

Transnational education strategy 2025–27

Accompanying
technical document

This accompanying technical document should be read in tandem with the British Council’s Transnational Education Strategy 2025–27. It supports the strategy by providing additional information on definitions, taxonomy, scale, scope and shape of UK transnational education (TNE), and organisational mapping.

1. Definitions

‘Education’ in scope of this strategy includes all tertiary education, which is understood as all education at level 5 to level 8 of UNESCO’s International Standard Classification of Education (ISCED)¹. Tertiary education includes what is commonly understood as academic education, but also includes technical and vocational education and training (TVET)². We acknowledge that the main definition and categories of TNE have, to date, focused on higher (academic) education at ISCED level 6 (bachelor’s degree) and above. We will work with the higher education and TVET sectors to explore how to improve definitions, to widen our understanding of TNE at level 5 (e.g. foundation degrees, micro-credentials) and non-academic education.

For the purposes of this strategy, we will be using terminology and categories accepted in UK official statistics³, such as those from the Higher Education Statistics Agency (HESA), the Department for Education (DfE) and the Office for National Statistics (ONS). We will also be using internationally accepted definitions, notably those of the United Nations Statistics Division (UNSD), UNESCO, Council of Europe, the General Agreement of Trade in Services (GATS) and the Australian Government Department of Education.

What is TNE?

Following the UNESCO – Council of Europe Code of Good Practice in the Provision of Transnational Education (2001), we understand TNE to be:

‘All types and modes of delivery of higher education study programmes, or sets of courses of study, or educational services (including those of distance education) in which the learners are located in a country different from the one where the awarding institution is based. Such programmes may belong to the education system of a State different from the State in which it operates, or may operate independently of any national education system.’ (Section I)

The United Nations Manual on Statistics of International Trade in Services (MSITS) 2010 also provides a useful definition that distinguishes and connects TNE and other modes of cross-border education:

‘Total education services combine international transactions relating to the provision of education services. It includes the provision of all levels of education through distance teaching, teaching services provided directly in the host economies and education services provided to non-residents who are present in the territory of the service provider.’ (Paragraph 3.302)

TNE includes both ‘distance teaching’ and ‘teaching services provided directly in the host economies’.

¹ <https://www.uis.unesco.org/en/methods-and-tools/isced>

² <https://www.britishcouncil.org/education/skills-employability/skills-policy/about-tvet>

³ <https://uksa.statisticsauthority.gov.uk/about-the-authority/uk-statistical-system/types-of-official-statistics/>

Types of TNE

There are different types of TNE, usually related to the medium of delivery. A useful classification is that included in the UNESCO – Council of Europe Code of Good Practice. This document defines TNE as educational, legal, financial or other arrangement leading to the establishment of:

- (a) collaborative arrangements, such as: franchising, twinning, joint degrees, whereby study programmes, or parts of a course of study, or other educational services of the awarding institution are provided by another partner institution.
- (b) non-collaborative arrangements, such as branch campuses, offshore institutions, corporate or international institutions, whereby study programmes, or parts of a course of study, or other educational services are provided directly by an awarding institution.

The Higher Education Statistics Agency (HESA) in the UK expands on the above definition to offer a more granular categorisation of TNE by the venue where the provision is delivered, and by the type of programme being delivered.

HESA's categorisation draws from the Classification Framework and data collection guidelines for International Programme and Provider Mobility (IPPM)⁴ published by the British Council and the German Academic Exchange Service (DAAD) in 2017.

Venue type

International branch campus: the UK provider typically has responsibility for the design, delivery and quality assurance of programmes delivered at this location. Separate host country organisation(s) may also have a quality assurance role. In some cases, a commercial partner may own and/or manage the physical facilities at an overseas campus. However, where the reporting provider owns and manages the intellectual operation (including academic support services), this is regarded as an international branch campus of the reporting provider.

Joint venture: responsibility for the design, delivery and quality assurance of programmes delivered at this location may be divided between the UK provider and the overseas provider, or sit with one or the other alone. Separate host country organisation(s) may also have a quality assurance role.

Partner campus: responsibility for programme design, delivery and quality assurance may be divided between the UK provider and the overseas provider, or sit with one or the other alone. Separate host country organisation(s) may also have a quality assurance role.

Distance learning: responsibility for programme design, delivery and quality assurance may be divided between the UK provider and the overseas provider, or sit with one or the other alone. Separate host country organisation(s) may also have a quality assurance role.

⁴ https://www.britishcouncil.org/sites/default/files/tne_classification_framework-final.pdf

Programme type

Independent programme: the UK provider has responsibility for programme design, delivery and quality assurance. Separate host country organisation(s) may also have a quality assurance role.

Partnership programme: responsibility for programme design, delivery and quality assurance may be shared between the UK provider and the overseas provider, though not all aspects of the provision will necessarily be divided, or divided evenly. Separate host country organisation(s) may also have a quality assurance role.

Where a programme meets the definition for both a partnership programme and a franchised programme, or a partnership programme and a validated programme, it should be coded as a franchised or validated programme respectively.

Franchised programme: the UK provider is predominantly responsible for programme design and quality assurance, but delivery is by the international provider. Separate host country organisation(s) may also have a quality assurance role.

Validated programme: the UK provider is predominantly responsible for quality assurance, while the international provider is predominantly responsible for programme design and is fully responsible for delivery. Separate host country organisation(s) may also have a quality assurance role.

For international comparisons, it's useful to be aware that the World Trade Organization's General Agreement on Trade in Services (GATS) regulates trade in education services when offered on a commercial basis in competition with other suppliers (as is the case of TNE in the vast majority of cases). The GATS defines four modes of supplying education services across borders.

Mode 1 – cross-border supply: services flow from the territory of one member into the territory of another member (e.g., online distance learning).

Mode 2 – consumption abroad: a service consumer (e.g., a student) moves into another member's territory to obtain a service (this would be restricted to international mobility of students, excluding TNE).

Mode 3 – commercial presence: a service supplier of one member establishes a territorial presence, including through ownership or lease of premises, in another member's territory to provide a service (e.g., international branch campus).

Mode 4 – presence of natural persons: persons of one member entering the territory of another member to supply a service (e.g., flying faculty).

The British Council's Transnational Education Strategy 2025–2027 mainly uses the UNESCO – Council of Europe definition of TNE, and the categories adopted by HESA as official statistics in the UK. Throughout our TNE-related activity, other categories, such as the GATS modes of provision, may also be used as appropriate.

2. Scale and scope of UK TNE (supply side)

This section provides an analysis of the scale and scope of UK TNE, based on data from HESA for the UK, analysis from Universities UK International (UUKi) and a short comparative with a key competitor: Australia. It also identifies data limitations and how this strategy aims to close some of those gaps.

Although the strategy's scope includes all tertiary education programmes of study that lead to a formal qualification recognised in the UK at levels, due to data limitations, the below analysis is limited to those categories where HESA and the Australia Department for Education have data available.

UUKi's report 'The scale of UK higher education transnational education 2023–24'⁵ shows there were 653,570 students studying in UK higher education programmes outside of the UK in the academic year 2023–24, an increase of 7.8% per cent over the previous year and of almost ten per cent annually over the past five years. While most UK TNE students globally study at the undergraduate level, postgraduate study has grown at higher rates. In 2023–24, around two of every three students were enrolled in undergraduate programmes. Over a ten-year period, increases in postgraduate taught study (80.6 per cent) have outpaced those in undergraduate (66.0 per cent) and in postgraduate research (48.6 per cent) (excluding Oxford Brookes University⁶).

In 2023–24, almost one in two UK TNE students were studying via collaborative provision (279,565 or 42.8 per cent) a 10.8 per cent increase from the previous year. Around a quarter (24.8 per cent) were studying via distance, flexible or distributed learning, while another quarter (25.9 per cent) were registered at an overseas partner organisation. The remaining students (6.6 per cent) were studying at an overseas campus. Over the past five years, the most significant growth has been in the number of UK TNE students registered at an overseas partner higher education organisation (72.5 per cent increase), and those studying via collaborative provision (58 per cent increase). Distance learning and overseas campuses grew at slower rates.

The relative concentration of students in collaborative modes of provision could be an indicator of the scalability of partnership-based TNE, where increases in demand can be absorbed with relative rapidity. Collaborative provision may also be more adaptable to different local environments worldwide (e.g., distance learning on the other hand often faces recognition challenges) and allow for streamlined reputational and financial risk management (e.g., setting up a branch campus is generally perceived as carrying higher risks). The relatively weak growth of postgraduate research programmes could also be an element to address if we are to build more balanced TNE systems that combine teaching and research.

Very few countries gather data as comprehensive as HESA⁷. Only Australia has roughly comparable datasets, published by the Australia Department of Education⁸. In 2023, Australian higher education providers reported 115,265 students studying offshore, a five per cent decrease on 2022, but a 33.8 per cent increase on 2019. Of those, 58,791 were studying in offshore partnerships and/or other programmes (three per cent increase on 2022), 43,599 were studying at offshore campuses (three per cent increase) and 12,875 were studying in distance education (41 per cent decrease). The proportion of students in international branch campuses is much higher among Australian providers (37.8 per cent of the total) than UK providers (6.6 per cent of the total).

⁵ <https://www.universitiesuk.ac.uk/topics/international/scale-uk-higher-education-transnational-0>

⁶ Historically, Oxford Brookes University students accounted for over 40% of all UK HE TNE student numbers, due to a partnership with the Association of Chartered Certified Accountants (ACCA). However, in 2019–20 Oxford Brookes University changed its reporting practices, resulting in a 256,450 reduction in the total number of students reported to HESA for the Aggregate Offshore Record (AOR) between 2018–19 and 2019–20. Longitudinal analyses generally exclude Oxford Brookes University where appropriate.

⁷ <https://www.hesa.ac.uk/data-and-analysis/students/transnational>

⁸ <https://www.education.gov.au/international-education-data-and-research>

International branch campuses

Despite only hosting 6.6 per cent of all UK higher education TNE students, international branch campuses (also called satellite or overseas campuses) are one of the most visible signs of UK TNE presence overseas and carry significant symbolic and diplomatic weight. Often, these campuses are clustered in ‘academic free zones’ that provide incentives to UK providers, in an effort to position certain countries and territories as regional or global ‘education hubs’.

According to the US-based Cross-Border Education Research Team (C-BERT), in March 2023 the UK had 46 international branch campuses globally, only surpassed by the US with 84. Since the launch of the UK International Education Strategy, activity has intensified and several campus openings have been announced in countries such as India, Indonesia, Egypt and Kazakhstan. The profile of such campuses is diverse, but they are often managed in partnership with a private sector organisation and focus on teaching. Crucially, the opening of campuses generally responds to demand from local authorities, and one of their main challenges will be to become part of local education ecosystems.

The British Council, through its in-country presence and close collaboration with local authorities, plays a key supporting role in established and emerging international campuses. The strategy aims to showcase initiatives that co-ordinate British Council support activity. One such example is the UK–India Higher Education Collaboration Hub (‘the Hub’), conceived as an interface through which the activities of UK international branch campuses in India can be channelled and supported. By knitting together engagement between all cross-government education bodies and universities into a single platform, the Hub will convert high demand for insights, connections and support into co-ordinated, compliant, reputation-enhancing TNE growth for the UK sector, helping India reach its ambitious goals around access to education.

TNE’s rich diversity is one of its strengths; providers in different home nations and of different sizes and institutional missions contribute to creating TNE ‘ecosystems’ that provide choice to overseas partners and students, and foster innovation. This diversity is distributed across UK home nations, institutions and partner countries.

In England, 145 providers report students in TNE, with the remaining distributed between Scotland (16 providers), Wales (nine providers) and Northern Ireland (three providers). The number of providers reporting TNE has increased from 139 to 173 in the last decade, with 84 of those providers experiencing increases of over 25 per cent in student numbers in the last five years. In 2023–24, 36 providers reported over 5,000 students each, an increase of 11 providers over a three-year period.

The increase of TNE activity among UK providers of different sizes and institutional missions seems to indicate that TNE is in the process of being mainstreamed as a key activity in the internationalisation strategies and international portfolios of UK tertiary education providers.

There is currently very limited data on important aspects of TNE, such as the student experience (TNE students are not included in the UK’s National Student Survey commissioned by the Office for Students on behalf of the UK funding and regulatory bodies) and graduate outcomes (TNE students are not included in HESA’s Graduate Outcomes Survey). Some limited research on UK TNE alumni who identify as studying outside of the UK has been commissioned by the British Council, and Jisc has produced research on digital challenges associated with the effective delivery of TNE⁹, but the scope of such studies is still limited. Different countries gather data on TNE students and graduates, but there is no comprehensive mapping of these datasets or an understanding of their comparability with UK datasets.

9 <https://www.jisc.ac.uk/innovation/projects/researching-international-students-digital-experience>

3. The shape and local impact of TNE (demand side)

Growth in TNE has been driven by demand for an education that is perceived to be of high quality, transnationally recognised, delivered mainly in the global lingua franca of English-medium teaching, and capable of responding to countries' policy priorities, institutions' strategic goals and students' career and life ambitions. The shape of TNE is diverse, complex and highly dependent on local environmental factors, and as such, UK providers have been skilled at adapting their provision to demand, policies and other local contextual drivers.

From the UK provision point of view, most students are based in Asia (51.1 per cent in 2023–24), Europe (18.4 per cent), the Middle East (14.3 per cent) and Africa (10.6 per cent), with fewer hosted in North America (4.6 per cent), South America (0.6 per cent) and Australasia (0.4 per cent). UUKi's 'The scale of UK higher education transnational education 2023–24'¹⁰ report shows that overseas campus provision is prevalent in UAE, China and Malaysia – countries with deliberate policies to attract investment in campus-based provision over the past decades. Distance learning is particularly successful in countries where demographic drivers (including access for underrepresented groups) and/or qualification recognition are favourable, such as Pakistan, Singapore and the US.

The increase in students in the last five years has been sharpest in countries like Viet Nam, Nepal, Pakistan, India, Uzbekistan and Kuwait, where factors such as favourable policies, demographic growth, economic development and geopolitical strategies have driven the liberalisation of transnational education.

UK higher education TNE is diversified. The top ten countries combined host only 57.6 per cent of all students. For comparison, in Australia, over 75 per cent of all offshore students study in five countries: China, Singapore, Malaysia, Viet Nam and UAE (with almost one in four studying in China). The highest growing countries for Australia TNE since 2019 have been China (123 per cent) and Viet Nam (129 per cent).

The British Council's analysis of the local TNE context in key partner countries has been crucial in identifying potential growth for TNE, and the shape that this growth should take¹¹. Much of this research is conducted at the country level, with some limited cross-country and regional analysis, and generally not annually or periodically.

In 2024, the British Council, QAA and Education Insight published the Global Framework for TNE engagement. This framework is an effort to analyse and describe national environments for TNE by aiming to:

- facilitate TNE engagement globally and further the understanding of the local context and educational priorities
- develop consistent language and better data to support global analysis and understanding of TNE
- situate and position a country's TNE within the broader global landscape.

The pilot framework is informed by 12 primary and secondary data sources, divided in six categories, as shown in Table 1. Some data sources are not yet developed, and this strategy aims to support their development and further use, where appropriate.

¹⁰ <https://www.universitiesuk.ac.uk/topics/international/scale-uk-higher-education-transnational-0>

¹¹ <https://www.britishcouncil.org/research-insight/transnational-education-what-we-know>

Table 1: data sources related to TNE and their availability

Category	Data source	Data type and availability
Macroeconomic and education context	International Monetary Fund World Economic Outlook	Secondary / Available
	UNESCO Institute for Statistics (UIS) Tertiary Education Enrolment Ratio	Secondary / Available
TNE and access to tertiary education	UK TNE enrolments	Secondary / Available
	UIS tertiary enrolments	Secondary / Available
	TNE as % of local tertiary enrolments	Primary / Available
TNE and positioning as an international study destination	Number of globally mobile students (UIS)	Secondary / Available
	TNE enrolments as a % of globally mobile students	Primary / Available
TNE and the quality of local tertiary education	Under development – TNE and student outcomes (completion rate, satisfaction)	Secondary / Unavailable
	Under development – employability of local (International Labour Organization) and TNE graduates	Secondary / Unavailable
Quality assurance and degree recognition	Local designated quality body is a member of an international quality assurance association	Secondary / Available
	MoUs and MoAs for higher education co-operation	Secondary / Available
	Ratified UNESCO degree recognition conventions	Secondary / Available
Annual survey with local quality and regulatory bodies	Changes in the TNE rules	Primary / Unavailable
	Changes in national TNE priorities	Primary / Unavailable

Interactive data series can be accessed on the Education Insight website: www.educationinsight.uk/gapminder/index.html The British Council is in the process of developing a dedicated dashboard for data, which will be available via www.britishcouncil.org/research-insight/research-topics/transnational-education

A survey among regulators and quality assurance agencies was included as a source of primary data in the 2024 pilot. It showed that when they engage in TNE, international authorities are primarily interested in enhancing the internationalisation, quality, diversity, access and innovation of their tertiary education system.

The British Council, with long-standing local presence and connections in multiple countries and territories, is particularly well suited to support the analysis of local environments for TNE to inform the building of TNE partnerships with the UK sector. The Global Framework for TNE engagement can be developed in a dashboard format, to analyse local environments longitudinally, facilitating projections of demand for different types of TNE.

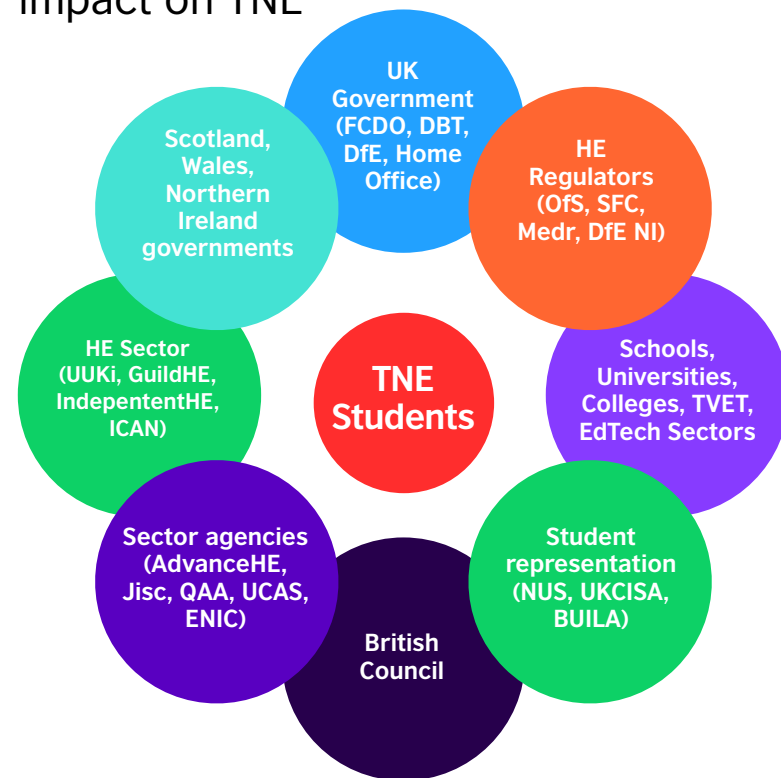
The use of the Framework to inform TNE research and insights has the potential to offer a forward-looking perspective of the potential evolution of national educational systems, contextualised within a broader macroeconomic context, offering projections of how TNE could contribute to absorbing demand for higher education, internationalise domestic higher education, enhance the quality of local higher education and facilitate international co-operation in higher education.

Figure 1: main priorities for international authorities in relation to TNE



Source: QAA Partner Forum, May 2024

Figure 2: UK-based organisations who impact on TNE



BUILA: The British Universities' International Liaison Association

DBT: Department for Business and Trade

DfE NI: Department for the Economy in Northern Ireland

DfE: Department for Education

ENIC: The UK National Information Centre

FCDO: Foreign, Commonwealth and Development Office

ICAN: UK International Campus Alliance Network

IHE: Independent Higher Education

Jisc: Joint Information Systems Committee

Medr: Commission for Tertiary Education and Research

NUS: National Union of Students

OfS: Office for Students

QAA: The Quality Assurance Agency for Higher Education

SFC: Scottish Funding Council

UCAS: The Universities and Colleges Admissions Service

UKCISA: The UK Council for International Student Affairs

UUKi: Universities UK International

4. UK TNE ecosystems – the key players

TNE is one of the most complex forms of international education. It comprises different delivery models, multiple stakeholders and dynamic characteristics, often operating across two or more jurisdictions with different political, social, economic, regulatory and technological environments, and where considerations of culture, politics, security and influence interplay.

This complexity means TNE partnerships do not work in isolation. They fulfil different functions and are mutually reinforcing. Consequently, a relatively large number of organisations play a role in ensuring TNE produces its intended outcomes, either directly or indirectly. Together they form a 'TNE ecosystem' that, when balanced appropriately, supports thriving provision, a high-quality student experience, and excellent graduate outcomes.

Figure 2 shows a non-exhaustive sample of UK-based organisations whose activity has impact on UK TNE. Each organisation's activity in the TNE is dynamic and variable in intensity, scale and reach. Their interest may be focused on just one type of TNE, a reduced number of providers, in a limited geographical area, and for just one aspect of the educational process.

The key point is that all organisations have a role to play in building UK TNE ecosystems and we should work collaboratively with them to develop and implement the actions in the British Council's Transnational Education Strategy 2025–27.

Find out more about our work in tertiary education and science:

<https://www.britishcouncil.org/education/he-science>

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