

Environment for Transnational Education
Partnerships and UK Qualifications:
Challenges and Opportunities

Pakistan and the UK

Findings and recommendations
from primary research

Part of Going Global Partnerships



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1. Introduction

This report considers the opportunities for tertiary education collaboration between institutions in Pakistan and the UK to develop and extend joint international partnerships in education. These include the provision of programmes from undergraduate to doctoral level. The report aims to provide a better understanding of the environment for such partnerships. To do this, a review of the legislative, regulatory and policy frameworks for international higher education was undertaken. Interviews were then conducted with higher education stakeholders in both countries. These included government representatives, sector agencies, higher education leaders, partnership managers and academic course leads. The report contains their views relating to the opportunities and the main challenges, together with how these might be addressed. Their contributions in the interview discussions inform the recommendations.

Data in this report are drawn from five sources:

1. Desk research into the regulatory and policy context of higher education in Pakistan.
2. Semi-structured interviews conducted in March and April 2022 with 12 stakeholders from 10 UK and Pakistani institutions. Sixty-five per cent of the interviewees were women.
3. An online survey collecting broader views on the environment for transnational education partnerships with Pakistan.
4. Analysis of the UK Higher Education Statistics Agency (HESA) Aggregate Offshore Record (AOR) for 2022, to provide a background on the current position of transnational education provision for the academic year 2020-21.
5. The university statistics data made available by the Higher Education Commission in Pakistan.

2. Current position

2.1 UK Transnational education in Pakistan

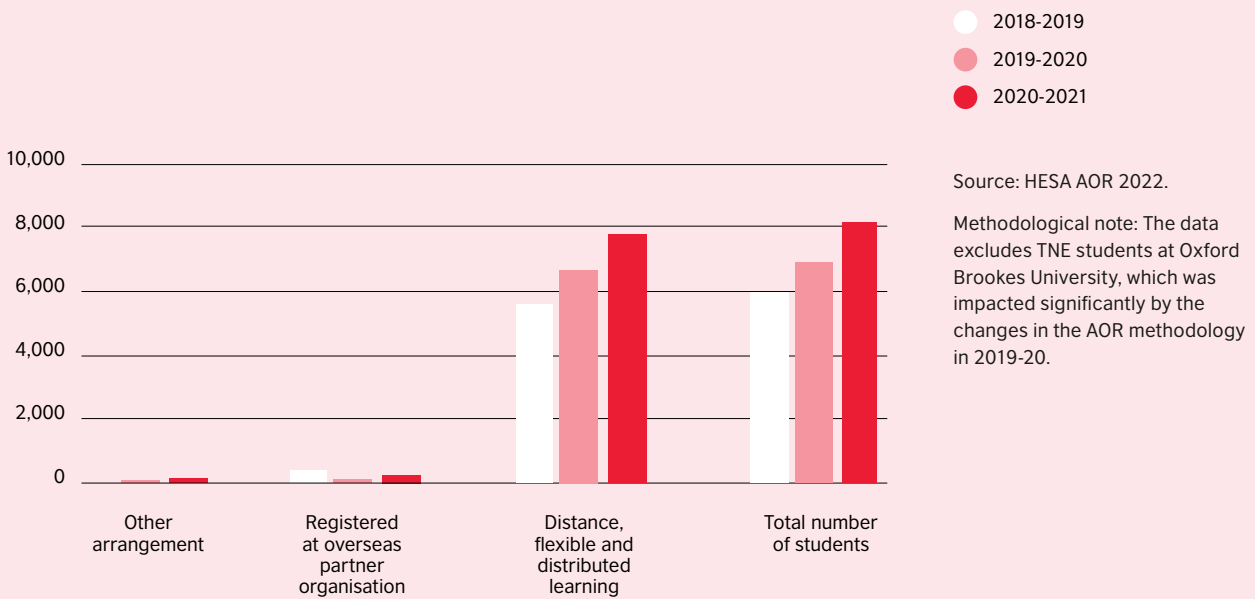
The UK and Pakistan have a strong relationship in the area of higher education and particularly international collaboration. The two countries have worked closely on the Pak-UK Education Gateway initiative,¹ which has generated a multitude of impact for both countries. Also, Pakistan is identified as one of the important regional markets in the 2021 update of the UK International Education Strategy.²

The total number of students studying on a UK transnational education (TNE) programme in Pakistan has increased by 49 per cent, from 5,950 in 2018-19 to 8,200 in 2020-21. The vast majority (95 per cent) of students study on distance learning and online education programmes. Only a small number study on other forms of transnational education, such as collaborative provision (franchising or validation), and there are no branch campuses of UK universities in the country.

1 <https://www.britishcouncil.pk/programmes/education/higher-education/pak-uk-education-gateway>.

2 <https://www.gov.uk/government/publications/international-education-strategy-2022-update/international-education-strategy-2022-progress-update>.

Figure 1: Number of UK TNE students in Brazil from 2018-19 to 2020-21



In Pakistan, the majority (90 per cent) of UK TNE students study for an undergraduate degree or another undergraduate programme. About one in 10 UK TNE students in Pakistan (11 per cent) studies on a postgraduate programme.

Figure 2: The level of study of TNE students in 2020-21



2.2 The relative position of the UK as study abroad destination and research collaborator for Brazil

According to the latest available data from the UNESCO Institute for Statistics, there are approximately 50,000 students from Pakistan who study overseas. Our analysis of outbound mobility destinations shows a preference on their part for traditional destinations of international study. Almost 50 per cent of all outbound students from Pakistan choose to study in Australia, the USA and

the UK. At the same time, the remaining 50 per cent are distributed across a range of countries in Europe (Germany), Southeast Asia (Malaysia, Republic of Korea), Middle East (United Arab Emirates (UAE), Saudi Arabia), North America (Canada) and Asia (Turkey). Our analysis indicates that across a 20-year period (1999 to 2019) the UK is consistently the third most popular destination for students from Pakistan. Since 2005 there has been a steady growth in the popularity of other destinations such as UAE and Germany.

Table 1: Top 10 destination countries for outbound students from Pakistan (latest year available)

	Country	2019 or Latest available	Change 2018-19
1	Australia	12,186	8%
2	USA	7,412	7%
3	UK	6,549	17%
4	Germany	4,936	17%
5	Malaysia	4,649	4%
6	UAE*	4,575	7%
7	Canada	2,475	-12%
8	Saudi Arabia	2,165	-46%
9	Turkey	2,115	16%
10	Republic of Korea	1,476	16%

* Latest available data is for 2016-17.

Source: UNESCO Institute for Statistics

According to the Scopus/Scival database, the UK ranks fifth as a research collaborator country for Pakistan. Overall, the UK typically ranks second as a research collaborator country for most UK TNE partner countries (Scival, 2022). For example, for the top 10 UK TNE host countries, the UK ranks as

a research collaborator country as follows: Malaysia, first; China, second; Sri Lanka, third; Singapore, third; Hong Kong, third; Greece, first; Egypt, fourth; Oman, second; UAE, second; Cyprus, second (Scival, 2022).

Table 2: Top 10 countries for international research collaboration in Brazil by number of co-authored publications (2018-2021)

	Country or Region	Number of co-authored publications	Share of total co-authored publications in Pakistan	Co-authored publications (growth %)
1	China	21,584	14%	89.6
2	Saudi Arabia	14,327	9%	91.5
3	USA	8,644	6%	19.3
4	Malaysia	7,002	5%	45
5	UK	6,839	4%	35.7
6	South Korea	5,617	4%	35.7
7	Turkey	3,949	3%	82.8
8	India	3,900	3%	54.4
9	Australia	3,900	3%	54.4
10	Germany	3,493	2%	11.4

Source: Scopus/Scival

3. Value of teaching partnerships and TNE

In 2022 there are 235 recognised universities and degree-awarding institutions in Pakistan, both public and private. There are 143 public institutions (60 per cent of the entire Pakistan higher education (HE) sector) and 92 private institutions (40 per cent of the sector). The 2020-21 government survey in Pakistan indicates that there were approximately 3 million students enrolled in tertiary education in Pakistan.³ Although there has been a rapid increase in the supply of tertiary education, there is still a substantial number (approximately 50,000 in 2020) of students from Pakistan who study abroad. This trend is expected to continue based on demographics and the shortage of supply of higher education programmes, especially at the graduate level. Despite its relatively small size as a proportion of the total enrolments in tertiary education (e.g., 8,200 UK TNE students vs 3 million enrolments), transnational education contributes to bridging the demand-supply gap affecting higher education in Pakistan.

A large number of UK TNE students in Pakistan (approximately 27,000) study on the Association of Certified Chartered Accountants (ACCA) – Oxford Brookes University BSc Applied Accounting course.⁴ Because of this, in 2018-19 Pakistan was ranked as one of the UK's top TNE host countries (e.g., the fourth UK TNE partner country in 2018-19 with a total of 38,000 students). However, since 2019-20 students on this course are no longer included in the total of UK TNE reported by HESA. This resulted in Pakistan moving to the 16th position as a UK TNE partner country on the basis of total students enrolled on UK TNE programmes.

The interviews with partner institutions suggest that UK TNE programmes constitute an important avenue to good-quality higher education in Pakistan. More specifically, it was mentioned that UK TNE programmes provide an affordable alternative to studying abroad and complement the offering of public and private universities in subject areas where local provision is limited. However, the cost of UK TNE programmes is higher than the cost of local university programmes. Hence UK TNE is not fully accessible to all.

According to the survey findings, for partner institutions in Pakistan, UK TNE is very important for capacity building in teaching and learning, for improvements in quality assurance opportunities, and strengthening international reputation. At the country level, UK TNE is considered to benefit Pakistan by retaining talent and improving the quality and the international outlook of higher education nationally.

³ <https://www.trade.gov/country-commercial-guides/pakistan-education-and-training>.

⁴ <https://www.brookes.ac.uk/business/undergraduate/bsc-applied-accounting/>.

According to one of our interviewees, TNE makes some contribution to gender equality in Pakistan by allowing more women to access foreign university programmes. During the interview, it has been reported that the female student participation rate in TNE programmes is higher than in local programmes; however, the available enrolment data does not allow us to verify this claim. The interviewee suggested that TNE provides female students with an opportunity to study in a foreign university programme that otherwise they would not have access to. That is because often families in Pakistan do not want young women to study abroad. For example, our interviewee explained, 'in the local culture when females reach 17 to 19 years of age families are concerned with their marriage [...] If you had three children and two of them are daughters, you'd send the son abroad.' The above is supported by the survey findings which indicate that 71 per cent of the respondents consider that UK TNE widens access to women and students with disadvantaged socioeconomic status.

Graduate employability is another area of value of UK TNE programmes offered in Pakistan. During the interviews conducted with local partners, it was discussed that graduates of UK TNE programmes are likely to have better employability prospects than graduates of local universities. This reflects the high reputation of UK higher education in society and business in Pakistan.

4. Overview of international collaboration policy landscape

The Higher Education Commission (HEC) is the organisation responsible for the regulation of higher education, including transnational education, in Pakistan. The 'Policy for Pakistani higher education institutions offering degree programs in collaboration with foreign universities'⁵ defines the types and standards for the operation of TNE in Pakistan. More specifically, the HEC policy defines three types of TNE: Type I includes online and distance learning external programmes where tuition is provided by local institutions and the course and assessment content is managed by the foreign university; Type II includes franchise arrangements where the local institution needs to be of the same standards as a university or degree awarding institution in Pakistan; and Type III concerns branch campus arrangements.

Local institutions planning to engage in international collaboration with foreign universities need to fulfil legal and licensing requirements.⁶ First, local institutions need to register with provisional government, provide proof of registration and apply to the HEC for a formal 'No objection' certificate for the proposed collaboration. The completion of this process of legal requirements is mandatory before any international collaboration is established. After the fulfilment of the legal requirements, the local institution submits a feasibility report to the HEC which is then followed by a physical inspection.

The recognition of international higher education qualifications in Pakistan is facilitated by the HEC⁷ under the context of the Pakistani Qualification Framework⁸. Despite Pakistan not being a signatory country of the Bologna process, the Pakistani Qualification Framework has been developed on the principles of the Bologna process. The process for the recognition of international qualifications⁹ is paperless and streamlined via the dedicated portal. For specific professional qualifications, such as the Institute of Cost and Management Accountants of Pakistan, the Institute of Chartered Accountants of Pakistan, and ACCA, there is an automatic recognition of equivalence to the Master of Commerce degree. Qualifications obtained through TNE programmes offered in Pakistan are recognised provided that they are from fully accredited teaching entities of foreign universities. These entities are identified by the HEC as 'recognised foreign collaboration institutions', and are listed on the HEC website.¹⁰ Hence, foreign universities looking to establish international collaboration projects in Pakistan should consider doing so with public and private universities or recognised foreign collaboration institutions.

5 <https://hec.gov.pk/english/services/universities/Documents/HEC-Foreign-Collaboratin-Policy.pdf>

6 <https://www.trade.gov/country-commercial-guides/pakistan-education-and-training>.

7 Since 2022, the process of the recognition of foreign degrees in Pakistan is facilitated through an online, paperless, process via the dedicated portal (<https://eservices.hec.gov.pk/>).

8 <https://www.hec.gov.pk/english/services/universities/pqf/Pages/default.aspx>.

9 This is summarised as 'foreign equivalence' by HEC.

10 <https://www.hec.gov.pk/english/universities/Pages/Foreign-Collaboration-Institutions.aspx>.

The policy landscape in Pakistan must be considered in the context of the HEC's strategic objectives, as these are outlined in the HEC's Vision 2025 document.¹¹ By 2025, the HEC aims to increase the number of universities operating in the country to 300 with 7.1 million enrolled students.¹² Also, it seeks to expand the gross HE enrolment rate by 15 per cent and increase by 40 per cent the proportion of faculty members with doctoral qualifications.

The Pak-UK Education Gateway is a strategic initiative aimed at developing human and knowledge capital by promoting collaborative projects across all strands of international higher education.¹³ The actions under this initiative are targeting six areas:

- research partnerships
- helping to find PhD scholarships for Pakistani students
- supporting leadership development and introducing quality assurance systems
- bringing more opportunities through distance learning
- helping more Pakistani students studying in the UK
- building on Pakistan's position as a market for TNE.

¹¹ <https://www.pc.gov.pk/uploads/vision2025/Pakistan-Vision-2025.pdf>.

¹² As outlined in the previous section of this report, there are currently 3 million students enrolled in tertiary education.

¹³ <https://www.britishcouncil.pk/programmes/education/higher-education/pak-uk-education-gateway>.

5. Environment for TNE

As summarised in the previous section, the TNE regulatory environment in Pakistan is well developed and there is active collaboration between the HEC and the UK sector to promote international collaboration. However, analysis of the evidence identified a number of areas in relation to the regulatory framework that potentially affect the development of TNA partnerships in Pakistan. Also, the evidence reveals broader factors – relating to students, institutions, and the economy – that impact the readiness of the environment in the country. This section summarises the key barriers that were identified during the analysis of the evidence from interviews, the survey, and the country data.

5.1 The clarity and consistency of the regulatory framework

The evidence from both the interviews and the survey suggests positive perceptions among local partner institutions and UK universities about the presence of a regulatory framework for TNE in Pakistan. Also, there are positive perceptions about the ability of the regulator to understand the different types of TNE and engage in technical discussions.

However, among local and UK universities there are mixed views about the clarity of the regulatory framework. During the interviews, it emerged that the local licensing and approval process is time-consuming and there is lack of support from HEC in clarifying various questions. Usually local partners are responsible for managing these approval processes, but they face challenges in completing the process. It was mentioned that it is a common practice in Pakistan for local institutions to use dedicated agents for handling the regulatory approval documentation and process.

5.2 High requirements for local partners that impact the development of TNE at the vocational level

As summarised above, under the regulatory framework for TNE in Pakistan, for a local institution to engage in most types of TNE it essentially needs to be recognised in the framework as a degree-awarding institution. This acts both as an enabler and a barrier for TNE in Pakistan. On the one hand, requiring TNE local partners to be at a university-level standard ensures a high-quality TNE provision in the country, hence creating a low-risk operating environment for foreign universities and students. Also, the degree-awarding ability of local partners allows the development of double and joint degree arrangements, which have been proven to be an impactful mode of TNE. On the other hand, setting such a high level of standards for TNE partners may act as an obstacle to the development of certain arrangements, especially those aimed at vocational education programmes. For example, as part of the licensing requirements, there is a need for each new private university to deposit Rs50 million in an endowment fund.¹⁴ This imposes a barrier to entry for smaller institutions that seek to engage in vocational or further education level TNE programmes.

¹⁴ See page 9 in https://www.hec.gov.pk/english/services/universities/Documents/887_HEC2_Criteria_of_university_institutions.pdf.

5.3 Lack of involvement of local institutions in the development of TNE regulation

Respondents from local partner institutions mentioned that TNE regulation is developed without any consultation with the sector's key stakeholders. For example, local institutions and students appear to be excluded from any policy or regulation dialogue. This contributes to TNE regulations being perceived by local institutions as imposed (e.g., top-down) and not fully justified. During the interviews, it was identified that the level of compliance with the regulations is high. However, there is dissatisfaction with how the regulations are developed, updated and imposed.

5.4 Students' finance

The survey identified that the key barrier to demand is the financial ability of students and their families. TNE does provide an alternative pathway to international higher education; however, the demand for TNE will be subject to the GDP of the host country (Tsiligiris, 2018). According to the World Bank, Pakistan's GDP per capita (PPP, current international) in 2021 was 5,877 USD, whereas the UK's was 49,675 USD.¹⁵ Hence, students in Pakistan have just 12 per cent of the purchasing power of those in the UK. UK universities should carefully consider this in their pricing strategy and financial model for TNE in Pakistan.

5.5 Lack of deeper engagement between UK universities and local institutions

The local partner institutions report the need for UK universities to engage more meaningfully with them. This refers to the areas of staff development and capacity building on systems and processes.

For example, it was reported during interviews that there is a lack of organised staff development on TNE and local academic staff are learning on the job. Indicative is the quote by one responder: 'I could have learned in one year what took 10 years to learn by experience.'

Research collaboration is another area that reflects the lack of deeper engagement between UK universities and local institutions. As outlined in table 2 in section 2.1, according to the data available in Scival/Scopus, during the period from 2018 to 2021 the UK was in the fifth position in terms of co-authored publications. As shown in Table 3 below, this is a drop from fourth place, where the UK stands if the period before 2018 is considered. In contrast, China consistently dominates as the top collaborating country for research output in Pakistan. Also, China and Saudi Arabia achieved substantial growth in co-authored publications with Pakistan. Considering the dynamic demographics and the broader geopolitical importance of the region and of Pakistan in particular, reversing the relative weakening of the UK as a research partner should be a top priority for UK stakeholders.

¹⁵ <https://data.worldbank.org/indicator/NY.GDP.PCAP.PP.CD?end=2021&locations=PK-GB&start=1990&view=chart>. The indicator provides per capita values for gross domestic product (GDP) expressed in current international dollars converted by purchasing power parity (PPP) conversion factor.

Table 3: International research collaboration in Pakistan – comparison of Top 10 countries (2018-2021 vs 2012-2021)

Position as international research collaborator country for Pakistan	2018-2021	2012-2021
1	China	China
2	Saudi Arabia	Saudi Arabia
3	USA	USA
4	Malaysia	UK
5	UK	Malaysia
6	South Korea	South Korea
7	Turkey	Germany
8	India	India
9	Australia	Turkey
10	Germany	Australia

5.6 Students' English proficiency

One of the barriers reported by the UK and local institutions is the English language proficiency of students in Pakistan. For example, during the interviews with local institutions and UK universities, it was mentioned that the low proficiency of students impacts the operation of TNE partnerships, as these students need more English language support.

One of the recommended metrics to assess the English proficiency of students in the TNE host country is the Education First English Proficiency Index (EF EPI) ¹⁶ (Tsiligiris, 2018). In the EF EPI 2021, Pakistan is amongst the 'low proficiency' countries, in the 63rd position. As a comparison with nearby TNE host countries, the EF EPI 2021 position of Malaysia is 28th and India is 48th. Using the data available in EF EPI, the English language proficiency remains stable over the years, with Pakistan ranking consistently in the 'low proficiency' countries.

5.7 Lack of local academic staff with doctorate qualifications and gender parity

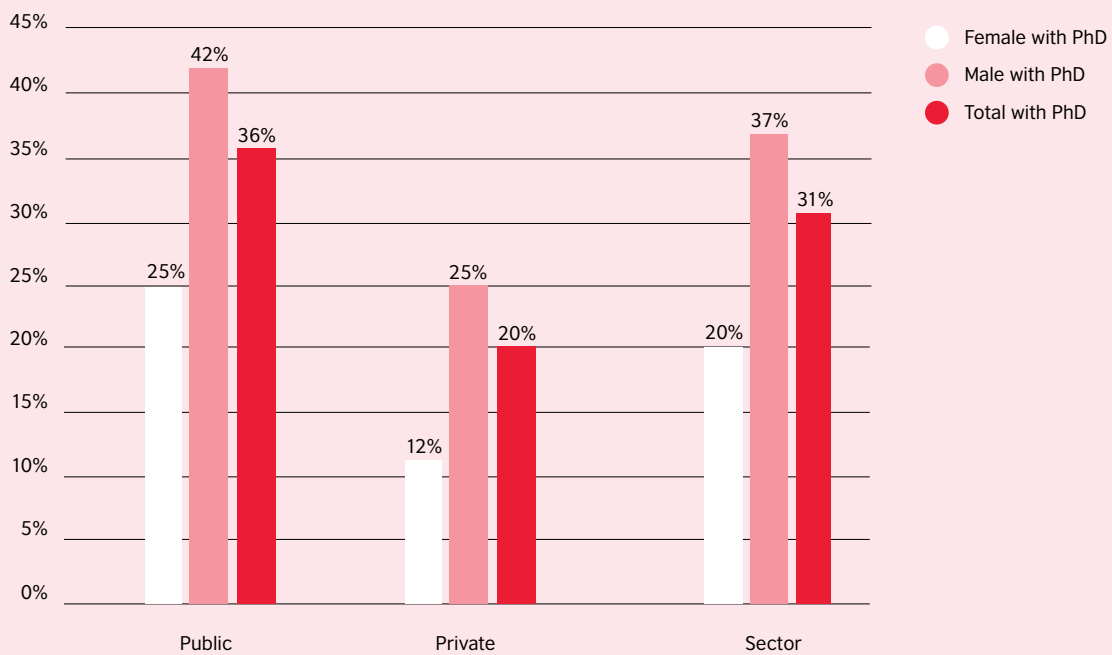
During the interviews, it was reported that despite the presence of PhD programmes in the country, there is still lack of academic staff with doctoral qualifications to support TNE programmes, and the higher education sector more broadly. Also, it was reported that academia in Pakistan seems to be male-dominated and there is a need to provide more opportunities for female full-time faculty.

The interview findings are supported by other data. For example, according to the latest available data from the HEC,¹⁷ only 31 per cent of the full-time faculty hold a PhD. The private universities have just 20 per cent of full-time faculty with PhDs, whereas public universities appear to have a higher proportion of 36 per cent. There is a gender imbalance among PhD holders, with only 20 per cent of the total female staff holding a PhD in comparison with 37 per cent of male staff. This imbalance is greater in the private sector, where just 12 per cent of the female faculty hold a PhD in comparison with 25 per cent in the public sector.

¹⁶ EF English Professional Index, <https://www.ef.com/wwen/epi/>.

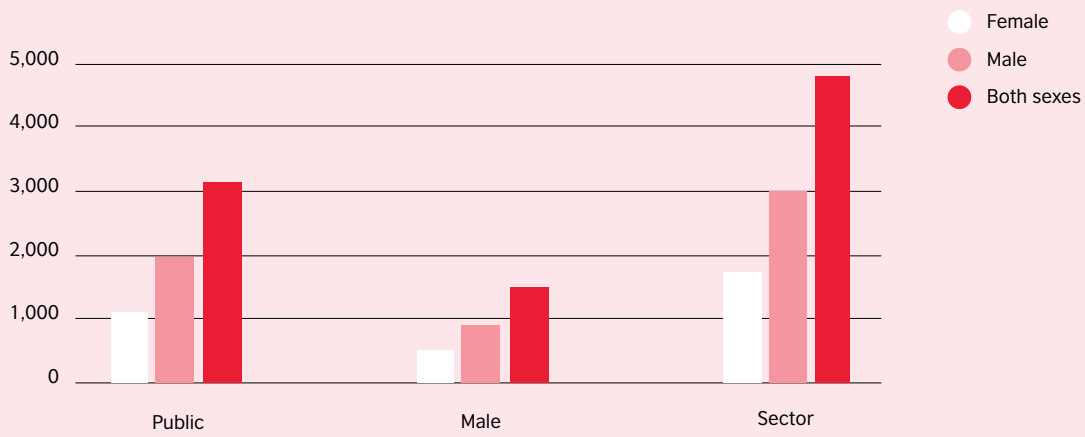
¹⁷ <https://www.hec.gov.pk/english/services/students/PCD/Documents/UniversityFulltimeFaculty.pdf>.

Figure 3: Full-time faculty with PhD by gender and type of university



The gender parity of full-time faculty members is another issue, given that the majority of full-time faculty in universities in Pakistan are male. More specifically, 64 per cent of full-time faculty are male and 36 per cent are female. This is consistent across public and private sector universities. Considering the extensive experience and expertise of the UK HE sector in terms of equality, diversity and inclusion, there is an opportunity for UK higher education institutions and organisations (e.g. the British Council, Advance HE) to support Pakistan in closing its HE full-time faculty gender gap. One way to achieve this is by establishing international collaboration programmes targeting the female population in Pakistan, and providing pathways to academic employment.

Figure 4: Full time faculty by gender and type of university



5.8 Underfunding of local higher education system

Local institutions have identified the lack of adequate government funding as a source of problems for the levelling-up of international collaboration in Pakistan. More specifically, the lack of funding is reported as adversely impacting the resources available to support teaching and administrative tasks, leaving no room for international collaboration activities.

The interview findings about the underfunding of education in Pakistan are verified by the data available by the World Bank. As shown in Table 4, government expenditure on education, as percentage of GDP, has dropped from 2.7 per cent in 2015 to 2.5 per cent in 2019, the latest data available. Pakistan's expenditure on education is below that of nearby countries and the world average.

Table 4: Government expenditure on education, total (% of GDP)

	2015	2019
Pakistan	2.7	2.5
India	3.3	2.18 ¹⁸
Iran	2.8	3.7
World average	4.3	3.7

Source: World Bank

6. Recommendations

6.1 All key stakeholders

- All the key stakeholders (e.g., local partners, UK universities, policymakers, and the British Council) need to establish an active dialogue for identifying ways to addressing the low proficiency of English in Pakistan. This is a challenging issue as it requires interventions that are suitable for students across the country. For example, the development of an online, self-paced English language course in academic English may not be suitable for students in areas with no internet access.

6.2 Pakistani universities

- Further incentives are needed to develop the local capacity in terms of academic staff with PhDs, and particularly women. Local universities should consider offering teaching relief incentives and sponsoring their academic staff to pursue PhDs. This needs to be considered as an investment, generating sustained improvements in quality across teaching and research. Additional incentives need to be given to women to encourage and enable them to enter academia in Pakistan.
- To address gender parity and contribute to the capacity building of the entire sector, Pakistani universities should engage with UK universities in developing joint and split-site PhDs. In this model, the UK institutions will support capacity development and upskilling through co-delivery of PhDs in Pakistan.

6.3 Pakistani policymakers

- Regulatory authorities in Pakistan need to consider a more inclusive approach when developing and updating TNE regulations and policies. There is a need for active and ongoing consultations with key stakeholder groups, such as local institutions and students.

- There is a need to address issues of clarity and consistency in the application of local regulatory processes. This is particularly about standardising the implementation of regulation and eliminating instances where vested interests influence the consistency of processes.

6.4 UK Universities

- UK universities, together with their local partners, need to develop targeted initiatives to promote the participation of women in UK TNE programmes. This can take the form of scholarships, jointly supported by the UK and Pakistan stakeholders. An increase in the participation of women in UK TNE and, more broadly, in higher education in Pakistan will improve gender parity in the country.
- UK universities need to seek ways to deepen their engagement with local partners to include staff development and expand on pursuing research opportunities. The former will further improve the quality of the TNE provision, and the former will create a broader impact and strengthen the position of the UK as a research collaborator country for Pakistan.

British Council

The British Council in Pakistan has conducted a number of projects that have contributed to the capacity building of the Pakistan HE sector. The Pak-UK Education Gateway and the International Strategic Partnerships in Research and Education are prime examples of multi-level programmes that generated important outcomes and ongoing impact for both Pakistan and the UK. However, there seems to be no recent activity on new programmes that will target the challenges and opportunities emerging after the pandemic. Hence there is a need to consider the next phase of existing initiatives (e.g., the Pak-UK Education Gateway) and develop new programmes that support the current needs of UK and local stakeholders.

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