



**International Higher  
Education Commission**

Supported by Oxford International Education Group

# The Role of Transnational Education Partnerships in Building Sustainable and Resilient Higher Education



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This is the 4th report produced to support the work of the International Higher Education Commission – by providing the data, insight and evidence necessary to establish a new and relevant ‘International Education Strategy 2.0’

Building on the recently launched British Council Transnational Education Strategy 2023–25, this report details the context and dynamics of TNE and how to realise its potential to generate substantially enhanced academic, operational and financial returns for UK providers and their overseas partners, augment experiences and widen access for students, and provide talent pipelines for industry on a global, scalable and sustainable basis.

It has been designed to be inclusive of the whole sector, regardless of experience, institutional size or TNE maturity. The report therefore introduces concepts and then explores them in more detail in subsequent sections and it purposely includes a comprehensive introduction for those who require a background to transnational education, as a precursor to the recommendations.

## Executive Summary

- TNE is an area of international higher education where the UK has a global lead with over half a million students enrolled on degree programmes overseas.
- Notwithstanding the above, TNE has yet to fulfil its potential, including engaging the full spectrum of world class UK HEIs. New approaches to delivery and new providers are essential to crystallise the available benefits.
- While pockets of expertise exist in UK HEIs, there is overall a lack of specific experience particularly in respect of a number of key countries; and the motivations of students and partner institutions are not well understood.
- Whilst institutional strategies will differ, a clear UK position on TNE is imperative, including appropriate investment to improve our understanding of supply, demand, and finances; risk and risk mitigation; awareness of needs and staff training.
- TNE offers many benefits to UK HEIs, their overseas partners and the enrolled students. Benefits include academic, research enhancement, financial returns, increased international profile plus improved access and quality experiences for students.
- TNE is very different to international recruitment to UK campuses in terms of the students enrolled, countries involved, and approach to market development. The two activities are complementary and not in direct competition.
- Student progression from offshore courses to UK campuses can happen through articulation routes, including the recognition of prior learning. These can be grown.
- TNE is delivered primarily through three modes: international branch campuses, distance learning, and partnerships (or some mix of these). Partnerships offer the greatest potential for a mix of benefits to be realised by all involved.
- Good choice of overseas partners is vital for successful TNE development and delivery. TNE partnerships are based on delivery through in-country partners.
- The behaviours and motivations of TNE students differ markedly, between and within countries and even between local country partners.
- Important innovations in research partnerships are possible through TNE, including for doctoral students.
- TNE has a growing role to generate impact and change towards meeting UN SDGs; this has facilitated cross institutional dialogue towards shared objectives.

# Summary of recommendations

- We urgently need new mechanisms to systematically develop novel academic, operational and financial models for TNE. This approach would support new entrants and the scaling up of existing provision through systematic sharing of best practice, benchmarking and building capacity and capability. We recommend the establishment of a TNE academy – modelled on Advance HE – that will act as a forum and focus to enhance TNE across multiple dimensions.
- Clear targets should be set for TNE growth as part of the next International Education Strategy, including for the different delivery modes. Further detailed, market orientated, in-country research is needed to inform this.
- We need to create an appropriate “international” data and insight architecture and grow expertise that can systematically apply this to better understand the dynamics of past, current and potential future recruitment onto TNE (and onshore) programmes.
- An appropriately funded, dedicated, all UK marketing initiative to focus on key TNE markets and segments is required – owned by and accountable to a single entity that can act on behalf of the sector. This showcasing of the UK offer to other nations, would have parallels with how Study UK seeks to attract students to study in the UK. In addition, UK HEIs need to support their overseas partners more directly, given their key role in marketing and delivery in country. They are the country-facing window for UK universities and their effectiveness will bring benefits to both partners.
- Notwithstanding the current consultation on the HESA Aggregate Offshore Record, we recommend a HESA-UK HEI working group on student data to improve the appropriateness, coherence and timeliness of data both for TNE and onshore UK international student enrolments so that it can better inform decisions about future activities, rather than simply record past activities. This working group would also clarify TNE definitions.
- Overseas based collaborative doctoral research training centres and cotutelle programmes need to be expanded. This will enhance development and delivery of transnational and collaborative research.
- TNE-like approaches should be embedded in institutional strategies through promoting and rewarding COIL (Collaborative Online International Learning) and IaH (Internationalisation at home) activities.

# Foreword



From the International Higher Education Commission Chair,  
The Rt Hon  
Chris Skidmore MP

The 2019 International Higher Education (IHE) strategy was a product of its time. It reflected a focus on export opportunities for UK education in a post-Brexit world and indeed the UK has been highly successful in this, exceeding the 600,000 target by some margin. Along with other recommendations, the 2019 strategy referenced the significance of TNE and noted earlier Government education approaches that had foregrounded TNE, particularly the 2013 document “International Education: Global Growth and Prosperity”. What was not noted in 2013 was the subtext that TNE was a less contentious way of “exporting” the UK’s higher education success by focussing on offshore rather than onshore delivery.

A decade later we are in similar territory with the debate about the student contribution to net migration figures again a central feature of the policy discourse with the current UK Government committing to a review of Graduate Route ‘abuses’. The Migration Advisory Committee was already expected to recommend a further tightening of the visa regime, having previously indicated that the Graduate Route should be curtailed as in their view it is frequently a route to work not study. Consequently the need for the UK to have a competitive international student offer is having to be rewon with Government. We can also learn from the removal of post-study work rights in 2012, this showed that students on articulation programmes were less affected, and the opportunity to enhance articulation routes should be embraced.

If we are to mainstream TNE over the coming decade, it is essential that we do TNE for the “right” reasons, not just because growing onshore recruitment is heading into the “too difficult” box. The reality we face is not an “either or” decision, the focus is firmly on developing a balanced portfolio of activity. TNE will never replace the financial, operational and academic contributions of onshore delivery, but it can facilitate multiple agendas as part of a sophisticated global engagement framework.

Updates to the 2019 Strategy have progressively enhanced the architecture for developing TNE, including through the work of Sir Steve Smith as the International Education Champion, a focus on priority countries and Government to Government negotiations which have delivered several successes including the mutual recognition agreement signed with India, and the TNE focussed agreement signed at The British Council’s Going Global conference in 2023 between the UK and Nigeria.

Simultaneously, there has been substantial growth in students enrolled on TNE programmes of UK providers, with almost every UK university involved, and the growth

across the UK broadly mirroring the increase in onshore recruitment over the past few years. There are now more than 550,000 TNE students enrolled with 162 UK universities in 230 countries and territories.

However, the view that TNE is now a central part of the educational mainstream is belied by the fact that very few universities have more than 10,000 registered TNE students. Hence the challenge for many institutions is how to develop partnerships at scale, and in particular how to ensure that the appropriate people, plans and processes are in place to crystalise opportunities.

It is inevitable that the volume of offshore delivery will overtake onshore provision in the near future, whatever the UK Government does or doesn’t do in response to net migration trends and the associated softening of demand for onshore delivery.

Nevertheless offshore enrolment exceeding onshore, is an entirely spurious measure of success. Firstly, because it is not a like for like measure. For example the AOR includes offshore distance learning delivered from the UK, but the onshore figures do not necessarily capture flexible delivery for overseas students in the UK. Secondly, and more fundamentally, we should be judging ourselves against potential to realise demand, not against other forms of delivery. Only the ability to crystalise delivery at appropriate scale can generate the returns that TNE promises, if the sector can develop the right models to meet the needs of UK providers our overseas partners and prospective students.

In referencing models we do not just mean flying faculty versus online, nor validation versus franchise, articulation versus overseas campus because TNE comes in many forms. The fundamental basis on which UK universities partner with overseas entities should better reflect the social and economic context in which education is delivered to best meet the needs of current and future students; hence new models are undoubtedly required.

It is in this context that we provide this report – for too long, transnational education has been treated as the poor relation to onshore student recruitment. In part, this was driven by the policy framework of the previous IES; the different financial dynamics are also a major factor. However, we live in a changing world to which we must adapt. Concerns around environmental costs and a desire across the academe to build more equitable partnerships are creating a momentum for change. The development at rapid pace of new forms of learning, not least with the emergence of AI, requires the higher education policy community to urgently shift our focus away from just students coming to the UK, to a more universal approach that reflects the complexity and diversity of the emerging global higher education market. The offer from universities and providers must evolve to meet the changing and growing pace of demand. We live in a global education market and are in a global international education race for fit for purpose provision. If we stand still and fail to better embrace the opportunities TNE presents, then the UK will miss the opportunity to be an international leader in this field. Yes, there are challenges around scale and sustainability, certainly we need new models and enhanced financial viability, but this chance to be an early global leader will not come again. We must seize it.

# Introduction

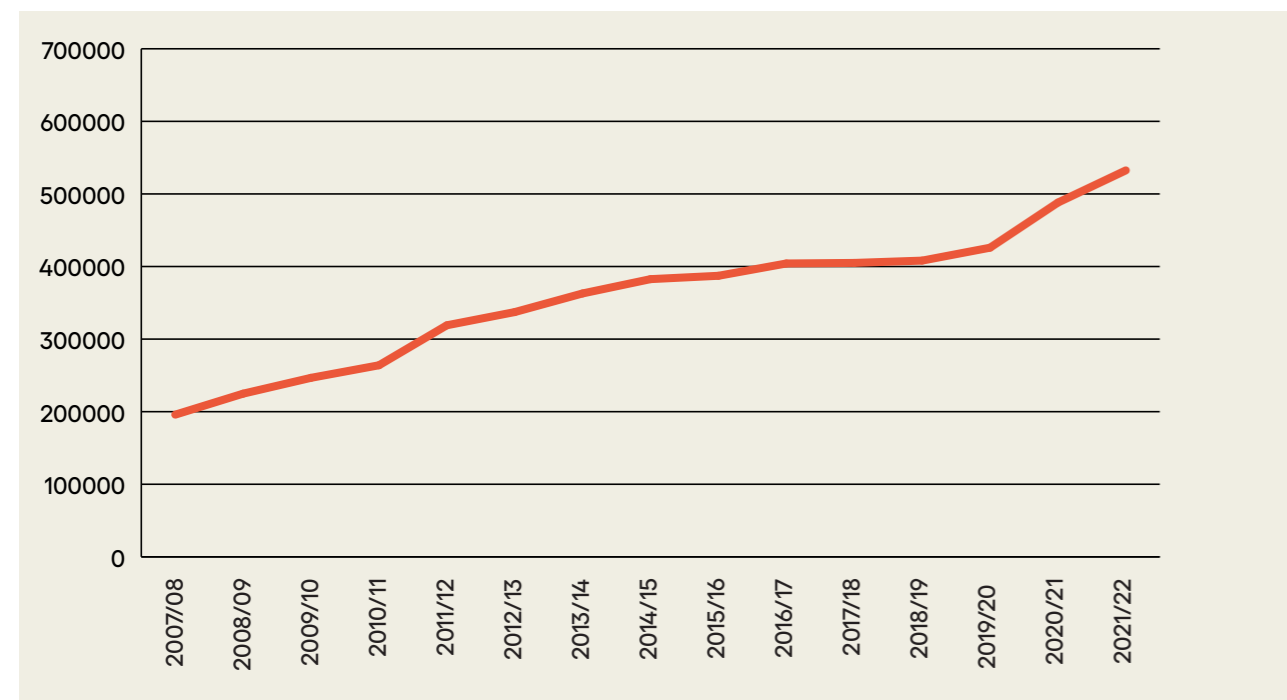
“Transnational education (TNE) is education delivered in a country other than the country in which the awarding institution is based, e.g., students based in country Y studying for a degree from a university in country Z. UK HE TNE refers to UK degree programmes delivered outside of the UK.”<sup>1</sup>

TNE is continuously evolving with new models emerging on the ground. Contemporary TNE goes well beyond traditional franchising and validation models to include innovative approaches that challenge the relevance of the traditional definition of TNE. Also, TNE includes models of collaborations that lead to joint, double or multiple awards from UK and partner universities.

Over the past 20 years, UK TNE has grown significantly from about 200,000 students in 2003 to more than 500,000 students in 2022. The majority of UK TNE students’ study at undergraduate level through a collaborative form of TNE partnership.

In 2022, The British Council noted that TNE serves at least three functions for UK HEIs 1) recruitment of international students; 2) expanding the global reach and 3) strengthening the global reputation of the institution.

Figure 1: UK TNE (2008–2022)



Data source: HESA Aggregate Offshore Record. The UK TNE data excludes Oxford Brookes University to normalise the data after the change in the reporting requirements introduced in 2018/19.

There is increasing discussion in the UK about the role of TNE as an integral part of university global engagement strategies. This reflects a notable shift towards proactive and meaningful engagement through teaching partnerships, with a strong focus on local impact. This includes the education and development agenda of national governments: widening access to education and international degrees, strengthening the quality and diversity of the local higher education provision, capacity building at the partner institution, opening up routes to research and knowledge exchange collaborations, supporting local employers by delivering flexible training options and attracting talent to the location of TNE delivery.

However, traditional models hinder the realisation of the full range of benefits and value of TNE as part of a global engagement strategy. Also, it bears repetition, that impactful TNE needs to be financially viable to be sustainable – or at the very least to be developed and delivered as part of a wider set of activities that evidence a financially sustainable approach across the entirety of the portfolio. Whilst pursuit of TNE simply for financial returns is unsustainable, due recognition has to be given to the need for a strategic return on investment if we are to mainstream TNE. The last half century demonstrates that is not a given but requires skill in financial structuring and a real focus on what adds value to the partners and students.

In this report we outline effective strategic approaches for the development of TNE at a national and institutional level and provide details of how to implement these strategies in ways that are financially sustainable.

# Size and Shape of UK TNE Provision

Figure 2 shows the main forms of TNE according to HESA’s aggregate offshore record (AOR).

While overseas branch campuses are perhaps the best-known form of TNE, and the UK Overseas Campuses Network\* is working to increase understanding and awareness of the contribution made by overseas campuses, they only account for 7% of the student population undertaking UK degrees wholly overseas. There is a re-emergence of the “multiversity” concept popular a decade ago, but it is as yet unclear how significant developments like the Incheon Global Campus in South Korea, Hainan Education Zone, China and Education City in Malaysia will become.

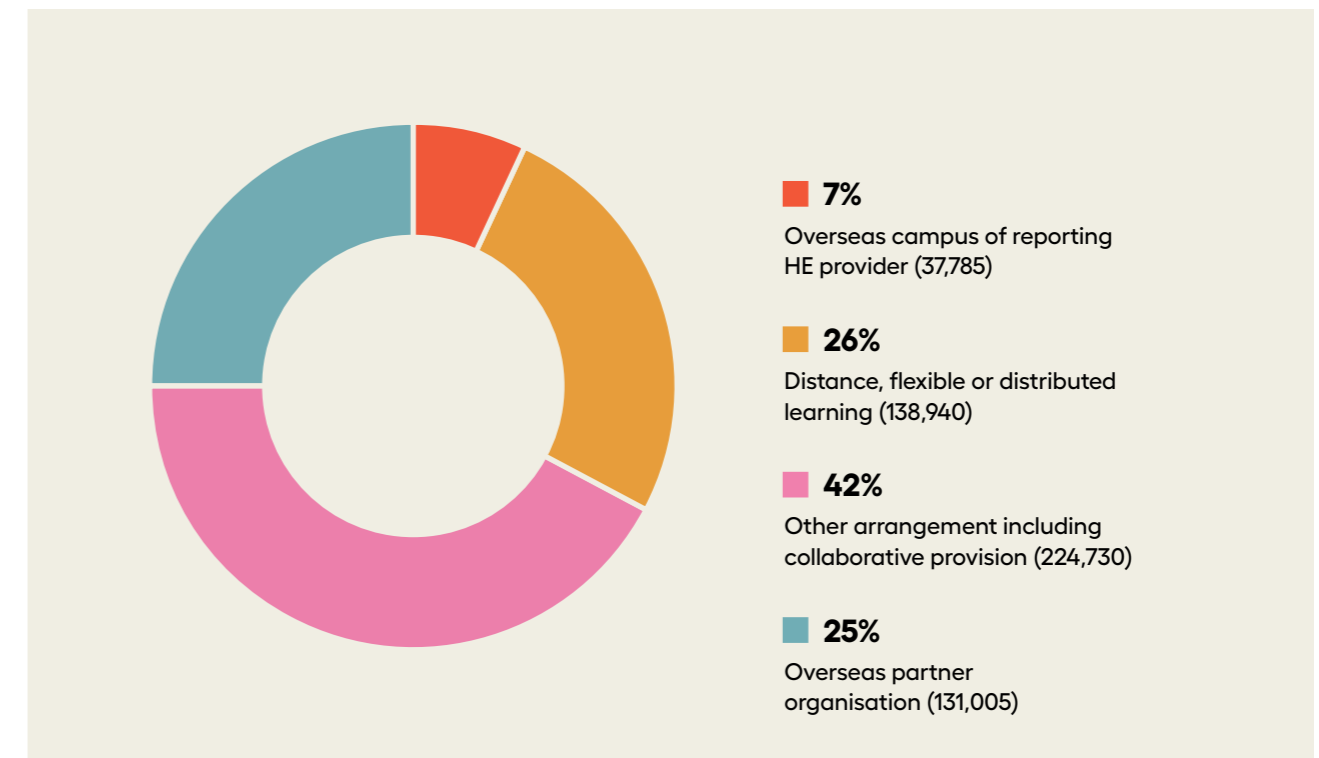
Collaborative forms of TNE, that primarily involve the overseas delivery of UK HE programmes by a local provider, accounted for 42% (224,730 TNE students) of the overall TNE population in 2021/22 and have experienced growth of 38% (50,280 students) over the past 2 years. It is important to note that many of these programmes constitute double-degree awards where students are often solely registered with an overseas partner provider.

In this context, the following definitions are applied:

- Registered at overseas partner**  
These partnerships encompass validation agreements with overseas partners.
- Other arrangement including collaborative provision**  
The largest portion encompasses forms of franchising and dual and joint degrees.
- Distance, flexible, or distributed learning**  
Include learners who do not regularly interact with the reporting institution.
- Overseas campus**  
A campus set up as a branch of the parent provider.

Please note: Appendix 1 to this report outlines the types of transnational education and associated award outcomes.

Figure 2: Proportion of UK HE TNE students by type of provision, 2021–22



Source: HESA Aggregate Offshore Record.  
<https://www.hesa.ac.uk/data-and-analysis/students/where-from#tne>

\* <https://www.universitiesuk.ac.uk/universities-uk-international/insights-and-publications/uuki-publications/uk-university-overseas-campus-network>

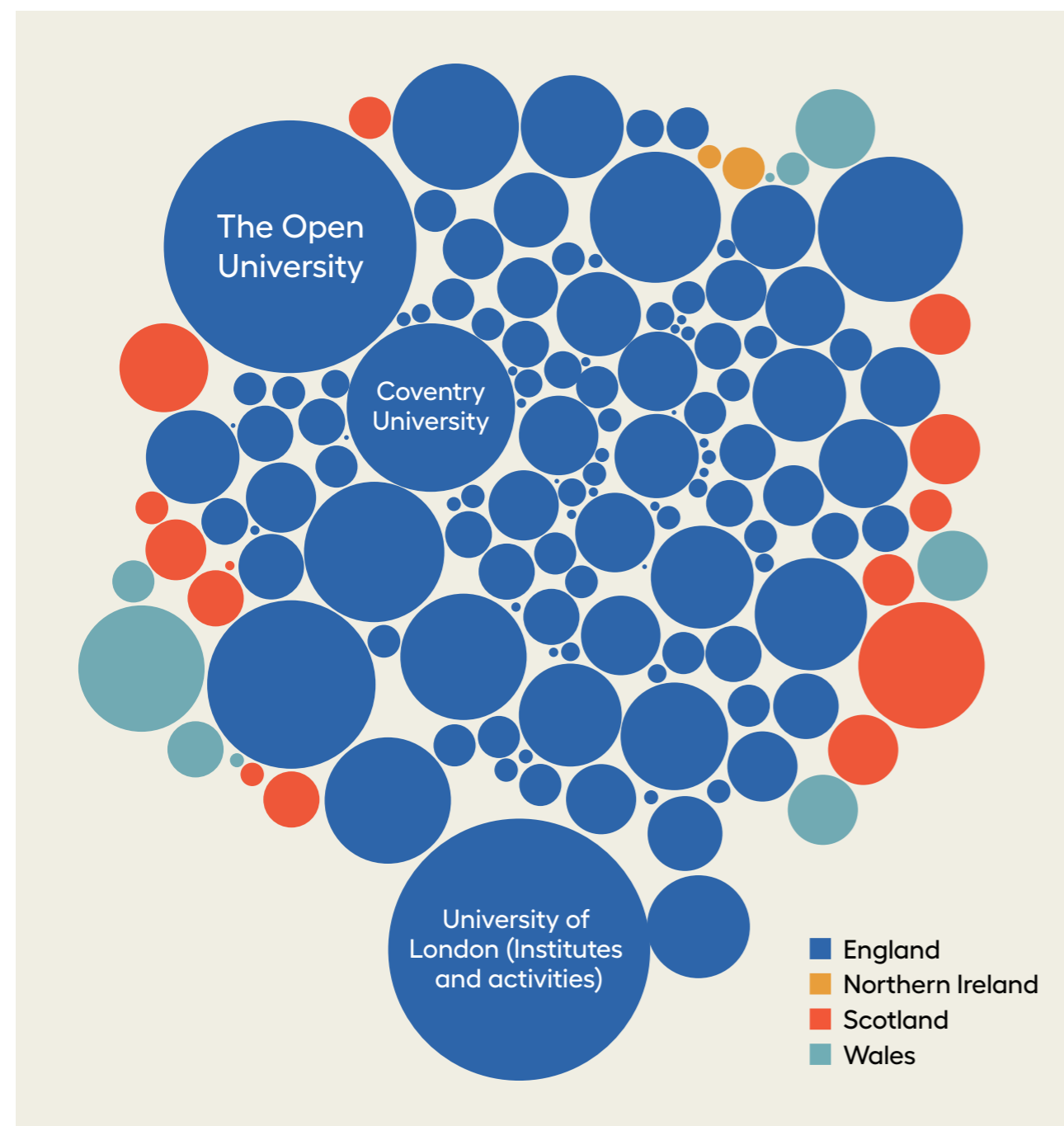
<sup>1</sup> Universities UK, “What Is UK Higher Education Transnational Education?,” Universities UK, 2023, <https://www.universitiesuk.ac.uk/universities-uk-international/explore-uuki/transnational-education/what-uk-higher-education-transnational>.

## Institutional capacity to deliver TNE

Growth in TNE depends on the capacity and capability of UK HEIs and their international partners, and on the local regulatory environment. Whilst most UK HEIs engage in TNE, a small number of institutions account for the vast majority of enrolments and there is a long tail of small providers – as shown in the figure below. The largest 15 HEIs, which represent 9% of the HEIs engaging in TNE

account for 50% of provision. In 2021–22, 54 HEIs reported less than 500 TNE students each. This suggests there is room to grow institutional capacity. However, crystallising that potential future TNE growth will depend on the emergence of new models delivering viability at scale and the advent of new players.

Figure 3: UK HE TNE students by UK provider, 2021–22



Data excludes Oxford Brookes University. From "The scale of UK transnational education" 2023 update

Table 1 shows HEIs with over 10,000 TNE students which belies the view that TNE is now a central part of the educational mainstream. The two largest TNE players were essentially established with "distance" learning at their core decades ago – The University of London and The Open University. Two Russell Group institutions (Nottingham and Liverpool) feature in the top 14 primarily as a result of overseas campuses (both in China, the biggest TNE market for the UK by far); there are 2 pre-92 institutions – Heriot Watt (two overseas campuses, and a large online footprint that contributes

to overall TNE numbers), and Lancaster who stand out in terms of institutional mainstreaming of TNE; Lancaster has made an active and strategic commitment to TNE on a global basis (although it currently has only just over 10,000 students) through delivery at scale in Malaysia, a Joint Institute in China, campuses in Africa and the EU, and a joint campus being developed with Deakin in Indonesia. The remaining eight are modern universities whose TNE provision has been built on various bases as part of long-standing strategic intent.

Table 1: UK universities with more than 10,000 TNE students

Rank	University Name	Postgraduate Research	Postgraduate Taught	First Degree	Other UG	Total
1	The Open University in England	220	2,125	43,320	625	46,295
2	University of London (Institutes and activities)	0	7,045	27,600	2,750	37,395
3	Coventry University	25	2,850	18,380	120	21,370
4	The University of Liverpool	70	3,325	16,585	0	19,980
5	University of Nottingham	1,115	4,485	10,365	690	16,655
6	Liverpool John Moores University	0	10,705	3,285	935	14,925
7	The University of Greenwich	0	1,260	12,615	10	13,885
8	Middlesex University	540	3,910	8,900	115	13,465
9	The University of Sunderland	45	5,780	7,520	0	13,350
10	Cardiff Metropolitan University	0	4,795	5,450	2,990	13,235
11	Heriot-Watt University	205	7,360	4,630	505	12,700
12	University of Bedfordshire	0	5,165	5,465	75	10,710
13	The University of Lancaster	360	405	9,590	0	10,355
14	The University of East London	5	6,035	3,995	0	10,035

Source: HESA Aggregate Offshore Record. <https://www.hesa.ac.uk/data-and-analysis/students/where-from/transnational>

## TNE and international student recruitment

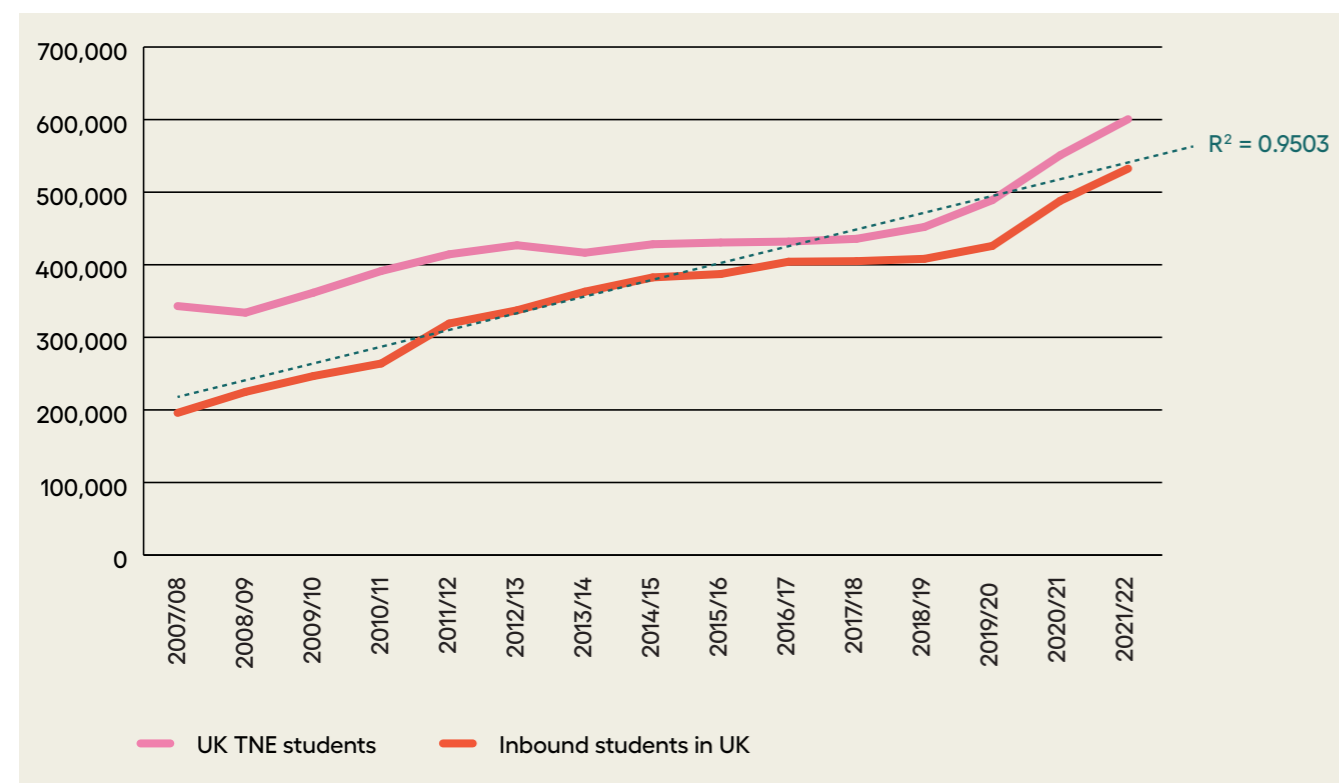
Figure 4 shows a strong positive relationship between TNE and international student recruitment (ISR). The two activities are complementary with growth in international student recruitment happening in parallel to expansion of TNE. The most likely explanation is:

- Global growth in the demand for higher education sees students increasingly choose the route that is most appropriate for them.
- The circumstances and intentions of internationally mobile students are different to TNE students. Expansion in TNE is not at the expense of international student recruitment to the UK.
- TNE can support onshore student recruitment. For example, TNE articulation is a means through which students on a TNE programme become part of onshore enrolments. Previous research shows that articulations make a significant contribution to onshore recruitment<sup>2</sup>.

Progression from offshore courses, and those with recognition of prior learning, constitute a significant part of the recruitment landscape in East and South-East Asia<sup>3,4</sup> that is well-documented for programmes delivered in English, and also in the Russian Language. A challenge for many has been to identify opportunities for progression/articulation at scale to minimise the complexity of managing multiple articulation routes simultaneously.

Despite the data and research evidence, it remains a common misconception that the growth of TNE will be at the expense of international student recruitment; TNE and international student recruitment (ISR) are not binary choices, and this characterisation creates a misconception about the purpose, potential and therefore effectiveness of TNE thereby undermining global engagement strategies.

Figure 4: UK TNE vs inbound international student mobility to the UK (2008–2022)



Data source: UK TNE data from HESA; Total inbound to the UK from UNESCO. The UK TNE data excludes Oxford Brookes University to normalise the data after the change in the reporting requirements introduced in 2018/19.

## TNE as a source of diversity

TNE allows the UK HE sector a broader and more evenly spread geographical global engagement footprint than international student recruitment. For example, based on the most recent data, half of all inbound non-UK students to the UK come from just four countries (China, India, Nigeria, and Pakistan).

In contrast, UK TNE engagement includes a much broader list of countries and geographical regions, where to reach 50% of demand it takes eight countries and, importantly, these are, apart from China, different countries with Europe and the Middle East are well represented. Hence a strategy that combines ISR and TNE achieves a more balanced approach that brings many benefits including the potential for more effective global engagement, enhanced diversification and augmented risk management – by geography, channel to market and level.

Table 2: Top 10 countries of origin of non-UK students in the UK (2021/22)

	Country of origin of non-UK students	Total of inbound students to the UK	as % of total non-UK	Cumulative
1	China	15,1690	22%	
2	India	12,6535	19%	41%
3	Nigeria	44,195	6%	47%
4	Pakistan	23,075	3%	51%
5	US	22,990	3%	54%
6	Hong Kong	17,630	3%	57%
7	Bangladesh	12,700	2%	59%
8	Malaysia	12,135	2%	60%
9	France	11,870	2%	62%
10	Italy	11,320	2%	64%
	<b>Total of non-UK students (all countries)</b>	<b>679,970</b>		

Table 3: Top 10 host countries of UK TNE (2021/22)

	UK TNE Host Country	Number of UK TNE students	as % of total non-UK	Cumulative
1	China	71,055	13%	
2	Malaysia	47,400	9%	22%
3	Sri Lanka	45,980	9%	31%
4	Singapore	27,970	5%	36%
5	Egypt	23,815	5%	41%
6	Greece	22,390	4%	45%
7	Hong Kong	20,455	4%	49%
8	UAE	18,045	3%	53%
9	Saudi Arabia	16,630	3%	56%
10	Oman	14,515	3%	58%
	<b>Total of UK TNE (all countries)</b>	<b>527,645</b>		

<sup>2</sup> Ilieva, J. (2015). Transnational Pathways to English Higher Education. *International Higher Education*, (81), 14–15. <https://doi.org/10.6017/ihe.2015.81.8733>

<sup>3</sup> HEFCE (2014). Directions of travel Transnational pathways into English higher education. [https://dera.ioe.ac.uk/id/eprint/21497/1/HEFE2014\\_29.pdf](https://dera.ioe.ac.uk/id/eprint/21497/1/HEFE2014_29.pdf)

<sup>4</sup> HEFCE (2015). Transnational pathways to higher education in England. [https://dera.ioe.ac.uk/id/eprint/23144/1/HEFCE2015\\_08.pdf](https://dera.ioe.ac.uk/id/eprint/23144/1/HEFCE2015_08.pdf)

Another dimension of diversity from TNE not often foregrounded is that undergraduate students account for two-thirds of all TNE students (353,430 students). At present the majority of the international students in the UK are at the master's level of study. The large undergraduate TNE population offers an opportunity to rebalance the international undergraduate student mix in the UK through articulations and progressions.

Articulation agreements (2+2, 3+1 etc) have been popular in the UK HE sector for many years, particularly in collaboration with Chinese partners where students study locally and then transfer to the UK and subsequently graduate with a UK award. This has been considered a "low risk" form of TNE as the quality assurance of the final award is solely controlled by the UK awarding institution.

This route typically relied upon the recognition of prior learning at the partner institution and hence did not require the building of de novo quality assurance processes fit for both UK requirements and those of the international partner. Articulations have helped a number of universities on their TNE journey and there is evidence that articulating students show higher levels of completion because any dropout tends to take place at the first year of study in their home institution.

However, a recurring theme of this report is the need to recognise that not all TNE students are the same, behaviours and motivations may differ markedly, both within a country and even between local country partners where the target communities are different. The failure to recognise this is one of the major reasons why the articulation models that were so successful in China when implemented elsewhere have failed to yield the same results.

## TNE as a source of new models

Innovative articulation agreements support recruitment and diversity objectives alongside internationalisation of curricula. The COVID pandemic illustrated just how radical, rapid and effective the sector can be in responding to landscape changes. Clearly that was not accomplished without cost and the call to action was obvious, but it behoves us to continue to think imaginatively about how we can meet the changing needs of students and respond to the changing environment. We are already seeing blended delivery develop as a major means of delivery of TNE and that is likely to accelerate. Successful HEIs ensure both flexible delivery by experts and access to a traditional "residential" learning community.

Further, it should be noted that multi-site delivery is becoming a more mainstream feature of delivery for the sector. Many such programmes were piloted by Business Schools who recognised that study in multiple locations enhanced perceived return on investment both to students and prospective employers. Three site delivery – principally North America, Europe and Asia – is becoming commonplace in this context. Whilst recent business school recruitment has experienced some headwinds, the rise of multi-site delivery is likely to continue.

Similarly, the arrangements entered into between Western and Asian universities during Covid to sustain students in-country have often continued and sometimes been incorporated into mainstream provision. This co-design, borne out of the pandemic, provided a basis for an appreciation of equivalence that will provide a solid platform for further collaborative TNE delivered at multiple sites – including the growth of cotutelle arrangements (a bilateral doctoral enrolment/co-enrolment and exchange agreement between two universities in different countries).

## TNE as risk mitigation

TNE is a means to balance risks not to eliminate them. For example, scale is required to generate significant returns as revenues per student are substantially lower than for ISR. TNE at scale may involve material additional staffing – both academic and professional services roles – and potentially investment in overseas physical infrastructure, all of which will carry financial and operational risks. Further whilst some institutions treat ISR as a tap – to be turned on and off as required – TNE is less amenable to changes in institutional priorities. The timelines for TNE developments are much longer than ISR engagements, and significant returns from the investment come at a point long beyond the financial cycle in which they are approved. During these extended periods of partnership development there are risks around changes in leadership and/or strategy for both partners and risks that successful partnerships will fall prey to predatory behaviour of more aggressive/more "attractive" competitors. This is in addition to the fundamental risk that the potential of the target market is not realised because of immaturity in data and insight. Consequently, viable exit strategies need to be defined at the outset and should be central to the business case and associated expert due diligence and risk mitigation. The potential for financial risk mitigation through TNE engagement is not equally spread across the sector and this needs to be reflected when setting the risk appetite of an institution along with the fact that risk, and potential return, varies with the type of activity and the location of delivery.

## The lifecycle of TNE

TNE usually emerges to bridge the supply and demand gap in overseas markets and where ISR is restricted due to political, economic, cultural, or other barriers. As the capacity of the host country develops, the emphasis of TNE provision tends to shift from quantity to quality or niche supply gaps. At a mature state, TNE is fully integrated in the host country's higher education system, with partner institutions that possess degree-awarding powers, and quality assurance oversight by the national regulator. At this stage, the emphasis is on pursuing particular forms of TNE (e.g., dual/joint degrees, doctoral studies, research collaborations and physical presence).

In the past TNE partnerships in Europe augmented already rich domestic higher education landscapes with an international offering. This traditional pattern is being replaced by more innovative partnership opportunities globally with a recognition of the geo-political importance of Asia for future generations.

A range of trends, exogenous to HEIs, is shaping the emerging TNE model. The substantial expansion in the capacity of overseas HE systems means there is a challenge to the dominant position of western countries, such as the UK, USA, and Australia<sup>5</sup>. Broader discussions about the dynamics between the "Global North" and "Global South" recognise the need for more equitable TNE partnerships<sup>6</sup>. In such partnerships, there is an inherent mutual flow of people, programmes, and institutions, which contrasts with the typically one-way flow of the traditional TNE models. Also, there is a growing emphasis on TNE that generates a balanced set of financial and non-financial outputs. The latter is increasingly evident in the desire to generate more equitable research partnerships and in a particular emphasis on partnerships in pursuit of impact in the context of the UN SDGs. The SDGs have given all TNE partners a common language whereby they can define their ambitions, extend their collaborations and map their impact. Lastly, TNE is recognised as not only a precursor to, but also an outcome of, research and other collaborations at institutional level. Hence, the emerging TNE model creates the potential for multilevel collaborations that go beyond the narrow teaching focus of traditional TNE.

Figure 5: TNE Lifecycle, stages, motives and opportunities



<sup>5</sup> Malcolm Tight, "Internationalisation of Higher Education beyond the West: Challenges and Opportunities – the Research Evidence," Educational Research and Evaluation 27, no. 3–4 (May 19, 2022): 239–59, <https://doi.org/10.1080/13803611.2022.2041853>.

<sup>6</sup> "Why Do Equitable Partnerships in Transnational Education Matter?," Universities UK, accessed November 18, 2023, <https://www.universitiesuk.ac.uk/universities-uk-international/insights-and-publications/uuki-blog/why-do-equitable-partnerships>.

# TNE impact and value for UK HEIs and the UK

Commonly, public discourse on TNE focuses on its economic value and benefits. These issues need to be recognised. However, research and practice evidence clearly suggest that TNE creates substantial multi-level impact and value<sup>7</sup> for UK HEIs and other key stakeholders. This section outlines the wide-ranging impact and value of UK TNE presented by key stakeholder groups; that is 1) UK HEIs and the UK, 2) Partner institutions and countries, and 3) Students and academics.

## Agility in strategic global engagement

- TNE is crucial for an effective global engagement strategy at the institutional level, necessary for sustainable student recruitment and allows full utilisation of the international mobility of students and academic programs. It can mitigate the risks associated with changes in UK study costs, student visa regulations, and environmental concerns, diversifying recruitment sources and revenue streams.

However, as noted above, the financial risk mitigation requires significant surpluses to be generated without introducing other risks. The financial contribution per student of TNE when fully costed has been low compared to well executed and strategically planned onshore delivery. Part of the challenge to realise the potential of TNE is to change the financial dynamics, a key element of which is to establish ways to generate greater “value” so that fees can be increased, through deeper engagement with the socio-economic infrastructure in the host country, and new models, and marketing approaches.

One of the biggest challenges is the lack of codification of different financial models – and this is an area where institutions have shown little inclination to systematically share. It would benefit all if there was more collaboration in TNE space (benchmarking, sharing etc) including by finance directors using anonymised data – on financially sustainable models – ramp up times, tax, contribution. This was an area where Coventry University was happy to share its expertise with others and there are other institutions that are similarly open, but it is not consistent, and it is to be hoped that the new British Council framework will facilitate this.

- The unpredictability of ISR is further exacerbated by the current uncertainty about the post-study work route. It necessitates UK HEIs to devise strategies to mitigate potential risks. HEFCE (2015)<sup>8</sup> shows that when the UK’s post-study work route was discontinued in 2012, non-EU entrants declined immediately. However, students who articulated in the UK from an offshore courses continued to enrol. The most likely explanation is the arrangements between the UK HEIs and their overseas partners, which meant these students were already bound into a study pathway that involved their progression into courses taught in the UK. For those institutions operating articulations at scale, TNE emerges as a significant component of their student recruitment portfolio, alongside a strategic presence in key overseas markets. This presence not only bolsters other recruitment pathways back to the UK, but also supports the delivery of academic programs locally, adapting to the needs of diverse student populations.
- Previous research, including that produced as part of the work of this Commission, shows significant reductions in the geographical diversity of international students in the UK<sup>9</sup>. TNE widens access to UK degrees for students without the financial means to study in the UK for the entire duration of their course. By widening access to UK higher education, TNE enables a more diverse student population.
- The emergence of new education hubs like China and Turkey, which now rank among the top host countries for international students, present both a challenge and an opportunity for UK HEIs. Connecting with these burgeoning hubs is essential. TNE facilitates this engagement, particularly appealing to price-sensitive students who may find the costs of studying entirely in the UK prohibitive. Through TNE, UK HEIs can reach these new regional hubs, and effectively extend their global footprint.
- As the IHEC recent report on Internationalisation at Home (IaH) demonstrated<sup>10</sup>, Collaborative Online International Learning (COIL) is also a means to accelerate the TNE journey. A sophisticated COIL platform includes many of the elements required to deliver accredited TNE programmes, particularly if they are integrated into the curriculum and attract credit.

<sup>7</sup> J Ilieva et al., “The Value of Transnational Education Partnerships” (London: British Council, 2022), [https://www.britishcouncil.org/sites/default/files/value\\_tne\\_fullreport.pdf](https://www.britishcouncil.org/sites/default/files/value_tne_fullreport.pdf).

<sup>8</sup> HEFCE (2015), Transnational pathways to Higher Education in England. [https://dera.ioe.ac.uk/id/eprint/23144/1/HEFCE2015\\_08.pdf](https://dera.ioe.ac.uk/id/eprint/23144/1/HEFCE2015_08.pdf)

<sup>9</sup> Adams, J., Ilieva, J. and J. Johnson (2023), The China question revisited: “de-risking” higher education and research. King’s College London Policy Institute. <https://www.kcl.ac.uk/policy-institute/assets/china-question-revisited.pdf>

<sup>10</sup> [https://ihecommission.uk/wp-content/uploads/2023/10/IHEC-Report\\_Is-the-UK-developing-global-mindsets-Report\\_24\\_10\\_2023.pdf](https://ihecommission.uk/wp-content/uploads/2023/10/IHEC-Report_Is-the-UK-developing-global-mindsets-Report_24_10_2023.pdf)

- Large scale TNE partners present an ideal basis on which to develop substantial outbound mobility opportunities as the experience can be quality assured and credit bearing, immediately addressing two of the factors underlying the low levels of outbound UK student mobility. Overseas experiences of this type enhance student satisfaction and employability feeding directly into rankings and reputation measures.

## Developing and enhancing global profile and reputation

- The profile and reputation of recruiting institutions is a key factor in sustaining their success<sup>11</sup>. Deep engagement with in-country partners enhances profile and, probably, institutional reputation locally and globally. There are many well defined parameters that define performance in the wide range of global ranking schemes commonly cited and much of their output is defined by citation performance and academic reputation and optimisation for these outputs\*.
- Meaningful TNE engagement that leads to enhanced university profile and/or reputation in the local context is a key predictor of TNE student success and satisfaction<sup>12</sup>. Reflecting on the risk-based approach adopted by the Office for Students<sup>13</sup>, which includes metrics on student satisfaction and success, meaningful TNE engagement can influence the efficiency and effectiveness of provision. While regulating quality in overseas delivery presents challenges, good provision, well executed, can improve student experience and outcomes. Conversely, we must also recognise that poor quality provision badly executed can significantly enhance risks especially if quality control is also poor.

\* However, Coventry was one clear example of where both reputation and profile were significantly enhanced, particularly in China, through its TNE activities. There are also clear examples of where TNE has benefited the profile of Russell Group and Pre-92 universities. As global rankings develop in sophistication and significance this is an area that would benefit from further systematic work that compares and contrasts across institutional groups; however, it is recognised that separating out the reputational impact of TNE from other factors will be challenging.

<sup>11</sup> Giorgia Miotto, Cristina Del-Castillo-Feito, and Alicia Blanco-González, “Reputation and Legitimacy: Key Factors for Higher Education Institutions’ Sustained Competitive Advantage,” *Journal of Business Research* 112 (May 1, 2020): 342–53, <https://doi.org/10.1016/j.jbusres.2019.11.076>.

<sup>12</sup> Troy Heffernan, Stephen Wilkins, and Muhammad Mohsin Butt, “Transnational Higher Education: The Importance of Institutional Reputation, Trust and Student-University Identification in International Partnerships,” *International Journal of Educational Management* 32, no. 2 (January 1, 2018): 227–40, <https://doi.org/10.1108/IJEM-05-2017-0122>.

<sup>13</sup> Office for Students, “Transnational Education: Protecting the Interests of Students Taught Abroad – Office for Students” (Office for Students, May 24, 2023), Worldwide, <https://www.officeforstudents.org.uk/publications/transnational-education-protecting-the-interests-of-students-taught-abroad/>.

<sup>14</sup> Guido Caniglia et al., “Transnational Collaboration for Sustainability in Higher Education: Lessons from a Systematic Review,” *Journal of Cleaner Production* 168 (December 1, 2017): 764–79, <https://doi.org/10.1016/j.jclepro.2017.07.256>.

<sup>15</sup> FWCI indicates how the number of citations received by an article compares to the average or expected number of citations received by other similar publications. Similar publications are determined by year, type, and discipline.

<sup>16</sup> A. Usher et al., “The Shape of Global Higher Education: The Americas” (London: British Council, 2019), <https://irep.ntu.ac.uk/id/eprint/36691/>.

<sup>17</sup> [www.TNEImpact.org](http://www.TNEImpact.org)

## Supporting international research collaboration

- Often TNE partnerships generate further collaborative activities including joint research projects<sup>14</sup>. This positive impact is also illustrated in the Joint Institute and other relevant case studies included in this report. At the same time, it is not uncommon for TNE projects to emerge as an outcome of existing research collaboration links between individual academics. Hence, TNE activity is linked with international research collaboration. Research produced through international research collaboration has a higher Field-Weighted Citation Index (FWCI)<sup>15</sup> than research produced by sole authors or national collaboration<sup>16</sup>. TNE is therefore an indirect promoter of research activity that is likely to yield high quality research outcomes.

## Serving the sustainability agenda

- TNE serves the sustainability agenda of UK HEIs and is aligned with their strategic objectives. The direct link of TNE with several of the UN SDGs is an often neglected yet crucial contribution of TNE activities. For example, case studies in the TNE Impact<sup>17</sup> repository suggests that UK TNE supports the implementation of UN SDGs with important impact generated at local and global levels.



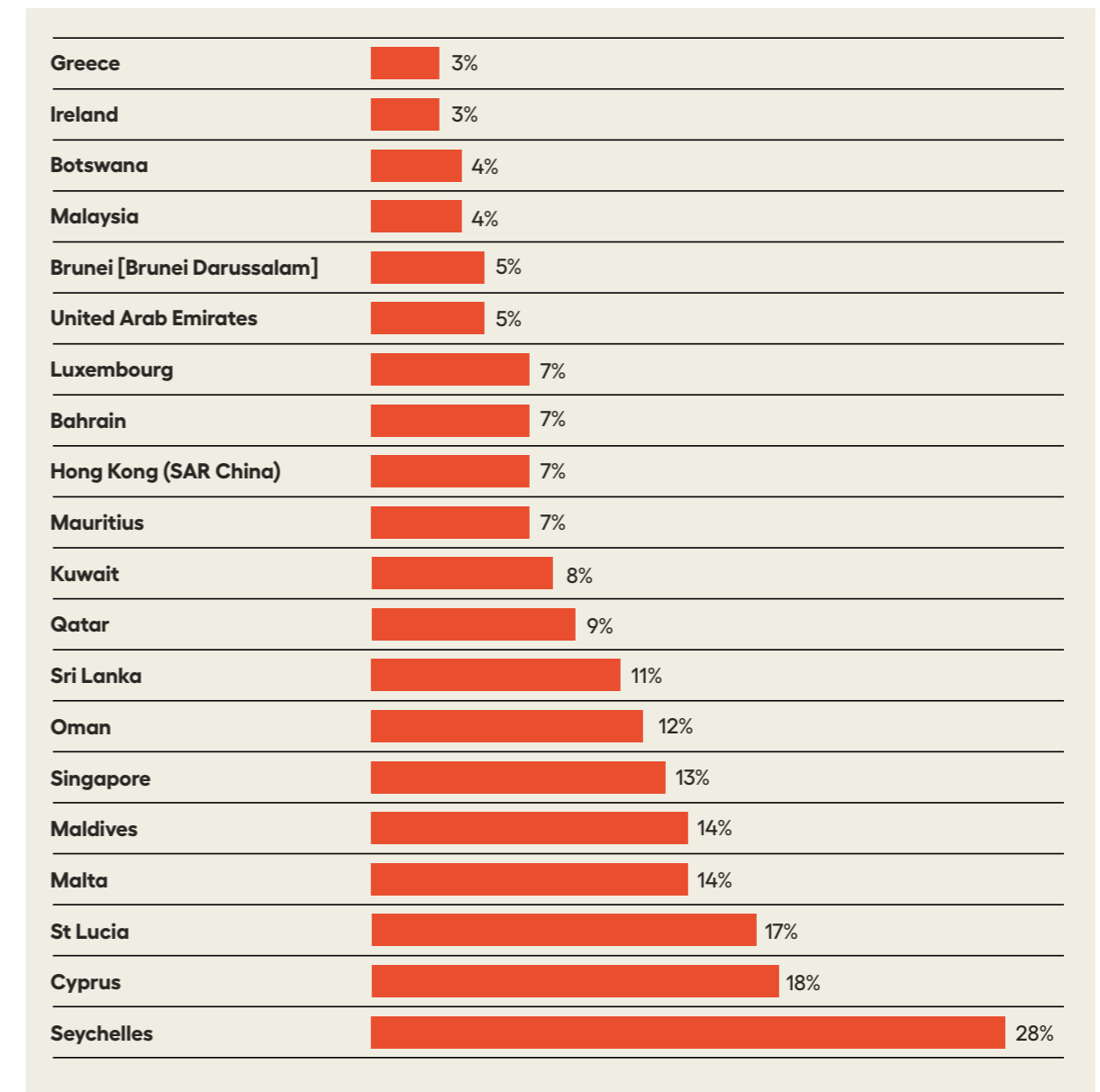
# TNE impact and value for partner institutions and countries

TNE is increasingly recognised as a transformative force within the global higher education sector, offering significant benefits to both partner institutions and host countries. This includes the multifaceted impact of TNE on in-country educational objectives, including its role in enhancing educational capacity, countering brain drain, and fostering internationalisation. Also, TNE has the potential to drive economic development, improve equity, and expand access to quality education in diverse geopolitical contexts. More specifically, the main impacts are:

## Shaping and advancing higher education objectives

- In recent years, there has been a growing emphasis on TNE in several countries, evident through the implementation of new policies and legislation aimed at promoting TNE activities<sup>18,19</sup>. This global trend presents a significant opportunity for UK HEIs to actively engage in these developments and capitalize on emerging opportunities, thereby maintaining a meaningful presence in key international markets. Simultaneously, UK TNE initiatives play a vital role in contributing to the capacity-building efforts of these nations.
- TNE makes a significant contribution to the local HE capacity. However, each territory is different – what is appropriate for Hong Kong will be different for what is needed in Sri Lanka. In reflecting on the returns from TNE and the opportunities to scale one needs to consider the unique context and particular returns of each instance. The figure right illustrates just how different the penetration is of UK TNE in a range of countries, and as a result the potential for growth.
- TNE counteracts brain drain by providing local opportunities to access international degrees. Often, TNE is taught in a foreign language (usually English for UK TNE to comply with QA requirements), and as a result it attracts local and international talent to the location of TNE delivery.
- The curriculum is often developed in collaboration between UK and overseas HEIs. In addition to strengthened teaching in a foreign language, the curriculum draws on the best practices from at least two nations. It plays a significant role in the internationalisation at home of the partner-HEI who benefits from international teachers, pedagogy and often students

Figure 6: Top 30 countries in which UK TNE makes the most significant contribution by expressing UK TNE enrolments as a percentage of domestic HE enrolments.



Source: Updated chart from the British Council (2022), The Value of Transnational Education Partnerships. [https://www.britishcouncil.org/sites/default/files/value\\_tne\\_fullreport.pdf](https://www.britishcouncil.org/sites/default/files/value_tne_fullreport.pdf)

<sup>18</sup> Ilieva et al., "The Value of Transnational Education Partnerships."

<sup>19</sup> Noteworthy policy developments in this regard include India's UGC Regulations facilitating Twinning, Joint Degree, and Dual Degree Programs with Foreign Higher Education Institutions starting from 2022, Indonesia's regulations governing International Universities established in the country since 2018, Pakistan's policies governing Higher Education Institutions collaborating with foreign universities, Egypt's Law No. 162 of 2018 regarding the establishment and organization of International Branch Campuses, new TNE regulations in Nigeria, the enactment of the Higher Education Act in the Philippines in 2019, which also involves the ongoing development of a national TNE Strategy, and ongoing regulatory discussions within Viet Nam's Ministry of Education and Training (MoET). These developments underscore the dynamic landscape of TNE and the strategic significance of UK TNE initiatives in this evolving global context.

# TNE impact and value for students and academics

TNE presents a range of opportunities for both students and academics, fostering enhanced access to education, employability, and professional development. For students, this includes the affordability of quality education and the competitive edge gained from exposure to international curricula and languages. For academics, TNE can act as a catalyst for professional growth, enriching their teaching and research capabilities through continuous professional development.

## Improving access and employability of students

- Even though TNE is often provided in collaboration with local providers and commands a price point above the domestic price point it is still more economical than overseas study. Hence it constitutes an affordable way for disadvantaged students to gain access to good quality education and improve their employability prospects. This has a direct impact on the social and economic mobility of these students<sup>20</sup>.
- Also, TNE exposes students to foreign languages, international curriculum, and more broadly gives them a competitive advantage in the employment market<sup>21</sup>.

## Culturally enriching global student experience “at home”

- TNE has the potential to contribute to the learning experience of “at home” students on the main campus. One of the common challenges faced by UK HEIs is the dominance of classrooms, especially at PG level, by one nationality. which hinders the quality of the international classroom experience which constitutes a key component of the value proposition of UK HE. TNE can enrich the student experience in the home campus, and support internationalisation at home, for example through joint projects between “home” and “TNE” students, and collaborative experiential learning opportunities (in-person and online). Hence TNE can support the development of a “Global Classroom” that brings together students who are studying at the same institution but at different locations.

- The IHEC IaH report noted the continuing importance of outbound mobility for the UK sector. This is the case for both domestic students (particularly disadvantaged students who often lack the financial and social capital to secure outward mobility opportunities for themselves, so missing out on the enrichment that overseas engagement provides) and overseas students (for whom the social and cultural experience of studying in a multicultural, multinational environment in the UK is further enhanced by the some time overseas). Before Covid a number of UK universities had significant mobility to continental Europe for short periods that were highly attractive to such students.

## Development opportunities for academics in partner countries

- The UK HE sector is known for its quality in teaching and research. This is partly due to the continuous professional development (CPD) ethos towards staff development and peer review. TNE collaborations can help embed aspects of academic staff CPD in provision both to meet quality assurance requirements and to maximise student outcomes. CPD activities also help academic faculty in partner institutions develop and enrich their capabilities and provides exposure to different pedagogies. Such meaningful CPD for TNE academics allows them to generate better quality outcomes across teaching and research<sup>22</sup>.

<sup>20</sup> [Robin Mellors-Bourne, “The Wider Benefits of Transnational Education to the UK,” n.d.

<sup>21</sup> Ilieva et al., “The Value of Transnational Education Partnerships.”

<sup>22</sup> Ly Thi Tran et al., “Induction and off You Go’: Professional Development for Teachers in Transnational Education,” Oxford Review of Education 47, no. 4 (July 4, 2021): 529–47, <https://doi.org/10.1080/03054985.2020.1867524>.

# Where next for TNE?

The challenges in scaling up means the intellectual, social and financial potential of TNE is not realised. This section considers the potential scale and scope of TNE in the future and leads onto a section offering a series of concrete and actionable recommendations.

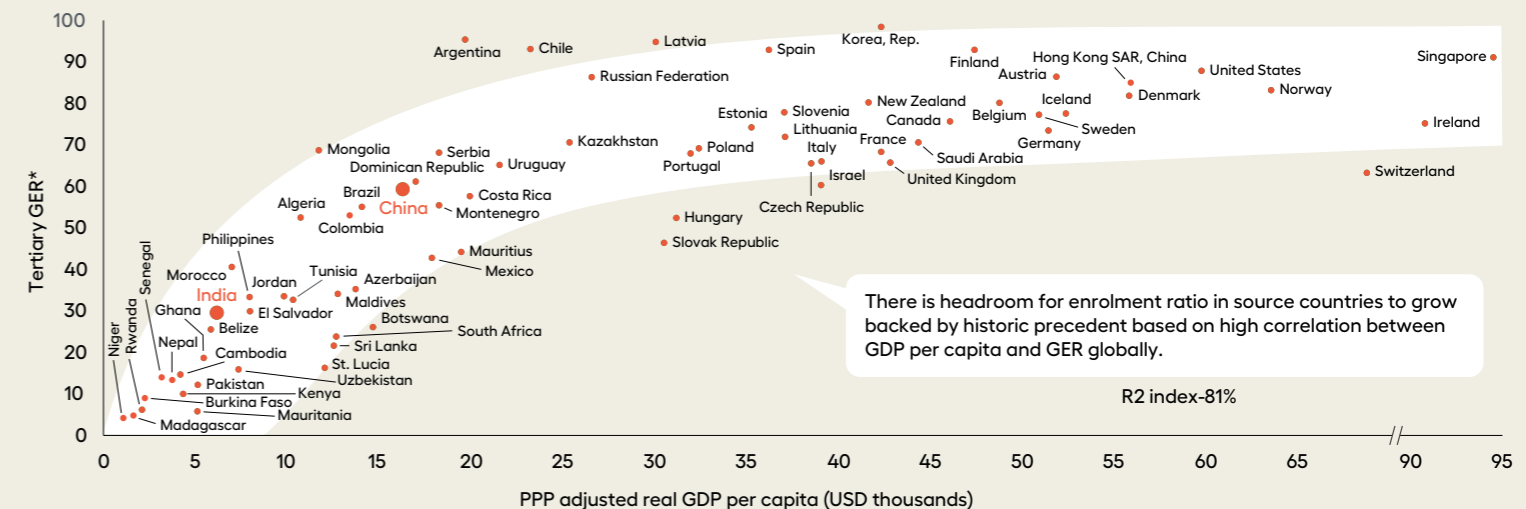
Enrolment targets are frequently established based on historical trends. Recent experience has shown this to be flawed for predicting future onshore recruitment and given the scale of the global higher education sector it is even less suitable for projecting future TNE demand.

A more effective approach to setting targets would involve analysing the addressable market to determine what proportion might feasibly be captured by UK TNE through sustainable delivery models. This should be done while considering the UK’s HE quality requirements and the cost structures associated with in-country delivery.

Much of the international student market – whether through internationally mobile students or TNE – is driven by constraints in tertiary education supply (because high quality local provision is expensive for countries to develop and low per capita GDP makes this level of investment challenging). Gross Enrolment Ratio (GER) in many countries of interest is below the world GER average of 40% indicating a substantial volume of unmet demand for tertiary education.

The chart below shows the income levels and enrolment rates across a wide range of countries and makes it clear that growth in demand for access to high quality HE will not be matched by a growth in domestic provision such that students will look to TNE to “fill the gap”. There are many countries where UK HE is highly valued with comparatively low gross enrolment rates in tertiary education like Nigeria, Pakistan, Sri Lanka and Bangladesh. They and other countries offer the prospect of large-scale TNE delivery that caters to unmet local tertiary education demand.

Figure 7: Increasing GER\* will drive the demand for higher education in source countries

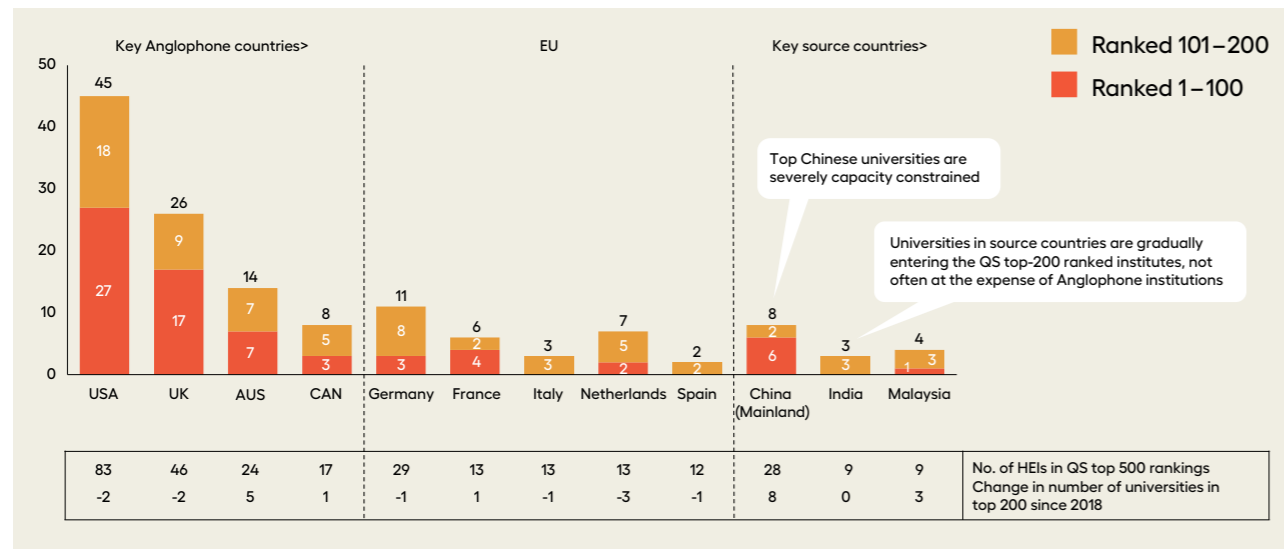


Source: Euromonitor, L.E.K. research and analysis

\*GER stands for Gross Enrolment Ratio which represents total enrolment in tertiary education expressed as a percentage of the population in the official age group corresponding to this level of education

In determining demand it should also be noted that the majority of highly ranked universities in both destination and source countries are already significantly oversubscribed.

Figure 8: Majority of top ranking universities are in anglophone countries and top ranking institutions in source countries are oversubscribed

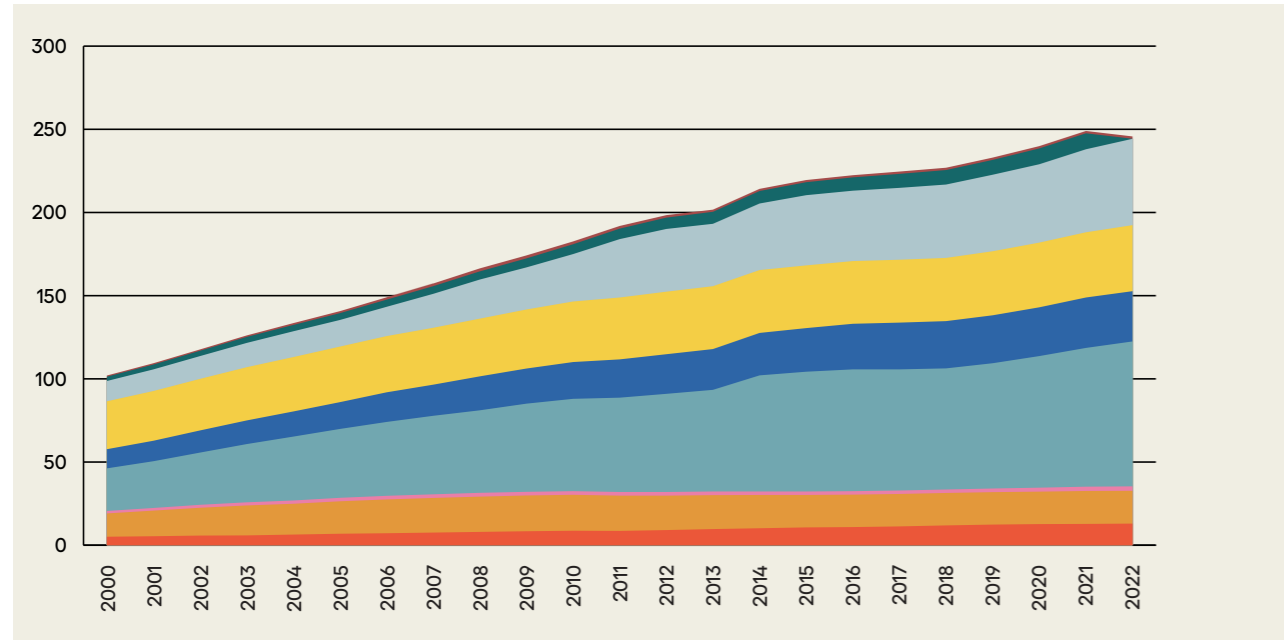


Source: QS World Rankings 2023, L.E.K. research and analysis

Data from the UNESCO Institute for Statistics shows that tertiary enrolments have more than doubled in the past 20 years.

According to the Aggregate Offshore Record TNE has more than doubled and that is consistent with anecdotal evidence about the changes in the intensity of TNE activity in the sector over that period.

Figure 9: Number of tertiary students by region, 2000-2020 (million)



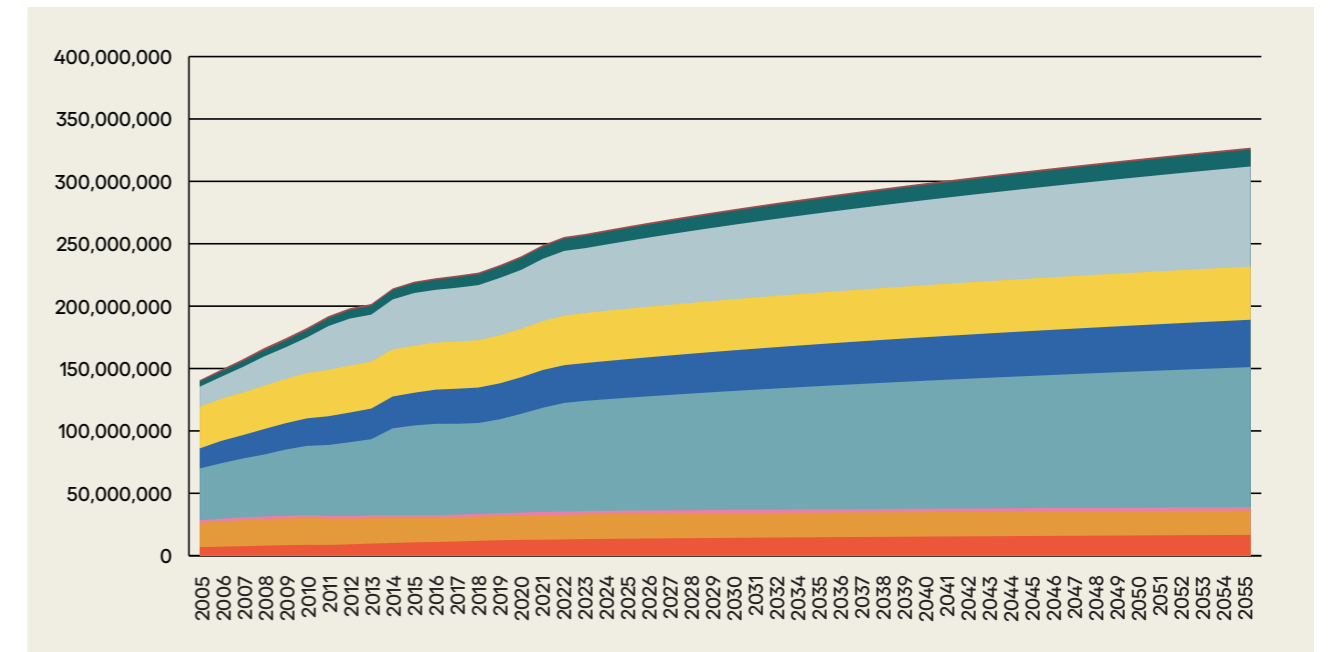
Source: UNESCO

- Arab States
- North America and Western Europe
- Central and Eastern Europe
- South and West Asia
- Central Asia
- Sub-Saharan Africa
- East Asia and the Pacific
- Small Island Developing States
- Latin America and the Caribbean

While future tertiary enrolments projections vary, the comparable UNESCO estimate is that by tertiary enrolments will rise 30 million by 2035 to 280 million globally.

- Arab States
- North America and Western Europe
- Central and Eastern Europe
- South and West Asia
- Central Asia
- Sub-Saharan Africa
- East Asia and the Pacific
- Small Island Developing States
- Latin America and the Caribbean

Figure 10: Projected tertiary enrollment data

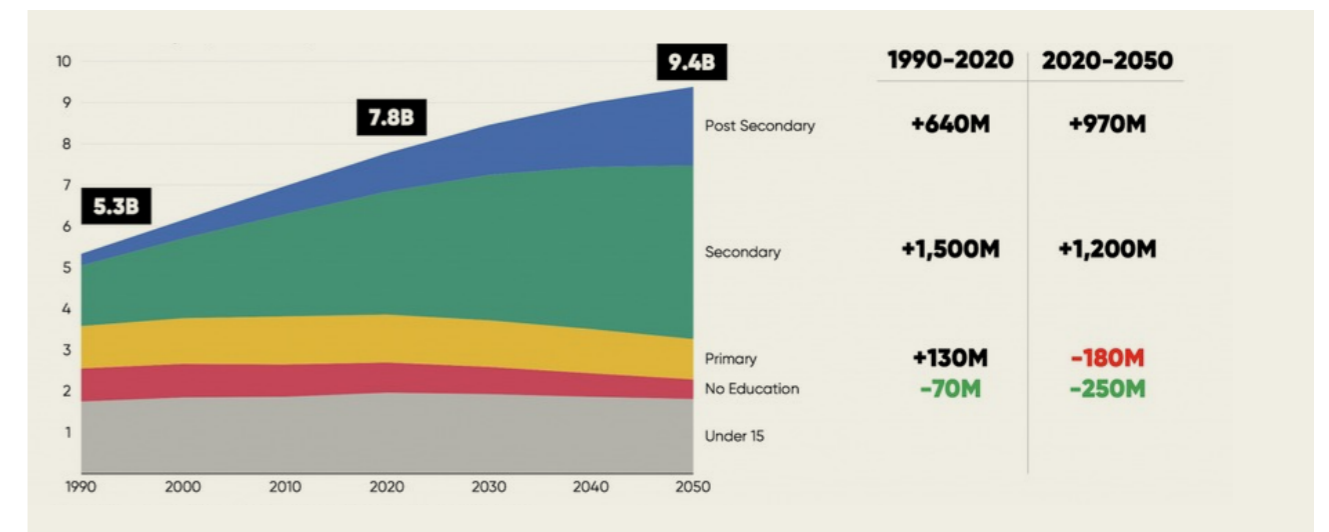


Source: UNESCO

Given the predicted growth in the population of Africa, particularly Sub-Saharan Africa, notwithstanding the current low levels of educational engagement, the UNESCO data would seem to underestimate the likely growth in demand for tertiary education, and within

that University level programmes. HolonIQ have a more aggressive view of likely growth in tertiary education which is estimated to be around 30% over the next 10 years; they also forecast that tertiary education will become a more significant proportion of the overall education market.

Figure 11: Global Levels of Attainment, 1990 to now and forecast to 2050 (billions)

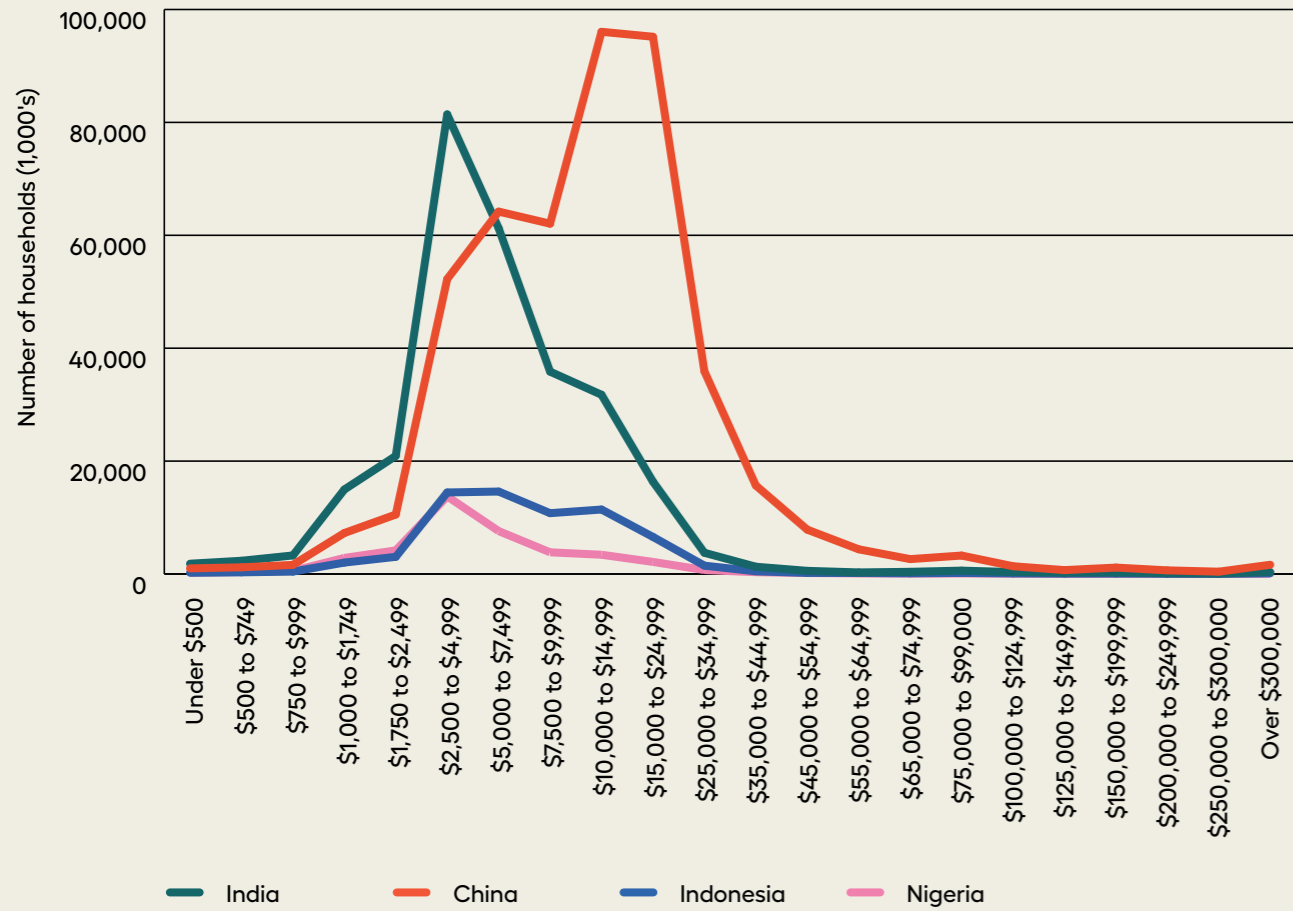


Source: Wittgenstein Centre for Demography and Global Human Capital

To reiterate, it is crucial to understand the underlying socio-economic dynamics of these rapidly growing regions when seeking to predict the scale and scope of the opportunity. The rise of ISR from China, followed quickly by the growth from India obscured the fact that outside

these two countries many other significant overseas markets have a socio-economic profile that makes the cost of studying at one of the major English speaking destinations challenging for all but a relatively small proportion of the population.

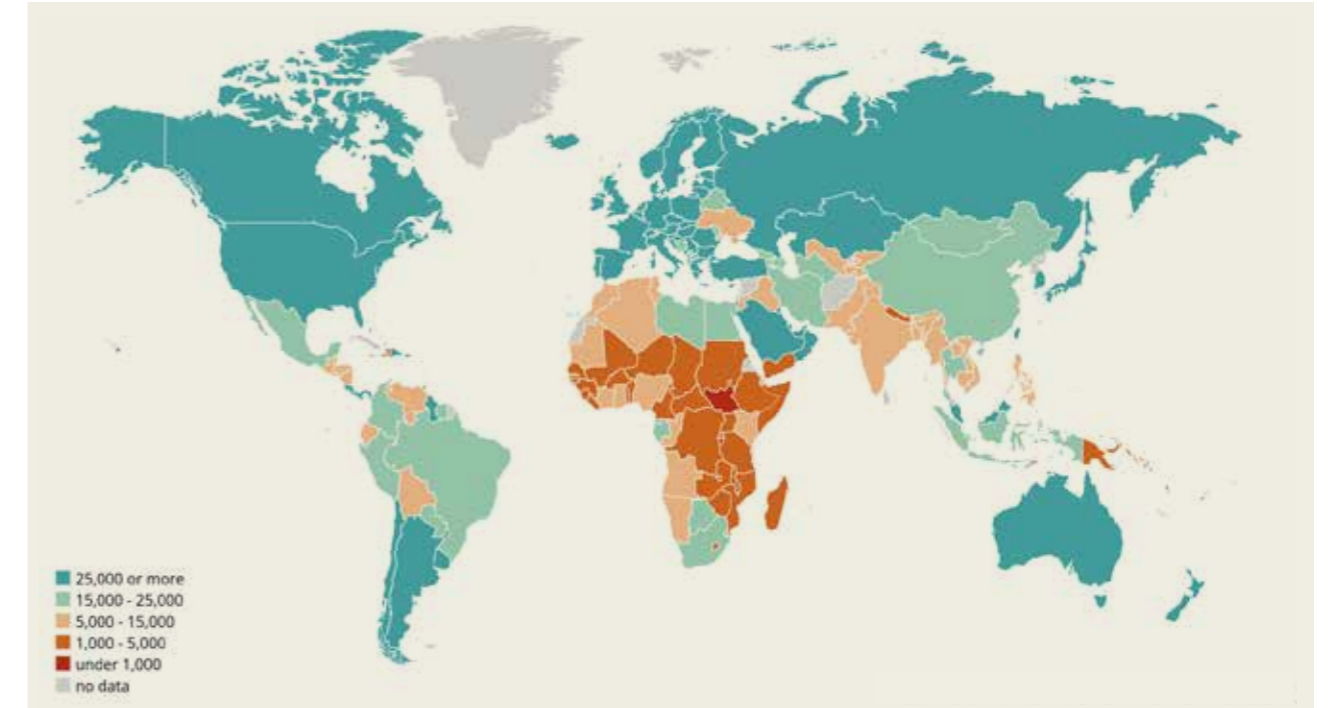
Figure 12: Beyond China and India, ISR markets are small and price-sensitive



Source: NOUS analysis of Euromonitor Data

A look into the socio-economic profiles of countries globally shows that TNE is a much more appropriate offer than ISR for many nations with rapidly increasing numbers of young people seeking access to world class education.

Figure 13: Countries or territories by GDP (nominal) per capita in 2023



Source: World Economic Outlook (October 2023) International Monetary Fund

In this context of a growing “addressable market” for TNE – with a realistic expectation that UK TNE will take a larger share of the global tertiary education market in a number of established and significant TNE markets, allied with the potential to establish a substantial presence in emerging markets, it is reasonable to expect that TNE will increase appreciably and at rates considerably in excess of those seen historically.

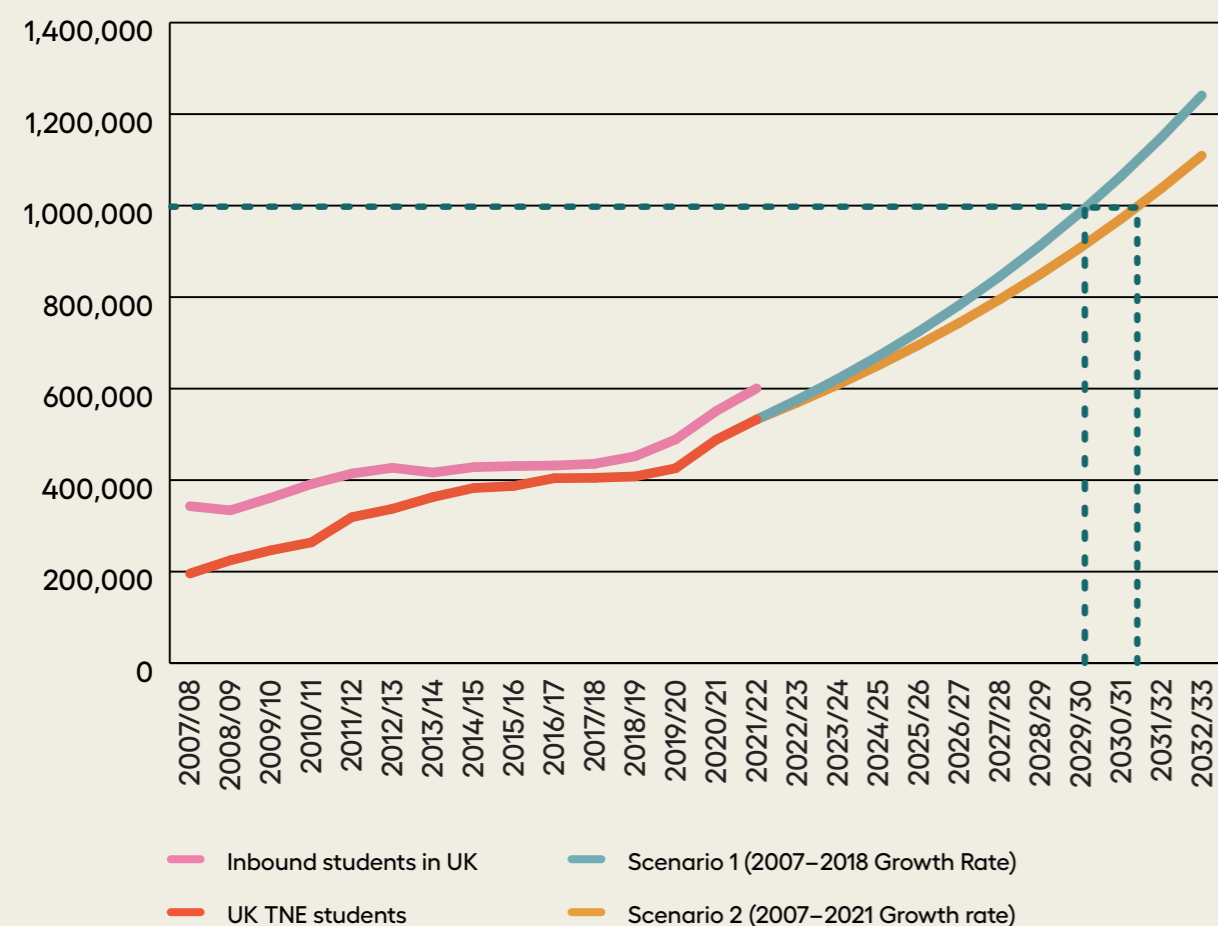
In the absence of robust data, if the historic growth is used as a baseline scenario, we can estimate the likely minimum volume of future enrolments if UK HEIs continue to evolve their TNE proposition.

This paper advances two scenarios:

- the first scenario assumes growth of 8% p.a.
- the second scenario is based on growth of 6.9% p.a.

The first scenario, based on TNE growth from 2007 to 2021 includes the 2 most recent years of HESA data where growth rates have accelerated. The second is based on the growth from 2007 up until 2017/18, so excluding the higher growth rates seen in the most recent 2 years of HESA data. Based on extrapolating these per annum growth rates it is forecast that minimum TNE enrolments will reach 1 million by 2030 in the case of the former or 2031 in the case of the latter.

Figure 14: Forecast minimum TNE enrolments



The higher growth rates underpinning Scenario 1 assume that the innovation and interest in TNE precipitated by the covid pandemic continues. However, it does not define the best case forecast of minimum

enrolments. Were the recommendations in this report to be implemented there would be a substantial increase in the enrolments over that forecast by Scenario 1 particularly in the period from 2028 onwards as new approaches, providers and opportunities kick in.

This growth will be aided by the fact that many governments are liberalising their legislative framework in order to encourage greater TNE activities with the hope of increased HE provision including:

- India’s UGC Regulations to Offer Twinning, Joint Degree and Dual Degree Programmes with Foreign Higher Education Institutions from 2022.
- Indonesia’s Regulation for International Universities in Indonesia by the ministry for research, technology and higher education from 2018.
- Pakistan’s Policy for Pakistani Higher Education Institutions Offering Degree Programs in Collaboration with Foreign Universities.
- Egypt’s Law No. 162 Of 2018 On the Establishment and Organization of International Branch Campuses
- The Transnational Higher Education Act in the Philippines in 2019. A national TNE Strategy is being developed.
- Regulatory changes are being discussed by Viet Nam’s Ministry of Education and Training (MoET)

These countries (excluding Viet Nam) account for over 20 per cent of the world’s tertiary education population, with over 54 million learners.

In summary, there are clear opportunities relating to both where UK TNE is in a strong position and growing, and where there is growth in population, particularly where the GER is low and local capacity is unlikely to develop rapidly. More specifically growth will come from:

- Countries where the host Government has identified growth in TNE is an essential part of increasing provision and are amending the law to permit growth as noted in the section left.
- UK Government priority countries - India, Nigeria, Vietnam, Indonesia and Saudi Arabia – where there is a systematic and sustained focus on opening up TNE opportunities.
- UK TNE market by far, where the joint-institute model is proving to be particularly effective in meeting the ambitions of both partners and where new models are developing that embrace significant research and reach out activities alongside the development of high-quality teaching.
- Countries that already value UK TNE, as evidenced by the high levels of domestic provision of TNE, as detailed in Figure 6 above.
- Countries where UK HE is highly valued with comparatively low tertiary education gross enrolment rates e.g. Nigeria, Pakistan, Sri Lanka and Bangladesh, where increased demand is unlikely to be met domestically.

□ Africa. The success of the LSBU-British University in Egypt, a case study in Appendix 4, shows that low GER is not the only determinant of demand for TNE in Africa. Hence Egypt currently dominates TNE delivery in the continent, but the broader potential is significant given the forecast growth in population particularly in sub-saharan Africa. Africa’s population is estimated to be currently over 1.4 billion. It currently accounts for roughly half the global increase in population and every two years adds as many people as live in France. The United Nations projects that by 2050, Africa’s population will reach close to 2.5 billion. Such a figure would mean that more than 25 percent of the world’s population will be African. Its population growth will slow, but Africa will remain by far the largest source of population growth globally: its share of the world’s population will reach close to 40 percent by the end of the century ie 2 out of every 5 people in the world could be African. The UN expects just eight countries to account for more than half of the increase in global population over the next three decades, and five of those countries are in Africa with Nigeria forecast to become the world’s third-most-populous country. Hence in these nations the challenge is finding scalable models of delivery in price sensitive settings.

- Re-engagement with continental Europe. We should not forget that continental Europe is the UK’s second largest TNE market. As the Swansea University case study in the appendix details, TNE provides an excellent basis for strategic engagement.
- New collaborative university models, like the Lancaster-Deakin joint venture in Indonesia
- Partnerships between UK universities and enterprise zones – such as that between KCL and Singhasari Special Economic Zone, Indonesia - featured as a case study in this report.
- Public-private sector partnerships, which have a long history in the development and delivery of TNE, which are being re-imagined, such as the strategic multi-country partnership developed by De Montfort and EdPeritus, building on the success of DMU Kazakhstan by implementing the model in Cambodia.

This, then, is the size and scale of the opportunity (with particularly promising prospects where two or more of the above overlap) which can be realised through: the effective application of better data and insight; the scaling up and broadening of the scope of TNE; more coherent and consistent sharing of best practice; and the development of new models.

# Recommendations

A UUK report on The scale of UK higher education transnational education 2020–21 made five key recommendations that are still pertinent today:

- Collect better data on TNE students' characteristics, experiences and outcomes
- Promote the quality of UK HE TNE overseas
- Continue to remove barriers to TNE to diversify provision
- Continue to mitigate risks in TNE
- Use TNE to support development

While we entirely support these recommendations, we make a series of further concrete and actionable recommendations that we believe are essential to move development and delivery of TNE substantively forward.

We propose the following:

## 1 Target setting

We recommend that targets are set for TNE that reflect both volume and diversity (by geography, subject and level) to mirror the success of the target driven approach in the 2019 IES strategy.

We believe this will enable TNE activity to be tracked and quantified and ultimately considered on parity with ISR activity.

## 2 TNE Academy

We recommend the establishment of a TNE academy – modelled on Advance HE, that will develop capacity and capability to undertake TNE. Included in this we recommend measures to foster collaboration (benchmarking, sharing etc) by finance directors using anonymised data – on financially sustainable models – ramp up times, tax, contribution.

Shared practice and knowledge will improve efficiencies in partnership activity and ensure standardisation of UK practices around the world.

## 3 Fostering Transnational Research focus

We recommend a national commitment to the development and delivery of Transnational research partnerships – embraced and enacted through a variety of enhanced mechanisms ranging from the creation of more overseas collaborative doctoral research training centres through to augmented cotutelle programmes.

## 4 Rewarding COIL and IaH:

We recommend measures to promote, recognise and reward COIL and IaH. This would represent

a big step towards embedding TNE-like approaches into the institutional mainstream to provide the platform for TNE development

## 5 Mapping the opportunities:

We need to urgently update existing definitions of TNE to reflect and report on the full range of existing provision. Notwithstanding the current HESA consultation, we recommend a HESA-UK HEI working group on student data to improve the appropriateness, coherence and timeliness of data both for TNE and onshore UK enrolments. We also need better UK wide coordination to establish a framework within which the national portfolio can be effectively managed and collaboration encouraged to share best practice and insights.

## 6 Create a data architecture and data-led culture

We recommend that data collection and insight mechanisms relating to past, current and future overseas students needs to be rapidly and comprehensively revamped across Government and its agencies for onshore and offshore recruitment in a coherent and consistent way.

If this is not forthcoming then public-private partnerships should be established to build on the emergence of significant and valuable private sector data and insight capabilities and this data made systematically available to support timely decision making, planning and management.

## 7 TNE Marketing campaign

We recommend an appropriately funded, dedicated and sophisticated, marketing initiative that focuses on key offshore market segments so that it enhances recruitment to UK university overseas programmes that cater to students who, for a wide variety of reasons, are not considering study in the UK.

The correct, targeted messaging would prevent the cannibalisation of ISR interest and enhance new market segments suitable for TNE provision.

Further detail on the recommendations can be found in Appendix 5.

# Appendix 1

## Defining and delivering a TNE Strategy

### Types of TNE and awards

Trifiro (2019) identifies the following modes; different national perspectives, motivations, traditions, and regulations add to complexity.

- Branch campus
- Franchising
- Validation
- Articulation (top up/twinning) arrangements
- Double or multiple degree
- Joint degree
- Joint university
- Distance/online education
- Locally supported distance/online education

For the UK and Australia, TNE was initially shorthand for collaborative delivery with institutions lacking degree-awarding powers. In the US, TNE is primarily international branch campuses and study abroad centres.

Germany offers a different style of TNE, typically shaped as government-backed investment, which often draws on support from the host country government, such as the Vietnamese German University<sup>23</sup>.

Differences also exist in host country perspectives with China focussing on collaborative partnerships and joint institutes and the UAE preferring branch campuses.

Further, traditional host countries such as India, Malaysia, and China are becoming exporters of TNE, including to more traditional sending countries. Examples include Xiamen University Malaysia<sup>24</sup> and Amity University Dubai<sup>25</sup>.

Many Australian universities have focussed their efforts on offshore preparation of students who then progress to home campuses in Australia. Collaborative delivery of TNE leading to progression is becoming an increasingly important channel.

### Key parameters

There are three trends that are influencing the emerging TNE landscape.

#### Is overseas delivery financially viable?

Global higher education is experiencing increased competition as new institutions and countries emerge as challengers to the UK HE sector. Clearly defining the purpose and objectives of TNE within the global engagement strategy of UK HEIs is critical for the success of overseas operations and the realisation of the benefits and impact discussed earlier in this paper.

Domestic challenges in the UK around the sustainability of funding for higher education only strengthens the need to mitigate risk and find long term TNE articulations that can weather political headwinds.

Successful TNE models, target markets, and overall tactics must be underpinned by market data and other solid evidence around demand and operational delivery models that capture all associated costs and deliver a surplus. Factors such as demographics, supply and demand, regulation and governance, human capital quality, and infrastructure are essential components in designing effective and sustainable TNE operations. Just as fundamental is the operational prowess to execute effectively. This requires the development of sophisticated global operating capabilities in areas such as staff recruitment and retention, insurance, tax, legal, finance, IT, student services and quality assurance. These global operating capabilities take time to develop and need to be fully accounted for to ensure sustainability.

#### Calculating the true value of TNE

There is a growing emphasis on the role of TNE in generating local impact as expressed and measured by UN SDGs which have become a helpful common language for cross institutional dialogue.

This growing emphasis reflects the global shift towards more socially and environmentally responsible education practices. As a result, it is anticipated that future TNE initiatives will not only include impact objectives but will also place a significant emphasis on promoting the UN SDGs within the local context. This could involve integrating SDG-related themes into curriculums, engaging in community-focused projects,

<sup>23</sup> <https://vgu.edu.vn/>

<sup>24</sup> <https://www.xmu.edu.my/>

<sup>25</sup> <https://amityuniversity.ae/about-amity>

or developing partnerships aimed at addressing specific local challenges in line with the SDGs. The aim is to ensure that TNE operations contribute positively to the host country's sustainable development, fostering educational practices that are both globally informed and locally relevant.

### Making TNE equitable for all parties

The UK must evaluate its approach to partnerships. For too long there has been an emphasis on recruitment targets and pathways. This approach involves considering and seeking to recognise and, as far as possible, align the priorities and objectives of all key stakeholder groups, such as UK HEIs, local HEIs, students, academics, regulators, and policymakers. Aligning the motivations of these diverse stakeholder groups is crucial and has been identified as one of the key prerequisites for successful TNE operations. This alignment ensures that the partnerships are not only beneficial for all parties involved but also sustainable and respectful of the unique needs and contributions of each group<sup>26</sup>.

### TNE functionality for a globally engaged university

1. An institution cannot sustain a position as a "global" university if it is not engaged internationally in key overseas territories – Internationalisation at Home is necessary but not sufficient
2. Collaborative delivery remains a major hedge against further adverse changes which reduce our ability to recruit to the UK, this includes but is not limited to UKVI changes – both the increasing cost of UK study and concerns about carbon footprint are playing into these concerns about the future market
3. Students who embark on a learning pathway in their country of origin are generally seen by UKVI as at lower risk of overstaying and better prepared to cope with a subsequent UK learning journey, so also retention rates will be higher
4. When delivered at scale the revenues and profits from collaborative delivery can become significant and sustainable
5. Deep engagement with in-country partners provides an excellent basis to engage with the Governments, regulators and industrial partners in the region, enhancing the understanding of markets and access to market intelligence
6. Working with high quality partners builds local and global profile and enhances the position of the UK in general and of committed, high quality, providers. TNE partners can play a crucial role in global reputation building efforts which feed into national and international rankings
7. Co-creation of teaching and learning with overseas partners is a crucial driver of the "Internationalisation at Home" agenda, and internationalisation of the curriculum in particular
8. TNE partners provide a ready-made platform to facilitate outbound mobility as it means experiences can be quality assured, credit bearing and student anxieties about isolation effectively addressed
9. TNE is a window to global knowledge exchange activity. In-country partners often times have better access to in-country corporates than UK universities do and so play an increasingly important part in developing overseas work experience opportunities as well as facilitating engagement with Global corporates and roll out of international CPD
10. TNE partners can play an important role in staff development – including through the development of international competencies and other opportunities for those selected as faculty and link tutors
11. Research is increasingly global and research with international partners is both more impactful and more highly cited. Strong TNE relationships create broad in-country networks: institutional, disciplinary and individual. These relationships can be the foundations for deeper research collaborations and furthering the transnational research (TNR) agenda
12. Much TNE had its foundations in distance learning programmes supplemented by in country support. Today TNE often remains a leader in both online delivery –and new blended forms
13. TNE partners are an invaluable part of the ecosystem to build and service institutional alumni bases globally

### Strategic market engagement

As the current level of engagement demonstrates, it is not difficult to begin an institutional TNE journey, every University has TNE enthusiasts who: think widening participation should be global; believe international co-creation enhances the student experience; wish to enhance research links through a wider collaborative platform; and are driven by a passion based on a multitude of other reasons.

The challenge is to develop TNE as part of a sophisticated and strategic global engagement framework, where the rationale and benefits are widely understood and embraced, and to move it from being a marginal activity to become central pillar that can scale and be sustained over time to deliver the academic, operational and financial benefits.

From an institutional perspective it is essential to:

- A. Be clearer about the TNE purpose
- B. Clear definitions of the institutional core values and mission
- C. Understanding of the institutional competitive position, including in terms of an operational SWOT Clear objectives and long-term goals
- D. TNE focus – by geography, subject and level – and update these regularly
- E. Developing plans to support delivery of agreed objectives
- F. Enhanced understanding of the external environment through a systematic PESTLE analysis

### Value Proposition and Core Values

A strategic approach needs to prioritise the following:

- Grow new enrolments with existing partners through a market intelligence led process
- Understand the position of competitors and their partners;
- Prioritise specific country markets with clearly defined potential for partnerships;
- Enhance the offer including, through offering distance learning and mixed mode options
- Establish a balanced and financially sustainable portfolio consistent with your core values
- Develop a deeper understanding of the regulatory and legal environment for operating in the prioritised countries;
- Increase awareness of the overseas domestic student market, the role of TNE within this and the operations of potential partner institutions;
- Understand the local market: student affordability, acceptable fee levels, potential revenue, competitor positioning and market trends;
- Build synergies with other activities in the country, including for transfer/articulation programmes, research and CPD etc;
- Support brand building in the country more widely
- Have a clear plan about how to respond when things go wrong

Students and stakeholders increasingly value authenticity and integrity and so it is important that your TNE reflects the core values. With proper management and sophisticated application this will allow you to leverage what you stand for as an institution by systematically responding to the drivers for TNE around access, equity, diversity, affordability, relevance, employability, and vocationally orientation.

<sup>26</sup> Nigel Martin Healey, "Transnational Education: The Importance of Aligning Stakeholders' Motivations with the Form of Cross-Border Educational Service Delivery," Higher Education Quarterly 77, no. 1 (2023): 83–101, <https://doi.org/10.1111/hequ.12371>.

More specifically, we know that many students choose TNE because they can not afford the time and/or money to study in the UK. This needs to be integrated into your mission to make your high quality programmes available to talented individuals on an affordable basis. Specifically, some of the demand drivers include:

1. Restricted access of specific social, cultural or ethnic groups to the country's regular HE system;
2. Shortage of places in the local HEIs (government and private);
3. Top-up degree award programmes e.g. for Higher diploma students;
4. Private providers in the country do not have Degree Awarding Powers
5. Enhanced employability – students seek study opportunities that bring them closer to the world of work and work experience

### Also...

Overall, wealthier developing countries tend to have a greater interest in UK transnational education. The weighted average number of UK TNE students per million student-age population is low in countries with low average per-capita incomes, while those with higher incomes tend to have more TNE penetration.

There is a strong positive correlation between secondary enrolment rate and UK TNE enrolment at the higher education level, although there is still a great deal of variation between individual countries.

We know that many students chose UK HE because they see it as the gold standard and the role of the quality bodies in evidencing quality on a global basis, including through their reviews of TNE, is still important alongside national and global rankings including the TEF.

## Sophistication, sustainability, and synergy

A TNE strategy should be explicit about whom you will work with, underpinned by specific objectives. Institutions are focussed on the quality of their educational delivery but also need to generate financial surpluses, including to invest in building their profile, and so reputational issues should be an explicit part of a balanced score card approach. Indeed, not every TNE partner needs to have the same profile – a portfolio approach with different objectives across the portfolio may be the best way of reflecting the different dynamics and context in which partners sit.

Working closely with a partner, whatever the structure is crucial – to build trust and respect and provide insight and expertise and resource. Moving beyond the transactional approach of much TNE in the past is essential.

HE benefits from its global perception as a public good and we can genuinely point to the contribution we make to building civil society in Countries where UK institutions are present. Quite how broadly this is drawn will need to be a judgement for individual institutions. There are also decisions to be made closer to home including the development of a TNE offer in Eastern and Western Europe as part of our commitment to a European future.

The sector is comfortable with case studies, but sometimes seems troubled by embracing reference sites and 'Beacons of Excellence' that can be used as exemplars and models to drive forward delivery. Hence, we need more exemplars of how to broaden and deepen links

## Understanding the Market and your Competitive Position

The approach to developing TNE markets is not yet as sophisticated as that for recruitment markets in part because our TNE support is provided on the basis of academic services to the local partner rather than into the market directly and also because historically many partnerships have grown out of individual staff relationships rather than from a thorough review of market attractiveness and business cases.

The fact that the development and delivery of TNE is a much more diffuse affair than overseas recruitment means that those serious about it have to create the internal and external architecture to properly manage and monitor it. Academic Partnership Units are becoming more common – also regionally oriented special interest groups that look at how to coherently implement a range of academic activities in a particular country or region of the world. Key issues for elucidation include:

- ❑ Identification of a set priority target markets assessed globally based on size, growth rate, tertiary enrolments and fee levels
- ❑ Assessment of the number and quality of local HE institutions and Schools for partnerships and progression agreements
- ❑ Reviewing the quality and extent of in-country collaborative provision involving foreign partners
- ❑ Identifying a select group of potential partners in each prioritised country.
- ❑ Undertaking enhanced financial and legal due diligence on potential partners
- ❑ Systematic assessment of partner reputation from the British Council and other trusted intermediaries
- ❑ Enhancing engagement with UK and local quality assurers and regulators
- ❑ Development and delivery of a coherent Country and Global view through Country Groups and by co-ordination between them
- ❑ Greater disclosure and best practice sharing around differing financial models e.g. cost recovery, revenue sharing

Potential new projects should be added, others promoted or demoted according to a balanced scorecard covering key criteria for partnerships. The scorecard will include factors such as potential enrolment numbers, programmes relevant to the University, potential revenue/per student remittance,

country operating environment (e.g. political, legal), partner status/reputation, costs (development and recurrent), time scale etc with the weightings for each factor reflecting the risk appetite, reputation etc of the partner. Exit is challenging and requires a commitment to teaching out existing institutions. This can lead to delays in exit and challenges around quality. Crucial in this process is that from the very beginning an experienced and expert senior member of the University meets with the proposed partners – often tough decisions need to be made and that's best done at the beginning. The continuation of this clear eyed approach means a process by which risks can be coherent and consistently established with viable real-world exit strategies if things don't go to plan.

## Operationalising your strategy

Clearly learning outcomes should be comparable to those at the home campus but not simply seek to replicate them. Neocolonial approaches have been consigned to history in favour of opportunities to re-articulate learning that is appropriate for these different settings. Teaching needs to reflect the local ecosystem – and will come in different forms depending on the model of delivery: fully-online, supported by local partners, fly-in/fly-out, local partner delivery, locally appointed staff and the various combinations. We need to de-link the student experience and student outcomes when thinking about TNE and in particular the requirement that TNE should be the same as the provision offered at the home campus. Trifiro, F. (2021).

The reliance on academic support from the TNE awarding provider will also vary. What is never up for debate is that teaching staff must be committed and competent and properly supported to deliver a programme that is equivalent in standard to that at home. Likewise, students must be treated the same – with access to all the learning support they rightly expect – library, IT, registry, tutoring, advising, etc. It is essential students can access course materials, engage in discourse with others, and submit assignments and exams without stressful delays or unfair penalties. We must take responsibility for all students regardless of the mode or location of delivery. This means providing ways for TNE students to clearly voice their needs and to provide feedback on their experience, through surveys, student representation, or student-staff and alumni councils. Partners should be keenly aware of the potential for dissatisfaction from alternative modes of delivery – each has its value, relevant to the circumstances, and the partners must together address perceived deficiencies and develop enhancements – it is good for students, and it is therefore good for us – and will over time allow TNE fee levels to be increased creating additional revenues for further enhancements.



Universities UK International has identified good practice case studies. To which we add our own:

Models that work well in one part of a region or country may not work elsewhere. These characteristics must align with the institutional strategies of the partners. Pick a partner who is strong operationally and financially, is well regarded by regulators and embedded in their local social and economic communities and so knows the local marketplace, as well as being prepared to jointly undertake market research to properly define addressable markets.

You must understand the education system you seek to operate in – along with local needs and requirements. In some markets students may be most concerned about institutional prestige (of host and/or overseas partner); in others it is total programme cost or time to completion, professional accreditation, the teaching and learning approach, or links to employers.

Make sure you develop shared aims and objectives with your partner – preferably that look forward over at least a five year period. Know what you are getting into and establish clarity about the longer term objectives of both parties.

Ensure the financial dynamics of TNE are understood by both parties at the outset – it can even be a “loss leader” if it is recognised to be strategically important, and be consistent and patient. TNE is about trust and relationships, give people time to make this happen before you move on to the next project or expansion.

Understand that your partner is not you – so don’t expect them to have the same view of the world. Their difference is what gives the partnership strength, but each of you need to identify the red-lines that cannot be compromised.

Show this is a shared endeavour – establish joint academic management committees, run joint conferences and seminars to showcase successes and share best practices – including between partners.

Put your best people on your TNE projects – they are difficult to deliver at scale and in ways that generate real benefits – if you are serious, invest your talent. Institutions who are serious about developing TNE must be ready to invest their best and most valuable resources and create a risk-management framework that provides meaningful tools to respond to challenges. Dedicated partnership managers who understand the nature of the academic process are essential, and it is preferable if they can speak local languages, and they should be having regular check-ins with students, faculty and administrative staff. Investing in on-site staff will secure continuous engagement with the local delivery partner and establish deep connections providing real-time intelligence – sadly, by the time you get a problem flagged in a periodic review it is likely too late to easily fix.

Build quality assurance into the programme – by the time a periodic review has established its gone wrong it’s too late to put right without pain – and be ready to externally demonstrate your quality, not just self-asserting it. Pulse surveys, student and alumni feedback and student destinations are all key data for analysing success.

Each TNE activity is by its very nature unique – different places, partners, programmes, people etc. TNE is very different to the highly regulated, close at hand business of the home campus. Yet the expectations to students, staff and regulators are often comparable. We need to recognise the multiplicity of quality assurance dimensions and internalise a commitment to quality. External quality assurance is of course part of the mix and undergoing regular independent review reassures key stakeholders – these stakeholders increasingly include overseas regulators and credential evaluators. Indeed it is clear that inter-agency cooperation in quality assurance is essential for improving reciprocal understanding of expectations about quality cross-border provision, building trust between different education systems, and exploring innovative ways to address regulatory gaps, unnecessary regulatory hurdles, and reap the benefits of TNE Trifiro’ (2018), Fabrizio Trifiro’ (2019).

# Appendix 2

## Overview of considerations for future engagement

Figure 15: Title to come

	Legacy/traditional model	Emerging model
<b>Broader strategic rationale</b>	<ul style="list-style-type: none"> <li>Shift away from the “soft power” approach (which assumes a dominant partner)</li> <li>International HE</li> <li>International Trade</li> </ul>	<ul style="list-style-type: none"> <li>Towards knowledge diplomacy with more emphasis on collaboration between equals, reciprocity, and mutuality.</li> <li>Towards deeper global engagement with a strong focus on:               <ul style="list-style-type: none"> <li>International mobility of (i) students; (ii) academic programmes; (iii) research, incl applied research</li> <li>local impact and long-term partnerships</li> </ul> </li> </ul>
<b>TNE forms</b>	<ul style="list-style-type: none"> <li>Franchising, validation, articulation</li> </ul>	<ul style="list-style-type: none"> <li>Collaborative forms involving degree awarding institutions (e.g., dual/double/joint degrees), hybrid models involving in-person and online modalities, university alliances</li> </ul>
<b>Motive</b>	<ul style="list-style-type: none"> <li>Primarily financial with a short to medium term horizon (3–5 years).</li> <li>Some projects with broader objectives such as research collaboration.</li> </ul>	<ul style="list-style-type: none"> <li>Part of a Global Engagement strategy with multiple objectives, including:               <ul style="list-style-type: none"> <li>sustaining international student mobility flows (directly via recruiting students; indirectly: building a global brand footprint and reputation),</li> <li>financial returns,</li> <li>Research and impact</li> </ul> </li> </ul>
<b>Approach</b>	<ul style="list-style-type: none"> <li>TNE as a third stream of income and secondary (often sidelined) activity for academic departments</li> <li>One-way model where the “home” institution dictates the terms of the collaboration</li> <li>Global North – Global South</li> <li>Use of English as the medium of instruction has been considered to limit growth</li> </ul>	<ul style="list-style-type: none"> <li>TNE as a key component of a cohesive Global Engagement strategy.</li> <li>Equitable forms of partnership that recognise the needs and priorities of partner institutions and host countries</li> <li>Access to regional networks – accessing partners’ partners</li> <li>Embedding language, cultural and other local elements in the design, content, and methods of teaching and learning</li> </ul>
<b>Outputs</b>	<ul style="list-style-type: none"> <li>Meeting student number targets, total revenue per project</li> </ul>	<ul style="list-style-type: none"> <li>Meeting student number targets, total revenue per project, broader impact, research collaboration prospects, joint ventures.</li> </ul>

# Appendix 3

## Recommendations in context

We applaud the work of the HE champion and others to establish the basis to develop more and better TNE through engaging with other countries to reduce obstacles to universities operating overseas, including TNE in trade discussions and promoting recognition of qualifications. However, more is required and **we recommend that targets are set for TNE reflecting including both volume and diversity (by geography, subject and level) to mirror the success of the target driven approach in the 2019 IES strategy**

In order to support this **we recommend the establishment of a TNE academy – modelled on Advance HE, that will develop capacity and capability to undertake TNE**, support establishing and spreading of best practice and can engage directly with overseas partners, working collaboratively with OfS and its analogs in the developed nations, Department of Business and Trade, UUK, QAA and UK ENIC. We do not recommend an enhanced role for the OfS in respect of TNE, its international efforts are better focussed on understanding and supporting the sector in addressing the challenges for onshore recruitment.

**In focussing on TNE, we fail to address the opportunities for Transnational Research (TNR). We recommend a national commitment to the development and delivery of Trans National Research – embraced and enacted through enhanced a variety of mechanisms ranging from the creation of more overseas collaborative doctoral research training centres through to augmented cotutelle programmes.** These should be promoted as part of a range of measures necessary to address decline in PhD students coming to the UK and is in line with the UK's stated strategic ambition to become a global research superpower

Our previous report on the importance of IaH clearly documented the link to TNE, particularly the development of COIL, which is “developmentally” focussed in many different ways and so **we recommend measures to promote, recognise and reward COIL and IaH. These would provide a big step towards embedding TNE-like approaches into the institutional mainstream to provide the platform for TNE development**

**We recommend the need to urgently clarify definitions of TNE and intentions of universities if we are to establish a framework within the national portfolio can be effectively managed.** It is widely acknowledged that universities do not always categorise their programmes by the same definitions as used by HESA. We understand the review of the AOR will see decisions made in Summer 2024 on the basis of the feedback to the consultation for implementation in 2026/27. Notwithstanding the current HESA consultation, we recommend a HESA-UK HEI working group

on student data to improve the We need to urgently update existing definitions of TNE to reflect and report on the full range of existing provision. Also we need better UK wide coordination to establish a framework within which the national portfolio can be effectively managed and collaboration encouraged to share best practice and insights.

We therefore recommend this more urgent review of the data and insight architecture in order that the sector can have confidence it will have the information available so that it can better inform decisions about future activities, rather than simply record past activities.

The Commission has looked extensively at the data deficiencies that undermine the ability to effectively plan – from the time it take for sector-wide enrolment data to be available through to the the lack of access to Home Office data that would allow more joined up working with local public sector service providers. It is no excuse to note that these dataset were developed for different purposes, we need the data and insight suitable for the purpose of planning the future of our sector. TNE is no better served than onshore recruitment. The Aggregate Offshore Record is particularly ill-suited to supporting effective decision making. It is extremely unfortunate that the burden of making these systems fit for purpose comes at a time when the sector is struggling with many other challenges but **we recommend that data collection and insight relating to overseas students needs to be rapidly and comprehensively revamped across Government and its agencies for onshore and offshore recruitment in a coherent and consistent way and if that proves to be impossible in a suitable period that public-private partnerships are established to enable such data to be made available on a effective basis to support timely decision making.**

GREAT and Study UK have both delivered successes, and we need to build on their achievements as we invest strategically in fostering recruitment to offshore as well as onshore programmes. It is of course important not to cannibalise recruitment to the UK, but these are essentially two different market segments and we do not help onshore recruitment by failing to grow offshore – both of these segments require a step change in resources applied to global marketing and messaging. Therefore, **we recommend an appropriately funded, dedicated and sophisticated, marketing initiative that focuses on key offshore market segments so that it enhances recruitment to UK university overseas programmes that cater to students who, for a wide variety of reasons, are not considering study in the UK**

# Appendix 4

## Case studies

### Zhejiang University – University of Edinburgh Institute (ZJE), China

#### Partnership Overview

In 2016 Zhejiang University (ZJU) and The University of Edinburgh (UoE) established the Zhejiang University -University of Edinburgh Institute (ZJE) for education, research, and translation across major biomedical research themes. The partnership facilitates a creative global education and research agenda between two world-leading universities. Programmes are delivered in state-of-the-art research and teaching facilities at Zhejiang University's new International Campus in China providing first class educational training in English and exceptional student support through a collegiate framework.

ZJE is UoE's largest overseas educational and research partnership in China and Globally. The shared vision is for transformative research led TNE to support students to be future leaders in biomedicine. The institute supports 1150 Chinese national and International undergraduate and postgraduate students undertaking 4-year UG Dual award BSc Honours programmes in Integrated Biomedical Sciences and Biomedical Informatics as well as MSc and PhD programmes including a dual award PHD and single award UoE MSc and PhD programmes in Biomedical sciences in China.

#### Delivery

All programmes are delivered in partnership between research active academic staff from UoE and Zhejiang University, at ZJE, the high international staff-to-student ratio offering a rich curriculum reflecting the full breadth of biomedical science. Students benefit from high quality teaching embedded in good research practice and combine the best of East and West approaches to education. Students are taught by “active researchers” and the strong research base at ZJE enables students to experience science “at the bench”. The exceptional facilities enable research led training in biomedical research targeted to the major emerging societal and health needs of both UK and China and Globally.



#### Internationalisation

ZJE builds on the considerable education and research strengths of both ZJU (QS 2023 44) and UoE (QS 2023 22) and is part of their wider internationalisation strategies. ZJE is based at ZJU's new International Campus (IC) which underpins ZJU's internationalisation strategy, enhancing diversity in both staff and student bodies.

Programmes encourage bi-lateral student exchange; UoE based students can study at ZJE as part of a study abroad programme (and vice versa) and scholarships are available for summer research studentships at ZJE and UoE. Graduates, on completion of UG programmes undertake postgraduate study at ZJE, Edinburgh, or UK or Globally, strengthening the international community of Biomedical scholars and alumni.

This transformational research-led educational partnership won the 2018 Education Institutional Partnership of the Year 2018 award at the British Business Awards, supported by the British Council. This prestigious award acknowledges ZJE as the foremost UK- China Educational Partnership and established ZJE as the benchmark for UK-China Education.

## Dundee International Institute of Central South University (DII CSU), China

TNE in China is a long-standing UoD strategic priority. UoD is the only Scottish institution that has Sino-foreign partnerships with three Double First Class Chinese Universities. The Dundee International Institute of Central South University (DII CSU) in Changsha is the anchor around which Dundee are developing a wide-ranging 'triple intensity' education, research and knowledge exchange relationship with Central South University encompassing a range of disciplines.

Building on a collaboration that began in 2009, DII CSU delivers Science and Engineering programmes to 300 students per year on a 4+0 model with a double degree exit award. Scale is likely to grow beyond the 1200 student per annum. The university is committed to ensuring that its students in China have a comparable experience to those on the home campus. Academic staff typically spend one or 2 semesters teaching in China, and the remainder of the year undertaking research in Dundee or Changsha. UoD English Language staff are embedded in Changsha teaching first year students and training CSU language staff. In addition all students across all their partners in China, can access the expertise provided through their China Student Services hub located in Shanghai which facilitates access to IT support, and other Dundee based services.

To support the development of a coherent cross institutional learning community we host student summer schools in Dundee, and Dundee also host in semester staff development programmes in QA, assessment and international pedagogy to support excellence in teaching and learning. Dundee host an annual research conference in Changsha to support staff to identify new opportunities and facilitate exchange opportunities. Dundee are also working on student voice opportunities in Changsha and a range of women in STEM opportunities. All staff and students collaborate on MyDundee, the Dundee VPN and a range of ITC collaboration tools. Dundee host a research conference in Changsha each semester to support staff to identify new opportunities and facilitate exchange opportunities. The emergence of collaborative research is further facilitated by regular online joint research workshops. CSU have also established a research seed fund for the disciplines aligned to those offered in the DIICSU.

By choosing their partner well and building on a long-standing relationship they have benefitted from a deep relationship and clearly aligned objectives in teaching, research and knowledge exchange across a range of disciplines. They have recently extended collaborations to include medicine, life sciences and art and design with articulations, exchanges, PhD programmes joint research and knowledge exchange around innovation districts.

Strategic leadership and institutional investment have proved crucial in operationalising this increasingly significant partnership. The formal governance is led in both institutions at VPI level with the UoD Principal and CSU President offering strategic leadership and participating in landmark engagements such as opening ceremonies and institutional celebrations. DII-CSU is at the heart of the University's Growth and Globalisation ambitions. In a typical semester Dundee now have around 20 staff in country. Dundee also fully exploit the potential of virtual working and enrich this with targeted staff visits across multiple activities relating to global challenges in health and life sciences, environmental sciences etc.



## King's College London with Singhasari Special Economic Zone, Indonesia

King's College London's (KCL) transnational education (TNE) partnership with the Singhasari Special Economic Zone (SEZ) in East Java, Indonesia underscores the benefits of a place-based TNE model.

This innovative approach positions place-based TNE as an equitable model of international partnership, emphasizing local context and priorities, place-based TNE is deeply rooted in responding to the specific economic needs of the host nation and the ASEAN region. In the case of KCL and SEZ, the thematic focus on the digital economy directly aligns with Indonesia's economic development goals, creating a mutually beneficial framework.

By tailoring educational programmes to address national and regional economic needs, place-based TNE becomes a powerful tool for fostering equitable partnerships. The collaboration between KCL and SEZ exemplifies the responsiveness of this model, ensuring that educational offerings are not only research-led and academically rigorous but also directly contribute to workforce development and economic growth.

Moreover, the place-based TNE model encourages active engagement with local stakeholders, fostering a sense of ownership and inclusivity. KCL's series of visits to Indonesia, extensive discussions with government entities, and collaborations with public and private sector organizations reflect a commitment to understanding and incorporating the perspectives of the host community - promoting a more participatory and sustainable partnership.

In addressing national and regional economic needs, the KCL-SEZ partnership extends beyond the delivery of academic programmes. It encompasses capacity-building consultancy, research collaboration, and progression partnerships, creating a holistic framework

for sustained impact. This multifaceted approach is designed to empower local institutions, cultivate research ecosystems, and facilitate the seamless integration of graduates into the workforce.

The emphasis on the digital economy as a thematic focus further enhances the effectiveness of this collaboration. In the dynamic global landscape, digital skills are integral to economic competitiveness. By aligning educational offerings with this thematic area, KCL aims to respond to Indonesia's economic strategy by equipping students with the skills necessary for success in the evolving job market. As the first phase of postgraduate programmes in the digital economy is set to commence in September 2024.

The significance of being based within one of Indonesia's 22 Special Economic Zones (SEZs) adds a distinct layer of strategic importance to King's College London's transnational education (TNE) partnership with the Singhasari SEZ. These designated zones, established by the Indonesian government to attract foreign direct investment and spur economic development, provide a conducive environment for academia and industry collaboration. By embedding educational initiatives within an SEZ, King's aims to foster real-time engagement with evolving industry demands. This proximity enables KCL to tailor its programmes to the specific needs of the SEZ, creating a dynamic and responsive educational ecosystem. Moreover, the SEZ framework offers unique opportunities for students to directly engage with local businesses, providing a practical and immersive learning experience. This strategic placement within an SEZ not only aligns with the broader economic development goals of Indonesia but also positions KCL as an integral contributor to the region's growth and innovation.



## De Montfort University and EdPeritus, DMU Kazakhstan

Discussions between De Montfort University Leicester (DMU) and EdPeritus - a global education services provider establishing higher education institutions and collaborative partnerships with government and industry leaders - commenced in 2020. It became clear that the two organisations had a close philosophical alignment, specifically around pedagogy and student experience. An agreement was reached to launch the first UK university branch campus, DMU Kazakhstan (DMUK), by September 2021.

Many Kazakh students leave the country each year to pursue their studies overseas, seeking an international educational experience to enhance their global employability. This project aimed to provide an opportunity to receive this in their own country, closely aligned with the broader Kazakhstan government's higher education strategy. The initiative received support from both British and Kazakh government officials.

This complex project was delivered within an exceptionally short timeframe during a global pandemic. As the first UK university in the country, there was a requirement to support the development of processes for setting up institutions of this kind. Multiple stakeholders were involved at the most senior levels within various Kazakh government ministries, including the Prime Minister. Inherent trust between partners and dedicated resource for the duration of the pre-launch phase and beyond were critical to its successful delivery.

Following the September 2021 launch, the second phase of course development has taken place, and students are being offered an even wider range of international study opportunities. DMUK is developing a broad network of industrial partners in the Central Asian region to provide student internships and connect with these companies to provide CPD opportunities to their employees.

DMU has now joined the UK University Overseas Campuses Network. As part of this, it will work with the UK government to identify barriers to trade affecting overseas campuses and explore the opportunity they provide the UK to build its reputation as a science and education superpower.



The Prime Minister of Kazakhstan took the significant and highly unusual step of signing and publishing a Prime Ministerial Decree to allow the university to operate in Kazakhstan and launch the campus. The project undoubtedly impacts Kazakhstan, a trailblazing country leading transformation and reform in Central Asia. DMU expect, given the globalisation and the attraction of UK university education, it will continue to positively impact students as they go on to become future leaders in the region. Many see themselves as global citizens, and initiatives such as this provide a strong foundation for critical thinking and support their desire to impact the world.

DMU Kazakhstan is part of DMU's Transnational Education (TNE) strategy, which includes collaborating with overseas partners to offer programmes to students globally. DMU recently published its 'Empowering University' strategy with 'Partnerships with purpose' as one of its pillars. DMUK fulfils both key themes in this pillar, providing a regional hub from which key projects can be launched. The campus will also offer bi-direction mobility for students to gain international academic experiences through traditional exchange programmes and Collaborative Online International Learning (COIL) projects with their classmates on the other campuses.

## The Millennium Universal College (TMUC) and University of Hertfordshire, Pakistan

The Millennium Universal College (TMUC) is a higher education provider with transnational provision and a national footprint of state-of-the-art purpose-built university campuses in Islamabad, Lahore, Karachi, Rawalpindi, and Faisalabad. The group and the TNE provision are recognised by the Higher Education Commission (HEC). TMUC is the largest provider of TNE in Pakistan and is a pioneer in offering quality academic delivery. The TMUC group also partner with the University of London and The University of Creative Arts.

TMUC and the University of Hertfordshire (UH), have partnered since 2016, using a Supported Distance learning mode of delivery. The partnership launched with 2 programmes: BA Hons Business Administration and BSc Hons Computer Science. LLB law, MA Education and MBA have recently been added to the portfolio.

The programmes are all delivered via a Supported Distance Learning Model; the exams, assessment and core tuition are delivered by the University of Hertfordshire, which students access through the University's Virtual learning Environment (VLE). This is supported by face-to-face tuition at the local institution. The face-to-face component delivered by local partner is required by UH academic quality and distinguishes the model from direct online courses. It also allows for a localisation of the curriculum, which is actively encouraged by the University, through projects and local case studies.

The University chose to partner with TMUC due to the scale, ambition, and previous experience of managing UK TNE through the long-standing University of London partnership. The Supported Distance learning model allowed the University to enter the market during a period when travel restrictions and safety concerns made a franchise unviable. It has proved hugely successful model and is now University's most successful partnership of this type (distance learning).



## London South Bank University and British University in Egypt

LSBU and the British University in Egypt have been partners for more than a decade. This remains one of the most notable examples of a successful TNE operation by a UK university. The relationship between LSBU and BUE started in 2011 with 2 programmes. This has developed significantly and now LSBU validates 19 undergraduate and 9 postgraduate degrees. There are around 5,000 LSBU students enrolled and studying at BUE in Egypt. Both institutions have developed a robust quality assurance framework and an environment that ensures that quality standards are adhered to for optimum performance.

Having grown together for more than a decade the spread of UG and PG courses largely mirrors the London LSBU campus with the exception of Health. As the relationship has matured the attention is moving to beyond the traditional TNE teaching agenda to research enterprise an development. The research potential in Egypt for example in making progress on UN SDGs to make a genuine impact is largely untapped and is now a major focus for LSBU. Additionally for the second year LSBU has supported the sustainability agenda of BUE and their hosting of the Model COP 27 and 28, involving students from 32 countries, culminating in sending student teams to participate in sessions in Sharm EL-Sheik and Dubai.

### Student mobility

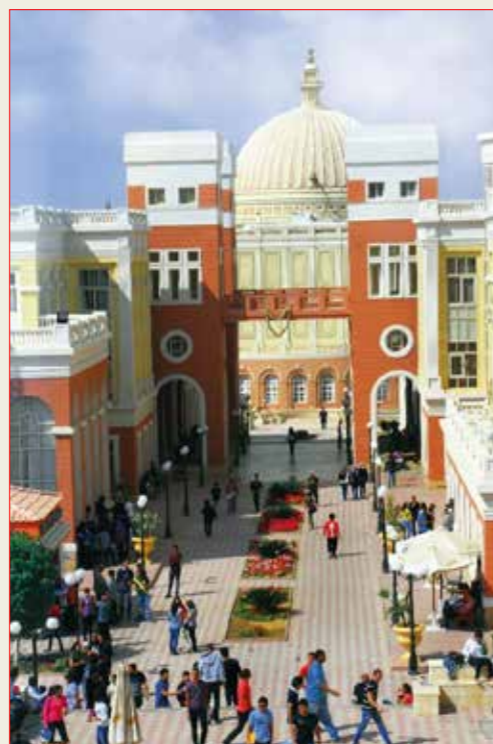
Both institutions believe that student mobility strengthens the student experience.

Two cohorts of BUE students enrolled on the LSBU Semester Study Abroad programme. The students came from the Economics and Mass Communication departments.

Three cohorts of BUE students enrolled on Summer School programmes. The students were from the Economics, Political Science, and Informatics departments.

LSBU students from the department of Law and Political Science have travelled to BUE and gained credit towards their LSBU degree through their studies in Cairo

LSBU plan to continue expanding student mobility both inbound and outbound in the future.



### PhD

LSBU and BUE are also collaborating on Research and Enterprise advancement.

- 12 teaching assistants are completing distance learning PhD courses at LSBU. As part of the arrangement, they spend 3 months at LSBU in London. There are plans to increase the number of teaching assistants undertaking their research with us.

### Staff

Academics from both institutions provide keynote lectures at LSBU and BUE. Professional Services staff also visit BUE and LSBU to spend time at each other's institutions to gain an understanding of the different administrative processes.

### Partnership management board

High level governance of the LSBU/BUE partnership is facilitated via the Partnership Management Board, which meets bi-annually to discuss all aspects (academic and non-academic) of the partnership. It also provides an opportunity for the institutions to agree on the strategic direction of the partnership going forward.

## Grenoble – Swansea Strategic Partnership

Established in 2013 between Swansea and Université Joseph Fourier as a joint research initiative in nanoscience, energy and ageing, the Swansea-Grenoble Institutional Strategic Partnership is now a unique and major venture between a UK and French University. It is an institution wide multidisciplinary strategic collaboration, which involves not only a wide spectrum of academic disciplines but also the management and administration of both Universities. It includes joint research and publications, student and staff exchange and secondments, joint doctorates and masters, collaborative funding bids, a joint approach to trans-sector collaboration with industry (both in the UK and France) and the sharing of best practice and innovative policies. It is central to Swansea University's strategic ambitions and for its drive for continued gains in research excellence and for an enhanced presence in Europe.

Swansea entered into discussions with l'Université Joseph Fourier, Grenoble (UJF) in 2012/13 with the support of the French Embassy and Government for the development of a Franco-Welsh alliance in the areas of nanoscience, energy and aging. Swansea has a strategy of focussing on few select global partners. UJF began a process of merging with the city's other universities to create possibly the largest university in France, the new Université Grenoble Alpes, with a combined student population of 65,000 and meant it became able to accommodate collaboration in a much wider range of disciplines.

At the beginning of 2020, Université Grenoble Alpes evolved into a single new institution that includes Grenoble INP (Institute of Engineering), Sciences Po Grenoble (School of Political Studies) and ENSAG (School of Architecture). A joint 5-year Strategic Plan (2021 to 2026) has been agreed between Swansea and UGA with a joint management structure to govern the partnership, underpinned by implementation plans.

### Joint doctoral degrees

- The first joint doctorate was established in 2014. These are jointly supervised degrees where the student spends 50% of his/her time at each university and is generally supported by 50/50 funding from both. The successful students receive a doctorate from Swansea and from Grenoble.
- To date, over forty doctoral degrees have been funded by the partnership across medicine, engineering, science, social sciences and humanities.

### Joint teaching

- 2 Joint Masters Programmes
  - [Computer Science - Informatique \(Swansea\), MSc - Swansea University](#)  
Two year masters programme, established in 2017/18, though recruitment paused during covid due to difficulties with travel. Students spend one year in each university.
  - [Professional Translation \(Extended, with Université Grenoble Alpes\), MA](#)  
Two year masters programme, established in 2021. Students spend one year in each university.
- Exchange student numbers have been small to date due to the lack of English teaching in Grenoble but this has changed recently and there will be an increase the numbers of students participating and the variety of subject areas involved. Virtual mobility and shorter-term mobility through summer schools is also being planned.

### Joint research

- A number of joint conferences and workshops in various subject areas.
- 75+ co-authored papers between SU and UGA colleagues
- A number of joint funding bids, a significant number of which have been funded.

### Staff exchanges and sharing of best practice

- Regular staff visits between both institutions during which staff are encouraged to share best practice and a number of Swansea academics have benefited from the Grenoble FOSTERING Science programme to increase Horizon 2020 and ERC Grant capture.

# Authors biographies

## Dr Vangelis Tsiligkiris

Dr Vangelis Tsiligkiris (SFHEA, FCMI, CMBE) is an Associate Professor at Nottingham Business School (NBS), Nottingham Trent University and the founder of the TNE Hub. He is a member of the Chartered Association of Business Schools International Committee and an advisory board member of the ECTIS UK Transnational Education Quality Benchmark (TNE QB).

He has 20 years of strategic development and operations management experience in TNE partnerships with several European Universities. His research focuses on exploring innovative models of global HE, the value and social impact of TNE and the influence of new technologies on student outcomes. He has led and contributed to research and strategic development projects for universities, international organisations, and governments. Vangelis has worked with governments and international organisations in countries such as Greece, Cyprus, Vietnam, Malta, Georgia, Brazil, Peru, Mexico, Pakistan, and India. He has championed global collaborative initiatives, such as the TNE IMPACT repository, which aims to capture the impact of TNE on UN SDGs

## Wendy Alexander

Wendy Alexander is Vice-Principal (International), and Professor of International Education at the University of Dundee. She is Scottish International Trade & Investment Envoy for Higher Education, a British Council Trustee, an Emerge Education Venture Partner and on DBT/DfE Education Sector Advisory Group. She Chairs Times Higher Education Student, Global Advisory Board; is Vice Chair, UK National Committee on China Advisory Board; on StudyPortals UK Advisory Board; SEP LLP's Investment Advisory Board; and former Co-Chair UUK Pro-Vice Chancellor's International network. She is a Fellow, Royal Society of Edinburgh; Patron of Social Investment Scotland and holds honorary degrees from Strathclyde University and UWS.

Wendy spent over a decade in government and elected office, serving the first three Scottish Cabinets, including as Minister for Further & Higher Education, also holding the Enterprise & Lifelong Learning, Transport and Communities portfolios and served as Scottish Labour Leader in the Scottish Parliament.

## Janet Ilieva

Janet Ilieva is the founder and director of Education Insight, a research consultancy specialising in international higher education.

Janet's research focuses on international student mobility, university partnerships, transnational education, and national policies for global engagement. Janet regularly researches higher education engagement for government departments, universities, and international organisations in Europe and Asia.

Education Insight's [Global Engagement Index \(GEI\)](#) evaluates UK higher education institutions' internationalism and involvement with sustainable development. Education Insight is a co-founder of the [TNE Impact](#) repository.

## David Pilsbury

David Pilsbury is Chief Development Office for Oxford International, a global educational services provider. He sits on the advisory boards of JISC, China-Britain Business Council, Times Higher Education, StudyPortals, EURIE, ECCTIS, Emirates Aviation University and Macao Millenium College. He is a member of the UK's International Higher Education Commission. He was previously Deputy Vice Chancellor of Coventry University and led its transformation to become an internationally focussed university: as the UK's 3rd largest recruiter of overseas students; the largest provider of programmes overseas; and host of the world's largest global enhancement programme. His contribution to global higher education has been recognised by The Queen's Award, EAIE's premiere award and an Honorary Fellowship from Hong Kong's VTC. Pilsbury was founding CEO of WUN, HEFCE Head of Research Policy and spent several years in the City after a D.Phil at Oxford.

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