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Research

TNE - What we know

An evolving landscape

November 2024

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Pulverness, A., & Carter, D. M. (2024). Transnational Education – What we know (An evolving landscape). British Council. https://doi.org/10.57884/2EAC-Z231

Series edited by Sarah Mount, TransformELT.

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Introduction

The British Council has researched transnational education (TNE) for over two decades and has built up a wealth of insight publications relating to UK TNE opportunities and impact.

This brief summarises some of the findings from British Council research papers published since summer 2022 which reflect the evolving landscape for TNE.

This is only a summary of a small window of our research – see the back page for how to find out more.

> It is impossible to say exactly what the future looks like. However, UK TNE is expected to continue to change and adapt, and most likely grow in size and significance.

An evolving landscape

The growth of TNE

Given the range and complexity of the UK's transnational education activities – and its geographical spread – it is hard to predict the future with any accuracy. However, we can establish a direction of travel from existing data.

The last few years have seen year-on-year growth in the number of TNE students. Although the rate of growth has slowed slightly, it remains high. The extent of UK TNE increased by 8.3% to 576,705 students in 2022-23, the most recent year for which we have data.

Many of the drivers for TNE growth remain in place, especially in countries where there is demographic growth allied to increasing demand for tertiary education. Among universities and other providers in the UK, there is heightened awareness of the risks, which might constrain TNE development, but at the same time a more rounded appreciation of the benefits.

Recent trends, however, suggest that growth will be uneven across types of provision. In particular, there is more rapid growth in international partnerships – both collaborative provision and validation arrangements – than in other forms of TNE.

	Overall TNE growth	Distance learning	International branch campuses	Other, including collaborative provision	Registered with overseas providers
2020-21	13.0%	9.7%	13.3%	12.8%	17.6%
2021-22	8.8%	-0.9%	7.7%	11.2%	16.9%
2022-23	8.3%	2.1%	6.0%	10.7%	11.5%

Source: HESA Aggregate Offshore record (2024)

While the last few years have seen year-on-year growth across most types of provision, the trend is much more marked in the last two categories given above. These categories embrace TNE activity delivered in partnership with a local provider. Given a reduced appetite for the business risks presented by bricks-and-mortar campuses, UK providers are increasingly keen to work with partners that already have a campus of their own. From the host country perspective, it is equally an attractive option to partner local tertiary institutions with universities in the UK. This makes strategic sense because partners learn from each other, and there are opportunities to build capacity in teaching and research.

Online provision

The slowest growth, perhaps surprisingly, has been in TNE students educated through distance, flexible or distributed learning. This category (as defined by HESA) encompasses courses that do not require the student to attend particular classes or events at particular times and particular locations.

The prospects for continued growth in TNE online degrees are uncertain. At one end, we could see experimentation with immersive online classrooms, using virtual reality to simulate a classroom, lecture hall or laboratory (the Future of International Tertiary Education page 12). At the other end is the risk that rural communities in developing countries are left behind as the world becomes more connected. A project in South Asia found that there is a digital divide between regions effectively walling out prospective students without access to the appropriate tools (International higher education partnerships and the SDGs page 56).

The biggest constraint, however, is lack of public confidence in the quality of online degrees. In many countries this is allied to regulation, where degrees awarded by foreign universities on the basis of online study are simply not recognised. As an example, Nigeria faces significant challenges relating to capacity in its tertiary education sector. Among a growing population, there are two million Nigerian students chasing 750,000 university places, many of whom turn to universities in neighbouring Ghana. The Nigerian University Commission (NUC) sees open and distance learning (ODL) as an affordable way to close this gap between supply and demand. So far, however, the NUC has said that only ODL qualifications offered by Nigerian universities can be eligible.

The position is similar, to a greater or lesser extent, in countries including China, Indonesia, Saudi Arabia and Vietnam. As a result, some students question the value of an online degree in the employment market.

The experience of the Covid-19 pandemic, during which face-to-face teaching across the world was moved online, has changed perceptions of remote learning. In many cases, the pandemic may simply have accelerated progress towards online learning that was already underway. However, these changing perceptions depend on how the move to online was managed. For stakeholders in Saudi Arabia, the experience of 2020 showed the resilience of TNE activities and led to a greater acceptance that online learning can be of high quality. And in the Philippines, this experience has amplified the reach of online education and resulted in significant growth in demand for micro-credentials (page 21 of that report). In other places, the move in 2020 to online provision was not something that all students enjoyed and, consequently, online learning can be seen as the choice of last resort.

The diversification of TNE

Much of the future for digital learning may turn out to be blended with other forms of TNE delivery. As UK providers become global institutions, advances in technology create more opportunities for colleagues and students to connect with each other across time zones. Equally, TNE is no longer construed solely in terms of full degree courses, whether in-person, online or hybrid. New modes of learning are increasingly available to students whose personal circumstances or financial resources might have made other forms of TNE programmes inaccessible.

For these reasons, we may need to expand the four-part typology of TNE provision given above, to include the following:

Massive Open Online Courses (MOOCs)	**Large numbers of learners follow an online course at the same time.**
Virtual mobility and online international learning	**Students engage in a virtual international learning experience, including online collaboration with students from other countries, virtual study abroad programmes and cross-cultural training.**
Work-intergrated learning	**Work experience forms part of an educational programme, enabling students to gain practical skills and real-world experience while studying.**
Personalised learning	**Data and analytics are used to tailor educational programmes to the needs and preferences of individual learners, providing a more personalised learning experience.**
Micro- / Nano-credentials	**Credit-bearing qualifications for individuals to learn new skills, progress in their careers or change careers entirely. Usually short, on-demand, online courses, designed to be fast, accessible and specialised, and provide certification on completion.**

Source: British Council, Transnational Education Strategy 2023-2025

Three scenarios

Our 2022 report on the Future of International Tertiary Education draws on views from a range of stakeholders, and includes three plausible scenarios for the future of TNE. The ‘core scenario’ includes growth but also fragmentation in provision. A bleaker view, which assumes a less connected world, says that international partnerships will become harder to achieve. A third view, in a more open and positive world, says that international collaboration and mobility in tertiary education will be normalised. The common theme across all three scenarios is the diversification of TNE provision.

This reflects assumptions about changing student and provider behaviour; and also the variety of ways in which TNE is regulated, including underpinning agreements for the mutual recognition of qualifications.

These assumptions find support in what we know about the changing nature of TNE provision. The number of UK TNE students is constantly growing. With this growth comes increased diversity of academic provision.

It is impossible to say exactly what the future looks like. However, UK TNE is expected to continue to change and adapt, and most likely grow in size and significance.

To find out more

British Council's research and insight on TNE (and other areas of international higher education) can be accessed via the following pages:

Research and insight | British Council

Opportunities and insight | British Council

Headline data on UK TNE participation are supplied on their website by the Higher Education Statistics Agency (HESA). More detailed data are available for UK HE providers through data mining portals on our Opportunities and Insight | British Council pages. Note that: although the data mining portal is based on the HESA Aggregate Offshore Record, the overall numbers are slightly different because of the rules under which data are compiled; and the way in which HESA accounts for TNE students among English and Welsh providers will change, yielding more granular data from 2026-27.

Our environment reports include data on TNE distance learners in individual countries.

On the business risks associated with international branch campuses, see our report (co-authored with UUKi) on Managing risk in TNE partnerships at page 12.

On the digital transformation of TNE since the Covid-19 pandemic, see our reports on the Value of TNE Partnerships at page 65; and the UK TNE Landscape in East Asia at page 11. See also reports on Saudi Arabia at page 14; the Philippines at page 21; and (for a different perspective) the outlook for India at page 38.

On opportunities to connect across time zones, see our report on TNE in Italy at page 26; and essays on TNE in East Asia, pages 27, 35-6, 37-8, 69 and 85.

British Council 2024

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