research/offshoreeducationdata/pages/transnational-education-data.aspx>).

analysis of the country of origin of the inbound students to these countries reveals that the majority comes from neighbouring countries, hence suggesting an increasing regional mobility trend.

The growing importance of transnational education

The analysis of the available TNE data² for the UK and Australia, two of the world's largest TNE exporting countries, presented in Table 2, shows the most significant jurisdictions for TNE provision of UK and Australian HE institutions, where East Asian countries feature prominently. One of the common problems in TNE student data is that it does not indicate the residency status of students. However, according to the Australian Government Department for Education, Skills and Employability statistics, almost 23% of the students enrolled on Australian university programs in Singapore were found to be non-residents (Australian Government, 2020). This suggests

that while TNE has expanded in East Asian countries to support domestic demand for HE, it has also contributed to increasing inbound ISM (McBurnie & Ziguas, 2006).

Similar to the East Asia region, research on the impact of TNE in Europe for the British Council found that 35% of the surveyed TNE students in Europe had a different nationality to the country of study (Ilieva et al., 2021). At the same time, TNE activity in the form of cross-national student mobility in the European Higher Education Area is primarily facilitated by the Bologna Process (Vögtle & Windzio, 2016).

Strengthened degree and qualifications recognition within the European Higher Education Area and the provision taught in the English language seem to have increased intra-European student flows, including new study destinations in Central and Eastern Europe (Shields, 2016). For example, 84% of the internationally mobile students in Europe choose to study in another European country (OECD, 2021).

4 | THE UK PERSPECTIVE: INTERNATIONAL STUDENT MOBILITY AND TRANSNATIONAL EDUCATION

In this section, we reflect on the four trends identified in the previous section to provide the UK perspective on international student mobility (ISM) and the interplay with UK TNE. In addition, we evaluate the impact of UK TNE on host countries in relation to capacity building and promotion of sustainable development goals (SDGs). Lastly, we consider the effects of Covid on UK TNE.

4.1 | What is the relative position of the UK as a destination country for international students?

In Table 3, we summarise our analysis of 10 years of outbound student mobility data, using three benchmark years (2008, 2013 and 2018). The UK is consistently second, behind the United States.³ The UK has maintained its position while other dominant countries, such as France, Japan and Canada, have experienced a drop in their position. At the same time, several countries are emerging as new destinations for international students. The most notable example is the United Arab Emirates, which has risen to 7th place and Turkey, which has gone up by 13 places from 24th place in 2008 to 11th place in 2018. Our findings are consistent with other research suggesting that the UK, alongside the US, continue to be the dominant destination countries for international students. Still, their place will likely be challenged (Peters, 2020).

4.2 | What is the interplay between international student mobility and transnational education for the UK?

Figure 5 shows a strong positive relationship ($R^2 = .93$) between the UK TNE data and the inbound student mobility to the UK data over 12. The UK TNE market grew at a compound annual growth rate (CAGR)⁴ of 7%, whereas the number of inbound students to the UK grew at a CAGR of 3%. This reflects the different dynamics of the two markets where ISM in mature markets, such as the UK, US and Australia, increased by 2%–5% per annum (Shkoler et al., 2020). At the same time, TNE is a more dynamic and fast-paced market, the growth in each host country varied significantly (Tsiligiris et al., 2020).

To explore in more detail the interplay between UK TNE and ISM to the UK, we focused on the top 20 UK TNE countries that host 76% (322,375) of all UK TNE students (Table 4). We investigated the correlation between the total number of UK TNE students in the country and the inbound students to the UK from the respective country over 12 years (2007–2018). In the table below, we see that out of the 20 countries investigated, 12 have a

TABLE 3 Destinations of international students (2008–2018/2019)

Change	Ranking			Country of destination for outbound students	Total inbound students (both sexes)		
	2008	2013	2018		2008	2013	2018/2019
–	1	1	1	United States	624,474	784,427	987,314
–	2	2	2	UK	333,942	416,575	452,020
1	4	3	3	Australia	230,635	249,868	444,514
1	N/A	5	4	Germany	N/A	196,619	311,738
–	5	6	5	Russia ^a	136,791	193,487	262,416
–3	3	4	6	France	243,436	228,639	229,623
8	N/A	15	7	United Arab Emirates	N/A	59,227	225,339
–1	7	7	8	Canada	93,479	151,244	224,548
2	11	9	9	China	51,038	96,409	201,177
–4	6	8	10	Japan	126,568	135,803	182,748
13	24	18	11	Turkey	20,219	54,387	125,138
–	N/A	N/A	12	Argentina	N/A		109,226
–5	8	10	13	Italy	68,306	82,450	106,611
5	19	13	14	Netherlands	30,052	68,943	104,015
–1	14	17	15	Korea (South)	40,322	55,536	84,749
–4	12	11	16	Malaysia ^a	41,310	77,926	81,953
–7	10	12	17	Austria	53,396	70,852	75,259
7	25	14	18	Saudi Arabia	18,725	62,143	73,216
–4	15	16	19	Spain	37,726	56,361	70,912
–4	16	19	20	Ukraine	32,573	49,686	55,333

Data source: (UNESCO Institute for Statistics, 2021).

^a For Russia and Malaysia, we have used the average of 2012 and 2014.

strong positive ($R^2 > .50$) correlation and only four countries (Sri Lanka, Greece, India and Pakistan) have a strong negative correlation ($R^2 > -.50$) between UK TNE students and inbound students to the UK. Overall, our findings suggest no direct ‘cannibalisation’ effect between the growth of UK TNE and the mobility to the UK. This confirms other research findings on this topic (Levatino, 2017; Tsiligiris, 2014).

4.3 | What is the evolving impact and value of UK transnational education?

4.3.1 | UK transnational education and capacity building of host countries and regions

To explore the contribution of UK TNE in the development of the capacity of host country HE systems and the subsequent growth in inbound student mobility, we explore the inbound mobility pattern in the major UK TNE host countries. There are ten countries (China, Qatar, Sri Lanka, Saudi Arabia, India, Ghana, Bahrain, Oman and United Arab Emirates) with a strong positive correlation ($R^2 > .50$) between the UK TNE students and the total number of inbound international students.

For all the countries presented in Table 5, we observe a concurrent expansion of UK TNE and increased inbound mobile students. This is attributable to several factors, including targeted national policies using TNE

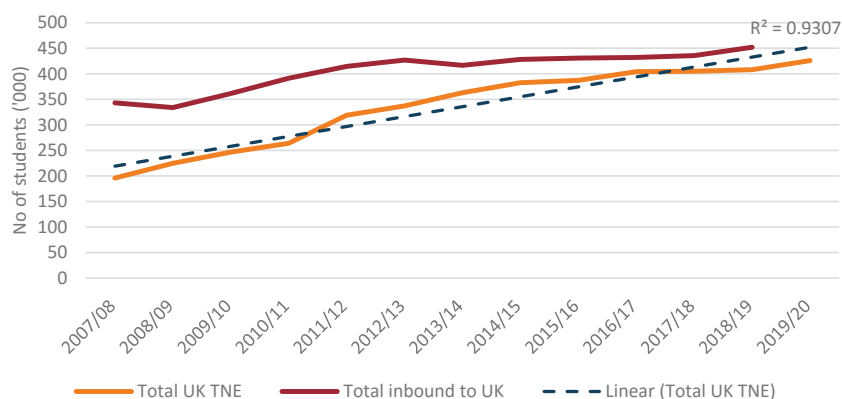


FIGURE 5 Number of UK transnational education (The UK TNE data excludes Oxford Brookes University to normalise the data after the change in the reporting requirements introduced in 2018/2019.) versus inbound students to the UK (2007–2020). *Data source:* HESA; UNESCO

TABLE 4 Rank, annual growth of UK transnational education (TNE) host country markets and correlation with inbound mobility

Rank position	Host country	UK TNE students 2019/2020	CAGR (2007/2019)	Correlation TNE vs. inbound to UK (2007–2018)
1	China	47,775	13%	0.93
2	Malaysia	46,925	7%	0.70
3	Sri Lanka	29,835	21%	-0.92 ^a
4	Singapore	25,855	2%	0.75
5	Hong Kong	20,640	0%	0.15
6	Egypt	19,255	15%	0.75
7	Greece	18,715	6%	-0.76
8	Oman	16,790	9%	0.83
9	United Arab Emirates	14,030	11%	0.90
10	Cyprus	11,170	19%	0.43
11	Germany	8885	4%	0.78
12	Saudi Arabia	8850	19%	0.83
13	India	7905	4%	-0.62 ^a
14	Kuwait	7310	39%	0.75
15	Nepal	7190	54%	0.22
16	Switzerland	7125	8%	0.95
17	United States	6415	9%	0.54
18	Pakistan	6250	10%	-0.85 ^a
19	Uzbekistan	5810	19%	0.41
20	Ireland	5645	-4%	0.97

Data source: UK TNE data from HESA.

^aStudents from countries with inverse correlations like India, Sri Lanka and Pakistan were heavily impacted by the removal of the post-study work route in the UK. Although their mobility to the UK reduced significantly, the visa changes did not affect TNE.

TABLE 5 Inbound mobility in major UK transnational education (TNE) host countries (ranked by correlation of UK TNE students vs. inbound mobile students to UK TNE host country)

Country	Inbound students to UK TNE host country		CARG of inbound students to UK TNE host country (2008/2018)	CARG of UK TNE students in host country (2008/2018)	Correlation of inbound to the UK TNE host country with UK TNE in-country
	Earliest	Latest			
China	51,038	201,177	13.30%	13%	1.00
Qatar	4544	12,332	9.50%	26%	0.98
Sri Lanka	435	1529	17.00%	21%	0.96
Saudi Arabia	18,725	73,216	13.20%	19%	0.91
India	27,531	47,424	7.00%	4%	0.90
Ghana	2754	6905	8.70%	10%	0.83
Bahrain	5039	6678	5.80%	11%	0.81
Oman	1387	3384	8.40%	9%	0.73
United Arab Emirates	48,653	225,339	21.10%	11%	0.48

Data source: UNESCO.

to boost inbound mobility of international students (e.g., UAE, Qatar) and regional mobility (e.g., Ghana, Saudi Arabia). This could suggest a contribution of UK TNE in the capacity building of the TNE host country HE sector, which becomes more attractive to international students.

Furthermore, UK TNE is seen as having an 'internationalising' impact and supports the cultural and linguistic capital of the locality. Many UK TNE programmes are taught in English and attract international students. For example, a survey of TNE students on UK programmes in Europe found that 35% of the students were international (Ilieva et al., 2021). The same study established that over three-quarters (79%) of the students spoke two or more foreign languages.

The benefits from UK TNE collaborative teaching partnerships through double and joint postgraduate degrees are diffused to individuals, participating HEI, and the wider society. For example, the Joint Development of Niche Programmes through Philippine–UK linkages (JDNP)⁵ is a TNE programme that develops local capabilities in niche subject areas with limited or non-existing HE provision. The programme supports the training and upskilling of local faculty to a higher degree through double or joint masters and doctoral degrees. JDNP is funded by the Commission of Higher Education (CHED) and the British Council. It provides a cost-effective way to acquire a higher degree while for the participating staff and faculty. Typically, a joint supervisory team supports the staff enrolled on the doctoral programme. Collaborative education provision strengthens the partnerships between the participating institutions and deepens their engagement beyond teaching. As a result, the collaboration expands into research partnerships in areas of mutual interest. Dual and double degrees at the postgraduate level enable students to conduct research relevant to their home institution (and country).

Box 1 draws a case study on the British Council–CHED Joint Development of Niche Programmes through Philippine–UK Linkages.

BOX 1 Case study—Joint Development of Niche Programmes through Philippine–UK linkages

The Commission on Higher Education (CHED) and the British Council launched the Joint Development of Niche Programmes through Philippine–UK Linkages (JDNP) in 2016.

The Government of the Philippines identified a range of niche subject areas, which were a national priority, such as climate change; design engineering; tropical medicine and public health; energy security and renewable energy; oceanography, digital innovation, and creativity, among other subjects.

The programme funded 11 Philippine and 9 UK HEIs to develop 17 collaborative postgraduate degrees, mainly double and joint masters and doctoral programmes. Over 100 students are expected to enrol annually.

While JDNP aimed to address local capacity initially, the impact was greater. Increased awareness about the potential of TNE to address local capacity was appreciated by policymakers. Improved quality assurance framework for TNE was soon to be implemented. Continued support from CHED for TNE aimed at capacity-building is a significant driver behind the expansion of TNE in the Philippines.

Globally, TNE is driven by unmet student demand. The JDNP is an example of a supply driven TNE and evidences how it can contribute to building higher education capacity. The TNE bill from 2019 enables the CHED to set up a dedicated office for TNE with a mandate for a national strategy. The Government is likely to invest more in TNE with benefits that will accrue more widely across higher education in the country, making it more dynamic and internationally focused. Capacity building initiatives like JDNP are likely to continue to attract government support.

4.3.2 | The impact of UK transnational education in promoting access to higher education and other sustainable development goals

HE contributes to the sustainable development agenda and has attracted significant interest from policymakers and HE leaders. Research of universities' engagement strategies by Lewis (2021) shows a shift in UK universities international strategies from commercial targets to long-term engagement focused on sustainability. Access to HE remains a global challenge for developed and developing countries (Sachs et al., 2019).

TNE, particularly collaborative education provision, embeds the international partner in the local community, learners and employers. This generates significant local impact across several of the UN SDGs, such as widening access to education (SDG4) and the reduction in societal inequalities (SDG10) (Ilieva et al., 2021).

Through postgraduate programmes and further/executive non-degree qualifications, UK TNE supports local communities' continuous professional development needs. Such programmes, often offered online, reach a rapidly growing ageing workforce and provide professional training opportunities not available locally, hence improving access to good quality education (SDG4).

Our analysis of the HESA data shows that 62%⁶ of UK TNE is in ODA⁷ countries. This finding highlights the contribution of UK TNE to countries with unmet demand for HE. At the same time, UK TNE enhances the qualitative aspects of the capacity of HE systems in countries with high participation rates in HE, such as Greece (Papageorgiou et al., 2020). Through postgraduate programmes and further/executive non-degree qualifications, UK TNE supports local communities' continuous professional development needs. Such programmes, often offered online, reach a rapidly growing ageing workforce and provide professional training opportunities not available locally.

UK TNE programmes contribute to local knowledge development and counteract 'brain drain' in the local area. Research shows that TNE in niche subjects—medicine, dentistry, pharmacy and engineering—has enhanced local education capacity and decelerated brain drain (Tsiligiris, 2014, 2019). Papageorgiou, Makelaraki and Tsiligiris (2020) illustrate how TNE in Greece has widened access to HE to disadvantaged groups of the population. Thus, it contributes to UN SDG4⁸ and supports the widening participation agenda. Greece has a high participation rate in HE at 77%. This is a relatively under-researched area of TNE impact, and further work is required into whether TNE engagement contributes towards the widening participation in education globally.

In addition, UK TNE facilitates the mobility of international students to the UK. For example, forty percent of the Malaysian first degree entrants in the UK started their bachelor course in Malaysia (British Council & Universities UK, 2020). Box 2 draws a case study of the Lancaster—Sunway University Partnership established in 2006. At present, over 5300 students are enrolled in courses offered through the partnership. They can transfer to Lancaster in the UK at the undergraduate level and apply for a scholarship to study in the UK at the postgraduate level. Students at both institutions are encouraged to participate in study abroad.

4.4 | Impact of Covid-19 on UK transnational education

Following the disruption in international travel and student mobility caused by the global pandemic, there is an emergence of a new wave of TNE programmes delivered either entirely online, through local education partners or a locally supported hybrid model (REF). In addition, transnational collaborations and teaching partnerships have improved institutional resilience (Nandy et al., 2021). Early indications indicate TNE engagement provided UK HEIs with additional flexibility in response to the pandemic (Ramos & Ryan, 2021). For example, UK HEIs experience in the online delivery of TNE programmes supported the transition to blended and online modes of

BOX 2 Lancaster—Sunway University Partnership

Lancaster University (UK) and Sunway University (Malaysia) established an academic partnership in 2006. While the partnership initially focused on teaching, it has evolved to include research collaboration, student exchanges, and engagement activities. The partnership offers 24 undergraduate degrees and 3 masters programmes. At present, there are over 5300 students who are enrolled in courses offered through the Lancaster—Sunway University Partnership. Over 6300 alumni have graduated from these programmes.

Lancaster University validates a range of full degree programmes taught at the Sunway University campus in Kuala Lumpur. After completing the degree programme, students are awarded two certificates: Sunway University and Lancaster University. Students at Sunway University can study at Lancaster University UK campus through various opportunities such as 1 + 2 transfers at the undergraduate level, scholarships for postgraduate study at Lancaster, summer programmes and study abroad for a year or a term. Through this partnership, Lancaster and Sunway University are encouraging student mobility between the UK and Malaysia.

The two institutions' response to Covid called for a stronger alignment of the pathway transfers. Students at Sunway also took part in a pilot, "Virtual Visit to Lancaster. The two institutions are working on the development of more cross-campus teaching and cooperation between colleagues.

Case study contributed by:

Professor J.S. Perry Hobson, Sunway University, Malaysia.

Professor Andrew Abbott, Lancaster University, UK.

provision at home. In addition, existing online courses and other online materials were adapted to the needs of campus students.

Recent examples from other countries illustrate how TNE improved the accessibility of their HE systems to a broader pool of students (Huang, 2022). New Zealand's University of Auckland announced a collaboration with NCUK, which will enable Chinese students to commence to enrol at one of the NCUK's study centres in China, and then transfer to a New Zealand HEI upon the successful completion of their foundation programme (Stacey, 2021). Coventry University entered a similar arrangement with Oxford International Education Group, where the OI Digital Institute serves as a digital pathway to degrees taught in Coventry (Stacey, 2020).

In the UK, several UK HEIs used their overseas partners' overseas campuses and online provision to support international students in their home country (The PIENews, 2021; Ye, 2021). That was evident when international travel was disrupted at the start of the academic year, and international students had to show some engagement as part of their study visa requirements (Li & Haupt, 2021).

In addition to the shift in the strategic importance and relevance of TNE partnerships for UK HEIs, the pandemic has impacted several of the operational aspects of UK TNE. Significantly more efficient forms of international collaboration evolved, which are paperless, travel-free, and require fewer financial resources. For example there has been a transition from face-to-face exam boards and quality reviews to online meetings (Green et al., 2020). However, the key to success is strong communication across the partnerships. The role of strong TNE partnerships in managing the disruptions brought by the pandemic outbreak is described in Box 3. The case study draws on the experience of Queen Margaret University and the adjustments they made to their offshore processes and operations to ensure an undisrupted and high-quality learning experience for their TNE students.

BOX 3 Queen Margaret University transnational education: Responding to the operational challenges of Covid-19

The Covid-19 pandemic has disrupted normal operations around the world affecting QMU and all partner institutions of QMU Business School in Greece, India, Nepal, Luxemburg and Singapore. The university responded by implementing adjustments in its quality assurance (QA) process and moving all relevant meetings online. The key adjustments to QMU QA processes included:

- Revised assessments: temporary changes were applied during the crisis to assessment instruments and specifications were revised accordingly for franchise and validated programmes for 2020 and 2021.
- Emergency adjustments to the standard assessment regulations: in April 2020 the University Senate approved a series of measures to ensure continued fairness, equity and integrity in decisions concerning academic progress and attainment.
- Board of Examiners, Reassessment Boards and Joint Board of Studies moved online.
- Review and Validation events moved online. Approximately 30 successful events were held from March 2020 onwards across the University. External, student and regulatory bodies input was still included.
- A newly added question to external examiner reports for 2020 and 2021, asked if external examiners were satisfied with any amendments to programmes as result of COVID-19. Most partnership responses expressed satisfaction with the amendments made for 2019–2020.

Additional table was added to the Annual Monitoring Reports (AMRs) submitted per programme to highlight Covid-19 adjustments/changes made in response to Covid-19, the impact and learning from the change. Through a dynamic and transparent approach QMU has managed to navigate the pandemic and overcome the operational challenges. The key lessons learnt from the QMU experience were:

- Need to be mindful of partner institutions' different operational environments and academic calendars in an inclusive way when making University-wide adjustments to regulation/processes.
- Communication is key to discuss, coordinate and implement rapid transitions in a consistent way across partnerships.
- Written guidance/guidelines are needed to improve understanding of the implementation of revised processes and regulations. Often, it involves input from academic and professional services colleagues supporting TNEPs.
- Technology can help overcome geographical barriers when it comes to student/staff induction activities, CPD sessions and team meetings.

Case study contributed by Vicky Makellaraki, Queen Mary University, UK.

5 | OBSERVATIONS ON THE FUTURE MODEL OF INTERNATIONAL AND UK HIGHER EDUCATION

There is ongoing discussion across the academic community whether the recent pandemic will act as a catalyst for a significant transformation in the HE provision model. Through the review of the relevant literature, the secondary data analysis and the primary case studies, we observe the following emerging themes that are likely to shape the future model of international and UK HE model in particular: (1) an emerging central role of online and blended

learning and (2) the strategic importance of the sustainability agenda in international HE. This section discusses the institutional and system-level considerations and implications of these themes.

5.1 | An emerging central role of online and blended learning

5.1.1 | Pedagogical and resource considerations

Despite the varied success of online learning (OECD, 2020; UNESCO, 2020), blended learning is emerging as the expected dominant mode of provision for HEIs (WEF, 2020). Many UK universities plan to continue with a blended learning model beyond the pandemic (Wylie, 2021). Nevertheless, there are concerns about whether this model will meet student expectations, particularly in terms of 'value for money' (HEPI/Advance HE Webinar, 2021). In addition, the blended learning approach used during the pandemic is primarily an Emergency Remote Teaching approach rather than a holistic blended learning model (Hodges et al., 2020). The latter requires a dedicated pedagogical design where online and face-to-face elements are complementary in producing the desired learning outcomes (Garrison & Vaughan, 2008). Creating a holistic blended learning modality requires substantial resources, which HEIs could misestimate, especially when resourcing assumptions are made on the old provision model (Gaebel, 2020; Tsiligiris, 2020).

5.1.2 | The adoption and recognition of online learning

In the pursuit of a safe alternative to face-to-face learning, many governments had to adjust their regulatory framework to streamline education provision online and through distance. This applied even to countries with conservative regulatory frameworks. For example, China (Yang, 2020) and Vietnam (Nguyen & Pham, 2020) have adapted their regulations to accommodate distance and online learning. In addition, other countries, such as India, have embraced digital education as part of their national education strategy (Srivastava, 2021). However, whether these regulatory reforms and strategic initiatives will be sustained when the pandemic is over is unclear. This is likely to impact the range and speed of adoption of online and flexible learning as a core component of the future model of HE provision.

The fiscal climate will likely impact the future shape of the regulatory environment for recognising and using online learning as a core HE modality. That is because, across the world, governments had to fund their health and economic response to the pandemic, which could result in a frugal fiscal environment characterised by scarce resources.⁹ This is likely to have the following two implications:

1. The lessons learnt from the move to online education delivery, supported by significant investments in online infrastructure, are likely to be capitalised on. Reductions in public funding for tertiary education will pressure tertiary education institutions to make the most of the available resources.
2. Countries aspiring to increase their participation rates in tertiary education will likely face significant financial constraints to deliver on their ambitions. This situation creates conditions for distance and online learning to absorb unmet local demand for tertiary education and reduce the pressure on the Government for funded university places.

The above may lead to a growing number of countries likely to recognise distance and online education. Over time this will likely result in greater international recognition of degrees and qualifications, followed by a convergence of HE systems, like the European Higher Education Area. Changes in the regulatory frameworks, which are likely to accommodate types of TNE, such as distance and online, are likely to accelerate regional mobility.

This has important implications for UK universities and the UK sector in general. Specifically, since UK universities rely heavily on international student inflows from specific regions (e.g., South East Asia), any disruptions caused by increasing rates of regional mobility will likely impact the flows of international students to the UK. At the same time, the recognition and broader acceptance of online provision, could be used by UK universities to reach global student markets and offset the adverse impact of regional mobility.

5.1.3 | The role of online learning in the internationalisation at home

During the pandemic, online learning was used to replace short-term mobility for experiential learning purposes (e.g., residential trips, guest speakers) relative to the home provision. For example, some institutions used the push towards online learning to bring employers into the classroom. The location of their workplace being of no importance meant that companies from international students' home country could join the students in a virtual environment. This has improved student experience by expanding the integration of experiential learning opportunities across courses (Kunjuthamby et al., 2021). Equally, students from various geographical locations could come as a team on an assignment, which means students could work alongside fellow students from partner institutions overseas. This took the form of Collaborative International Online Learning (COIL) that expanded the internationalisation at home by enabling virtual student mobility and collaboration (Van Hove, 2019). Adopting online elements in the future model of HE can generate a superior student experience and promote internationalisation at home (Tsiligiris, 2020).

From the analysis of the data presented earlier in the paper, we observe an expansion of the regional capacity of HE systems and concurrent development of regional mobility. At the same time, the emergence of new models of delivery and the blurring of boundaries between global student mobility and TNE is expected to impact further the flows of ISM. This trend is expected to continue and inevitably it will become more challenging for the UK, and other traditional destination countries, to continue and attract international students. Hence, HEIs in the UK will need to focus on creating a value-adding learning experience at home that will provide a strong proposition for convincing international students. This could be done partly by incorporating elements of online learning as a way to embed experiential learning and strengthen the internationalisation at home.

5.2 | The sustainability agenda in international higher education

While the pandemic widened existing inequalities in educational attainment, it also highlighted their potential cost and impact on society. Sustainable development and climate change became a preoccupation for many universities' leaders. Lewis (2021) observed a significant shift in the UK's universities' strategies over the past two decades from inward-looking and commercially driven to becoming outward-looking and engagement focused. In addition to sustainability and climate emergency, other themes in the study included diversity, social mobility and social justice, collaboration addressing global challenges, community engagement.

Locally, in major destination countries of international students, like the UK, there are emerging trends and considerations about the need to widen participation (Connell-Smith & Hubble, 2021), decolonising the curriculum (HEPI, 2020) and embed sustainability (Congreve & Cross, 2021). These developments drive the strategic plans, which include the internationalisation agenda. As a result, we observe a prioritisation of global impact as part of the UK universities' strategies. This is also reflected in the 2020 UK International education strategy (DfE & DIT, 2021) and includes consideration of the TNE impact on host countries (Action 19) but also the impact of international students on home students (Action 5).

Themes of internationalisation and decolonising the curriculum are gaining prominence among the universities and colleges, and more recently, sustainability and climate change. In addition to being reflected in the curriculum,

a shift in institutional approaches was captured in the joint HEPI/Advance HE Student Academic Experience Survey 2021. One of the highlights in the surveys was most students feel that 'their institution is committed to eliminating racial inequalities, with only 5% disagreeing' (Neves & Hewitt, 2021, p. 7).

Future students also add their voice behind the sustainability and climate change agenda. The Times HE student panel shows that prospective international students are increasingly preoccupied with sustainability and climate change (THE, 2021). Changes in the student decision-making factors will encourage universities to engage further with the sustainability agenda.

Notwithstanding the controversy associated with the impact of the universities' league tables, the latter have also attempted, although in a limited way, to measure universities' engagement with the global sustainability agenda through the framework of the United Nations SDGs. This has encouraged a growing number of institutions to demonstrate their work in sustainability and climate change. For example, 1117 HE institutions took part in the Times Higher Education Impact Rankings in 2021.¹⁰

TNE offers a cost-effective pathway to an international degree for a fraction of the cost and the carbon footprint. The mobility of academic programmes delivered outside the country of the respective education institution is associated with a significantly lower carbon footprint. Such programmes reach students in their home location and maintain the physical mobility of students and academics at low levels. Additionally, as outlined in the QMU case study in section 3.3, with the move to online quality assurance processes, the overall environmental footprint of TNE provision is minimal.

6 | CONCLUSION, IMPLICATIONS AND FURTHER RESEARCH

6.1 | Conclusions

Our study identifies the presence of several macro-trends relative to international HE that have been developing before the recent pandemic and have been outlined in previous research. Covid-19 has accelerated these trends and blurred the boundaries between ISM and TNE. Outbound mobility is expected to accelerate at the global level to specific regions, such as East Asia. Our analysis suggests that traditional destination countries of international students, such as the UK, US and Australia, are facing increasing competition from other countries that emerge as regional education hubs.

The role of TNE is changing and expanding as a pathway to international student recruitment and in-country delivery. Our analysis of the UK in-bound global student mobility and the UK TNE market indicate that the two markets complement each other rather than compete. Additionally, TNE contributes to the host countries' HE capacity and facilitates the regional mobility of international students. This is in line with previous research findings and highlights the growing importance of TNE as a core of the global HE provision. However, our study provides new evidence about the contribution of UK TNE in the inbound mobility of TNE host countries.

Our research identifies a persistent role of TNE in generating local impact in host countries relative to UN SDGs and particularly to access to good quality HE. This, in turn, supports local systems and generates a positive impact across the economy, education and society. In addition, this study adds valuable evidence about how the changes adopted during the pandemic can contribute to a sustainable model of international HE. For example, the case study evidence suggests that the rationalisation of international travel related to TNE administrative activities provides an excellent prospect for generating environmental benefits.

The data suggest that the impact of Covid has created various expectations about the use of online and blended learning as elements of the future HE model. Regulators and governments have adopted a more receptive stance towards online delivery during the pandemic. This has the prospect in transforming online delivery and its derivatives (e.g., blended, hybrid) as drivers of expanding access to HE. However, the pivot towards online education as the preferred component of the post-pandemic HE model, comes with a range of potential challenges and

limitations related to pedagogical considerations, impacting the perceived 'value for money' of HE and resource implications for HEIs.

6.2 | Implications

From the findings of our study, we can conclude that the future HE model fits the characteristics of the 'Global Delivery Model' (Ilieva & Tsiligiris, 2021; Tsiligiris, 2020). This model is characterised by the convergence of international HE and TNE into one universal delivery model where the learner's location becomes irrelevant. This has an embedded flexibility to allow for an ad hoc selection and a mixture of the delivery modes (e.g., face-to-face, blended, hybrid, online). In addition, this model integrates internationalisation and facilitates impact and sustainability goals.

Our analysis indicates the growing importance of internationalisation at home, widening participation, decolonising the curriculum and embedding sustainability. These themes are becoming the central driving force of internationalisation activities, particularly for UK HEIs. In the current HE model, internationalisation is often considered an external component to academic delivery that is evident in specific courses and students. In a Global Delivery Model, internationalisation is by design a core component of the learning experience. Most importantly, this is not limited to certain students (e.g., study abroad, exchange) but is evident across all courses and accessible by all students. The use of COIL and other online elements of international engagement can facilitate this.

One of the critical lessons learnt from the pandemic is the value of face-to-face interaction, especially in an international context. At the same time, there is now a clear understanding of the massive environmental implications of international travel for education. In a Global Delivery Model, international travel and any psychological mobility need to be justified in relation to the unique learning benefits for students versus the environmental footprint.

6.3 | Limitations

In this study, we strive to use various sources and forms of data to capture all elements and angles of the topics considered. Part of these data comes from national and international bodies that help capture the key trends in student mobility and TNE. However, these data are often incomplete for certain countries. In addition, the global data are not available for the latest academic year. Therefore, we must rely on data that go back two academic years or older in some instances. Considering the dynamic environment of international HE and the accelerated changes that occurred once the pandemic started, these data constraints impact our observations and findings.

Predicting the future of HE is a challenging process, particularly during an ongoing pandemic. Like all other studies that aim to explore the impact of the recent pandemic, our discussion and conclusions are relative and limited to our reflections on the data.

6.4 | Further research

As the world is exiting from the pandemic and HEIs find their new normal, there is scope for future research to identify the impact on the post-Covid priorities of HEIs. It will be particularly valuable to explore the qualitative nature of senior management perceptions about the sustainable models of HE. In addition, considering that most

of the current work has focused on exploring the pandemic impact on existing students, there is value in exploring new students' expectations due to start their studies once the pandemic is over.

DATA AVAILABILITY STATEMENT

The data that support the findings of this study are openly available in UIS, OECD and HESA at <http://data.uis.unesco.org/>; <https://stats.oecd.org/> and <https://www.hesa.ac.uk/data-and-analysis/students>.

ORCID

Vangelis Tsiligkiris  <https://orcid.org/0000-0002-5478-3464>

Janet Ilieva  <https://orcid.org/0000-0003-4637-0210>

ENDNOTES

- ¹ Data and detailed data analysis are available upon (reasonable) request.
- ² There is limited TNE data and at present there is a small number of countries which collect such data. This significantly limits the ability to perform international comparisons.
- ³ The UK has been consistently second to the United States except for 2019, when it slipped to 3rd position behind Australia (OECD 2021). HESA data shows strong enrolment growth in 2020/2021. Our estimates show the growth is sufficient to which place the UK back in second place.
- ⁴ $CARG = (\text{Most recent year}/\text{Beginning year})^{1/\text{number of years} - 1}$.
- ⁵ For details on the British Council CHED Jointly Developed Niche Programmes through TNE see <https://www.britishcouncil.ph/tne/about/the-project>
- ⁶ That is, 441,558 students in the total of 662,424 UK TNE students reported in the HESA offshore record.
- ⁷ ODA is defined by the Organisation for Economic Cooperation and Development's Development Assistance Committee as 'government aid that promotes and specifically targets the economic development and welfare of developing countries. The [committee] adopted ODA as the "gold standard" of foreign aid in 1969 and it remains the main source of financing for development aid'. The list of ODA countries used in this study can be found at <http://www.oecd.org/dac/financing-sustainable-development/development-finance-standards/DAC-List-of-ODA-Recipients-for-reporting-2018-and-2019-flows.pdf>.
- ⁸ The United Nations' 2030 Agenda for Sustainable Development contains 17 goals including a new global education goal (SDG 4). SDG 4 is to 'ensure inclusive and equitable quality education and promote lifelong learning opportunities for all'.
- ⁹ It is unclear whether the investments made in online education were a temporary measure, and teaching will return to normal when it is safe for students to return on campus.
- ¹⁰ Times Higher Education Impact Ranking: https://www.timeshighereducation.com/rankings/impact/2021/overall#/page/0/length/25/sort_by/rank/sort_order/asc/cols/undefined

REFERENCES

- Australian Government. (2020, October). *Offshore delivery of Australian higher education courses in 2019*. Department for Education, Skills and Employment Research Snapshot. <https://internationaleducation.gov.au/research/research-snapshots/Documents/RS%20HE%20Offshore.pdf>
- Beecher, B., Streitwieser, B., & Zhou, J. (2020). Charting a new path toward economic prosperity: Comparing policies for higher education hubs in Hong Kong and South Korea. *Industry and Higher Education*, 34(2), 80–90. <https://doi.org/10.1177/0950422219880477>
- C-BERT. (2021). *International Campuses*. <http://cbert.org/resources-data/intl-campus/>
- Cheng, M. (2021). Shifting trends in international student mobility: Embracing diversity and responding to change. *Trends & Insights*, 1–6.
- Choudaha, R. (2021). Role of graduate management education in preparing future leaders: Perspectives of enrolled students. *GMAC Advisor*. <https://blog.gmac.com/gmac-advisor/role-of-graduate-management-education-in-preparing-future-leaders-perspectives-of-enrolled-students>
- Congreve, A., & Cross, I. (2021, January 21). Responding to climate change in teaching. *Wonkhe*. <http://wonkhe.com/blogs/responding-to-climate-change-in-teaching/>

- Connell-Smith, A., & Hubble, S. (2021). *Widening participation strategy in higher education in England*. <https://commonslibrary.parliament.uk/research-briefings/cbp-8204/>
- British Council, & Universities UK. (2020). *Transnational routes to on-shore UK higher education* (pp. 1–39). <https://www.universities.ac.uk/policy-and-analysis/reports/Pages/Transnational-routes-to-on-shore-UK-higher-education.aspx>
- de Wit, H., & Altbach, P. G. (2021). Internationalization in higher education: Global trends and recommendations for its future. *Policy Reviews in Higher Education*, 5(1), 28–46. <https://doi.org/10.1080/23322969.2020.1820898>
- DfE, & DIT. (2021). *International Education Strategy: 2021 update: Supporting recovery, driving growth*. GOV.UK. <https://www.gov.uk/government/publications/international-education-strategy-2021-update/international-education-strategy-2021-update-supporting-recovery-driving-growth>
- Gaebel, M. (2020, May 28). *Expert voices*. Expert Voices—European University Association. <https://eua.eu/resources/expert-voices/178:covid-19-and-digitally-enhanced-learning-and-teaching-new-opportunities-in-challenging-times.html>
- Garrison, D. R., & Vaughan, N. D. (2008). *Blended learning in higher education: Framework, principles, and guidelines*. John Wiley & Sons.
- Green, B., Glautier, D., Haddleton, F., King, M., MacKinlay, A., McLaughlin, M., Ramos, E., & Shaw, C. (2020). *Effective practice in UK transnational education during the COVID-19 pandemic*. [Report]. Quality Assurance Agency for Higher Education. <https://strathprints.strath.ac.uk/75119/>
- Gümüş, S., Gök, E., & Esen, M. (2020). A review of research on international student mobility: Science mapping the existing knowledge base. *Journal of Studies in International Education*, 24(5), 495–517. <https://doi.org/10.1177/1028315319893651>
- HEPI. (2020, July 22). *New report calls for the decolonisation of universities in order to address a 'silent crisis.'* HEPI. <https://www.hepi.ac.uk/2020/07/23/new-report-calls-for-decolonisation-of-universities-in-order-to-address-the-silent-crisis-in-universities/>
- HEPI/Advance HE webinar: *What is the future of higher education?*, 9 February 2022. (2022, January 21). <https://www.hepi.ac.uk/2022/01/21/hepi-advance-he-webinar-what-is-the-future-of-higher-education-9-february-2022/>
- Hodges, C., Moore, S., Lockee, B., Trust, T., & Bond, A. (2020, March 27). The difference between emergency remote teaching and online learning. *EDUCAUSE*. <https://er.educause.edu/articles/2020/3/the-difference-between-emergency-remote-teaching-and-online-learning>
- Hou, C., & Du, D. (2022). The changing patterns of international student mobility: A network perspective. *Journal of Ethnic and Migration Studies*, 48(1), 248–272. <https://doi.org/10.1080/1369183X.2020.1797476>
- Huang, F. (2022). Two-way internationalisation plan faces several roadblocks. *University World News*. <https://www.universityworldnews.com/post.php?story=20220209123732497>
- ICEF. (2019). Intra-regional mobility in Asia. *ICEF Insights*, Fall 2019, 1–84. https://www-cdn.icef.com/wp-content/uploads/2018/04/ICEF-Insights-2019_web.pdf
- Ilieva, J. (2015). Transnational pathways to English higher education. *International Higher Education*, 81, 14–15. <https://doi.org/10.6017/ihe.2015.81.8733>
- Ilieva, J., Roe, G., & Killingley, P. (2017). *Higher education engagement between the Republic of Ireland and China: Evidence and strategy to 2020*. Enterprise Ireland.
- Ilieva, J., & Tsiligiris, V. (2021). Globally engaged and locally relevant: Revisiting higher education. *International Higher Education*, 106, 13–14. <https://doi.org/10.36197/IHE.2021.106.00>
- Ilieva, J., Tsiligiris, V., Killingley, P., & Brandenburg, U. (2021). *Local impact of transnational education: A pilot study in selected European Union countries* (pp. 1–19). British Council. https://www.britishcouncil.org/sites/default/files/bc_tne_report_final_120421.pdf
- Kirloskar, P., & Inamdar, N. (2021). Shifting international student mobility directions and factors influencing students' higher education destination choices. *Journal of Higher Education Policy and Leadership Studies*, 2(3), 160–178. <https://doi.org/10.52547/johepal.2.3.160>
- Knight, J. (2018). International education hubs. In P. Meusbarger, M. Heffernan, & L. Suarsana (Eds.), *Geographies of the university* (pp. 637–655). Springer International Publishing. https://doi.org/10.1007/978-3-319-75593-9_21
- Knight, J., & McNamara, J. (2015). The impact of transnational education in receiving countries. *International Higher Education*, 82, 3–5.
- Knight, J., & McNamara, J. (2016). *Transnational education: A classification framework and data collection guidelines*. British Council and DAAD. https://www.britishcouncil.org/sites/default/files/tne_classification_framework-final.pdf
- Kunjuthamby, S., Bennett, M., & Zhou, X. (2021). *Collaborative online international learning (COIL) in UK higher education: Reloaded*. <https://www.bera.ac.uk/blog/collaborative-online-international-learning-coil-in-uk-higher-education-reloaded>
- Levantino, A. (2017). Transnational higher education and international student mobility: Determinants and linkage. *Higher Education*, 73(5), 637–653. <https://doi.org/10.1007/s10734-016-9985-z>
- Lewis, V. (2021). *UK Universities' Global Engagement Strategies: Time for a rethink?* (pp. 1–66). Vicky Lewis Consulting. <https://www.vickylewisconsulting.co.uk/global-strategies-report.php>

- Li, X., & Haupt, J. (2021, February 13). Could 'distance TNE' become a growth area after COVID-19? *University World News*. <https://www.universityworldnews.com/post.php?story=20210210074621731>
- McBurnie, G., & Ziguas, C. (2001). The regulation of transnational higher education in Southeast Asia: Case studies of Hong Kong, Malaysia and Australia. *Higher Education*, 42(1), 85–105. <https://doi.org/10.1023/A:1017572119543>
- McBurnie, G., & Ziguas, C. (2006). *Transnational education: Issues and trends in offshore higher education*. Routledge.
- Nandy, M., Lodh, S., & Tang, A. (2021). Lessons from Covid-19 and a resilience model for higher education. *Industry and Higher Education*, 35(1), 3–9. <https://doi.org/10.1177/095042220962696>
- Neves, J., & Hewitt, R. (2021). *Student academic experience survey 2021* (pp. 1–64). HEPI/Advance HE. https://www.hepi.ac.uk/wp-content/uploads/2021/06/SAES_2021_FINAL.pdf
- Nguyen, H., & Pham, T. (2020, May 16). Is COVID-19 an opportunity to strengthen online teaching? *University World News*. <https://www.universityworldnews.com/post.php?story=20200512154252178>
- Nørgård, R. T., & Hilli, C. (2022). Hyper-hybrid learning spaces in higher education. In E. Gil, Y. Mor, Y. Dimitriadis, & C. Köppe (Eds.), *Hybrid learning spaces* (pp. 25–41). Springer International Publishing. https://doi.org/10.1007/978-3-030-88520-5_3
- OECD. (2020). *What is the profile of internationally mobile students?* <https://doi.org/10.1787/974729f4-en>
- OECD. (2021). *Education at a Glance 2021: OECD indicators*. OECD. <https://doi.org/10.1787/b35a14e5-en>
- Papageorgiou, F., Makellarakis, V., & Tsiligiris, V. (2020). *Transnational education as enabler of access to quality higher education and its link to UN SDG4: The case of Greece*. Palgrave Macmillan. <https://eresearch.qmu.ac.uk/handle/20.500.12289/10689>
- Peters, M. A. (2020). *The crisis of international education*. Taylor & Francis.
- QS. (2021). *How the coronavirus pandemic reshaped international higher education*. QS Quacquarelli Symonds. <https://www.qs.com/portfolio-items/how-the-coronavirus-pandemic-reshaped-international-higher-education/>
- Radwan, A. (2022). The post-pandemic future of higher education. *Dean and Provost*, 23(6), 1–5. <https://doi.org/10.1002/dap.30987>
- Ramos, E., & Ryan, G. (2021). How can TNE help the UK's international education sector in the post-Covid-19 period? *Universities UK*. <https://www.universitiesuk.ac.uk/universities-uk-international/insights-and-publications/uuki-blog/how-can-tne-help-uks-international>
- Rorty, R. (1982). *Consequences of pragmatism: Essays, 1972-1980*. University of Minnesota Press.
- Sachs, J. D., Schmidt-Traub, G., Mazzucato, M., Messner, D., Nakicenovic, N., & Rockström, J. (2019). Six transformations to achieve the sustainable development goals. *Nature Sustainability*, 2(9), 805–814. <https://doi.org/10.1038/s41893-019-0352-9>
- Santos, C. A., & Pinheiro, M. M. (2022). The future is now: Coping with the digital paradigm in higher education. In Barbosa, B., Filipe, S., & Santos, C. A. (2022). *Handbook of research on smart management for digital transformation* (pp. 504–526). IGI Global.
- Shields, R. (2016). Reconsidering regionalisation in global higher education: Student mobility spaces of the European Higher Education Area. *Compare: A Journal of Comparative and International Education*, 46(1), 5–23. <https://doi.org/10.1080/03057925.2014.884348>
- Shkoler, O., Rabenu, E., Hackett, P. M. W., & Capobianco, P. M. (2020). *International student mobility and access to higher education*. Springer Nature.
- Srivastava, S. (2021, May 13). The future of online education in India (Updated 2021). *IIM SKILLS*. <https://iimskills.com/the-future-of-online-education-in-india/>
- Stacey, V. (2020, December 21). Blended modes of learning helping facilitate mobility. *The PIE NEWS*. <https://thepienews.com/news/not-online-vs-f2f-blended-modes-helping-facilitate-mobility/>
- Stacey, V. (2021, January 11). NCUK/Uni of Auckland reveal China study centre. *The PIE NEWS*. <https://thepienews.com/news/ncuk-uni-of-auckland-reveal-china-study-centre/>
- Study Portals and British Council. (2021). The changing landscape of English-taught programmes (pp. 1–36).
- Thang, L., & Kim, H. (2016). Regional mobility from East Asia to Southeast Asia: The case of education and retirement migration. In S. Wajjwalku, K. C. Ho, & O. Yoshida (Eds.), *Advancing the regional commons in the New East Asia* (pp. 77–99). Routledge.
- THE. (2021). Students, sustainability, and study choices: Exclusive analysis of findings from a survey of 2,000 prospective students. *Times Higher Education*. https://www.timeshighereducation.com/sites/default/files/breaking_news_files/innovation_and_impact_summit_presentation_slides_v01.01.pdf
- The PIENews. (2021). *The post-pandemic mainstreaming of TNE*. <https://thepienews.com/the-view-from/the-post-pandemic-mainstreaming-of-transnational-education/>
- Tsiligiris, V. (2014). *Transnational Education vs International Student Mobility: Substitutes or Distinct Markets?* (pp. 1–53). The Observatory on Borderless Higher Education http://www.obhe.ac.uk/documents/view_details?id=952
- Tsiligiris, V. (2019). *Research on Greece-UK higher education institutional collaboration in the field of transnational education* (pp. 1–91). British Council.

- Tsiligiris, V. (2020). Towards a global delivery model for international higher education. *University World News*. <http://irep.ntu.ac.uk/id/eprint/40495/>
- Tsiligiris, V., Lawton, W., Hill, C. (Eds.). (2020). *Importing transnational education: Capacity, sustainability and student experience from the host country perspective*. Palgrave Macmillan. <https://doi.org/10.1007/978-3-030-43647-6>
- UNESCO. (2020). *COVID-19 response—Hybrid learning: Hybrid learning as a key element in ensuring continued learning*. <https://unesdoc.unesco.org/ark:/48223/pf0000373767?posInSet=3&queryId=b40003f4-2249-4974-84e4-acb9bc32fcf9>
- UNESCO UIS. (2021). *UIS statistics*. UNESCO. <http://data.uis.unesco.org/>
- UUKi. (2021). *The scale of UK higher education transnational education 2018–19* (pp. 1–71). Universities UK International. <https://www.universitiesuk.ac.uk/sites/default/files/field/downloads/2021-08/the-scale-of-UK-HE-TNE-2018-19.pdf>
- Van Hove, P. (2019). *COIL: What's in an acronym?*. EAIE—European Association for International Education. <https://www.eaie.org/blog/coil-acronym.html>
- Varghese, N. V. (2009). *Globalization, economic crisis and national strategies for higher education development*. International Institute for Educational Planning (IIEP).
- Vögtle, E. M., & Windzio, M. (2016). Networks of international student mobility: Enlargement and consolidation of the European transnational education space? *Higher Education*, 72(6), 723–741. <https://doi.org/10.1007/s10734-015-9972-9>
- WEF. (2020, November 25). *Is this what higher education will look like in 5 years?*. World Economic Forum. <https://www.weforum.org/agenda/2020/11/higher-education-online-change-cost-covid-19/>
- Wylie, I. (2021, June 15). 'A better system': How online and blended learning are changing education forever. *CMI*. <https://www.managers.org.uk/knowledge-and-insights/article/a-better-system-how-online-and-blended-learning-are-changing-education-forever/>
- Xiong, W., Mok, K. H., & Jiang, J. (2020). *Hong Kong university students' online learning experiences under the Covid-19 pandemic*. Higher Education Policy Institute. https://www.researchgate.net/publication/343547114_Hong_Kong_University_Students'_Online_Learning_Experiences_under_the_COVID-19_Pandemic
- Yang, R. (2020). China's higher education during the COVID-19 pandemic: Some preliminary observations. *Higher Education Research & Development*, 39(7), 1317–1321. <https://doi.org/10.1080/07294360.2020.1824212>
- Ye, R. (2021). Testing elite transnational education and contesting orders of worth in the face of a pandemic. *Educational Review*, 1–16. <https://doi.org/10.1080/00131911.2021.1958755>

How to cite this article: Tsiligiris, V., & Ilieva, J. (2022). Global engagement in the post-pandemic world: Challenges and responses. Perspective from the UK. *Higher Education Quarterly*, 00, 1–24. <https://doi.org/10.1111/hequ.12390>