

The global environment for  
transnational education,  
UK degrees and qualifications

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Findings and recommendations  
from primary research

Part of Going Global Partnerships



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# 1. Background to the study

The report 'Global environment for Transnational Education, UK degrees and qualifications' synthesises the analytical findings from a series of 15 individual country reports. It draws on the main challenges and opportunities for transnational education (TNE) engagement and the recognition of UK degrees and qualifications. This report summarises the regulatory changes that have taken place over the past decade and identifies areas where institutions engaged in TNE need support.

## 2. Aims, objectives and methodology

This research aimed firstly to provide an in-depth understanding of current challenges to international collaboration in tertiary education between the UK and selected priority countries, and secondly to recommend ways in which to address these. The research focused specifically on exploring the challenges to:

- the recognition and acceptance of international tertiary and professional qualifications; and
- the delivery of collaborative transnational education (specifically TNE from UK providers).

Challenges included ‘hard’ factors – e.g., policy and regulatory frameworks, strategic barriers – and ‘soft’ factors such as perceptions about TNE and foreign degrees in the studied countries.

This research covered 15 countries: Brazil, China, Egypt, India, Indonesia, Mexico, Nigeria, Pakistan, the Philippines, Peru, Saudi Arabia, South Africa, Spain, Turkey and Vietnam. Five of those (India, Indonesia, Nigeria, Saudi Arabia and Vietnam) are immediate priority countries under the UK government’s International Education Strategy. All except Saudi Arabia and Spain were eligible for official development assistance funding.

This research followed the following methodological steps:

1. Systematic desk research, which used a previously developed framework under the British Council’s Global Gauge series, to capture:
  - a. The policy environment for international higher education (HE) collaboration.
  - b. Regulatory changes impacting TNE.
2. Primary research, collected through semi-structured interviews in each of the countries the following stakeholders’ groups:
  - a. Higher education institution (HEI) representatives in-country, to explore institutional perspectives on existing regulatory frameworks and policies.

- b. Policymakers, to expand on findings from our desk research and to identify the direction of the future policies.
- c. UK HEIs, to explore perspectives on enablers and challenges in different partner countries’ systems.

In total, approximately 150 semi-structured interviews were conducted for the research.

A sector-wide questionnaire survey was distributed to HEIs in the UK and overseas engaged in TNE. This aimed to complement and expand on the interview data, identifying:

- a. key current challenges to TNE collaboration
- b. challenges that had already been successfully navigated and the interventions that had achieved this.
- c. cases where system challenges had been overcome, in particular where lessons were more widely transferable.
- d. the potential for British Council interventions to address challenges and create a more enabling systems environment for collaboration.

The questionnaire attracted 98 valid survey responses, which were used to inform the research findings. However, the responses from some of the studied countries were limited, and as such, the research mainly relied on the primary data collections.

The analysis below is derived from the 15 country research reports and presents a global perspective on shifts in the regulatory frameworks for TNE, current and emerging challenges to TNE and the recognition of UK degrees and qualifications. The study identifies opportunities for international engagement in each of the studied countries. It provides recommendations for the UK government and UK HEIs on how challenges might be addressed and opportunities secured.

## 3. Shifts in the regulatory frameworks for TNE

TNE is becoming more embedded in the domestic higher education landscape. After years of deliberation, several countries have enshrined the provision of TNE in law. Examples include Egypt, Indonesia, Pakistan, the Philippines, and, most recently, India.

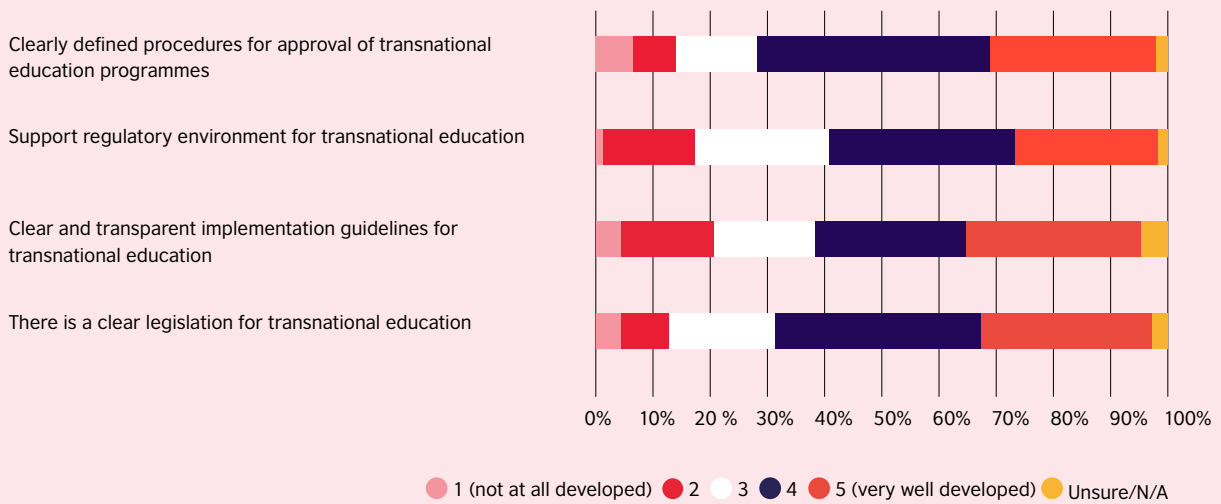
Latin America is the only region where no TNE-specific regulatory provision is available. While there is some limited TNE, it tends to be mainly delivered through the means of online and distance learning.

While Nigeria is Africa's largest TNE host, the regulatory rules are still evolving, and TNE and online degrees are not officially recognised. This ambiguity has led to a situation in which the country's demand for TNE is mainly at the postgraduate level, where private sector employers value and accept the relevant degrees and qualifications.

Respondents to the online survey had to select a country to evaluate the TNE environment. Sixty-four responses qualified for inclusion. Overall, the area that these responses identify as the least developed is the presence of clear implementation guidelines for TNE. Our assessment shows that, while most countries have published TNE rules, there are no published guidelines, which leaves the regulatory environment open for interpretation. This has given regulatory bodies flexibility in tightening or relaxing the TNE provision in response to shifts in the domestic HE environment. In China, for example, while the TNE implementation rules have stayed the same since 2004, many institutions report significant tightening of TNE courses where students study for part of their degree in the UK.

**Figure 1: Presence of conditions that enable TNE (n=64)**

**How well developed are the following enabling conditions in this country?**



The primary data suggests that as the participation rates in domestic tertiary education improve, the focus of TNE programmes moves to the quality of higher education. Governments often explicitly relate this to upskilling their country's workforce and, ultimately, to national economic development and competitiveness.

India is one of the latest countries to liberalise its TNE regulatory framework. A recently agreed memorandum of understanding for recognising academic qualifications<sup>1</sup> cemented its higher education relations with the UK. It incentivised further the acceptance of UK degrees, both those earned in the UK and through TNE in India. In addition, the expansion of TNE in the country creates opportunities for foreign institutions to contribute to the country's National Education Policy objectives and supports the building of the local capacity of its higher education institutions.

Globally, there is a shift towards online education, with online provision becoming more embedded in local higher education landscapes. Initially, the shift to online education was an emergency response to keep students safe during the COVID-19 pandemic. However, significant investments in online education are incentivising HEIs to continue to develop provision.

Policymakers in many countries are maintaining this, and a growing number are recognising and prioritising online degrees (e.g. Vietnam and the Philippines respectively). Some countries (e.g. Nigeria) are still to implement new guidelines.

Table 1 summarises the latest TNE developments in each studied country studied.

<sup>1</sup> <https://www.gov.uk/government/publications/uk-and-india-mutual-recognition-of-academic-qualifications-memorandum-of-understanding>.



**Table 1: Summary of TNE developments**

Country	Presence of TNE law	Latest TNE developments
Brazil	There is no TNE regulatory provision.	Moderate expansion of online education.
China	<p>The TNE rules in China are:</p> <ul style="list-style-type: none"> <li>• Regulation 2003</li> <li>• Implementation Measures 2004</li> <li>• Notification 2007</li> <li>• Quality Assurance Manual 2009.</li> </ul> <p>These chart the regulation and guidance that govern TNE activities.</p>	While the implementation guidelines have not changed since 2004, many institutions are observing a tightening of the TNE rules related to programmes with UK study, such as 2+2 and 3+1 partnerships. A growing proportion of students are staying in China to complete their studies.
Egypt	<p>There is a specific legal framework (Law 162/2018) for establishing international branch campuses.</p> <p>There is no specific national body for the quality assurance and monitoring of TNE activities.</p>	TNE contributes both quantitatively and qualitatively to expanding the supply of HE in Egypt. This includes the number of places available on HE courses, the range of specialisms, the internationalisation at home agenda, and the quality of teaching.
India	New TNE regulatory framework 2022.	The new legislation creates prerequisites for TNE expansion. However, TNE through online and distance learning is not permitted at present.
Indonesia	The Ministry of Research, Technology and Higher Education published a new regulation in 2018, which paved the way for the establishment of international branch campuses.	<p>Branch campuses are invited to set up in the special economic zones, either independently or in partnerships with local HEIs. The 11 autonomous public universities do not require approval to engage in TNE.</p> <p>Validated and franchised programmes are not allowed.</p>
Mexico	There is no specific TNE law, but regulations allow foreign providers to set up and operate, providing they comply with foreign investment controls. There are dual degrees between Mexican HEIs and those in the USA and Europe.	<p>No change is immediately obvious. However, the government's goal is to guarantee access to universities for all young people by 2024, and for there to be 100 per cent geographical coverage of higher education across the country. This is unlikely to be achieved without encouraging TNE.</p>

Country	Presence of TNE law	Latest TNE developments
Nigeria	There is no TNE regulatory provision. Provisional guidelines for online and distance learning are imminent.	Most TNE is at the postgraduate level. TNE qualifications are recognised by the private sector, and there is continued growth in online provision is growing. HEIs use neighbouring Ghana as a TNE host country to engage with Nigerian students.
Pakistan	There is a well developed regulatory framework for the licensing of new TNE ventures.  The framework and process for the recognition of TNE and foreign qualifications are effective and streamlined.	TNE programmes constitute an affordable alternative to studying abroad, and complement the local offering by private and public universities.  UK TNE contributes to Pakistan's international reputation as a study destination. This is achieved through capacity building in teaching and learning; contribution to the higher education quality assurance framework and best practices.
Peru	There is no specific TNE law. However, there is legal framework for private HE providers.	After recent policy and regulatory interventions strengthened the quality of the local HE sector, there are positive prospects for TNE as part of a broader policy agenda for promoting internationalisation.
Philippines	There is a new Transnational Higher Education law from 2019, which paved the way for TNE in the country. <sup>2</sup>	TNE is rapidly expanding. Demand is growing, and so is the Commission of Higher Education (CHED)'s support for TNE. However, the country will benefit from better articulation to the labour market of the recognition of foreign degrees and qualifications acquired through TNE.
Saudi Arabia	In August 2022, the Ministry of Education presented draft regulations to allow the establishment of branches of foreign universities in Saudi Arabia offering high-quality and reliable private HE courses. This was put out for public consultation from 8 August to 5 September. <sup>3</sup>	The government's immediate focus is on opening up to scientifically distinguished universities setting up international branch campuses.  Online provision is becoming more acceptable because of COVID-19.

2 The Philippines Republic Act No. 11448: <https://www.officialgazette.gov.ph/downloads/2019/08aug/20190828-RA-11448-RRD.pdf>.

3 <https://istitlaa.ncc.gov.sa/en/Education/Moe/DraftRegulation/Pages/default.aspx>

Country	Presence of TNE law	Latest TNE developments
South Africa	<p>There is no specific TNE law. The Policy Framework for Internationalisation of Higher Education in South Africa (2019)<sup>4</sup> was the first national strategy for HE internationalisation. It bans double (not joint) degrees in TNE.</p> <p>An earlier (2014), Policy for the Provision of Distance Education in South African Universities, lacks detail.</p>	<p>Almost all UK TNE in South Africa is distance and online education. It is recognised that an updated policy framework is needed to articulate rules for TNE provision, including online and distance learning.</p>
Spain	<p>The legal framework in Spain allows the establishment and operation of private universities from overseas and the provision of cross-border higher education.</p>	<p>While European partnerships continue to strengthen, the UK's exit from the EU means that the future of Spanish-UK partnerships are much less certain.</p>
Turkey	<p>There are no specific regulations for TNE and the operation of foreign higher education providers in Turkey. The legal framework allows the operation of private, not-for-profit universities.</p> <p>The country is aligned to the Bologna process and there is activity in the dual and joint degree space.</p>	<p>There is a lack of momentum for international collaboration. Instead, there is increasing emphasis by Turkey policymakers on attracting international students and promoting the country as an education hub.</p>
Vietnam	<p>The first regulations were issued in 2000, then revised in 2012 and 2018. These are under revision again.</p>	<p>The 2018 regulations expanded TNE to the school sector and online provision. However, HEIs report difficulties in delivering such online provision.</p>

4. Department of Higher Education and Training (2019), Policy Framework for Internationalisation of Higher Education in South Africa. It came into effect in 2020. [www.dhet.gov.za/Policy%20and%20Development%20Support/Policy%20Framework%20for%20Internationalisation%20of%20Higher%20Education%20in%20South%20Africa.pdf](http://www.dhet.gov.za/Policy%20and%20Development%20Support/Policy%20Framework%20for%20Internationalisation%20of%20Higher%20Education%20in%20South%20Africa.pdf).

# 4. Challenges to international collaboration in tertiary education between the UK and selected priority countries

The research identifies challenges for the UK in three areas – firstly, TNE partnerships across the countries; secondly, collaboration following the UK's changed relationship with the EU; thirdly, the recognition of UK degrees and qualifications.

## 4.1 Challenges for TNE partnerships

The main challenges faced by HEIs engaged in TNE across the 15 countries are at three levels – those of the system, the institution and the student. The most frequently experienced challenges at each of these levels are summarised below.

### 4.1.1 System-level challenges

At the HE system level, the most frequently cited challenge is the lack of a clear articulation of the regulatory framework, followed by a lack of guidance on implementation. While some countries have frameworks and published implementation measures, regulatory bodies can alter these to reflect the higher education priorities of their governments. For example, although guidelines in China have not changed since 2004, many institutions report a tightening of the TNE rules related to programmes with UK study. This has resulted in the discontinuation of certain arrangements, which had previously led to the articulation of students in the UK.

There are system-level challenges in many countries where the internationalisation of higher education is at an early stage, including:

- The lack of an appropriate visa system to facilitate the movement of students and academics.
- Rules that are solely based on the domestic agenda, which may often prohibit foreign institutions from engaging locally. The most common example is related to the requirement that only allow foreign universities to set up campuses if they have a leading position in the global league tables.
- A lack of degree and qualification recognition, which often impeding TNE degree holders from continuing their education in the local HE system or from seeking public sector employment. Often, the lack of such recognition also leads to negative perceptions about the quality of TNE provision in the country.

#### 4.1.2 Institution-level challenges

There were fewer institution-level challenges than at the system level. The most frequently cited are the need for more engagement from the local HEIs and the comparatively low levels of English language proficiency. In particular, the latter limits partnership opportunities to those academic staff with good English.

Other challenges were:

- Limited experience in setting up partnerships, particularly in countries where internationalisation of higher education has not been a priority. In many of these, the local universities lack the infrastructures and knowledge to support TNE partnerships. Engagement is often hampered by extensive bureaucratic requirements, which the overseas partners perceive as a lack of commitment, often resulting in the partnership's collapse. Recognising this as a problem in the early stage of the collaboration, and supporting the local HEIs with staff development and training, is critical for the viability of the partnerships.
- Underfunding of local HEIs, meaning that most of their resources focus on domestic issues. As a result, many have very limited ability to participate in international collaborations.

Furthering the academic qualifications to master's or doctoral level of existing staff can significantly improve the collaborative teaching provision through TNE. Often, dual and double PhDs are extended to existing members of staff at the local institution to support their career advancement and strengthen capacity at the local partner.<sup>5</sup>

#### 4.1.3 Student-level challenges

Over the years, TNE has evolved to cater to unmet local demand for higher education. As a result, it often reaches atypical students, such as mature learners; those with caring or work responsibilities; and ethnic minority groups with limited access to the domestic system.

The most frequently cited challenges at the student level are lack of financial resources and low English language proficiency. A significant proportion of UK TNE is taught in English. High-quality TNE programmes, therefore, usually signal HE capacity in that country in the English language. As a result, such programmes attract international learners and positively contribute to the host country as a local education hub. Previous research for the British Council found that over a third (35 per cent) of the students in UK TNE programmes were international.<sup>6</sup>

Table 2 summarises the most frequently cited challenges in each country.

5. For examples of dual and double degree programmes open for local staff, see <https://www.britishcouncil.ph/tne/about/the-project>.

6. Ilieva, J., Vangelis Tsiligiris, Pat Killingley and Uwe Brandenburg (2021), Local impact of transnational education: A pilot study in selected European Union countries. Report for the British Council. <https://www.britishcouncil.org/education/he-science/knowledge-centre/transnational-education/local-impact-TNE-Europe>.

**Table 2: Summary of the main TNE challenges for the UK in each country**

Country	TNE challenges
Brazil	<ul style="list-style-type: none"> <li>• There is no regulatory framework to promote and facilitate international partnerships.</li> <li>• Low proficiency in English.<sup>7</sup> and, a broad preference towards regional languages as a medium of instruction, impose a barrier to international partnerships.<sup>8</sup></li> <li>• There is a complex market with a range of provider types, each servicing a particular market segment. For example, public universities aim at research and excellence and have limited capacity to meet the wider growing demand. In contrast, the growing demand for tertiary education, especially among poorer students, has been met by private providers – about 75 per cent of bachelor's degree students in Brazil study with a private provider.<sup>9</sup></li> </ul>
China	<ul style="list-style-type: none"> <li>• Recent tightening of TNE programmes with study modules spent at the foreign partner HEIs has resulted in a growing number of students finishing their degrees in China.</li> <li>• Policymakers are applying their discretion over TNE engagement in the country. China's increased participation in HE has led to a decline in the need for TNE to absorb unmet local demand for HE.</li> <li>• Distance and online education were only temporarily allowed during the pandemic.</li> </ul>
Egypt	<ul style="list-style-type: none"> <li>• Processes for TNE programme approval by local authorities are lengthy and often unclear.</li> <li>• There is a complex market, which requires UK HEIs to have a deep understanding and conduct extensive due diligence before entering.</li> <li>• Despite substantial improvements by the local authorities in terms of process and support, the recognition of foreign qualifications is still a challenging process. This is particularly relevant to the recognition of qualifications that involve professional bodies.</li> <li>• Local perceptions about the quality assurance processes, academic standards, and marking are grounded in the local culture.</li> </ul>

7 <https://www.ef.com/wwen/epi/regions/latin-america/brazil/>.

8 Rainer Enrique Hamel, Elisa Álvarez López & Tatiana Pereira Carvalhal (2016) Language policy and planning: challenges for Latin American universities. *Current Issues in Language Planning*, 17:3-4, 278-297, DOI: 10.1080/14664208.2016.1201208.

9 <https://www.oecd-ilibrary.org/sites/c61f9bfb-en/index.html?itemId=/content/component/c61f9bfb-en#section-d1e2439>.

Country	TNE challenges
India	<ul style="list-style-type: none"> <li>• Affordability for students is a major barrier.</li> <li>• There are too few examples of sustainable economic models for international partnerships and a lack of seed funding to initiate partnerships.</li> <li>• There are mixed perceptions about the quality and employability of TNE students.</li> <li>• There is a perception that UK visas are subject to delays, refusals etc.</li> </ul>
Indonesia	<ul style="list-style-type: none"> <li>• The regulatory support for international branch campuses requires them to be established in the special economic zones. These are outside Java and away from urban areas. Globally, universities are in urban areas with the infrastructure necessary for their operation, where student demand is also concentrated.</li> <li>• There is no regulatory framework for TNE partnerships. While the 12 self-accredited public universities do not require approval to engage in TNE, all other universities need to go through a lengthy approval process. This is meant to take six months, but universities report it can take up to three years.</li> <li>• While dual and double degrees are permitted, there are no regulations for their delivery.</li> <li>• Franchising and validation are not permitted.</li> <li>• Local labour law requires staff to be Indonesian.</li> <li>• Local teaching faculty members with high proficiency in English are hard to source.</li> <li>• Limited students' finance and affordability.</li> <li>• Levels of English language proficiency are low.</li> </ul>
Mexico	<ul style="list-style-type: none"> <li>• Even where studying abroad is not involved, tuition fees are still challenging in terms of affordability. This is in the context of the Mexican government's aim for higher education to be free to all students.</li> <li>• While courses can be delivered in Spanish, some English language skills are needed (by staff, if not students)</li> <li>• While the Mexican and UK governments signed an agreement on the mutual recognition of qualifications (MRQ) in 2015, this is not yet fully operational. Once it is, it should be an important enabler of TNE.</li> <li>• HEIs lack knowledge about the systems in each other's countries.</li> </ul>

Country	TNE challenges
Nigeria	<ul style="list-style-type: none"> <li>• Lack of regulatory framework for TNE has pushed many HEIs wishing to engage in this space to Ghana.</li> <li>• There are very low tertiary education participation rates (10 per cent), with very limited alternatives.</li> <li>• The huge potential for online teaching and learning is not yet recognised or regulated.</li> <li>• Participation in the National Youth Congress is mandatory for university graduates, but TNE degrees are not recognised. This means that TNE graduates are denied access the public sector jobs and postgraduate education in Nigeria. Hence, study abroad and TNE demand occur at the postgraduate level.</li> <li>• Public HEIs are underfunded, with very limited capacity to spare for international collaboration.</li> </ul>
Pakistan	<ul style="list-style-type: none"> <li>• There is a lack of clarity and consistency in the implementation of the regulatory framework.</li> <li>• The high requirements (e.g., set-up costs, deposits in endowment funds) for local partners impact on smaller-scale development of TNE at the vocational level.</li> <li>• There is a lack of involvement of local institutions in the development of TNE regulation.</li> <li>• The reduced financial ability of students limits the potential TNE market.</li> <li>• There is a lack of deeper engagement between UK universities and local institutions to support a more equitable and broader form of collaboration.</li> <li>• The overall low English language proficiency of students impacts on the academic delivery of TNE programmes.</li> <li>• Local academic staff lack doctorate qualifications. This particularly applies to women, impacting gender parity.</li> <li>• Underfunding of the local higher education system impacts on the readiness of local universities to establish international collaborations.</li> </ul>
Peru	<ul style="list-style-type: none"> <li>• Data and information relating to HE and TNE are lacking.</li> <li>• There is no national strategy for the internationalisation of higher education.</li> <li>• Human and financial resources are needed to support the implementation of internationalisation at local HEIs.</li> <li>• There is a lack of English language and other foreign language skills.</li> <li>• Economic conditions including a lack of government financial support to the local HE sector adversely affect student mobility and the employment of graduates.</li> </ul> <p>Graduate employment is also affected by problems in the recognition of qualifications.</p>



Country	TNE challenges
Philippines	<ul style="list-style-type: none"> <li>• Students' finance is a significant constraint to participation in international mobility and TNE provision.</li> <li>• The current regulatory provision mainly favours large institutions with Level III or Level IV accreditation. Reputable private HEIs without such accreditation face significant constraints in the collaborative provision of TNE.</li> <li>• There is limited institutional experience and understanding of TNE; similarly, the internationalisation of HE is little understood. There is a need for professional development of staff at partner HEIs.</li> <li>• A lack of coordination between government departments has led to contradictory policies. For instance, CHED encourages international flows of researchers and academics, but there are no earmarked visas to support such mobility. International students have to renew their visas annually.</li> </ul>
Saudi Arabia	<ul style="list-style-type: none"> <li>• The draft regulations to allow the setting up of international branch campuses (August 2022) envisage a high level of direct supervision of programmes by the Ministry of Education. This will challenge the autonomy of international HEIs and, unless modified, is likely to be a major deterrent.<sup>10</sup></li> <li>• From 2019, all proposed international agreements between universities have had to be approved by the Council of Universities' Affairs. There is a lack of clarity about the criteria for approval, as well as continuous changes to these. The process requires more time and justifications, and a higher level of scrutiny, than previously.</li> <li>• There is a lack of clarity on the part of the Ministry of Education regarding the recognition of exit qualifications from partnership programmes, so HEIs are reluctant to get involved in these.</li> <li>• Where previously the Saudi Ministry of Finance allocated funding for HEIs' international partnerships, HEIs must now fund these themselves through self-sustaining business models. Student tuition fees are also a challenge. HE is subsidised by the government, with most of the population expects HE to be free. There is, therefore, a problem where international partners want to charge fees.</li> </ul>

10. <https://www.universityworldnews.com/post.php?story=2022090908005012>.

Country	TNE challenges
South Africa	<ul style="list-style-type: none"> <li>• There is a ban on double degrees in TNE; however, joint degrees are allowed.</li> <li>• TNE regulations are not fully articulated, just indirectly referenced in the 2019 policy framework and 2014 policy for distance and online education.</li> <li>• There are bureaucratic delays in quality assurance processes for cross-border programmes, and in the provision of police clearance certificates. The latter delays the processing of student visas.</li> <li>• Many students have difficulty affording tuition fees.</li> <li>• Academic staff turnover creates difficulties in filling positions.</li> <li>• Affirmative action requirements for local staff are not well understood.</li> <li>• There are concerns over safety and security in a society with a high level of violent crime (though this is localised).</li> <li>• There is a widespread desire on the part of South Africans to transform the higher education system along decolonised lines, and for knowledge equity with the Global North.</li> <li>• There is a need to navigate the tension between internationalisation ideals and the policy imperatives of 'Africa first' and decolonisation.</li> </ul>
Spain	<ul style="list-style-type: none"> <li>• Most major challenges result from the UK's exit from the EU, and UK HEIs no longer being covered by EU HE framework agreements: <ul style="list-style-type: none"> <li>– There is a lack of framework agreements for reciprocal mobilities and university academic collaborations, previously covered by the EU framework agreement.</li> <li>– Erasmus funding no longer supports reciprocal mobilities, but there also a lack of funding for management costs and overheads.</li> <li>– Immigration and visa procedures involve new conditions, added costs and a lack of timely and clear information, particularly about internships.</li> <li>– Qualification recognition processes now mean additional bureaucracy for UK degrees.</li> <li>– Franchise and validation programmes require new procedures for authorisation, and additional pathways that are proving difficult to navigate.</li> <li>– The most immediate challenges are information provision and promoting understanding.</li> </ul> </li> </ul>

Country	TNE challenges
Turkey	<ul style="list-style-type: none"> <li>• TNE is not considered a strategic priority by policymakers. Instead, there is an emphasis on promoting Turkey as a study destination and on attracting international provision via local providers.</li> <li>• Simplistic conceptualisations of the internationalisation of HE are held by different local stakeholders (e.g., academics, policymakers, and media). Often the level of internationalisation is expressed in terms of the number of international students in the country.<sup>11</sup></li> <li>• There are concerns about the financial, political and strategic risks that can impact the sustainability of the international collaboration.</li> </ul>
Vietnam	<ul style="list-style-type: none"> <li>• There is a lack of English proficiency among both TNE students and local staff.</li> <li>• There are limitations on online TNE provision</li> <li>• There are issues around the transferability of credits of TNE students to local training programmes.</li> <li>• Finding the right partners is difficult</li> </ul>

## 4.2 The UK's changed relationship with the EU: challenges for collaboration and partnership

Spain is the only EU country in this study. The research highlights significant challenges to TNE partnerships arising as a direct result of the UK leaving the EU.

Interviews with UK HEIs suggest that the challenges faced in Spain are typical of those in other EU member countries.

While the UK remains in the European Higher Education Area and there have been no significant changes in Spain's HE regulatory provision, the UK's status as a non-EU country has thrown up some major challenges:

- Visa requirement changes for travelling academics and students (especially interns). Delays and uncertainty have resulted in some Spanish partners looking for non-UK partners for the future. One UK university described the hugely increased administrative burden of complying with regulations for its academic staff to teach on programmes located in its centres in Europe. This 'huge hurdle' raised questions about the future – the university 'has to have a clear underlying philosophy and real commitment; otherwise, it's just too costly in terms of time.'

- Lack of EU funding and frameworks (e.g., Erasmus+, Horizon Europe). Overheads will no longer be met through EU programmes, nor will costs associated with any staff or student mobility. More complex legal and administrative agreements will be needed between individual UK HEIs and their partners in different EU countries.
- More complex bureaucratic processes. For instance, the recognition of UK qualifications in Spain now requires additional processes. There are particular challenges associated with navigating the regulatory processes for validation and franchising programmes. Regulations and processes are often unclear and confusing to HEIs.
- Wider confusion and misperceptions. Spanish HEIs are unclear about what the UK's exit from the EU means in terms of its membership of the EHEA and compliance with Bologna and the European Qualifications Framework. There is a related perception that UK HEIs are no longer interested in working with European partners.
- Increased competition from both EU and non-EU countries to take over the UK's markets in Europe, since the UK no longer has the advantages conferred by EU membership.

### 4.3 Challenges to degree and qualification recognition

While many countries are liberalising their regulatory frameworks for TNE, the recognition of degrees and qualifications obtained through TNE continues to be challenging. The lack of such recognition is often associated with negative perceptions locally, stemming from the lack of clear guidance that TNE degrees are legitimate.

The recognition of distance and online education is another area where government guidance has remained opaque. While many governments liberalised online education as part of their response to the pandemic, and there is an acknowledgement of the benefits of online education, there is still a reluctance to recognise courses that are mainly delivered online. Forty-one per cent of the respondents to the online survey experienced challenges relating to the recognition of online and distance learning degrees. Thirteen per cent identified challenges in terms of recognition of TNE qualifications for entry to the regulated professions.

**Figure 2: Challenges to degree and qualification recognition (n=64)**

**How difficult is the recognition of transnational education**

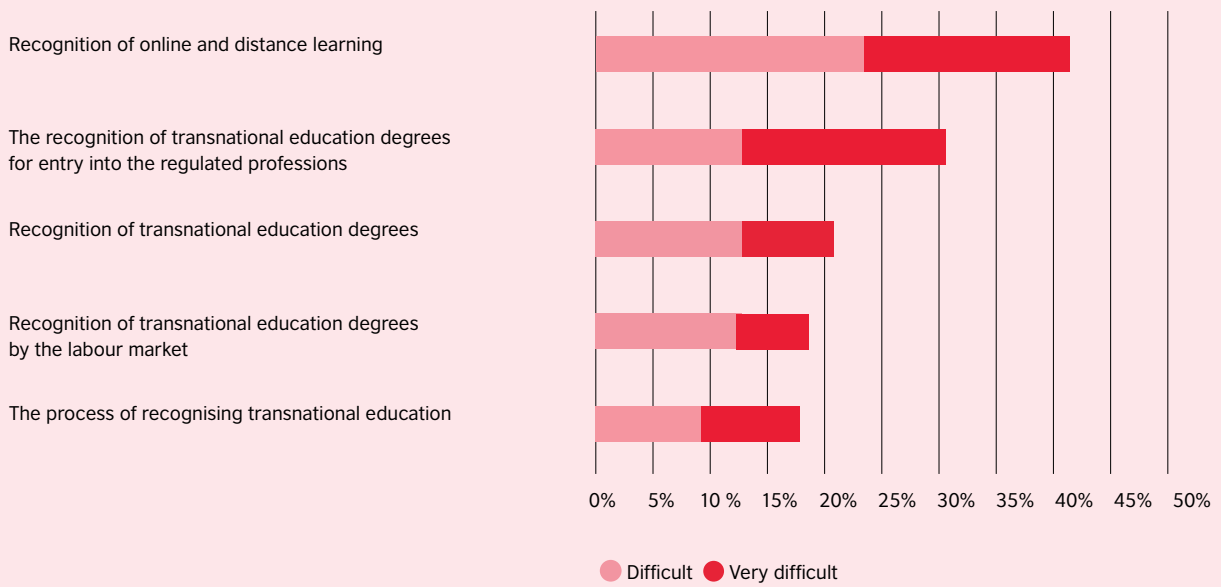


Table 3 summarises degree and qualification recognition arrangements between the UK and the countries in this study. Multilateral arrangements, where the UK and at least one of the listed countries are participants, are also listed.

**Table 3: Bilateral and multilateral agreements and treaties for recognition of degrees and qualifications**

Country	Degree and qualification recognition agreement	Notes
Brazil	Memorandum of understanding (MoU) for general collaboration in higher education. <sup>12</sup>	No mutual recognition agreements with the UK. There are limited recognition agreements, only with countries in the region (e.g. the cultural and scientific cooperation agreement between the Republic of Chile and the government of Brazil <sup>13</sup> and the convention about the exercise of liberal professions between the same two countries <sup>14</sup> ).
China	There are a few HE cooperation agreements between the UK and China, <sup>15</sup> but no MoUs for degree recognition.  At the agencies level agreements include the UK's Quality Assurance Agency for Higher Education and China's China Academic Degrees and Graduate Education Development Centre. <sup>16</sup>	Washington Accord signatory, represented by China Association for Science and Technology ( <a href="http://english.cast.org.cn/">http://english.cast.org.cn/</a> ).
Egypt	MoU between the UK and Egypt for HE cooperation and establishment of branch campuses in Egypt. <sup>17</sup>	

12. [http://portal.mec.gov.br/arquivos/pdf/artigo\\_uk.pdf](http://portal.mec.gov.br/arquivos/pdf/artigo_uk.pdf).

13. <https://www.bcn.cl/leychile/navegar?idNorma=400437>.

14. <https://www.bcn.cl/leychile/navegar?idNorma=22349>.

15. <https://www.britishcouncil.org/contact/press/uk-and-china-agree-long-term-ambitions-education-plans>.

16. [https://www.qaa.ac.uk/docs/qaa/international/cdgdc-qaq-memorandum-of-understanding.pdf?sfvrsn=e026f381\\_9](https://www.qaa.ac.uk/docs/qaa/international/cdgdc-qaq-memorandum-of-understanding.pdf?sfvrsn=e026f381_9).

17. <https://www.gov.uk/government/news/sam-gyimah-signs-agreement-for-uk-universities-to-expand-in-egypt>.

Country	Degree and qualification recognition agreement	Notes
India	MoU on mutual recognition of academic qualifications between the government of the Republic of India and the government of the United Kingdom of Great Britain and Northern Ireland. <sup>18</sup>	<p><b>Current bilateral and multilateral agreements:</b></p> <ul style="list-style-type: none"> <li>• UK-India MRQ agreed in July 2022. (<a href="https://www.gov.uk/government/publications/uk-and-india-mutual-recognition-of-academic-qualifications-memorandum-of-understanding/memorandum-of-understanding-on-mutual-recognition-of-academic-qualifications-between-the-government-of-the-republic-of-india-and-the-government-of-the">https://www.gov.uk/government/publications/uk-and-india-mutual-recognition-of-academic-qualifications-memorandum-of-understanding/memorandum-of-understanding-on-mutual-recognition-of-academic-qualifications-between-the-government-of-the-republic-of-india-and-the-government-of-the</a>).</li> <li>• India's National Board of Accreditation acquired permanent signatory status of Washing Accord in 2014. Accredited programmes are detailed at <a href="https://www.nbaind.org/accreditationprogram">https://www.nbaind.org/accreditationprogram</a>.</li> <li>• Institution of Engineers India is a part of the International Professional Engineers Agreement. The UK is represented by the Engineering Council UK. For details, see <a href="https://www.ieagreements.org/assets/Uploads/Documents/Competence-Agreements-November-2020-Version-1-Approved.pdf">https://www.ieagreements.org/assets/Uploads/Documents/Competence-Agreements-November-2020-Version-1-Approved.pdf</a>.</li> </ul> <p><b>Working towards:</b></p> <ul style="list-style-type: none"> <li>• Distance learning is not detailed yet. Further liberalisation of online and distance education may be used to widen access to HE to atypical student groups, including those in rural areas or HE cold spots, learners with family or work responsibilities, and a further boost for continuing professional development and upskilling.</li> </ul>
Indonesia	No agreements for mutual recognition of degrees and qualifications  HE-level agreements need to be updated.	<p>There are difficulties in recognising UK degrees, which are typically shorter than Indonesian degrees:</p> <ul style="list-style-type: none"> <li>• Three-year bachelor programmes are assessed as equivalent to an Indonesian diploma (local bachelor programmes are four years long).</li> <li>• UK one-year masters are not equivalent to Indonesian two-year master's degree.</li> </ul>

18. <https://www.gov.uk/government/publications/uk-and-india-mutual-recognition-of-academic-qualifications-memorandum-of-understanding/memorandum-of-understanding-on-mutual-recognition-of-academic-qualifications-between-the-government-of-the-republic-of-india-and-the-government-of-the>.



Country	Degree and qualification recognition agreement	Notes
Mexico	Mutual recognition of HE awards and qualifications. <sup>19</sup>	<p><b>Working towards:</b></p> <ul style="list-style-type: none"> <li>• Regulatory framework for local delivery of international programmes which will further facilitate collaborative TNE provision in the country.</li> </ul> <p>Mexico is a signatory of the Washington Accord (approved 2022,) represented by Consejo de Acreditación de la Enseñanza de la Ingeniería (CACEI) (2022) <a href="https://www.ieagrements.org/accords/washington/signatories/">https://www.ieagrements.org/accords/washington/signatories/</a>).</p>
Nigeria	No agreements for mutual recognition of degrees and qualifications.	<ul style="list-style-type: none"> <li>• Limited regulatory provision at the present; however, a new framework on online and distance education is imminent</li> </ul> <p><b>Working towards:</b></p> <ul style="list-style-type: none"> <li>• Transparent regulatory framework for teaching partnerships and TNE</li> <li>• New rules for online and distance learning.</li> <li>• Mutual recognition of degrees and qualification.</li> </ul>
Pakistan	MoU between the British Business Centre and the Karachi Chambers of Commerce and Industry in 2016. The British Business Centre is a new body set up to assist British and Pakistani businesses develop closer links. <sup>20</sup>	<ul style="list-style-type: none"> <li>• Pakistan is a signatory of the Washington Accord (approved in 1989), represented by the Pakistan Engineering Council (<a href="https://aasc.knack.com/mra-inventory#home/view-mra-details/6011a6877c4fee067a49bf31/economy-details/5f907213729a4100159c706d/view-mra-details/5f99b5e7efac270015e08884/">https://aasc.knack.com/mra-inventory#home/view-mra-details/6011a6877c4fee067a49bf31/economy-details/5f907213729a4100159c706d/view-mra-details/5f99b5e7efac270015e08884/</a>).</li> </ul> <p><b>Working towards:</b></p> <ul style="list-style-type: none"> <li>• Mutual recognition of degrees and qualification.</li> </ul>

19. <https://www.gov.uk/government/publications/cs-mexico-no12015-ukmexico-mutual-recognition-of-higher-education-awards>

20. <https://www.gov.uk/government/news/new-agreement-promotes-trade-between-uk-and-pakistan..>

Country	Degree and qualification recognition agreement	Notes
Peru	UK-Peru treaty on the mutual recognition of degrees (CS Peru No.1/2021).	<ul style="list-style-type: none"> <li>• UK-Peru treaty signed in May 2021. <a href="https://www.gov.uk/government/publications/ukperu-treaty-on-the-mutual-recognition-of-degrees-cs-peru-no12021">https://www.gov.uk/government/publications/ukperu-treaty-on-the-mutual-recognition-of-degrees-cs-peru-no12021</a>.</li> <li>• Peru is a signatory of the Washington Accord, represented by the country's Instituto de Calidad y Acreditación de Programas de Computacion, Ingenieria y Tecnologia (<a href="https://www.icacit.org.pe/web/es/">https://www.icacit.org.pe/web/es/</a>).</li> </ul>
Philippines	No degree or qualification recognition agreements.	<p>Working towards:</p> <ul style="list-style-type: none"> <li>• Mutual recognition of degrees and qualification.</li> <li>• Implementation guidelines for the TNE regulatory framework.</li> <li>• Recognition of sub-degrees, micro-credentials and diplomas.</li> </ul>
Saudi Arabia	<p>No agreements for mutual recognition of degrees and qualifications between the UK and Saudi governments.</p> <p>The UK's Science and Innovation Network engages with the local science and innovation community.<sup>21</sup></p>	Washington Accord provisional signatory, approved in 2022, represented by Education and Training Evaluation Commission.
South Africa	<p>South Africa is a signatory to the Addis Ababa Convention on the recognition of academic qualifications across a number of African countries.<sup>22</sup></p> <p>There are subject-specific mutual recognition agreements for accountancy, architecture, engineering, surveying, and veterinary councils.<sup>23</sup></p>	<p>The National Qualifications Framework Act 2008 notes that the South African Qualifications Authority must, with respect to foreign qualifications, collaborate with international counterparts, provide an evaluation and advisory service consistent with the Act, inform the Quality Councils about international practice in qualifications frameworks, and ensure that South African qualifications are internationally comparable</p> <p>(<a href="https://www.gov.za/sites/default/files/gcis_document/201409/31909167.pdf">https://www.gov.za/sites/default/files/gcis_document/201409/31909167.pdf</a>).</p>

21. <https://www.gov.uk/world/organisations/uk-science-innovation-network-in-kingdom-of-saudi-arabia>.

22. See [http://portal.unesco.org/en/ev.php-URL\\_ID=49282&URL\\_DO=DO\\_TOPIC&URL\\_SECTION=201.html](http://portal.unesco.org/en/ev.php-URL_ID=49282&URL_DO=DO_TOPIC&URL_SECTION=201.html).

23. See <https://aasc.knack.com/mra-inventory#home/view-mra-details2/60521df6f94cd10d18ff2c24/economy-details/5f9072ef5a03d6001589ab70/economy-details/5f9072ef5a03d6001589ab70/economy-details/5f9072ef5a03d6001589ab70/>.

Country	Degree and qualification recognition agreement	Notes
Spain	Spain is a signatory of the Lisbon Convention on the Recognition of Qualifications concerning Higher Education in the European Region (Treaty No.165).	<p>Spain and the UK are members of the European Higher Education Area and operate within its qualification framework. There is currently no separate bilateral agreement with the UK to address the specific administrative challenges arising from the UK's withdrawal from the EU.</p> <p>Qualifications obtained through TNE programmes offered in Spain are recognised, provided that they are from fully accredited teaching entities of foreign universities.</p>
Turkey	Turkey is a signatory of the Lisbon Convention on the Recognition of Qualifications concerning Higher Education in the European Region (Treaty No.165). <sup>24</sup>	Turkey is a signatory of the Washing Accord, represented by the Association for Evaluation and Accreditation of Engineering Programs ( <a href="https://www.mudek.org.tr/en/hak/kisaca.shtm">https://www.mudek.org.tr/en/hak/kisaca.shtm</a> ).
Vietnam	No agreements for mutual recognition of degrees and qualifications with the UK.	<p>Vietnam has mutual recognition agreements with a number of countries, but not yet the UK.</p> <ul style="list-style-type: none"> <li>• There is a TNE regulatory framework.</li> </ul> <p><b>Working towards:</b></p> <ul style="list-style-type: none"> <li>• Clearer rules on online and distance TNE.</li> <li>• Mutual recognition of degrees and qualification between Vietnam and the UK.</li> </ul>

Source: The main sources for the multilateral accreditation and mutual recognition agreements are a literature review of national agreements with the UK and the APEC Inventory of Mutual Recognition Agreements for Professional Qualifications (<https://aasc.knack.com/mra-inventory#home/>).

24. <http://www.ehea.info/page-recognition>.

# 5. Findings and recommendations for UK policymakers and HEIs

Transnational education has evolved to support the needs of local education systems, whether to absorb demand by providing additional HE places, increase the quality and diversity of local provision, attract international students, or build research capacity. Regardless of countries' individual motivations for TNE, our findings show that two system-level facilitators of TNE are of critical importance:

- TNE regulatory frameworks; and
- Recognition of international degrees and qualifications, including those obtained through TNE.

## 5.1 Importance of TNE regulatory frameworks

Clear and transparent regulatory frameworks are critical in supporting and growing TNE provision. From the studied countries, the largest hosts for UK TNE are those with regulatory frameworks, such as China (60,495 students), Egypt (23,280 students), Saudi Arabia (14,140 students) and Pakistan (8,465 students). The latest country to liberalise its TNE is India (8,520 students).

TNE regulatory frameworks have developed over the past 20 years, with some countries much more advanced in this area than others. China and Vietnam, had their regulatory frameworks published in early 2000. Pakistan has also clearly articulated its TNE rules. The Philippines published a legislation for transnational higher education in 2019, whereas TNE in India was only legislated in 2022.

Egypt, Saudi Arabia and Indonesia have encouraged the development of international branch campuses in the past few years. In Indonesia, this development was given the justification that 'The objective of the establishment of Foreign Universities shall be to improve the nation's competitiveness'.<sup>25</sup> Through Vision 2030, Saudi Arabia is currently developing a framework to attract leading international universities and vocational institutions to set up campuses or establish partnerships with local institutions.<sup>26</sup> Whereas certain types of TNE are encouraged by the national governments in these three countries, a comprehensive TNE framework still needs to be published.

25. Republic of Indonesia (2018) Regulation of the Minister of Research, Technology, and Higher Education of the Republic of Indonesia Number 53 of 2018 on Foreign Universities, [https://internationaleducation.gov.au/International-network/indonesia/PolicyUpdates-Indonesia/Documents/Minister%20Regulation%2053%20of%202018%20-%20English%20translation%20\(unofficial\).pdf](https://internationaleducation.gov.au/International-network/indonesia/PolicyUpdates-Indonesia/Documents/Minister%20Regulation%2053%20of%202018%20-%20English%20translation%20(unofficial).pdf).

26. Human Capability Development Program (2021) Human Capability Development Program 2021-2025 Media Document. Human Capability Development Program. Riyadh, Saudi Arabia, [https://www.vision2030.gov.sa/media/nfob33q5/hcdp\\_mv\\_en-1.pdf](https://www.vision2030.gov.sa/media/nfob33q5/hcdp_mv_en-1.pdf).

Of the countries in this study, Turkey, Nigeria, South Africa, Brazil, Mexico and Peru have yet to develop clear regulatory frameworks. At present, Latin America is the only global region without legislative provision for TNE. In sub-Saharan Africa, the largest hosts – Nigeria (5,115 students) and South Africa (5,095 students) – do not have clear TNE regulation (although in South Africa, it is implied in the Policy Framework for Internationalisation of Higher Education in South Africa (2019).<sup>27</sup> Most of the TNE in both countries is at the postgraduate level and delivered online.

While transparent regulatory frameworks are needed for TNE to grow, other factors may limit growth. For example, while Vietnam was one of the early adopters of TNE, the numbers of student enrolments in programmes have remained comparatively low (5,115 students in 2020-21). Challenges related to the English language proficiency of staff and students, limited recognition of courses fully delivered online, and lack of recognition of modules earned through TNE (credit transferability) have all served to limit growth.

## 5.2 Recognition of degrees and qualifications

Degree and qualification recognition agreements are critical for returning international graduates from the UK back to their home countries.

Recognition is essential for international graduates to further their education or seek employment in the public sector at home. Our findings highlight the importance of extending such agreements to TNE students.

MRQs are a UK government priority. Across the studied countries, there are mutual recognition agreements with Mexico, Peru and most recently India. There are also multilateral arrangements, such as the Lisbon Recognition convention.

In countries with limited student mobility to the UK, such as those in Latin America, TNE presents an alternative way to engage with these countries' domestic student populations.

Figure 3 segments the studied countries in quadrants according to the existence of regulatory frameworks for TNE, and degree and qualification recognition agreements.

Figure 3 segments the studied countries in quadrants according to the existence of regulatory frameworks for TNE, and degree and qualification recognition agreements.

Countries north of the horizontal axis (Groups 1 and 2) are those with regulatory frameworks for TNE. Those without such regulation are in Groups 3 and 4.

27. Department of Higher Education and Training (2019), Policy Framework for Internationalisation of Higher Education in South Africa. [www.dhet.gov.za/Policy%20and%20Development%20Support/Policy%20Framework%20for%20Internationalisation%20of%20Higher%20Education%20in%20South%20Africa.pdf](http://www.dhet.gov.za/Policy%20and%20Development%20Support/Policy%20Framework%20for%20Internationalisation%20of%20Higher%20Education%20in%20South%20Africa.pdf).

**Figure 3: Country segmentation according to TNE regulatory frameworks and degree recognition agreements**

**Countries with recognition agreements for degrees and qualifications are to the right of the vertical axis. These are Groups 2 and 4.**



Groups 2A and 2B have the most favourable environment across the two measures. However, there is a differentiation between subgroups 2A and 2B:

- 2A is a subset of countries with transparent and well-defined TNE regulatory framework.
- 2B consists of countries supportive of certain TNE provisions. However, they lack a regulatory framework which details how to engage in TNE.

While the countries in Group 4 recognise foreign degrees and qualifications, they do not have TNE regulatory provisions. If TNE is legislated, it will further enhance the impact of international degrees and qualifications recognition agreements, which will extend to include those delivered locally.

The countries in Group 3 lack both TNE regulatory framework and international degree recognition agreements. While this shows the scale of the work to be done at the system level, it also signals the huge potential of Brazil and Nigeria for TNE partnerships once the right infrastructures are in place.

### 5.3 Recommendations for policymakers and HEIs

The country groups shown in Figure 3 and the respective system-level recommendations are summarised in Table 4. The audience for the fifteen country reports was predominately policymakers and agencies in those countries, with the aim being to provide them with analyses to support their strategies in relation to TNE. While the broad recommendations are not directed at UK policymakers and HEIs, they may be useful in highlighting areas where the UK can support countries to develop their TNE systems.

**Table 4: Countries' segmentation and broad system level recommendations**

Group of countries	Recommendations
Group 1: Some TNE rules but limited degree recognition	<p>There is a need for recognition of international degrees and qualifications (especially where local degrees are longer than UK degrees). These will further encourage and strengthen TNE partnerships in the country.</p> <p>Country: Indonesia</p>
<p>Group 2A: TNE is broadly allowed; however, there are some limitations to types of TNE</p> <p>Group 2B: Some types of TNE are encouraged, but the TNE framework is not articulated</p>	<p>Clear articulation of and adherence to the TNE implementation rules is needed in some countries. Most degrees are recognised, except for entry to the regulated professions.</p> <p>Countries: China, Spain, India, Vietnam, the Philippines and Pakistan</p> <p>While some types of TNE are permitted, a regulatory framework for TNE will encourage stronger collaborative teaching provision.</p> <p>Countries: Saudi Arabia, South Africa and Egypt</p>
Group 3: Lack of TNE framework and no degree recognition arrangements	<p>The countries will benefit from a regulatory TNE framework. Mutual recognition of degrees and qualifications is required to support those with international degrees (acquired overseas and through TNE once TNE is formalised).</p> <p>Countries: Brazil and Nigeria</p>
Quadrant 4: Degrees are recognised but there is a lack of TNE framework	<p>UK degrees are broadly recognised; however, there is no regulatory framework for TNE.</p> <p>System-to-system agreements for TNE partnerships tailored to the needs of the country are needed.</p> <p>Countries: Turkey, Mexico and Peru</p>



Table 5 summarises more specific recommendations for UK policymakers and HEIs. These are drawn from each of the country reports and should be read in conjunction with the summary of the main TNE challenges for the UK in each country in Table 2.

**Table 5: Summary of country level recommendations for UK policymakers and HEIs**

Country	Specific recommendations
Brazil	<p>Over the past two decades, the Brazilian HE system has opened for international engagement - a process accelerated by the country's flagship 'Science without Borders' programme. However, internationalisation is still to gain momentum and:</p> <ul style="list-style-type: none"> <li>• There is limited understanding across the HE stakeholders of the benefits TNE partnerships can bring. A proactive approach, spearheaded by UK national agencies could address this.</li> <li>• There is a strong research collaboration between Brazil and the UK, which could be extended to include teaching partnerships.</li> </ul>
China	<p>UK HEIs should particularly note that:</p> <ul style="list-style-type: none"> <li>• The most significant TNE challenges in China are the enforcement and implementation of the legal framework, understanding the legal environment and relevant regulations, and keeping abreast with the changes in compliance. As a result, the approval for joint partnerships is conducted on a case-by-case basis.</li> <li>• There is strong demand for high-quality education programmes in science, technology, engineering and maths, such as life sciences and artificial intelligence. From Chinese stakeholders' perspective, the regulatory and compliance framework creates a conducive environment to legitimise TNE activities and to enable innovation in international collaborations through joint programmes, joint institutes and cooperative universities.</li> </ul>
Egypt	<p>UK universities seeking to develop collaborations and presence in the country are advised to conduct an in-depth exploration of the contextual factors and the market developments.</p>
India	<p>The recently signed MRQ presents an opportunity to grow the international mobility of students and programmes. To support this, national agencies should:</p> <ul style="list-style-type: none"> <li>• Raise awareness through positive messaging and case studies of successful partnerships.</li> <li>• Conduct research into the benefits of TNE partnerships for different stakeholders. This should also aim to allay myths about poor quality and employability of TNE graduates.</li> </ul>

Country	Specific recommendations
Indonesia	<p>There may be an opportunity to have online study recognised in light of the experiences during COVID. This could be encouraged by UK policymakers alongside:</p> <ul style="list-style-type: none"> <li>• MoU renewal at the government level to include HE cooperation, partnerships and TNE.</li> <li>• An MRQ will streamline the broader recognition and strengthen the international mobility of students and TNE programmes.</li> </ul>
Mexico	<p>Details are currently being finalised on Mexico-UK MRQ. This has the potential to facilitate and support UK-Mexico partnerships. In order to promote action:</p> <ul style="list-style-type: none"> <li>• UK policymakers should work with Mexican policymakers to consider jointly funded initiatives to encourage mutually beneficial TNE partnerships, which also support Mexico's higher education ambitions.</li> <li>• Sector agencies should consider how they can collaborate with their counterparts in Mexico to ensure greater alignment of systems and develop support mechanisms for the growth of Mexico's higher education.</li> <li>• UK HEIs already have valuable research collaborations with Mexico. They should consider whether these partnerships can be extended to develop more transnational education partnerships, specifically to support Mexico's HE agenda (e.g. joint doctoral programmes aimed at Mexican faculty).</li> <li>• Opportunities should be investigated for UK HEIs to develop dual degrees, and open and distance learning provision.</li> <li>• There needs to be greater information and networking between Mexico and UK HEIs to develop an understanding of each other's systems and priorities and also of providing opportunities to explore areas of collaboration.</li> </ul>

Country	Specific recommendations
Nigeria	<ul style="list-style-type: none"> <li>• A system- level mutual recognition of degrees and qualifications is essential – this will strengthen bilateral flows of students for the purpose of credit and degree mobility. UK policymakers should pursue this further.</li> <li>• Nigeria has a major need for faculty development. UK policymakers and HEIs should consider how TNE, particularly joint Masters and PhD programmes, might supply this.</li> <li>• The country’s National Youth Service is mandatory for graduates, including those from overseas. However, it does not recognise TNE graduates.</li> </ul>
Pakistan	<ul style="list-style-type: none"> <li>• UK providers should explore ways to support the improvement of proficiency in English in Pakistan.</li> <li>• UK universities with existing partnerships in Pakistan should seek ways to deepen their engagement with local partners.</li> <li>• UK universities can support their local partners in improving female participation in HE.</li> </ul>
Peru	<ul style="list-style-type: none"> <li>• UK HEIs should focus on creating TNE partnerships that are focused on widening participation in quality higher education.</li> <li>• UK policymakers should integrate and optimise existing bilateral and multilateral national strategies and initiatives.</li> <li>• UK universities should ensure they understand the contextual factors that impact the nature of international collaborations in Peru.</li> </ul>

Country	Specific recommendations
Philippines	<ul style="list-style-type: none"> <li>• Professional development workshops and training are needed to further the professionalisation of the international office and international relations departments at Philippine HEIs. There is a role for the British Council to continue to work with CHED and UK HEIs to provide these.</li> <li>• A cost-effective option to acquire a higher research degree is an extension facility funded by the government of the Philippines as part of the national 'free tertiary education', which creates an opportunity for undergraduate students to continue their studies in a postgraduate TNE programme (MA, MSc or PhD) awarded by local and overseas institutions. There is a role for the UK agencies, like the British Council, to articulate this opportunity to UK HEIs.</li> <li>• To achieve the above, there is a need to get to know better each other's HE systems and HEIs. UK agencies can facilitate this by convening events that contribute to UK and Philippine HEIs getting to know each other with the intention of developing TNE partnerships.</li> <li>• Research collaborations can be enhanced to include TNE partnerships. Equally, to fully utilise the potential of dual and double PhD partnerships, existing TNE provisions can include research collaborations. A bilaterally funded UK-Philippine programme can provide a natural continuation to the previous Newton Agham programme.</li> </ul>
Saudi Arabia	<ul style="list-style-type: none"> <li>• Vision 2030 provides a major emphasis on the role of international education in preparing citizens for the challenges and opportunities of the future global and local labour market.</li> <li>• Collective policy development, particularly relating to the development of future skills, is seen as important by the Saudi government. UK TNE providers could make a valuable contribution to this. The British Council should look at ways of facilitating this.</li> <li>• It is unclear whether (and to what extent) the ministry's proposed regulations to allow the setting up of foreign campuses will provide opportunities for UK HEIs. UK policymakers should consider how they can help to conceptually develop this initiative.</li> </ul>

Country	Specific recommendations
South Africa	<ul style="list-style-type: none"> <li>• HEIs engaged in South Africa should consider responding directly to the concerns expressed under the broad decolonisation theme.</li> <li>• TNE is a rational response to brain drain concerns and can support the decolonisation agenda more widely by constantly validating the role of South African partners – there is room for more guided advice on how to approach TNE partnerships in South Africa.</li> <li>• South Africa’s Policy Framework should give more attention to online and distance teaching and learning in the post-COVID era.</li> <li>• There is scope for UK government, national agencies and local stakeholders to encourage HEIs experienced in ‘collaborative online international learning’ to respond to South Africa’s decolonisation agenda. This needs to be done in tandem with addressing the country’s digital divide.</li> </ul>
Spain	<ul style="list-style-type: none"> <li>• In the absence of European frameworks, UK-Spain partnerships would be facilitated by a government bilateral framework agreement for sector and institutional partnerships. UK policymakers should pursue this.</li> <li>• The British Council should look at: <ul style="list-style-type: none"> <li>– Setting up a knowledge hub and taking actions to promote and inform institutions on areas of concern or uncertainty, in order to address misconceptions and misunderstandings.</li> <li>– Facilitating the promotion of educational strengths of Spanish HE to UK HEIs, and UK HE to Spanish HEIs, in order to strengthen HEIs’ knowledge of the strengths of each other’s systems.</li> <li>– Creating networks for communications and collaborations to provide the foundations for developing future partnerships.</li> </ul> </li> </ul>

Country	Specific recommendations
Turkey	<ul style="list-style-type: none"><li>• There is a need for documentation in English that provides an overview of the TNE regulatory environment. There is a role for the British Council and UK agencies to provide more information on the range and type of existing partnerships in the country.</li></ul>
Vietnam	<ul style="list-style-type: none"><li>• Degrees that are partially delivered online in partnerships with Vietnamese universities are recognised under regulations issued in 2020. The British Council and UK sector agencies should ensure that UK HEIs have relevant information on this and are supported to take up opportunities.</li><li>• Staff at Vietnamese institutions will benefit from training and professional development in international higher education relations to fully support TNE partnerships with international partners. There is an opportunity for UK organisations (e.g. Advance HE) and UK HEIs to engage in such initiatives.</li></ul>

## 6. Conclusion

Across the countries reviewed in this research, there is clear, although differential, evidence for developments in the regulatory environment relevant to international partnerships. There is a common trend for the adoption of mechanisms that improve the recognition of foreign qualifications. However, there are different levels of maturity in these developments that reflect the market size and types of TNE activity in each of the countries included. Also, there is a common strategic emphasis on internationalisation by governments and institutions in partner countries. As with the regulatory developments, the extent to which these strategic aspirations are translated into actions is a function of several market factors (e.g., language of instruction preference, stakeholder buy-in, and availability of resources).

Most recognition issues following the pandemic relate to distance and online learning. The labour market has been a critical supporter of online provision, where continuous professional development opportunities have enjoyed significant growth. Increases in demand for TNE are observed in sub-degrees and micro-credentials, many of which are taught by private providers. Over time, employers are likely to demand bespoke training opportunities. As part of the fourth industrial revolution, new modes of jobs and skills are already emerging, pressuring universities to respond quickly to such shifts (Tsiligiris and Bowyer, 2021).<sup>28</sup> Employers' changing needs and continuous upskilling requirements will continue to exert pressure on policymakers to recognise and support online provision.

Another driver in support of the above stems from the fiscal climate, and the growing environmental concerns about the footprint of international education. This will likely impact the future shape

of the regulatory environment for recognising and adopting online learning as a core model of HE provision.

Countries' commitments to increasing their participation rates in tertiary education will likely face significant financial constraints to deliver on their ambitions. This creates a favourable environment for TNE to absorb unmet local demand for tertiary education. For host countries, this is a cost-effective way to increase domestic tertiary education provision. However, overseas HEIs need a clear TNE regulatory framework in place to justify the resources and long-term commitment such engagement requires.

The pandemic has highlighted the role of universities in the face of crisis and their impact on society. Sustainable development and climate change have become a preoccupation for many university leaders. TNE offers a cost-effective pathway to an international degree for a very small carbon footprint. The need for and value of in-person support is more prominent in the context of international partnerships. For example, research by Tsiligiris and Hill (2021)<sup>29</sup> has suggested that TNE students need customised support as their needs are influenced by various contextual factors such as culture, prior educational experience, and perceptions about quality.

The above evidence and reflections highlight an emerging central role of TNE as a mechanism to address the growing global demand for higher education within the financial sustainability parameters. The broader consensus by students, academics and other key stakeholders is in favour of a blended or hybrid approach for the delivery of higher education. Such a global delivery model (Tsiligiris and Ilieva, 2022)<sup>30</sup> can be used to promote international partnerships in a financially effective and environmentally sustainable way.

28. Tsiligiris, V., & Bowyer, D. (2021). Exploring the impact of 4IR on skills and personal qualities for future accountants: a proposed conceptual framework for university accounting education. *Accounting Education*, 30(6), 621-649.

29. Tsiligiris, V., & Hill, C. (2021). A prospective model for aligning educational quality and student experience in international higher education. *Studies in Higher Education*, 46(2), 228-244.

30. Tsiligiris, V. and Ilieva, J., 2022. Global engagement in the post-pandemic world: challenges and responses. Perspective from the UK. *Higher Education Quarterly*. <https://doi.org/10.1108/QAE-11-2020-0137>. ISSN 0951-5224

TNE is set to continue to expand and cater to the wide-ranging needs of students worldwide and provide the means for continuous professional development of the global workforce. Previous research has highlighted that the more transparent and supportive the regulatory environment for TNE, the greater its value and impact.<sup>31</sup> There is a clear role for national governments to continue to work towards the development of a supportive TNE environment and greater recognition of degrees and qualifications acquired through TNE.

For the UK, there is a need for greater recognition of the value that TNE partnerships bring to the host country and their critical role in the UK's knowledge diplomacy and global engagement. For these to thrive, support for TNE needs to feature in bilateral and multilateral agreements at the national level. More specifically, the country reports detail the regulatory barriers in each country. International agreements should focus on the reduction of regulatory barriers and the wider recognition of TNE degrees, qualifications and credentials, including those acquired online and through blended learning programmes.

31. See 'The Value of Transnational Education Partnerships'. <https://www.britishcouncil.org/education/he-science/knowledge-centre/transnational-education/value-transnational-education>.



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