
The Value of Transnational Education Partnerships

Part of
Going Global
Partnerships

A report commissioned by British Council, based on original research undertaken and written by Education Insight

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Foreword

by Professor Sir Steve Smith,
October 2022



As the UK's International Education Champion, I am delighted to have been invited to write the Foreword for this comprehensive publication, commissioned by the British Council, with the aim of better understanding the value and impact of transnational education (TNE) partnerships for higher education policymakers, sector agencies and higher education institutions.

In my role, I spearhead overseas activity by opening up international partnership opportunities and developing strong international relationships at a senior government level, to help to tackle challenges and barriers. TNE partnerships are an important aspect of my role, and I have been fortunate to be able to continue working globally to develop these. Setting up academic partnerships between UK and overseas providers is something I value highly, and champion in my work, as a more inclusive means of education, that retains high standards.

Although we know that UK TNE is a hugely valuable export contributing an estimated £2.2 billion to the UK economy in 2019 ([Department for Education, 2021](#)) research on its wider value, including how it supports local economies, is limited. As the UK's cultural relations organisation, the British Council recognises the value and importance of filling these gaps in the body of knowledge. This journey began in 2014, when the British Council joined forces with the German Academic Exchange Service (DAAD) to produce a report entitled: 'Impacts of transnational education on host countries: academic, cultural, economic and skills impacts and implications of programme and provider mobility' (Knight & McNamara for British Council 2014).

However, since that report, aside from an important Department for Education's study ('The wider benefits of Transnational Education

to the UK' research report (Robin Mellors-Bourne, 2017)) very little work has been done to assess the impact of TNE beyond the economic benefits. This is why this new study will be valuable in helping us build knowledge on TNE, with data gathered from higher education policy makers, practitioners, HE leaders and a range of other sources.

I'd like to thank Education Insight, who brought together a strong cast of TNE experts and practitioners who have all written extensively on TNE and its impact. Between them, they have produced a piece of work which provides insight into the missing evidence base to help stakeholders understand, define and evaluate the value that can be achieved through international collaboration. For the first time, this report provides supporting evidence that TNE partnerships can support progress towards the United Nations Sustainable Development Goals, and how they can lead to a wide range of capacity-building and institutional development outcomes.

The findings and implications presented here will be of value to higher education leaders and policymakers in both TNE host and provider countries. It will help inform practice and provide a greater holistic understanding of TNE and the impact that it can have.

This report will certainly help to inform my key activities, alongside those of my colleagues in the Department for International Trade and DfE. I hope it will also be of benefit to institutions and policy makers reading it in helping them to assess the global higher education landscape.

Steve Smith

1. Introduction

This research aims to understand the value of transnational education (TNE) partnerships to a range of higher education stakeholders in the UK and partner countries. These include policymakers, sector agencies and higher education institutions.

Specifically, the research addresses the following questions:

- What does the evidence tell us about the impact of TNE partnerships on institutions, communities and broader stakeholders overseas?
- What value do TNE partnerships bring to national higher education (HE) sectors?
- What are the drivers and challenges for higher education institutions (HEIs) in the UK and overseas to engage in TNE partnerships?
- What institutional strategies do TNE partnerships support in the UK and partner countries?

The research was commissioned by the British Council to develop an evidence base on the value of TNE beyond the economic. It examines UK and overseas stakeholder needs in the context of major global shifts in higher education accelerated by the pandemic. It is intended to provide the evidence to support and facilitate UK TNE partnerships that better support partner countries' development. Our research found considerable evidence of how TNE partnerships already contribute significantly to global and national agendas. Our analysis suggests that, given the right conditions, TNE has potential to make even greater contributions. We have, therefore, explored these conditions and the implications for policymakers and higher education leaders.

In the research, we have identified gaps in the existing evidence base where further investigation is needed to provide a more comprehensive picture.

2. Coverage

The research focuses on jurisdictions that have been crucial for the UK in terms of TNE partnerships, and where lessons can be learned from which evidence of value can be derived. We have used the term 'partner country' to refer to these in the report. Partner countries included in the research are:

Egypt

Greece

Malaysia

Nigeria

Pakistan

The Philippines

Singapore

South Africa

Vietnam

Other regions and countries with strong examples of TNE value (e.g. Uzbekistan, Greece, the United Arab Emirates).

3. Methodology

Our methodology includes a literature review (3.1) and primary data collection (3.2).

3.1 Literature review

Our analysis draws on the existing body of knowledge through a review of relevant research and a synthesis of evidence from across the partner countries. The study includes evaluation reports published by the British Council and external sources, identifying beneficial outcomes for institutions, students, communities and wider stakeholders.

Key findings are included and discussed in the main body of this report.

3.2 Data collection

Following extensive desk research (including reviewing national higher education policies), primary research data has been collected from three sources:

- interviews with the UK and overseas stakeholders
- a survey of HEIs engaged in TNE partnerships
- impact case studies from HEIs and national agencies.

3.2.1 Interviews

Interviews were conducted with higher education stakeholders across universities, regulatory bodies, and government stakeholders, such as heads of agencies, UK sections overseas with responsibilities for education engagement, UK Trade and Investment and the Department for International Development. A criterion for selecting interviewees was that they should have a knowledge and understanding of TNE.

Representatives from higher education institutions include:

- Pro-Vice-Chancellors International and equivalent at the UK HEIs and their international partners. These interviewees were asked to identify academic leads with responsibilities for the respective partnership programmes
- Academic leads of the partnership programmes in the UK and overseas
- Staff based overseas with responsibility for managing international partnerships.

In total, 79 interviews were conducted across 12 countries, 46 per cent of which were with women, as shown in Table 1. We have collated stakeholders' views on the value TNE collaborative partnerships bring to HE systems, HEIs, students and local communities.

Table 1: Stakeholder groups

Stakeholder groups	Number of interviews	Gender (% female)	
UK HEI stakeholders	25	48%	
Overseas HEI stakeholders	30	37%	
Regulatory bodies and government departments	21	62%	
Other (professional associations, local experts)	3	0%	
Total	79	46%	

3.2.2 Survey

A survey was developed and distributed through the TNE Hub (<https://www.tnehub.org/>) and British Council offices in partner countries to quantify and add to the qualitative insights obtained from the stakeholder interviews. As well as gathering information on the types of TNE collaborative provision, the survey sought views on the drivers for HEIs to engage in TNE and the value TNE partnerships bring. Target recipients for the survey were individuals with defined responsibilities for TNE.

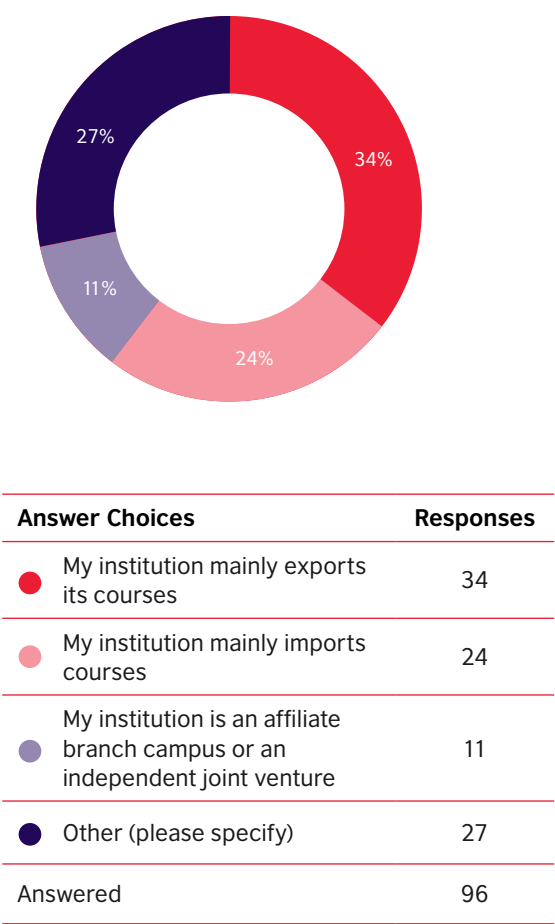
The survey collated views from over 100 higher education stakeholders involved in the delivery and regulation of transnational education. It included perspectives from HEIs, either importing or exporting transnational education. The views of those based at international branch campuses were also included. Ninety-eight of the respondents met the survey participation criteria, and their responses are analysed below.

The survey questions were grouped in parallel strands, and different stakeholder groups responded to different questions. For example, the analysis of impact of TNE on host countries, only draws on the responses from HEIs hosting TNE programmes. Equally, the responses from the international branch campuses are presented and analysed separately. The responses from UK HEIs exporting TNE programmes are discussed in the section on the value of TNE for the UK.

Profile of respondents

As shown in Table 2, survey respondents represented the following groups: HEIs that mainly export their teaching provision (35 per cent); HEIs that mainly import (25 per cent); international branch campuses (IBC) (11 per cent) and other (28 per cent).

Table 2: Profile of respondents



Most of the 27 respondents in the respondents in 'other' category engaged in a collaborative type of TNE and online degrees. They classified their TNE provision as outlined in Figure 1.

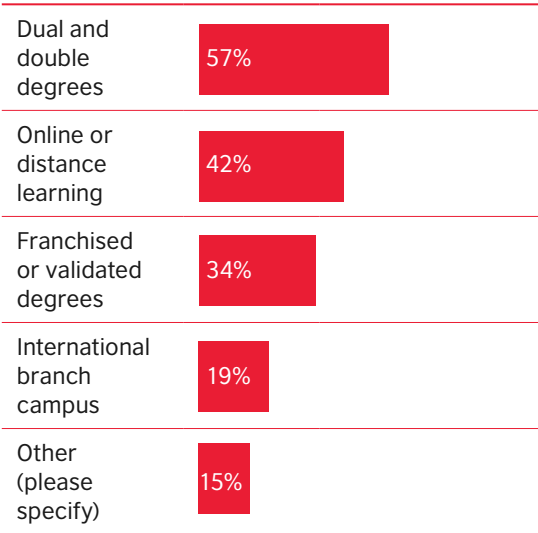
Type of TNE provision

Ninety-eight HEIs described their TNE provision as:

- Dual and double degrees (57 HEIs, 58 per cent)
- Online and distance learning (42 HEIs, 43 per cent)
- Franchised or validated degrees (34 HEIs, 35 per cent)
- IBC (19 HEIs, 19 per cent)
- Other (15 HEIs, 15 per cent)

Overall, as shown in Figure 1, most HEIs selected at least two options which is why the percentages add to over 100.

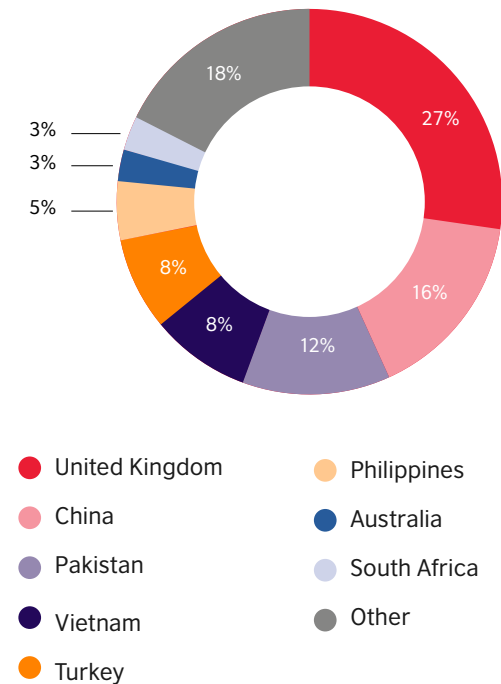
Figure 1: Type of TNE activities of responding HEIs (n=98)



Country of the responding institution

As shown in Figure 2, over a quarter of the responses were from the UK (27 per cent), followed by China (16 per cent), Pakistan (12 per cent) and Vietnam (8 per cent). The typology of TNE holds for both importing and exporting institutions. For HEIs that mainly import TNE, dual and double degrees still dominate the partnerships (59 per cent), followed by online and distance learning (32 per cent) and franchised or validated degrees (30 per cent).

Figure 2: Country of the responding institution



3.2.3 Case studies

Since much of the narrative about the impact of TNE is held at the institutional level, a call for impact case studies was developed. The [United Nations Sustainable Development Goals](#) (UN SDGs) framework was used to capture the narrative on impact. The call was sent out through the TNE hub to its membership, including HEIs in the UK and globally. The call for case studies elicited 23 submissions, representing most of the importing countries in the global TNE market (as defined by Tsiligkiris and Ilieva, 2022). It is important to note that 13 of the 21 countries providing case studies are countries in receipt of official development assistance (ODA). This reflects the broader TNE global market outlook, where most TNE is offered in ODA countries (Ilieva et al., 2021).

The case studies are analysed as part of this report. They provide a broader evidence base from wider stakeholder groups focusing on the locality of TNE collaborative partnerships.

The impact case studies will form the basis of a more comprehensive piece of work, which will ensure the ongoing capture of TNE impacts and their contribution to the UN SDGs. Beyond the timescale of this report, ‘TNE Impact’ will be a database of case studies that will be searchable by SDG, impact country, and participating institution. This will be a global resource aiming to contribute to the body of knowledge on the contribution of TNE to sustainable development. It will be maintained by the TNE-Hub, Education Insight and British Council.

Table 3: Countries reported in the impact case studies (ODA countries in red)

Bangladesh
Botswana
China
Germany
Ghana
Greece
Kenya
Malaysia
Nepal
Nigeria
Philippines
Qatar
Russia
Switzerland
Sri Lanka
Seychelles
Hong Kong
Singapore
Vietnam
United Kingdom
Pakistan

1. <https://sdgs.un.org/goals>

3.3 Analytical framework

3.3.1 Defining value and impact

Despite the long history and extensive scale of UK TNE, its value has mainly been measured in financial returns. Much less evidence has been gathered on the societal, cultural and non-economic impacts of TNE on the UK and partner countries. In this research, we have sought to capture the broader value and impacts of UK TNE in the context of each host partner country and the primary key stakeholder groups.

We have interpreted ‘value’ to mean the importance, or worth, of the benefits resulting from the partnership. Our analysis recognises that value is likely to be different for different stakeholders. For example, for UK institutions, the value may lie in additional revenue, diversification of international student recruitment or international profile and prestige. For partner country institutions, the value may be expressed in capacity building, greater local revenue or market share of students. For governments, the value might lie in the strengthened capacity of the system to educate students or the quality of the education offered. The value may be about greater employability and international mobility for students due to the qualification earned.

To better capture the impacts on the different stakeholder groups, the survey findings are analysed and presented separately for the UK HEIs and those in partner countries. The IBCs’ responses are analysed independently.

As well as the value of TNE, our research seeks to unpick the impact of TNE partnerships on institutions, national systems and other policy and sector stakeholders. ‘Impact’ refers to the longer-term changes which result from TNE partnerships. We recognise that evidence for impact will inevitably be more significant in countries with mature tertiary education systems with a longer track record of TNE. However, in our analysis, we have sought to derive a set of common impacts from the country-level research.

We have interpreted ‘value’ to mean the importance, or worth, of the benefits resulting from the partnership. Our analysis recognises that value is likely to be different for different stakeholders

3.3.2 United Nations Sustainable Development Goals

At the macro level, we have used the UN SDG framework to structure the narrative on the value and impacts of TNE partnerships across the global landscape. The SDGs provide a means of assessing whether activities of many types contribute to the world's most pressing development priorities (Chankseliani and McCowan, 2021). They are central to the policy objectives of the UK Foreign, Commonwealth and Development Office and other ODA programmes, and constitute a national policy priority for all the partner countries included in this research. The SDGs are also well understood by different stakeholder groups, including policymakers, academics, students, and the public. Therefore, as an analytical framework, they enable us to organise and report rich qualitative data to capture impact and value in the local context. They also facilitate cross-country comparisons.

3.3.3 National goals

In investigating value and impact at the level of individual countries, we have used a framework derived from the literature review, which categorises and explores the main contributions of TNE. At the country level, we have considered the changing nature of TNE and the types of contributions it can make in different contexts.

In Section 5, we explore the value of TNE to partner countries that host UK collaborative provision. Section 6 examines the matter in the UK. These are not mutually exclusive. Many of the values are shared – and become increasingly so as the differences between the maturity of the higher education systems diminish over time.

4. TNE and the Sustainable Development Goals

Our research provides strong evidence that TNE partnerships are a primary driver in achieving the Sustainable Development Goals. They play a critical role in the area of education, gender, and inequality (one of the six SDG transformations defined by Sachs et al. (2019))².

Evidence from the case studies is supported and supplemented by the stakeholder interviews in partner countries, providing a rich and nuanced picture. As expected, it illustrates the complex interrelationships and dependencies between the goals. But, above all, it points to the overriding importance of context (national, economic, cultural) on the value and impact of TNE.

The 23 case study authors were asked to identify whether their partnership contributed to achieving any SDGs. As seen in Figure 3, nearly all reported that their case study illustrated a contribution to ensuring access to good quality education (SDG4), while around half said it showed a contribution to achieving decent work and economic growth (SDG8), reduced inequality (SDG10) or partnerships for the goals (SDG17).

2. <https://resources.unsdsn.org/six-transformations-to-achieve-the-sustainable-development-goals-sdgs>.

Figure 3: UN SDGs reported in 23 TNE impact case studies (frequency of SDG reported)



The focus on broadening access to education and the workforce is a common theme that recurs throughout our research. Respondents point to TNE as a significant driver of social and economic mobility in partner countries.

A more detailed analysis of the case studies shows that TNE generates a broader impact, extending beyond access to education and reducing inequalities. The case study authors describe how the educational content of TNE programmes contributes to a range of other goals, including the sustainability of cities and communities (SDG11), gender equality (SDG5), good health and well-being (SDG3) and responsible consumption and production (SDG12).

Stakeholder interviews in partner countries add more detail. They suggest that country context is an essential factor in shaping the impact of TNE in achieving different SDGs.

For example, increasing access to HE *'to raise up'* is a core driver of TNE in Nigeria. *'Sheer lack of access, and the huge gap between demand and supply'* has forced Nigerians to go everywhere to study – there is a *'hunger that cannot be met domestically'*.

In Egypt, TNE partnerships are about quality education and access to it. TNE is provided on an overtly exclusive basis. It is concentrated in the private sector, while most students in Egypt attend public universities with almost nonexistent tuition fees. Given the higher fees attached to it, one interviewee expressed concerns that while TNE widens access, it also reproduces inequality. However, this needs to be contextualised. Unlike public higher

education provision, TNE is not subsidised, and operates on a cost-recovery basis. Therefore, it attracts higher tuition fees compared with those of local public HEIs.

Partner country interviews also point to differential impacts on groups in society. In Pakistan, for example, TNE has elements of both inclusivity and exclusivity: the fee structure is higher than for domestic provision but less than going abroad to study. It is a *'godsend for those who cannot afford to go to the UK'*. But affordability is limited, as is the pool of people with the educational background to succeed in TNE programmes.

The interview evidence from Greece – the major UK TNE host in Europe – reveals that TNE partnerships are an alternative route to higher education, promoting SDG4. Moreover, this route is particularly attractive to students from disadvantaged economic and social backgrounds, and therefore directly related to SDG10. These students can often not afford the high financial cost of private tuition required to succeed in the national exams for entry to Greek universities. Also, the price of TNE in Greece is substantially lower than the cost of studying in the UK, especially in the post-Brexit era.

Additionally, the interviews with key stakeholders indicate that a large proportion of the students who experience UK TNE programmes are female and mature students with family and other commitments who would not otherwise have been able to study on a higher education programme. This applies generally to the majority of the TNE students globally.

Refugee Protection and Forced Migration Studies

Author:

Mike Winter, Director International Affairs, University of London

1

Case Study

The University of London has a long history of engagement with national and multinational agencies in the field of refugee policy and practice. Its Refugee Law Initiative (RFI) is the only academic centre in the UK to concentrate specifically on international refugee law. As a national focal point for leading and promoting research in this field, the RFI works to integrate the shared interests of refugee law scholars and practitioners, stimulate collaboration between academics and non-academics, and achieve policy impact at the national and international levels.

In response to needs identified through the RFI, and to help address urgent UN priorities, in 2016 the University launched a new online MA in Refugee Protection and Forced Migration Studies. Since then, it has become one of the largest programmes on forced migration anywhere in the world. With students across the globe, the programme provides a legal, practical and theoretical understanding of refugee protection and forced migration. The programme enables students to become more independent in managing and critiquing law, policy and practice, and in gathering, organising and deploying evidence to form balanced judgements and develop policy recommendations.

Graduates pursue careers in a range of professional contexts in the refugee, human rights or humanitarian fields; and employers include international agencies, such as the United Nations High Commission for Refugees (UNHCR), the International Committee of the Red Cross (ICRC) and the International Organization for Migration (IOM), governmental bodies and non-governmental organisations.

Recently the University established a partnership with the UNHCR to provide bursaries for Commission employees around the world. The University's collaboration with the UNHCR extends also to representation on the Commission's panel of specialist advisors; and the University has developed a MOOC on Internal Displacement, Conflict and Protection to support the UN's heightened focus on the growing global challenge of internal displacement. The programme also attracts talented scholars funded by the Commonwealth Scholarships Commission.

In Uzbekistan, TNE has opened lifelong learning opportunities (SDG4), providing value for older people who can attend university for the first time.

The picture of TNE's contribution to SDG8 (decent work and economic growth) is complex. Employment was flagged as a concern in Nigeria, while in Pakistan, numerous respondents highlighted employability as a critical value of TNE partnerships (*'providing employable graduates'*). There is no question that TNE has a direct and positive impact on employability in Egypt, but only for students who can access and afford the TNE provision.

Overall, the research provides evidence of the direct contribution of TNE partnerships to 15 of the 17 SDGs. While the most substantial contribution is to SDG4, the evidence shows that TNE acts as a catalyst for achieving broader SDG-specific impact, such as good health and wellbeing, and promoting collaboration to achieve all 17 goals (SDG17).

The critical importance of context is an important message that should not be overlooked if TNE partnerships are to deliver maximum value and impact.

Policymakers and HE leaders need a clear and comprehensive understanding of each country's context and what partnerships can and cannot achieve. Policymakers in-country might also consider what measures they can take to enable TNE to realise its full potential and provide maximum value. The evidence suggests that policy interventions (e.g. on regulatory frameworks), strategic initiatives, funding allocations, etc., may all have the potential to do this.

5. The value of TNE for partner countries:

Contribution to capacity building and institutional development

This section explores the value of TNE for partner countries. We observe that the importance of TNE varies according to the maturity of the higher education system it engages with. As higher education systems develop and cater to the needs of a growing proportion of a country's population, the role of TNE shifts from being focused on demand absorption to becoming more preoccupied with quality and catering to the needs of underrepresented student groups. (This is explored further in Section 8.3).

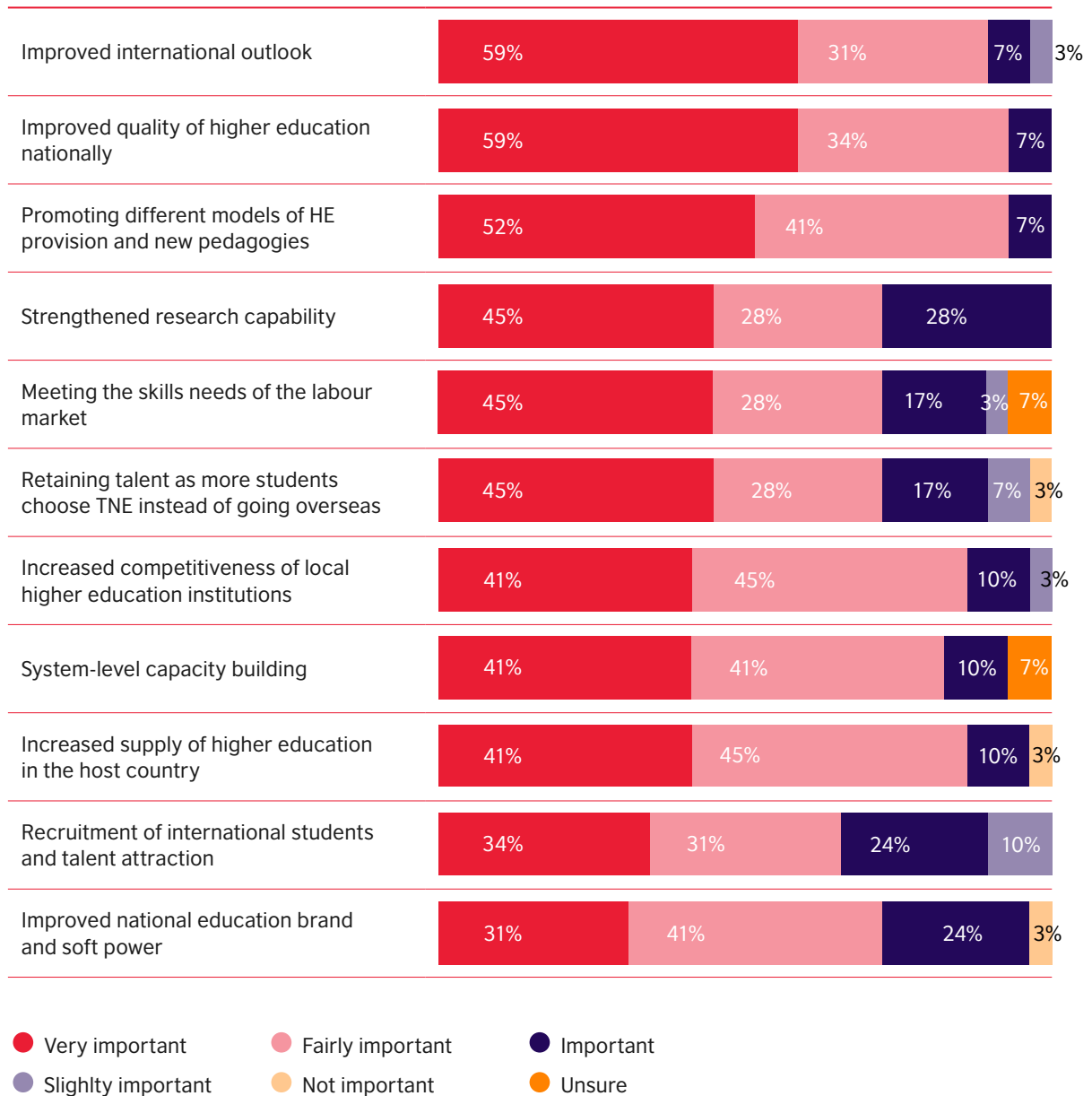
This section considers the survey responses from HEIs based in partner countries hosting TNE programmes. The majority of the responses were from China and Pakistan (21 per cent from each country), followed by Vietnam (19 per cent) and Turkey (10 per cent).

Survey respondents ranked the international outlook of the domestic higher education system, alongside the improved quality of higher education, as the most important factors (rated by 59 per cent of the survey HEIs).

As shown in Figure 4, [Promotion of] Different models of HE provision and new pedagogies was ranked as the second most important factor by more than half of the HEIs (52 per cent), with a further 41 per cent rating it as a fairly important. In joint third place, ranked as very important by 45 per cent of the respondents and 28 per cent as fairly important, were:

- strengthened research capacity
- meeting skills needs of the labour market
- retaining talent as more students choose TNE instead of going overseas

Figure 4: How important is each of the following factors to the host country (n=29)



5.1 Enhanced supply of quality higher education and institutional development

One of the main drivers of the growth of international education in recent decades has been the unmet demand for university places, particularly in fast-growing middle-income countries (Bennell and Pearce, 2003; Healey, 2008). While economic growth has fuelled demand for higher education, the expansion of the domestic higher education sector has often lagged. Students who fund their own studies may seek instead to enrol with international universities, either by travelling abroad or through TNE. This is sometimes referred to as TNE's 'demand-absorbing' function. Among the countries examined in this study, Uzbekistan fits this profile well, in that a primary value of TNE is increasing the supply of higher education.

When growing numbers of students travel overseas to study because of a shortage of supply of suitable local higher education, governments often become concerned about the resultant outflow of funds and the risk of 'brain drain', both of which may hamper economic development. By encouraging foreign universities to set up transnational partnerships in-country to meet this demand, the host government can reduce the financial outflow and the emigration of talent (Vincent-Lancrin, 2007; Healey, 2017).

The survey asked overseas partner HEIs to rate the importance of a range of factors associated with TNE for partner countries (See Figure 4). 'Increased supply of higher education' and 'Meeting the skills needs of the labour market' were the most significant factors, with 95 per cent of respondents rating them as important or very important.

UK TNE makes a significant impact in many small and island states with limited domestic options for students, and some larger nations with limited higher education systems.

The contribution of TNE to the overall supply of higher education varies enormously between countries. Figure 5 shows the 30 countries in which UK TNE makes the most significant contribution, by expressing UK TNE enrolments as a percentage of domestic HE enrolments.

When growing numbers of students travel overseas to study because of a shortage of supply of suitable local higher education, governments often become concerned about the resultant outflow of funds and the risk of 'brain drain' both of which may hamper economic development

Figure 5: Contribution of UK TNE to local HE provision



Students on UK TNE programmes as a percentage of home tertiary enrolments

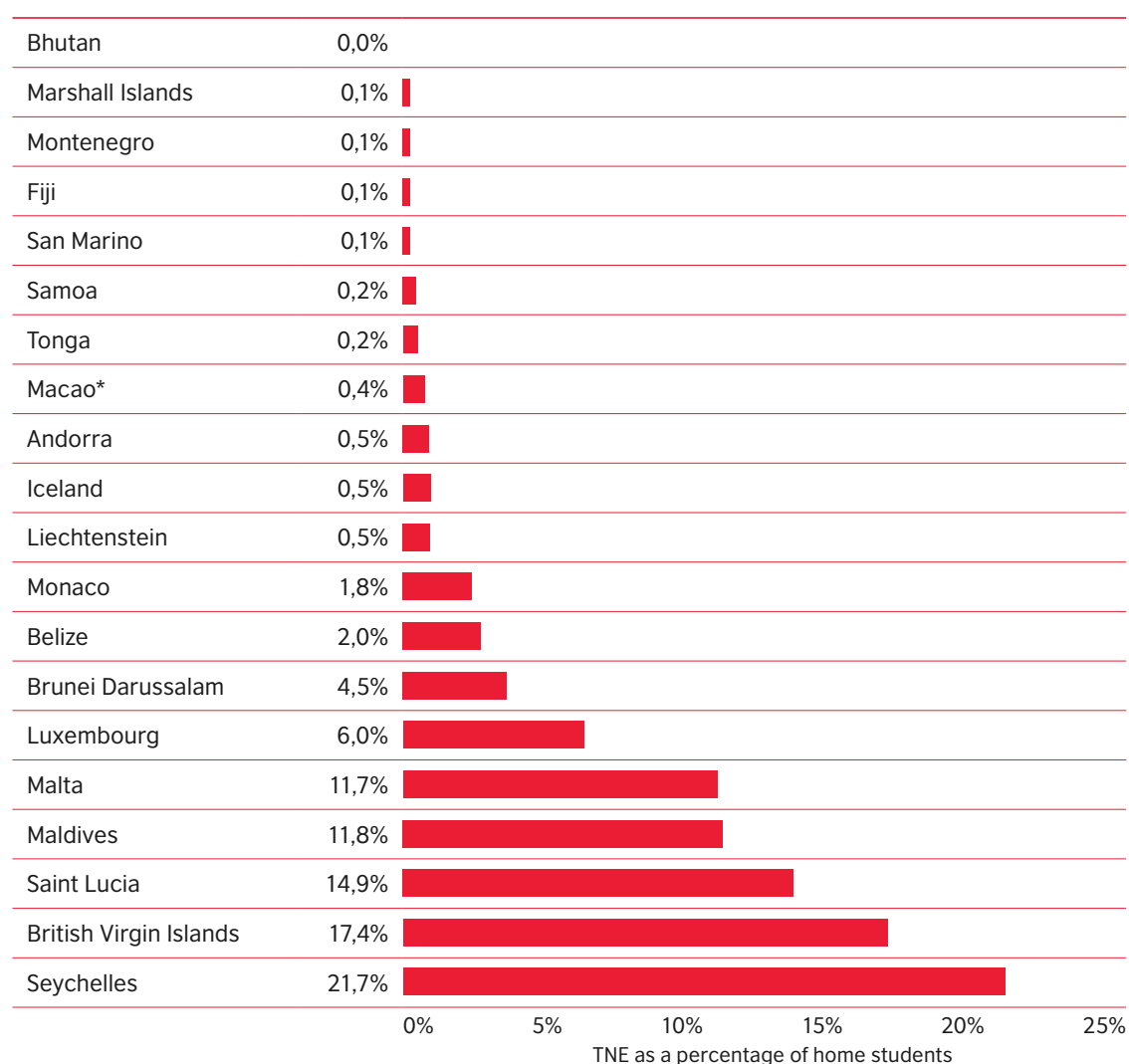
The contribution of TNE to small nations

TNE makes a significant contribution to small nations with limited capacity to build diverse higher education systems, given the lack of scale and the small numbers of the youthful population demanding tertiary education.

Figure 6 below shows the numbers of students from the countries listed, expressed

as a proportion of the domestic tertiary education system. More than a fifth of the local tertiary students in Seychelles are enrolled on UK TNE programmes, followed by Saint Lucia and the British Virgin Islands. UK TNE accounts for more than 10 per cent of the tertiary enrolments in Malta and the Maldives.

Figure 6: Contribution of UK TNE to local HE provision (small nations)



* China, Macao Special Administrative Region

Data sources: HESA Aggregate Offshore Record 2020/21, UNESCO Institute of Statistics, ISCED Levels 6, 7 and 8.
Methodological note: the chart shows students on UK TNE programmes expressed as a proportion of domestic enrolments.
The data is calculated as an average of the past two years of the Aggregate Offshore Record and the UIS data..

Mismatches between demand and local supply of higher education are often short-lived, becoming rebalanced over the longer term by an expansion of the local system after a period of high rates of outbound mobility. For example, Greece, Malaysia and Singapore experienced very high rates of outbound mobility in the 1980s and 1990s, as the growing demand for higher education as a means of social and economic mobility was not able to be accommodated because of restrictions in the supply of higher education (Psacharopoulos, 2003). Malaysia and Singapore responded in the mid-1990s by encouraging TNE. The resulting growth of partnerships and branch campuses has meant that for nearly two decades, there have been more students in TNE in those countries than those studying abroad (Ziguras and Gribble 2015). TNE has also grown in Greece for the same reasons, albeit at a slower rate due to a lack of government support, recognition and quality assurance.

The value of TNE may change over time, reflecting changes in domestic supply. For example, tertiary education participation rates in China were about 6 per cent in 2000. Hence, the early development of any TNE programmes helped to grow local capacity quickly, and regulatory frameworks were initially relatively loose. Over time, the Chinese Ministry of Education has become increasingly selective to ensure that TNE programmes complement rather than compete with local universities (Gu, 2009; Mok and Xu, 2008). Now that tertiary participation is about 58 per cent, the Chinese government sees TNE's value in filling specific supply gaps, focusing on science, technology, engineering and maths (STEM)

programmes, joint doctoral programmes, and expanding capacity in second and third-tier cities³. As a result, Chinese regulators are increasingly active in picking and choosing which programmes will be allowed to establish in which locations, all to complement rather than compete with Chinese public universities.

The changing nature of TNE, reflective of developments in the local higher education system, is further explored in Section 9: Implications.

5.1.1 Widened access to international higher education and reduction in brain drain

Many students who are unwilling or unable to travel abroad to study still seek an internationally recognised qualification (Wilkins et al., 2012; British Council, 2014). By studying for a UK award with a franchise partner or at an international branch campus, even though the educational experience and learning environment may not be directly comparable with the home campus, the students know that they will qualify for a UK degree in the English language, which will be recognised by employers and immigration authorities globally (British Council, 2014; Hill and Sughnani, 2021; Li et al., 2021).

Students can gain an internationally recognised qualification much more affordably, both because they avoid the travel and living costs of studying overseas and because tuition fees are invariably much lower at the TNE partner than if they studied at the home campuses (Humfrey, 2009; Waters and Leung, 2013; Levatino, 2017; Wilkins and Juusola,

3. QAA (2020), Country report: People's Republic of China.
<https://www.qaa.ac.uk/news-events/news/new-country-report-people-s-republic-of-china>.

2018). Universities that have sought to charge the same tuition fees at both their home and international campuses – notably George Mason University in Ras Al-Khaimah and the University of New South Wales in Singapore – quickly learned that without a large tuition fee discount at the IBC, enrolments failed to materialise. Both IBCs were closed after failing to achieve their enrolment targets.

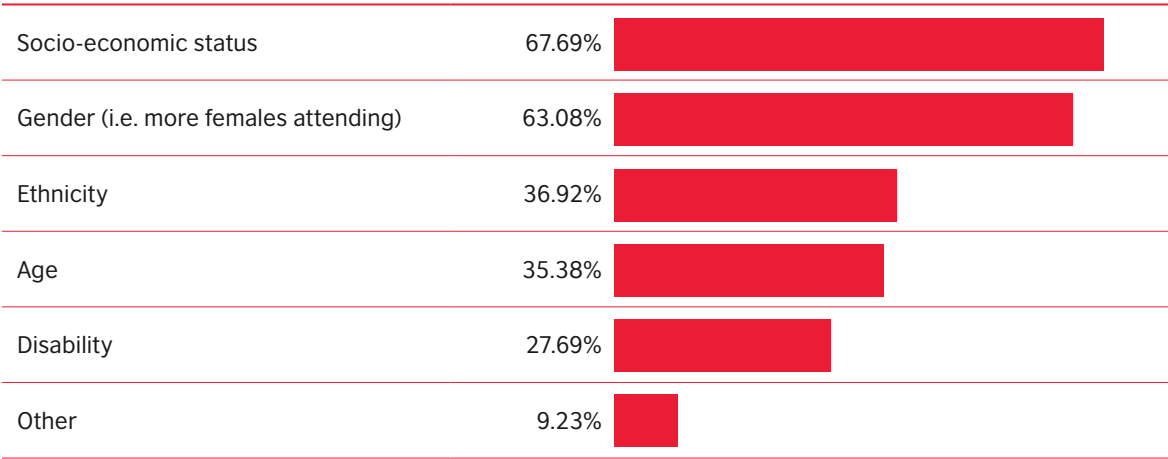
Seventy-three per cent of our survey respondents ranked as important to very important the role of transnational education partnerships in retaining students in the country by giving them an alternative to studying overseas. Interviews supported this: in Nigeria, for example, reducing the incidence of brain drain was presented as an explicit rationale for TNE.

5.1.2 Expanding access to higher education for particular groups of students

The sections above describe efforts to improve access to higher education by using TNE to increase supply overall. However, an essential and often overlooked dimension of TNE is how partner institutions use it to widen participation for specific social groups in their country. Widening access to these groups was a key driver of TNE partnerships in Pakistan, Nigeria, and Greece.

In our survey (see Figure 7), 68 per cent of the respondents agreed that TNE widens access for students from underrepresented socioeconomic groups and contributes to better gender balance (63 per cent), while 37 per cent stated that it widened access for underrepresented ethnicities.

Figure 7: TNE and access to HE to underrepresented student groups (n=65)



Interviews and case studies provide greater detail, summarised in the following sub-sections.

Socioeconomic status

While UK universities have a publicly mandated mission to widen access to higher education for underrepresented domestic students, this has not generally been reflected in the recruitment of international students or the objectives of TNE. For domestic students, universities receive financial support to enrol disabled and low-income students, and their student profiles are subject to public scrutiny to meet their social objectives. Since 1980, however, when public subsidies were withdrawn from international students and universities were permitted to charge tuition fees at a full economic cost, international recruitment and TNE have been regarded as commercial activities. This perception of TNE is dominant in the academic literature. Currently, it is also a dominant narrative in the UK's international education strategy.

However, interviews with senior representatives of UK universities revealed that for some, TNE has come to be seen as an international extension of their domestic widening access mission. The University of London International Programmes, for example, have a strong social justice dimension. The university offers its programmes either online or indirectly through teaching centres overseas, making low-cost education accessible to students without the means to study in local universities.

Glasgow Caledonian University (GCU) provides an example of an institution with a mission to serve the 'common good', dating back to 1875 when it was set up 'to educate poor women'. One of its TNE partnerships is with Transnet Freight Rail in South Africa, a public utility with 30,000 employees. GCU works in partnership with the University of Johannesburg to provide

undergraduate and postgraduate programmes for the rail company's workers. The partnership has graduated 1,000 students from Transnet Freight Rail, almost all low-income black employees who would otherwise have had no access to formal higher education in the last eight years.

In another TNE venture in Bangladesh, GCU has established a nursing college as a social enterprise. The college principal was seconded from Glasgow, and a flying faculty model was used to train locally hired faculty members. It aimed to provide training for women from rural villages so that they could return to their communities and deliver primary health care. The college is now financially sustainable and is being absorbed by the University of Dhaka, which was 'always the plan'.

In Hong Kong, local universities are highly selective, and many secondary students are privately tutored to achieve the necessary grades to achieve entry. Economically disadvantaged students have been typically left out. In response, the government allowed local universities to establish community colleges which became 'second chance' providers, enrolling students who had missed out on places in more prestigious programmes. These colleges offered two-year diploma programmes, followed by enrolment in TNE top-up degrees offered by foreign, mainly UK, HEIs (Leung and Waters, 2013; Yang, 2006b). Similarly, in Singapore, TNE provided by private colleges and professional associations such as the Singapore Institute of Management often caters to 'second chance learners', who miss out on entry to competitive public universities and cannot afford to study abroad (Hoare, 2012; Ziguras and Gribble, 2015).

Gender

In some countries, families are reluctant to allow female students to study abroad, resulting in more male than female students being internationally mobile. The result is that the female participation rate in TNE programmes can be higher than among internationally mobile students and within the domestic higher education system. In the case of the TNE provision at Millennium Universal College in Pakistan, women constitute 55 per cent of the student body. This perhaps explains why over 60 per cent of survey respondents believe that TNE expands opportunities for female students.

It is difficult to test this belief, since no data on the gender of UK TNE students is available, and we are not aware of any published research on this point. However, the proposed move to collecting UK TNE data at the student level rather than the programme level will reveal the gender composition of TNE students for the first time. We will then be able to assess how it relates to the that of internationally mobile students and domestic higher education students, for whom gender data is readily available.

In some cases, TNE programmes actively endeavour to support women's entry into specific industries. For example, Metropolitan College in Greece, the largest TNE host institution in the country, has developed a plethora of initiatives promoting widening participation. Most interesting is the initiative to educate 300 women entrepreneurs in the tourism industry with the support of 40 volunteers from across the college's stakeholder groups (mature students, staff and alumni), who acted as trainers and mentors.

Ethnicity

Sometimes the misalignment of demand and domestic supply is compounded by other obstacles to remaining at home for higher education. In the 1990s, for example, public universities in Malaysia operated quotas for citizens not belonging to the Bumiputra ethnic majority, forcing many Chinese Malaysians to seek places in Australia and UK universities (Chiu, 2000). In the United Arab Emirates (UAE), where expatriates make up 88 per cent of the population, the children of expatriate workers are not eligible for admission to the Emirati public universities (Wilkins, 2011; Madichie and Kolo, 2013). In such a case, the student market is completely segmented, and the TNE partnerships and national higher education system are operating in parallel, recruiting different types of students.

A representative of the University of London cited the example of a programme that disproportionately enrolls young Muslim women in Singapore whose parents forbid them from studying in local institutions with men. In a more extreme example, prisoners worldwide routinely studied on the university's programmes, most famously Nelson Mandela who studied law while incarcerated on Robben Island. The University of London developed an online MA in Refugee Protection and Forced Migration Studies in response to the 2015 Syrian refugee crisis. It aims to support professionals who work with refugees by giving them 'a solid legal, practical and theoretical understanding of refugee protection and forced migration'. (See pg 30, *Refugee Protection and Forced Migration Studies*).

TNE can also expand access where there are cultural or religious obstacles to studying abroad, and the educational culture of local

universities is antipathetic to a liberal or critical approach to learning. For example, for students in countries with a strong religious influence on acceptable behaviour and intolerance of difference, studying at the IBC of a UK university may give them the academic freedom to express themselves in a more nurturing international environment.

Age

Mature students are sometimes under-served in countries with rapidly growing education systems, where the emphasis has been on increasing access to bachelor's degrees. A prominent topic in the interviews with international higher education institutions was the value of TNE in enabling older students with work commitments to upgrade their qualifications. Uzbekistan was a case in point, where it was said that TNE had opened up lifelong learning opportunities.

In countries where the domestic higher education system is overwhelmingly designed to accommodate school leavers who study full-time, some students may be attracted to study with TNE providers because the curriculum is delivered much more flexibly – for example, by distance learning, or part-time out of working hours (British Council, 2014). For example, most UK TNE in Singapore serves older working, part-time professional students who cannot access similar vocational courses from local institutions. While Singapore has a world-class higher education system and has set itself the target of attracting foreign universities to join its Global Schoolhouse initiative, many working students choose part-time study at UK and Australian universities through PSB Academy because the delivery model is highly flexible and allows accelerated completion times by studying intensively in the evenings.

The importance of online education for continuous professional development (CPD) was highlighted in many interviews with HEIs and organisations active in sub-Saharan Africa. While recognition of online and distance education remains problematic, learners appreciate the development opportunity TNE offers, which explains the high numbers of enrolments in online postgraduate programmes in Nigeria. The value of TNE for CPD is mirrored in other regions; for example, in Dubai, almost all of Heriot-Watt University's postgraduate students are studying professional disciplines part-time.

Disability

Students with disabilities may not be able to access international study for health reasons or because of the medical checks required to obtain student visas. Despite UK scholarships and financial support schemes for international students with disabilities and special educational needs, the more fundamental challenge is that students with significant physical or mental disabilities may be unable or unwilling to travel internationally. TNE, and especially distance learning, opens up the possibility of being able to study for a UK qualification from either a local partner institution or home.

There is currently no data on the scale of this potential market for TNE. However, a recent report by Hubble and Bolton (2021) reported that 'in 2019/20 332,300 UK higher education students said that they had a disability of some kind, this was 17.3 per cent of all home students. The number of students with a known disability has increased by 106,000 or 47 per cent since 2014/15'(p.3). This suggests that the likely global market for TNE from geographically immobile disabled students is likely to be many millions.

5.1.3 Attracting international students

The obverse of demand absorption is for the partner government to use TNE to attract students from surrounding countries, boost educational exports and attract international talent. By drawing foreign universities to cluster their TNE activities in-country, the country can seek to establish itself as an education hub (Knight, 2011). This strategy may help the country diversify its export base or overcome skilled labour shortages (Mok and Yu, 2011; Lee, 2014).

Singapore's Global Schoolhouse initiative was designed to create an education hub of foreign providers that would attract the global talent necessary to transform the city-state into a knowledge-based economy (Mok, 2008; Sidhu et al., 2011). Mauritius has similarly used TNE to diversify its export base away from reliance on sugar cane by encouraging the UK and French universities to set up campuses in its Unicity; these include Middlesex University, Ecole Centrale de Nantes and Université Paris II Panthéon Assas (Mariaye and Samuel, 2018).

In some cases, the TNE partner is a peer university seeking to work with the home university to offer a joint programme that allows it to compete more effectively for internationally mobile students. The Trium EMBA, for example, was jointly established by the London School of Economics and Political Science, École des Hautes Études Commerciales de Paris and New York University Stern in 2001, to combine the distinctive discipline strengths of the three universities and attract executive students with global career aspirations. In the Financial Times 2020 Executive Master of Business Administration (EMBA) global rankings, the Trium EMBA ranks fourth globally, with another joint EMBA programme – Kellogg- Hong Kong University of Science and Technology – ranked first.

The obverse of demand absorption is for the partner government to use TNE to attract students from surrounding countries, boost educational exports and attract international talent

5.1.4 Improved quality of higher education provision

Over 90 per cent of respondents rated ‘improved quality of higher education’ as essential or very important factors associated with TNE for partner countries (See Figure 4). Our research provides examples of governments, HEIs and students making use of TNE (albeit in different ways) to enhance the quality of local higher education provision.

For governments, this may be about adding value to, or diversifying, their domestic systems. Indonesia and India, for example, both seek to attract top-ranked international universities to set up campuses, not so much to increase the overall size of the system as to develop niche high-quality international study options to contribute to national competitiveness, while expanding choices for students.

In the Philippines, the Commission for Higher Education has used TNE partnerships through the British Council- Commission on Higher Education Joint Development of Niche Programmes through Philippine-UK Linkages programme, to introduce new interdisciplinary programmes deemed of national importance. These include programmes on climate change; design engineering; tropical medicine and public health; energy security and renewable energy; oceanography; and digital innovation, and creativity.

The provision of dual degrees through TNE – a form of diversification – was a key value in various countries. These may be at the undergraduate or postgraduate level.

Nigeria is one of the UK’s largest TNE partners, with the majority of the students studying at the master’s level (87 per cent) and online. TNE and online programmes diversify Nigeria’s postgraduate education landscape, illustrated by a partnership between Covenant University and the Massachusetts Institute of Technology in collaborative MicroMasters Degrees. Students can earn a master’s degree at either institution in business administration, economics, mechanical engineering, and computer science⁴.

TNE often improves the quality and diversity of an institution’s offer, enabling it to develop and thrive. Some institutions enter a TNE partnership to learn from a more prestigious home university and accelerate their organisational development. The arrangement may focus on revenue maximisation in the early years, but as they mature and build their brand in the local market, motivation shifts to leveraging the partnership to acquire degree-awarding rights (Anis et al., 2018).

In Malaysia, for example, since the 1980s and 1990s, many small private colleges with no degree-awarding powers have franchised UK university degrees and, over time, developed their staff and infrastructure until they could become university colleges and, ultimately, autonomous universities. Among the best known are Sunway University and Taylor’s University, which started in the mid-1990s as private colleges offering UK programmes on a 2+1 basis. Sunway University continues to provide some dual degrees with Lancaster University, one of its early UK TNE partners. Many Malaysian students in the UK still follow a 2+1 or 3+1 route, with the final top-up year taking place in the UK.

4. <http://archive.covenantuniversity.edu.ng/wp-content/uploads/2019/04/Covenant-MIT-Collaborate-on-MicroMasters-Pathway.pdf>

TNE partnerships in Uzbekistan have operated as a vehicle for increasing the autonomy of local institutions. But particular types of TNE are seen to be more helpful. In Uzbekistan, validation programmes are perceived as the most relevant to the local market because they permit local institutions to develop their identities. They combine local relevance with the prestige of a UK degree. On the other hand, franchising can limit academic freedom in the host country. There are instances of franchising being tried and abandoned in Uzbekistan because that local relevance was missing.

In some cases, internationally linked education providers provide models for innovation that impact the local system. For example, the Cardiff Metropolitan University representative showed how its TNE operations in Oman led to a change in the Omani government's approach to broadband. Before the Covid pandemic, its partner Gulf College had been unable to fully use the university's virtual learning environment because of the poor quality of broadband outside Muscat. In contrast to Gulf College, there was little understanding or use of online learning by the local institutions. When the Covid pandemic forced a lockdown in Oman, Gulf College and its staff and students lobbied the government for an urgent upgrade in broadband. When the government responded, it enabled Gulf College to support its students better. There was also a strong demonstration effect, with other higher education institutions reaching out to Gulf College to support the development of online teaching resources.

For students and broader communities, the appeal of TNE is often based on a belief that

foreign programmes are of higher quality than those offered by domestic universities. In Uzbekistan, there is a perception that TNE partner institutions are the best higher education providers; this is linked to the rise of the English language in the governing classes. In Greek society, the UK higher education system is perceived to be one of the best globally, and this is one explanation for the high demand for UK TNE in the country. In many cases, students are voting with their feet and paying higher tuition fees for TNE programmes than they would at domestic universities.

We draw some lessons from our research for policymakers and higher education institutions.

First, while there are good examples of TNE's value in improving the quality and diversity of higher education, government policy often lags. In many countries, TNE and private higher education more generally have been allowed to develop without an adequate regulatory or quality assurance framework until problems emerge that force government intervention (Levy 2012; Ziguras and McBurnie 2015).

The absence of a policy framework that enables and encourages TNE (or worse, the presence of one that actively discourages it, as in the case of Greece) limits its potential impact. Nigeria, for example, states that it is working towards a renewed regulatory framework to encourage a physical presence for international branch campuses in the country with Nigerian delivery partners. However, holders of foreign degrees in Nigeria must produce evidence of their overseas study, such as student visas, which makes the recognition of online degrees impossible. Many Nigerian students circumvent this by studying

for UK degrees in neighbouring Ghana. In India, attempts to pass legislation allowing foreign universities to set up campuses to absorb demand date back to 2007; a new law was passed in 2020 (Chakraborty, 2020). Subsequent regulations in 2022 intend to streamline the collaborative provision of joint, dual or twinning programmes between Indian and overseas institutions⁵. Currently, proposals are set to liberalise further the setting up of IBCs outside the GIFT City special economic zone in Gujarat⁶.

Secondly, while there may be a perception that foreign programmes are of higher quality than domestic provisions, the reality can only be safeguarded by effective quality assurance systems at national and institutional levels. Without these, there is the potential to diffuse quality assurance practices from foreign

programmes to the local higher education provision. Benefits are realised only through the full integration of TNE in the national quality assurance system of the partner countries. For example, interview evidence from UAE, where TNE is fully integrated into the HE system, shows that TNE contributes to improvements in the quality of the domestic provision. In contrast, in Greece, where TNE has been treated as exogenous to the HE system and therefore not part of the national quality assurance system, the value of TNE has not reached its full potential. Tamrat and Teferra (2021) argue that in Ethiopia, implementation issues have resulted in a patchy and inconsistently applied regulatory framework that has not been able to ensure consistent quality and has undermined provider confidence in the quality assurance process.



The absence of a policy framework that enables and encourages TNE (or worse, the presence of one that actively discourages it), limits its potential impact



5. UGC letter and Regulations to offer twinning, joint degree and dual degree programmes..
https://www.ugc.ac.in/ugc_notices.aspx?id=NDQ2Ng==

6. <https://www.moneycontrol.com/news/business/economy/ugc-forms-committee-finalising-rules-to-allow-foreign-universities-to-open-campuses-in-india-8518571.html>

5.1.5 Enhancing the internationalisation of partner institutions

In our survey, over 90 per cent of respondents rated ‘improved international outlook’ as an essential factor associated with TNE for partner countries. The ‘internationalisation of the curriculum and the institution’ was similarly identified as important to very important by just under 90 per cent of respondents (See Figure 8).

The interviews were consistent with these findings: for example, the institution’s internationalisation was noted as a top three driver of TNE partnerships in Egypt. In Pakistan, it was internationalising the curriculum.

There are a number of examples of policymakers recognising TNE as a vehicle to internationalise the domestic higher education sector. For example, the Commission of Higher Education (CHED) in the Philippines, in partnership with the British Council, is funding Access and Competitiveness through Internationalisation of Higher Education (ACT-IHE)⁷, supporting collaborative TNE programmes between the UK and Philippine universities that aim to internationalise the local institutions. The initiative aims to enhance the competitiveness of local universities by upskilling staff to engage and deliver joint programmes, including through distance and online education.

In Vietnam, TNE is believed to increase the mobility of students, faculty and scholars to

other countries. Beyond the physical mobility of students, international collaborations involve the development of training models, academic programme design, knowledge transfer and academic exchange. TNE is seen to ‘promote the internationalisation of training programs (*both for international students and the training programs taught in English for Vietnamese students*)’.

Internationalisation of the curriculum and institution is generally characterised by one or more of the following:

- most of the UK TNE courses are developed and taught in English
- they attract international students to the local area
- they engage local staff in jointly developed courses
- they stimulate mobility in all forms, including for staff and students, academic programmes, and branch campuses.

Our research found evidence that TNE programmes are contributing to all of these. For example, most TNE programmes are taught in English. Other recent British Council research shows that 35 per cent of the TNE students in selected European countries were international students, and that more than three-quarters (79 per cent) of TNE students also spoke two or more foreign languages in addition to their mother tongue (Ilieva et al., 2021). Therefore, TNE attracts students with language capital to the location of its delivery.

7. <https://www.britishcouncil.ph/call-for-interest-tne-partnerships-2022>

5.2 Enhancing teaching in partner institutions

5.2.1 Developing teaching capacity

From an early stage in the evolution of TNE provision, when most partner countries' primary motivation was to absorb domestic demand, a secondary aim was to develop the teaching capacity of their systems. It has been argued that some TNE models are better than others in achieving the latter. Altbach and de Wit (2020), for example, suggest that *'There is little evidence that international branch campuses have contributed much to the reform of the higher education systems in which they operate'* (p.15)

As discussed above, many examples illustrate how TNE has helped build the partner's internal teaching capacity. This effect can also work at the macro level, strengthening the capacity of universities in the host HE sector through a 'demonstration effect'. By encouraging leading foreign universities to set up branch campuses, typically in partnership with national public universities, the government hopes that a combination of sharing knowledge and the wider demonstration effect – with other national universities observing and copying the innovations that the foreign universities bring into the country – will lead to sector-wide improvements in quality and efficiency.

Most jurisdictions, like Malaysia, Hong Kong and China, started with relatively liberal TNE frameworks, which were tightened over time to reflect the changing needs of the local HE system.

Arguably, China's primary motivation more recently for establishing 12 Sino-foreign cooperative universities is technology transfer (Hou et al., 2014; Hu and Willis, 2017). The foreign partners are all elite universities, including the Universities of Nottingham and Liverpool, New York University and Duke University and the Chinese University of Hong Kong. The Chinese partners are also major universities. The resulting 'cooperative universities' are new, private universities. The Chinese partners typically provide the campus and infrastructure, and the foreign universities contribute their curriculum and pedagogy, enabling the former to learn from the latter. A focused attempt to create an international hub of higher education is the Guangdong-Hong-Kong-Macao Greater

In our survey, over 90 per cent of respondents rated 'improved international outlook' as an essential factor associated with TNE for partner countries. The 'internationalisation of the curriculum and the institution' was similarly identified as important to very important by just under 90 per cent of respondents

Bay Area (Xie et al., 2020), with the ambition to strengthen cross-border cooperation in higher education.

Given the scale of the Chinese higher education sector, with approximately 2,000 universities, China's gross tertiary enrolment ratio (42 per cent) and the falling number of 18- to 22-year-olds of university age due to the one-child policy, it is clear that the 12 cooperative universities make no meaningful impact on either demand absorption or educational exports. However, the benefits of technology transfer are clear as China tries to adjust from a traditional reliance on rote learning to student-centred learning for a knowledge economy (Mok and Han, 2016; Mok, 2021).

One example of institutional capacity building identified during the interviews was GCU's 20-year relationship with Caledonian College of Engineering in Oman to support its ambition to become an independent university. The college in Oman focuses on STEM subjects, and 50 per cent of its undergraduates are female. As the college matured and developed, it gained undergraduate degree-awarding powers from the Omani Ministry of Education; as it did so, GCU disengaged from its former franchise arrangement at the undergraduate level and switched the focus to franchising postgraduate degrees and developing a joint doctoral centre to train future faculty members.

A further example is Coventry University's partnership with an electrical company in Egypt to set up The Knowledge Hub Universities (TKH). Similar to the Knowledge Village founded

in Dubai, TKH provides a campus that can host universities worldwide. Coventry University was the first partner in 2019 and currently offers 14 undergraduate degrees. In addition to the usual business, computing and engineering degrees, its range includes psychology, interior architecture and design and graphic design. Coventry has worked closely with the Egyptian 'syndicates' (professional statutory and regulatory bodies) to ensure that the degrees taught by TKH are nationally accredited. This has entailed increasing the duration from three to four years by incorporating a bespoke foundation year.

The University of London provides interesting examples of partnering with public research universities to build their capacity. Some of its teaching centres in Russia, Central Asia and Latin America are public universities, where the local staff teach on the London degrees, typically in discipline areas that are underdeveloped locally. Over time, some have developed their local versions of the London programme, and students graduate with a dual degree. In this way, there has been a transfer of discipline knowledge and pedagogy to the partner universities.

Taking a longer-term perspective, over its 190-year history, many of the University of London's teaching centres (so-called 'colleges in special relation') across the Commonwealth have since developed into major public universities. These include the University of the West Indies, the Universities of Ghana, Ibadan, Nairobi and Zimbabwe in Africa and the Universities of Colombo, Peradeniya, Vidyodaya and Kelaniya in Sri Lanka.

In the Philippines the British Council and CHED initiated the JDNP in 2016⁸. The programme funded 11 Philippine and nine UK HEIs to develop 17 double and joint master's and doctoral programmes. JDNP aimed to address higher education capacity building in the participating local universities in niche subject areas identified as national priorities by the Philippines' government, such as: climate change; design engineering; tropical medicine and public health; energy security and renewable energy; oceanography; and digital innovation, and creativity. Many of the teaching faculty enrolled on the programme. There were tangible benefits for the participating HEIs, including new teaching and research collaborations, the development of new courses, and staff with upgraded qualifications.

The programme's success resulted in continued support from CHED for TNE as a higher education capacity building vehicle. A new bill on TNE was legislated in 2019. With guidance and support from University of Liverpool staff, a follow-up programme that supports academic staff from overseas partner institutions will develop training modules to cascade lessons learned to other teachers in the Philippines. The Postgraduate Certificate Academic Practice is accredited by Advance HE. It enables graduates to simultaneously achieve a University of Liverpool Postgraduate Certificate award and Fellowship of the Higher Education Academy (see case study).

Another example of how TNE contributes to local higher education capacity building is the collaboration between the British Council and Thailand's Office of Higher Education Commission on the Thai-UK Higher Education Partnerships Project⁹. The project focuses on a network of 22 existing TNE links developed as part of the UK-Thailand TNE Development Project from 2015 to 2018 and extends these partnerships to include industry engagement. As a result, Thai and UK institutions facilitate capacity building for members of staff, including management, researchers, academics and those involved in international affairs on the process of internationalisation. Over time, this will lead to a more supportive environment for Thai and UK institutions to forge partnerships.

8. <https://www.britishcouncil.ph/tne/joint-dual-post-degrees>

9. <https://www.britishcouncil.or.th/en/programmes/education/our-work-support-higher-education-and-research-sector/uk-thailand-transnational-education-development-project>

5.2.2 Strengthening the pool of academic talent in host countries

The UK's TNE operations typically employ a mixture of seconded, local and expatriate staff. Not only do the local and expatriate staff strengthen the pool of academic talent in the host country, but their exposure to new pedagogies, forms of assessment and quality assurance systems upskills them, benefitting the local universities they later join. The natural 'brain circulation' between the UK TNE operations and the rest of the higher education system brings a more international orientation to the host sector.

The Covid pandemic has had a powerful impact on transnational teaching partnerships. In particular, the capacity of TNE to upskill staff has been significantly enhanced. All interviewees reported that with the global pivot to online learning in March 2020, online teaching, seminars, conferences, and workshops had become routine, allowing staff working overseas to engage seamlessly in meetings and professional development programmes with staff on the home campus. The representative from Cardiff Metropolitan University explained that the new online environment had broken down barriers between the home and offshore campuses and 'built camaraderie' between staff groups, while the added 'sense of purpose' in helping staff and students through the crisis had built lasting trust. Similar views were expressed by staff at Staffordshire University.

The representative from Northumbria university reported that Covid has '*supercharged our technological capabilities*', noting that all the international staff around the world now meet regularly on Microsoft Teams. He pointed out that this was unlikely to change in the future. Since Covid, there was a much greater awareness of the carbon footprint of international travel and the benefits of meeting online. The university's new 'Virtual First' travel policy means that there is an expectation that in the future, TNE will be managed virtually, rather than by the physical mobility of staff.

Apart from supporting the professional development of existing faculty, there are numerous examples of TNE partnerships focusing on training future faculty. For example, the representative from the University of Nottingham, which has a branch campus in Semenyih, referenced a longstanding agreement with the Malaysian government under which young Malaysian university staff could study for a PhD part-time. In the beginning, they would spend short periods during their PhDs in the UK, but the Malaysian campus increasingly supervised them. More recently, this split-site PhD model has also been used to train young faculty from Vietnam and Myanmar, with all activities based in Semenyih.

TNE enabling collaborative approach: Lancaster University and its global-local research partners

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Engagement between Lancaster University and its global TNE partners is happening at multiple levels. In addition to a wide range of teaching initiatives, Lancaster prides itself on successful collaborations with researchers around the world, including with local partners in regions where it has an international campus presence.

Lancaster seeks to address global challenges by leveraging connections built through TNE partnerships. Since 2006, Lancaster and one of its strategic partners Sunway University, a leading Malaysian private university, have been continually building on existing research strengths and exploring collaborative research opportunities. The launch of the Future Cities Research Institute (FCRI) in 2019, a joint research centre based in Malaysia, marked further commitment from both institutions to advance a shared research agenda. The FCRI aims to become the go-to urban research hub that shapes the global agenda and trains the next generation of researchers.

Supported by the Global Challenges Research Fund, RECIRCULATE is a research and capacity-building project between Lancaster University and partners at several research institutes and universities in Ghana, Nigeria, Kenya, Malawi, Zambia and Botswana. Enabled by over a decade of local engagement efforts and accelerated by the Centre for Global Eco-innovation Nigeria, based at the University of Benin - the first international hub of Lancaster's renowned Centre for Global Eco-Innovation - the project connects researchers with businesses, policy-makers, civil society and community stakeholders. It learns from local expertise to develop tailored solutions, which have been co-created and co-developed to deliver real impact to communities.

FCRI

Research taking place at the FCRI is centred around three themes, namely Digital Cities, Sustainable Cities, Resilient Cities and Liveable Cities, sharing its goal with the SDG 11 'Sustainable Cities and Communities' and tackling other major global SDG challenges associated with rapid urbanisation worldwide. The Centre's research topics complement the work of the Jeffrey Sachs Centre on Sustainable Development (based at Sunway University).

As part of its plan, FCRI researchers will utilise Sunway City, in Kuala Lumpur, as a living lab to explore how cities in the future can be made more liveable and sustainable. The FCRI is looking to expand its research portfolio by including design for healthy living, people-based infrastructure, night-time urban environments and urban food security, which reflect the SDG 12 'Responsible Consumption and Production'.

RECIRCULATE

Seeking to improve a safe circular water economy and to pilot eco-innovative solutions in Africa, the RECIRCULATE project is underpinned by a partnership-based approach aimed at enabling and empowering local partners focussing on water for health, water for energy and water for food. In addition to co-designing research with local communities and businesses, the capacity-building element is also reflected through a substantial training element built into the RECIRCULATE project, which includes training events in Africa, knowledge exchange events, month-long 'residences' at Lancaster University and more widely through digital training with stakeholders across the African continent.

5.3 Enhancing research capacity in local institutions

The importance of TNE partnerships to capacity building in both teaching and research was highlighted by the interviews, case studies and survey with overseas governments and institutions. Additionally, interviews with international partner universities highlighted the importance of collaborative teaching and learning at the postgraduate level, which often contributes to capacity building in niche subject areas. An additional benefit of such collaboration is a natural extension to produce collaborative research outputs.

Increasing research capacity was indicated as a rationale for TNE in Nigeria. In Egypt, it was noted that TNE partnerships enhance the knowledge base and improve research output. Examples include robotics engineering research, which benefits from staff spending time at a UK institution.

While TNE is generally seen as teaching-related, as IBCs mature, some are beginning to develop research in areas of distinctive strength that contribute directly to the agenda of host governments. The University of Nottingham, for example, has established a 'Crops for the Future' research centre in Semenyih to work on tropical agriculture, with funding from the Malaysian government. At its Ningbo campus in China, the university focuses on research on green architecture and renewable energy, again funded by the Chinese government.

Similarly, Heriot-Watt University has established the 'Centre for Smart Construction' at its

branch campus in Dubai, funded by industry. Because there is no government research funding for non-Emirati universities in Dubai, Heriot-Watt has focused on industry-based research that local universities do not undertake. After its success in the construction sector, new research centres for water management and fisheries are in development.

The University of the Philippines Los Baños described how the development of a dual PhD was a natural progression of an established TNE partnership. Having a joint supervisory team contributes to raised awareness of different research perspectives and creates synergy. The example also highlights how an unsupportive regulatory environment can limit the potential of such partnerships. In this case, the difficulty of obtaining visas discouraged visiting researchers and fellows from spending time in the Philippines. The Philippines is one of the world's largest source of skilled workers, but because of this one-way outflow, it lacks structures to host global talent. The *'guidelines are being created to enable visiting researchers to come to the university'*.

IBCs, in particular, have the potential to contribute to the research output of their host country, but the scale of the impact is likely to be proportional to the contribution of TNE to the system as a whole. For example, Pohl and Lane's (2018) study of research in IBCs found that although Chinese IBCs had a larger number of research publications than those in any other country, these accounted for less than 1 per cent of Chinese publications. Conversely, the IBCs in Qatar, which represent a much more significant share of the system as a whole, produced over a quarter of that country's publications between 2006 and 2016.

Vietnamese-German University

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3

Case Study

Jointly supported by the governments of Vietnam, the German Federal State of Hesse and Germany, the Vietnamese-German University (VGU) is the first public Vietnamese university established in binational cooperation. The overall objective of the joint university is to create an autonomous research-oriented HEI in Vietnam based on the German university model, with a focus on technology, its scientific bases and its embedding in society. The German Academic Exchange Service and the German Committee of the World University Service support and advise the VGU. A consortium of German universities constitutes the academic backbone of VGU.

Through its study programmes, research and the implementation of self-governing structures modelled on those of the German partner universities, VGU forms a showcase within the Vietnamese public HE sector. It contributes to the realisation of SDG 4 (quality education) by providing quality HE to its students and giving impetus to the ongoing debate in Vietnamese politics and academia on the concept and realisation of HE quality and autonomy in Vietnam.

Several degree programmes of VGU are directly linked to the realisation of SDGs, among them water technology, reuse and management (SDG 6, clean water and sanitation) from Technical University Darmstadt. Others provide indispensable knowledge and skills for the realisation of SDGs, for example, SDG 8 (decent work and economic growth) with global production engineering from Technical University Berlin, civil engineering from the Biberach University of Applied Sciences or an MBA focused on small and medium enterprises from Leipzig University. The course portfolio is complemented by a research strategy that defines the focal areas for research activities in sustainable manufacturing (SDG 12, responsible consumption and production), sustainable urban development and Transportation (SDG 9, 11) and Environment, Water and Climate Change Adaptation (SDG 6, 7, 9, 13).

5.4 Enhanced student experience

TNE partnerships as vehicles for enhancing student experience – and student services – were mentioned as a top driver and a primary value of TNE by respondents in Egypt, Pakistan and Greece. This was especially indicated in contrast to domestic public university provision in Egypt and Greece. In Egypt, the facilities and infrastructure are superior in the better-funded private sector. In the case of Greece, TNE partnerships are perceived by students as more organised and efficient in their operation than the Greek universities. Other aspects indicated were student access to senior management, the introduction of student-centred learning, and the ability to diverge from the relatively rigid national curriculum. Additionally, visiting speakers from the UK could convey first-hand the international expectations regarding workplace skills.

There was evidence that standards of student experience were imported from the TNE partners. An Egyptian university with UK partners noted that it held weekly staff development for student engagement meetings. Higher education investment in the sizeable Egyptian state sector was too thinly spread; TNE enabled superior provision and a visibly different student experience.

A respondent from a Pakistani institution with several UK TNE partners acknowledged that *‘a lot of work [remains] to be done on student experience’*. But they stressed their reputation for student engagement and providing a *‘safe space’*. Facilities included effective career development and incubation centres for their most popular programmes in partnership

with the UK. This respondent also noted the benefits to students that flow from the internationalisation of the curriculum. However, these benefits were couched in terms of future employability rather than the student experience per se.

Evidence from the interviews from Greece indicates that the partner UK universities’ internal quality assurance mechanisms have contributed to establishing local means to track and improve the student experience. For example, a senior academic operations manager of a host college underlined the central role of module- and course-level student evaluations in promoting culture to continuously improve the student experience. This is a substantial departure from the norm in Greek higher education, where student evaluation surveys are not widely adopted. Overall, the evidence from the different interviews conducted with Greek partner institutions points to the systems and processes of the UK TNE programmes making a strong contribution to promoting an enhanced TNE student experience in the local context.

In Uzbekistan, TNE provision has brought better facilities – and better food – to higher education. TNE partnerships were described as having produced a cultural shift through more assertive and demanding students – a *‘revelation’* in the Uzbek context, where students are listened to by the national agencies. A positive knock-on effect in the Uzbek domestic sector was apparent.

5.5 Improved graduate employability

One of the significant factors in students' satisfaction is their employment after graduation. Graduates of TNE programmes, like graduates who have studied abroad, are more likely to be employed in industries, and roles, where English language proficiency and a global outlook are highly valued. In many countries, economic globalisation has created new opportunities in internationally oriented businesses for such graduates, with salaries significantly higher than in domestically oriented firms. It is unsurprising then that the fields of study that predominate in TNE are business and management and, to a lesser extent, information technology and related fields.

UK universities have a strong focus on graduate employability and a tradition of close links with employers. In some partner countries, universities are, by tradition, very academic and resistant to engagement with the business world. This was particularly true in the former communist countries of eastern Europe and China. UK TNE has been able to change how employability is viewed by bringing a different approach to industry engagement. For example, the representative of the University of Reading explained that its Malaysian campus has made close links with national and regional professional bodies and employers central to its offer, emphasising the importance of industry placements and student volunteering. As a result, some local employers are beginning to demand the same support from the leading Malaysian universities.

Employability flows from skills, and a direct link exists between TNE and skills development. In Pakistan, an essential skill through TNE partnerships was learning critical thinking instead of rote learning. In Uzbekistan, TNE partnerships focus on developing entrepreneurship for start-ups and training for business. In Egypt (see also Section 5.8.1, below), reskilling and upskilling are central goals for the government and a core rationale for having liberalised the TNE regulatory regime in the first place. That policy shift was a response to the fact that public universities in Egypt are not skills-based, apart from professional qualifications such as engineering and medicine. It was said that their graduates could struggle to secure jobs at home or abroad. The private universities with TNE partners are more student-centred and skills-based. Some TNE students

TNE partnerships as vehicles for enhancing student experience – and student services– were mentioned as a top driver and a primary value of TNE by respondents

in Egypt benefit from guest lecturers from the UK, including from UK businesses. This provides students with knowledge of the skills requirements that are expected internationally.

In other host countries, the TNE operations of UK universities play an essential role in training skilled professionals for the local labour market. In Pakistan, Sri Lanka and Malaysia, for example, many members of the judiciary have law degrees from the University of London. The representative from Northumbria University noted that in Sri Lanka, the university's TNE partner, Business Management School, is one of the largest producers of business graduates, explaining that:



‘We have good connections to the Sri Lankan government and [are] seen as the highest quality provider. We have staffed a lot of businesses with our graduates in banking, finance and biomedical. Our employability rates are close to 100 per cent’

**Representative from
Northumbria University**

Coventry University has developed a joint Masters of Management in Aviation Management with Universitas Indonesia, introducing this niche discipline to Indonesia for the first time. The representative of Heriot-Watt similarly highlighted the capacity for TNE to allow the university to share new disciplines with host countries, citing net-zero technology, artificial intelligence and robotics as the disciplines targeted for TNE development.

The role of TNE in widening employment options was highlighted in Vietnam, as one survey respondent observed:



‘TNE brings a new door of career choice, meets the needs of the new generation, and helps Vietnam have a workforce with knowledge of new industries, contributing to Vietnam’s economic development in the process of international integration’

One survey respondent

In Greece, the link between public universities and businesses is often considered inappropriate. This is partly due to the prevalence of the view of an egalitarian role of higher education in Greece, where any link with for-profit organisations is seen as incompatible with the mission of public universities. Consequently, graduates of public universities often experience low employability, especially in professions and subjects where exposure to experiential learning is vital in developing specific skills. In contrast, according to the interview findings, the graduates of UK TNE programmes in Greece have better employability prospects. Alongside the curriculum and the standards of the academic delivery, this improved employability is attributed by interviewees to the emphasis that UK higher education places on experiential learning, internship opportunities and continued professional development.

In addition to responding to local labour market demands, there is a growing pressure on the HEIs to monitor the employability of the TNE graduates from the regulatory bodies. As part of the reaccreditation process, universities are often asked to demonstrate the relevance of the locally delivered programmes to the labour market. Strong evidence of employability and responsiveness to the labour market needs are required to secure successful re-accreditation.

In England, the pressure to evidence the graduate outcomes of TNE students is likely to become a requirement for those HEIs engaged in TNE.

The UK's Joint Information Systems Committee (Jisc) is carrying out a pilot study on the feasibility of graduate outcomes for TNE, in partnership with Universities UK and universities selected to represent a good spread of TNE activities, such as IBCs, distance and online learning, dual and double degrees, validation and franchised degrees. The outcomes of the research are expected to be published in late 2022. The study adopts a two-step approach to measuring graduate outcomes for TNE students:

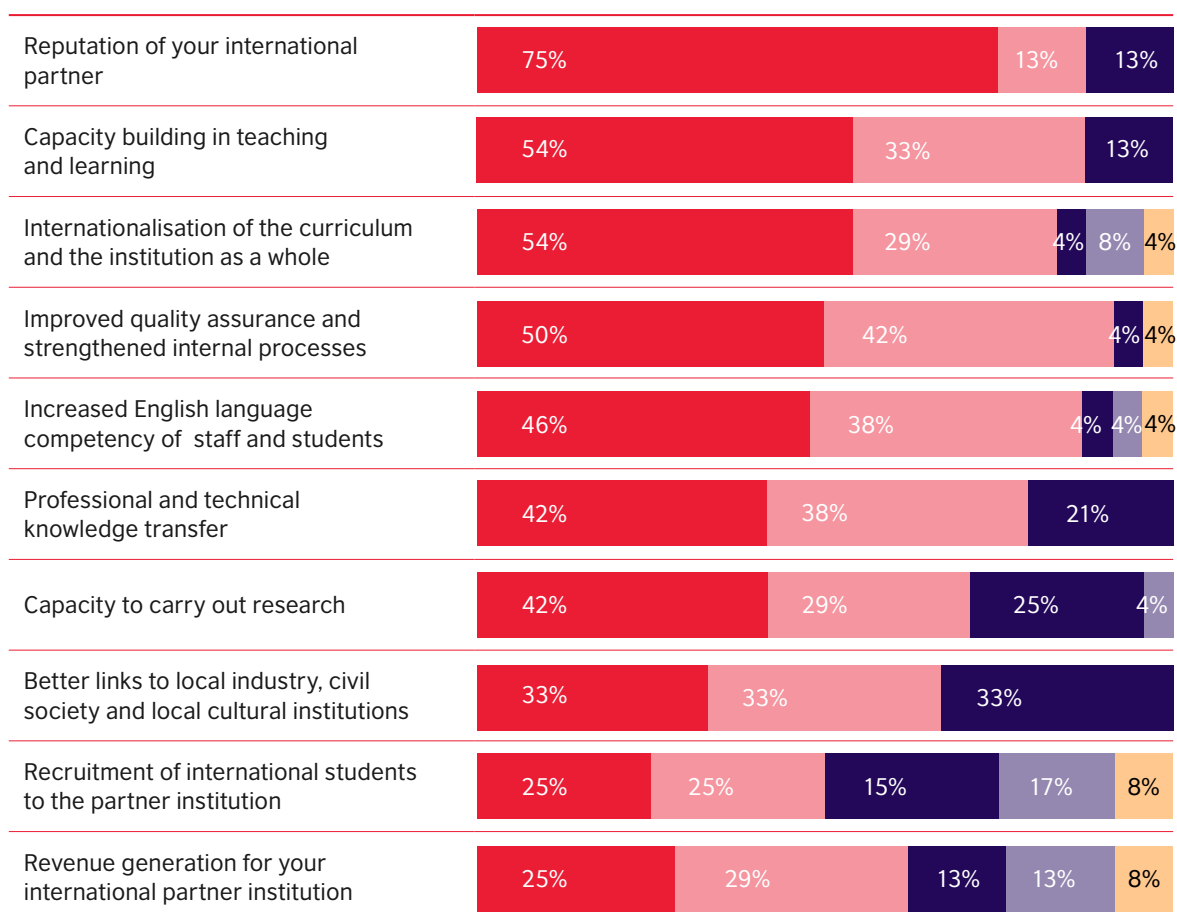
- Review of existing universities' data collection
- Survey with TNE alumni students over the past five years (those who graduated in 2017, 2018, 2019 and 2020, respectively), to establish:
 - levels of graduate outcomes
 - international labour mobility
 - impact of TNE on students' career progression.

With a few exceptions (e.g. Pham, 2018), there are few studies of employers' views in partner countries on the employability of TNE graduates. This is an essential gap in our understanding of this aspect of TNE's value to a group of key stakeholders.

5.6 Reputational value

Reputational enhancement is the rationale for hosting UK TNE across the countries surveyed and the interviews. In the survey conducted for this study, the most essential factor selected by HEIs for hosting TNE programmes was the partner's reputation (see Figure 8). Not a single respondent said it was unimportant.

Figure 8: Importance of factors to the HEIs hosting TNE programmes (n=24)



● Very important ● Fairly important ● Important
● Slightly important ● Not important

‘Prestige and positioning’ was a top three driver of TNE partnerships in Pakistan.

As with the home university, some partner organisations – typically peer universities – may choose TNE partners to raise their global profile and league table position (Sidhu and Christie, 20013). One of the best examples of a partner focused on international brand building is Nanyang Technological University (NTU). In 1992, when polytechnics in the UK were being rebranded as universities, NTU was formed by a merger between the Nanyang Technological Institute and the National Institute of Education. One of its many strategies for raising quality and prestige was establishing joint PhD programmes with elite universities, including the University of Warwick, Columbia University, the University of British Columbia and the Indian Institute of Technology, Bombay. In the 2021 Quacquarelli Symonds World University Rankings, NTU was ranked 11th globally, surpassing all its PhD partners.

The reputation of UK higher education globally is a pull factor for prospective partners. Interviewees in Nigeria, Egypt and Greece attested to the role that ‘Britishness’ and a British education played in the actual foundation of their institutions and TNE programmes. The value of UK higher education was transmitted to partner country communities through TNE.

The same is seen in Greece. The reputation of the UK higher education system as one of the best in the world is highly valued in Greek society. This is also reported to be the main driver for local partners in choosing UK universities for their TNE collaborative arrangements. The result is that more than 90 per cent of the TNE programmes offered in Greece are in collaboration with UK universities. A new development is that policymakers have recognised UK TNE as a means to enhance the internationalisation of the Greek higher education sector. More specifically, in 2021, in collaboration with the British Council of Greece and under the auspices of the British Embassy in Athens, the Greek Ministry of Education developed the initiative UK-Greece Strategic Partnership in Education to foster collaborations between UK and Greek universities¹⁰. This marks the first time the Greek government actively supported the strategic engagement of Greek universities in transnational education activities.

10. <https://www.britishcouncil.gr/en/programmes/education/uk-greece-strategic-partnership-in-education#:~:text=The%20UK%2DGreece%20Strategic%20Partnership,between%20UK%20and%20Greek%20universities.>

Over and above reputation, our research suggests that TNE partnerships play a wider role in ‘soft power’. Ziguras (2018) argues that ‘the projection of soft power remains a primary imperative shaping the international education strategies of most governments’ (p.174). Nye (1990) coined the term ‘soft power’ as the ability of states to co-opt increased international support by positively changing the way the country and its culture are perceived by others:



‘States are happy to subsidise their mechanisms for projecting soft power, and TNE is one means of achieving this. States seek to build their political capital and national brand through high-profile educational linkages with prestigious institutions’

States are happy to subsidise their mechanisms for projecting soft power, and TNE is one means of achieving this. States seek to build their political capital and national brand through high-profile educational linkages with prestigious institutions, based on their major trade partners and political allies. One common feature of such initiatives is that the host government is willing to heavily subsidise the foreign universities’ operations to attract elite institutions to legitimise their global standing and advocate on their behalf (Crist, 2015; Lee, 2015). Qatar’s Education City is a well-known example of these education hubs or ‘knowledge mega-projects’. The Qatar Foundation funds both the campuses and the shared infrastructure – including a golf course and Metro line – and research (Rizzo, 2017).

There are many other examples. In the early 2000s, up to one-third of IBCs had received financial support in the host country (Lawton and Katsomitros, 2012), typically from national or provincial governments. Prestigious universities established IBCs through varying support from host governments, as was the case for New York University and Sorbonne University in Abu Dhabi, and Yale University’s joint campus with the National University of Singapore.

Projecting soft power is designed to change external perceptions of a country. The success of elite foreign universities in education hubs in attracting the best staff and wealthy, cosmopolitan local students may negatively impact domestic universities. But if the host country strengthens its international higher education profile by hosting knowledge hubs, national universities may begin to attract foreign staff and students, constituting an offsetting benefit.

5.7 Building sustainable communities

Building sustainable communities was highlighted mainly by higher education participants from the countries hosting TNE programmes. An example was a jointly developed master's programme in food security contributing to a significant reduction in the usage of pesticides in the area, which significantly improved the rice crops' sustainability and the farming communities' quality of life. This is in addition to benefits such as capacity building at partner institutions in niche subject areas.

The representatives of the UK universities cited multiple examples of how their teaching and research in TNE partnerships contributed to building greater sustainability and resilience in the partner countries. One example is a project-based learning and a site field trip experience of architecture students from the School of Architecture, March Architecture and Urbanism at Metropolitan College, Greece and Portsmouth School of Architecture, March Architecture Course, UK. The project involved planning the remediation and sustainable regeneration of post-industrial sites in the ancient town of Eleusina, located 20 miles outside of Athens, Greece. The area concentrates the largest density of industrial activity in the country and in the last 30 years it was considered one of the most polluted areas in the Mediterranean Sea. The proposals created by the students have been presented to the local authorities and to the local community and have been listed for an exhibition as part of the ELEUSINA Cultural Capital of Europe (2023).

Another example is Lancaster University's strategic effort to address global challenges by leveraging connections built through TNE partnerships. Since 2006, Lancaster University and one of its strategic partners Sunway University, a leading Malaysian private university, have been continually building on existing research strengths and exploring collaborative research opportunities. The launch of the Future Cities Research Institute (FCRI) in 2019, a joint research centre based in Malaysia, marked further commitment from both institutions to advancing a shared research agenda. The FCRI aims to become the go-to urban research hub that shapes the global agenda and trains the next generation of truly international and interdisciplinary researchers across the Global South and Global North. Research taking place at the FCRI is centred around four themes, namely digital cities, sustainable cities, resilient cities and liveable cities, sharing its goal with SDG 11, sustainable cities and communities, and tackling other major global SDG challenges associated with rapid urbanisation worldwide.

From the examples given to us, we conclude that TNE has the potential to generate a substantial impact on the local communities in partner countries. However, a prerequisite for building sustainable communities is for TNE activities to be designed and implemented, emphasising impact. Also, for this impact to be maximised and diffused across the local communities in the partner country, TNE activities must be supported by the local government through funding or other initiatives.

5.8 Economic development

5.8.1 National competitiveness

Indonesia provides an excellent example of linking inward TNE explicitly to promote national competitiveness. Its enabling legislation states that *'The objective of establishing Foreign Universities shall be to improve the nation's competitiveness'* (Republic of Indonesia, 2018). This objective is coupled with a desire to boost capacity in STEM, and the Indonesian rules require IBCs to offer at least two STEM programmes.

Just as partner organisations in TNE may be motivated by the desire to transfer technology from the home university, this may also be the aim of the host government. By encouraging leading foreign universities to set up branch campuses, typically in partnership with national public universities, the government hopes that a combination of sharing knowledge and a wider demonstration effect – with other national universities observing and copying the innovations that the foreign universities bring into the country – will lead to sector-wide improvements in quality and efficiency.

Host governments are stakeholders in TNE partnerships and play an important role in facilitating or discouraging them. Interviewees in Egypt were divided on whether the influence of existing TNE provision had prompted the Egyptian government to liberalise the law to become more welcoming to foreign providers. It did so in 2018, for reasons consistent with Egypt's national developmental priorities as expressed in its Vision 2030 strategy. These included

injecting vitality into the domestic higher education sector, the promise of new teaching and research collaborations, enhancing international economic competitiveness through the support of knowledge industries, filling human resource and skills gaps, and strengthening the country's prestige and reputation globally. TNE in Egypt is fundamentally about contributing to national success by enhancing knowledge and skills, and this *raison d'être* for the state is supported by the HE sector.

In Greece, TNE emerged and grew without the support or strategic involvement of the government. However, in 2020 the Greek government has engaged with the British Council in a strategic initiative to promote TNE partnerships between Greek and UK universities to strengthen the international standing of the Greek higher education sector. Through this development, it is likely that the contribution of UK TNE in the Greek higher education sector, including private providers, will reach its full potential.

In Pakistan, awareness of the value and benefits of TNE partnerships is influenced by senior officials' attitudes. The current leadership of the Higher Education Commission is far more in favour of TNE activity than its predecessor; this may reflect a growing acceptance of online and distance learning in response to the Covid pandemic. But even so, the state-level rationale for TNE at this stage appears to be dominated by demand absorption concerns rather than national strategic positioning.

In a wide range of cities, local authorities have seen international branch campuses as a means for achieving urban and regional development. Governments can use

inducements such as long-term leases, subsidies and public expressions of support to attract international universities to establish themselves in particular locations where they will support broader development goals. Schulze and Kleibert (2021) use the term ‘strategic coupling’ to refer to the intention to fuel regional development by tapping into global value chains, observing that TNE represents a means of ‘globalising’ regional development. This approach is readily apparent in Iskandar, Malaysia, and Singapore, where many international institutions and partnerships have burgeoned over the decades. On a smaller scale, the Ho Chi Minh City government and the Vietnamese national government supported Australia’s Royal Melbourne Institute of Technology (RMIT) University to establish a campus in the Saigon South precinct. When the campus location was chosen in the late 1990s, this area on the city’s outskirts comprised rice paddies and wetlands. Still, it was earmarked to develop new export-oriented high-technology industries. RMIT’s campus provided a cornerstone initial development for the precinct, helping to lure subsequent investments by multinational firms in the area, and associated services, including hotels, international schools and an international exhibition centre (Wilmoth, 2021).

University offshore campuses and the regional development of Iskandar Malaysia

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Case Study

EduCity in Iskandar Malaysia is a 1.2 square kilometre greenfield development in the Malaysian state of Johor, neighbouring the city-state of Singapore. The transnational education zone hosts six offshore campuses from the UK, the Netherlands and Singapore, services around 4,000 students, and provides shared facilities such as a sport complex and student accommodation.

Though universities' direct impact on regional and urban development in terms of quantifiable economic effects is difficult to pin down, they are active agents in producing spatial imaginaries that condition social practice and can attract foreign investment (Addie, 2021). In particular, offshore campuses may be part of political projects to plug regions and cities materially-cum-discursively into global economic networks (Olds, 2007; Schulze and Kleibert, 2021), and are envisioned to attract international firms and higher-skilled labour (Rottleb and Kleibert, 2022).

This is reflected in EduCity's role in the regional development strategy of Iskandar Malaysia, which is intended to enhance the economic development of the trans-border metropolitan region Johor Bahru-Singapore. Firstly, EduCity is designed as a local international learning and knowledge production

infrastructure in which foreign providers function as signifiers for 'world-class' education (Kleibert et al., 2021). In particular, the early established British offshore campuses act as reputable anchor tenants that other international education institutions follow. Secondly, EduCity is embedded in Iskandar Malaysia's objective to attract foreign investments and international firms to vital local industries. The programmes' disciplinary foci at the EduCity campuses are neatly tailored to these local industries. The medicine programmes at EduCity should, for example, supply higher-skilled graduates for a growing health tourism sector.

Offshore campuses are assigned an important role as catalysts for economic development in Iskandar Malaysia. Yet by now this role remains rather symbolic in nature, with few students at EduCity coming from outside the Johor region, and significant university-industry linkages still in their infancy.

5.8.2 Revenue generation and diversification

Some partner organisations may be primarily interested in TNE for revenue maximisation. For example, private, for-profit colleges without degree-awarding powers may partner with foreign universities to offer their degree programmes for a licence fee. This model emerged most prominently in Malaysia in the wake of the Asian financial crisis, when private colleges serving as 1+2 pathway providers for UK universities moved to a 3+0 delivery model to maintain their revenues. Numerous examples persist, notably KDU Penang (with the University of Lincoln), Brickfield Asia College (with Aberystwyth University) and YPC International College (with Liverpool John Moores University).

Similarly, all UK TNE is provided in Greece through local private colleges. These institutions, like those in Malaysia, do not have degree awarding powers and their prime motive, at least in the early stages of TNE engagement, was profit generation. This has been one of the reasons that have contributed to the Greek government's resistance to fully integrating TNE into the local higher education sector. However, several Greek colleges have developed a diversified agenda beyond economic objectives, including research activity and sustainability. For example, Metropolitan College, the largest provider of UK TNE in Greece, is part of the UN Sustainable Development Solutions Network.

Local partners with degree awarding powers are also often driven by financial incentives to offer TNE programmes. For example, in China, Hong Kong and Vietnam, most TNE is delivered in collaboration with local public universities, which can charge significantly higher tuition fees for international programmes than for the university's programmes. This is in part a reflection of students' willingness to pay more for foreign qualifications, but is also a result of governments tightly regulating fees for public universities programmes while allowing the same institutions to be quite entrepreneurial when developing and pricing TNE programmes (for example, on Vietnam see Ziguras and Pham, 2017; Tuyết, 2014).

6. The value of TNE for the UK

This section considers the value of TNE for UK higher education at national and institutional levels. It draws on findings from interviews, case studies and the survey from a mainly TNE exporting perspective.

6.1 TNE as a government and institutional priority

UK universities see a range of potential benefits from offshore operations, with different universities prioritising benefits differently. This means that it is sometimes difficult to assess the relative significance of each of these drivers. Even within one institution, our research found evidence of a range of different drivers. Academic units are more likely to be motivated by reputational benefits and the prospect of internationalising the student body and teaching programme; in contrast, managers are more concerned with revenue generation.

6.1.1 Increased exports as a government priority

The UK government's priorities are set out in its International Education Strategy, updated in February 2021¹¹. This identifies two key ambitions to achieve by 2030: firstly, to increase education exports to £35 billion per year, and secondly to increase the number of international higher education students studying in the UK to 600,000 per year. For the first time, the strategy includes the contribution of TNE to those ambitions. In

describing this, the term 'value' means TNE's monetary return to the UK economy as an increasingly important export.

The strategy notes that *'the value of HE TNE continues to proliferate, reaching £650 million to the UK according to the latest 2018 statistics'*. This is described as a significant increase since 2010, when the value was £350 million. The strategy highlights the growth of TNE activity and education-related exports. In 2017, *'these were above £20 billion for the first time, reaching £21.4 billion, and increased again in 2018 to £23.3 billion. Since 2010, the estimated value of education-related exports and TNE activity has risen by 46.7 per cent in current prices.'*

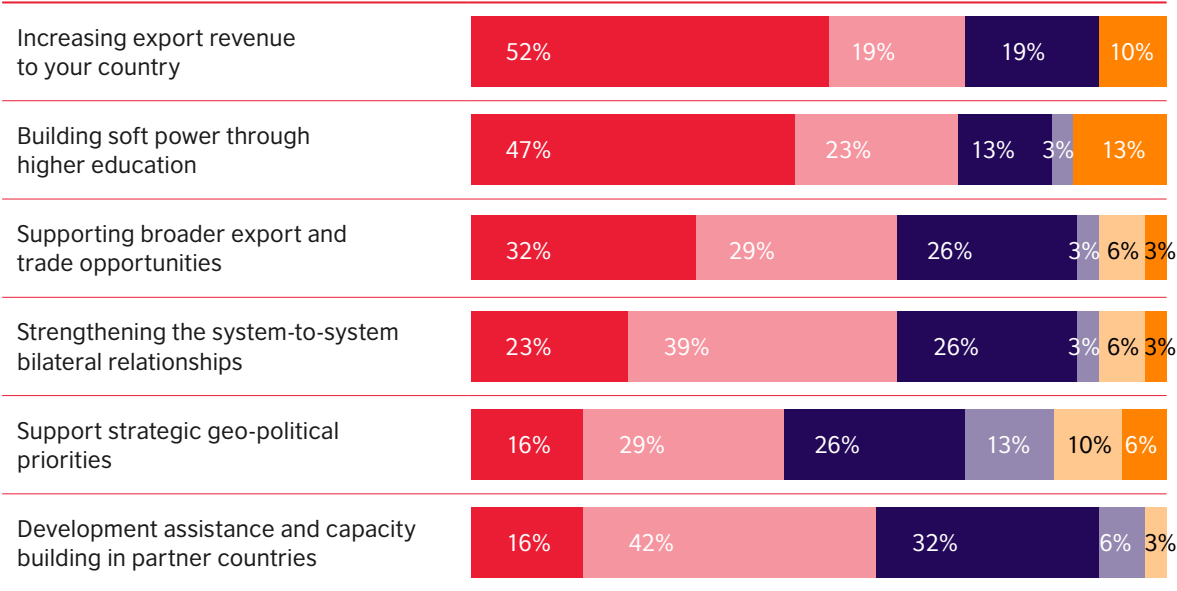
Pathway providers are essential facilitators of TNE's role as a UK export. The strategy notes that *'UK pathway providers help international students to improve their English language or study skills before attending a UK university. They also offer foundation courses, which often lead to direct degree-level entry upon completion.'*

While the focus of this study is on the non-monetary contributions of TNE, it is helpful to consider how significant financial contributions are for UK stakeholders compared with other benefits.

As Figure 9 shows, more than half of the survey respondents (52 per cent) rated TNE export revenue as the most important factor, with further 19 per cent rating them as fairly important. The second highly ranked factor was TNE as a conduit of soft power (rated by 47 per cent as very important).

11. <https://www.gov.uk/government/publications/international-education-strategy-2021-update>.

Figure 9: How important is each of the factors below for the export country (n=31)



● Very important ● Fairly important ● Important
● Slightly important ● Not important ● Unsure

6.1.2 Recruitment of international students to the UK – institutional priority

Some TNE activity primarily prepares students in their own countries for subsequent transfer to the UK as conventional international students (HEFCE, 2015; British Council, 2020). Many TNE partnerships are based on an X+Y model, with students doing the first X years of their degree in their own country and then travelling to the UK to complete Y years and graduate from the home university. The first period of X years may be spent studying the university's curriculum, which the partner delivers on a franchised basis, or the university may simply recognise the partner's curriculum for credit transfer purposes. An X+Y model reduces the cost of the overall degree for students, and, where students are not qualified to directly enter the UK university (e.g. because they have only completed 12 years of education in a K-12 system¹²), they can include an additional preparatory year in the X component of their higher education.

Many UK universities report that TNE is an essential pipeline for international student recruitment. For example, Xi'an Jiaotong-Liverpool University (XJTLU) is an IBC in Jiangsu Province, China, and was established as a joint venture between Xi'an Jiaotong University and the University of Liverpool to offer 2+2 programmes. Students complete the first two years at XJTLU, including all the mandatory Chinese courses required by the Chinese Ministry of Education, before transferring to Liverpool to complete their

degrees as conventional international students. As one interviewee from the British Council noted, *'TNE is also becoming a core recruitment tool, with 2+1, etc. Some big universities have most international students coming from TNE programmes'*.

Similarly, Reading University's IBC in Malaysia provides an essential pathway for students to begin studying for their degrees at home and then move to the UK campus to complete their degrees. One of their representatives explained that the IBC *'creates a separate income stream that doesn't go into the subsidiary company [the Malaysian IBC], but comes to Reading directly through the transfer of students.'*

The Department for Business, Energy and Industrial Strategy estimates that the value of TNE exports in 2019 was £0.69 billion¹³. An earlier study established that the most financially profitable activity is the articulation of TNE study into UK higher education programmes delivered in the UK¹⁴. In other words, the financial benefit of TNE to exporting HEIs is likely to be significantly higher from the induced flow of international students to the home campus than from the net tuition fee income generated directly in the TNE partnership.

As Figure 10 shows, the survey of HEI participants identified international student recruitment as the key driver for the institutions exporting TNE programmes, with 68 per cent of the HEI respondents exporting TNE ranking it as most important and further

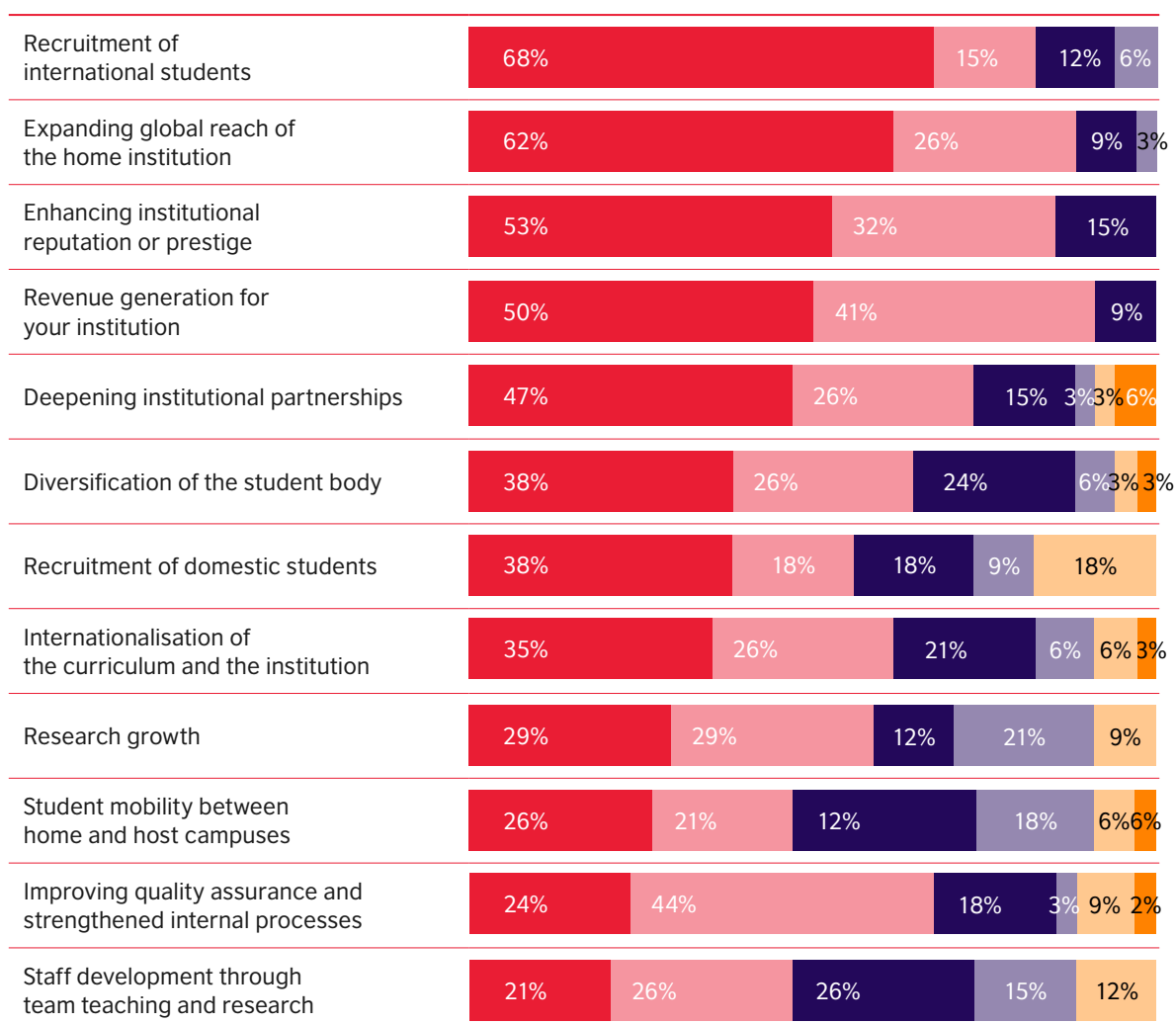
12. Generally, the K-12 system stands for 'from kindergarten to 12th grade'.

13. <https://explore-education-statistics.service.gov.uk/find-statistics/uk-revenue-from-education-related-exports-and-transnational-education-activity/2019>

14. CRAC (2014), The value of TNE to the UK. Report for BIS. <https://dera.ioe.ac.uk/21481/1/bis-14-1202-the-value-of-transnational-education-to-the-uk.pdf>.

15 per cent as fairly important. Expanding the global reach of the home institutions was in the second position (62 per cent of the respondents), followed by enhancing institutional reputation (53 per cent). Revenue generation came fourth, with half of the surveyed HEIs ranking it as the most important factor.

Figure 10: How important is each of the factors below to your institution? (n=34)



● Very important ● Fairly important ● Important
● Slightly important ● Not important ● Unsure

6.2 Revenue diversification

For some universities, TNE is primarily about converting TNE enrolments into a revenue flow back to the home university while mitigating financial and reputational risk (Pon and Ritchie, 2014; Universities UK, 2018a, 2018b). While revenue diversification and maximisation through TNE are sometimes criticised as amounting to the ‘McDonaldization of higher education’ (Altbach, 2013), focusing on revenue in a sustainable way requires the home university to protect its brand in both its home and host markets by maintaining the quality of the student intake, the academic experience and the employability of its TNE graduates.

For example, the University of Bolton Academic Centre Ras Al Khaimah is a franchise operation. The joint venture partner is Western International College, which provides the campus in Ras Al Khaimah (one of the United Arab Emirates) and recruits and employs the staff. Still, the campus has a strong brand image as a University of Bolton IBC. It offers a range of undergraduate and postgraduate degrees in engineering and business that can be completed in Ras Al Khaimah.

It is rare for universities to enter into offshore programmes and campuses with the intention that home campuses’ operations will subsidise them. TNE is nearly always intended to generate a surplus that assists in supporting the operations of the university as a whole, or at least to be financially self-supporting (Wilkins, 2021, p.318). However, while many IBCs were initiated in the early 2000s with an expectation that they would generate a surplus, it has become apparent over time that this is an unlikely prospect. Wilkins (2021)

points to various studies that suggest that institutions tend to underestimate the costs involved in the establishment, and have unrealistic expectations of student numbers. In many cases, such expectations are fuelled by enthusiastic local partners and consultants in the host country. This explains numerous unsuccessful branch campus initiatives, such as those established by the University of East London in Cyprus, and by the University of Wolverhampton and Aberystwyth University in Mauritius (Wilkins, 2021).

6.3 Institutional and national reputation

In some cases, TNE activity is primarily about establishing the home university as a global brand with a reach that extends far beyond its national base. For example, University College London (UCL) operated an IBC between 2010 and 2020 in Qatar Education City, an ‘education hub’ that houses IBCs of other leading universities, including Virginia Commonwealth University, Texas AandM University, Carnegie Mellon University and Georgetown University. The UCL Qatar campus offered programmes in archaeology, conservation, museum and gallery practice, and library and information studies. IBCs based in Qatar Education City are heavily financially supported by the Qatar Foundation to promote them as international centres of excellence.

Wilkins (2021) observes that many institution leaders believe that their IBCs enhance the institution’s global status and reputation. He argues that prestigious universities are typically motivated by the desire to build a global brand, with reach beyond their

national base. These institutions are often able to attract generous funding from host governments. This driver is particularly strong in the case of international branch campuses (Escriva-Beltrana et al., 2018) and joint doctoral programmes.

Interviews with senior managers in the UK confirm that building an international profile remains an important motivation for many universities. Global reach and reputation were ranked in second and third place, respectively, as the most important factors behind TNE engagement by those surveyed HEIs mainly exporting TNE programmes.

The University of Nottingham, for example, positions itself as a global university, with three campuses in the UK, China and Malaysia. Speaking of the motivation of the university, one representative recalled:

For Coventry University, representatives reported that one of the primary goals of its extensive TNE operations is a global reach. In contrast to the examples cited from the University of Nottingham, Heriot-Watt and UCL, however, Coventry achieves this objective not by a 'branded' physical presence in third countries but by the number of TNE enrolments in Coventry programmes globally. Coventry's approach was described as *'very entrepreneurial with no particular model. We use mainly franchise and validation, progression and articulation, 3+1, 4+0 [rather] than IBCs. The focus was on trying to get partners that would provide significant numbers rather than base it on the finances'*. The aim was to have Coventry students distributed across the planet, creating a global brand through TNE partnerships.

Siltaoja et al. (2019) found that IBCs are frequently featured in universities' marketing

to support claims of being a global or world-class university (cited in Wilkins, 2021, p.317). However, these reputational benefits are often quite uneven. Although the IBC may significantly raise the profile of the institution in the host country, this may have little impact on students, the academic community and the broader community in the university's home country, who may be quite unaware of the campus's existence or even see it as a distraction (Wilkins, 2021).

While IBCs are typically teaching-focused, some have developed a significant research output, particularly the larger branch campuses of research-intensive universities, such as Nottingham's campuses in Malaysia and China (Pohl and Lane, 2018). Researchers in such campuses often collaborate with scholars at the home campus and with scholars based in universities in the country or region in which the campus is located. They therefore have the potential to extend the research profile and impact of the university in a particular region.

Those states whose education systems are internationally attractive regularly fund and facilitate access to their universities by international students. This is most visible in the form of scholarships for international students to study onshore. Less obviously, governments also sometimes support their local education providers to act as national representatives in-country. Such people-to-people contact facilitated by the government is referred to as 'track II diplomacy' (Davidson and Montville, 1981). For example, the Vietnamese-German University near Ho Chi Minh City receives funding from the German government to offer a suite of programmes awarded by several German universities (see Ziguras et al., 2017).

6.4 Research growth

TNE activity can be used to recruit the most gifted students. They can contribute to the university's research programmes and position the home university through its TNE partnership so that it can build research teams offshore and access new sources of research funding from the host government (Ennew and Fujia, 2009; Feng, 2013).

For example, the University of Nottingham Ningbo Campus is simultaneously an IBC and a private Chinese university accredited by the Chinese Ministry of Education. It is authorised to recruit elite students from the highly competitive Gaokao national university entrance examinations. It has established several highly regarded research centres, which receive funding from the Chinese government and industry. These include the Centre for Sustainable Energy Technologies, Nottingham Ningbo New Materials Institute and the International Academy for the Marine Economy and Technology, all areas that align with national research priorities in China.

6.5 Institutional internationalisation

TNE can create opportunities for structured international mobility for students from both the home and host country (Pon and Ritchie, 2014). If the home university can replicate programmes at both its home campus and the TNE partner or IBC, then, in principle, students can move seamlessly between the different nodes to build their intercultural experience and competency while maintaining an integrated, coherent student programme. This contrasts with the traditional student

exchange between universities, which is plagued by difficulties in transferring credit between participating institutions.

All the representatives of UK universities regarded TNE as an essential means of internationalising their institutions in a fundamental way, beyond simply providing an internationalised learning environment for their students. The University of Kent, for example, brands itself as 'the UK's European University' and has operated the Brussels School of International Studies since 1998. This is a nationally accredited institution in Belgium and offers programmes from the university's School of Politics and International Relations and Kent Law School. Students can move between the IBC in Brussels and their home university to enrich their learning and access EU institutions. More importantly, it reshapes the organisational identity of the University of Kent as a multinational enterprise, having to simultaneously meet the needs of UK and Belgian stakeholders.

Heriot-Watt University has recently reorganised its structure to emphasise its globally distributed nature, with the dean of each school (e.g., business, science) line-managing business school staff on its campuses in the UK, Dubai and Malaysia. One of its representatives noted that '*we are a global organisation because of our campuses in Dubai and Malaysia. It's quite an interesting situation that we don't actually have anybody formally identified as a [Pro-Vice-Chancellor International], but we are very, very international.*'

Wilkins (2021) notes there is 'renewed interest in developing networks of global micro-campuses or international study centres, i.e. small-scale foreign campuses. Columbia University has established eight global centres

[...] while the University of Arizona has so far opened four micro-campuses' (p.322)¹⁵. Student flows between IBCs, and the home country campus can be significant but tend to be primarily from the branch to the home campus (Wilkins, 2021, p.316).

6.6 Strengthened knowledge base and knowledge diplomacy

Similar to the benefits for the institutions exporting TNE programmes, export revenues were the most significant factor for the UK: this factor was rated as the most important by over half of the respondents (52 per cent), with further 19 per cent rating it as fairly important.

According to survey respondents, building soft power through higher education engagement was the second most important factor for the UK, with 47 per cent of the HEIs ranking it as important and a further 23 per cent as fairly important.

It is essential to highlight that 20 of the surveyed HEIs were international branch campuses. As Figure 11 shows, they presented a distinctly different picture from the results above. To better illustrate the results, the data is normalised.

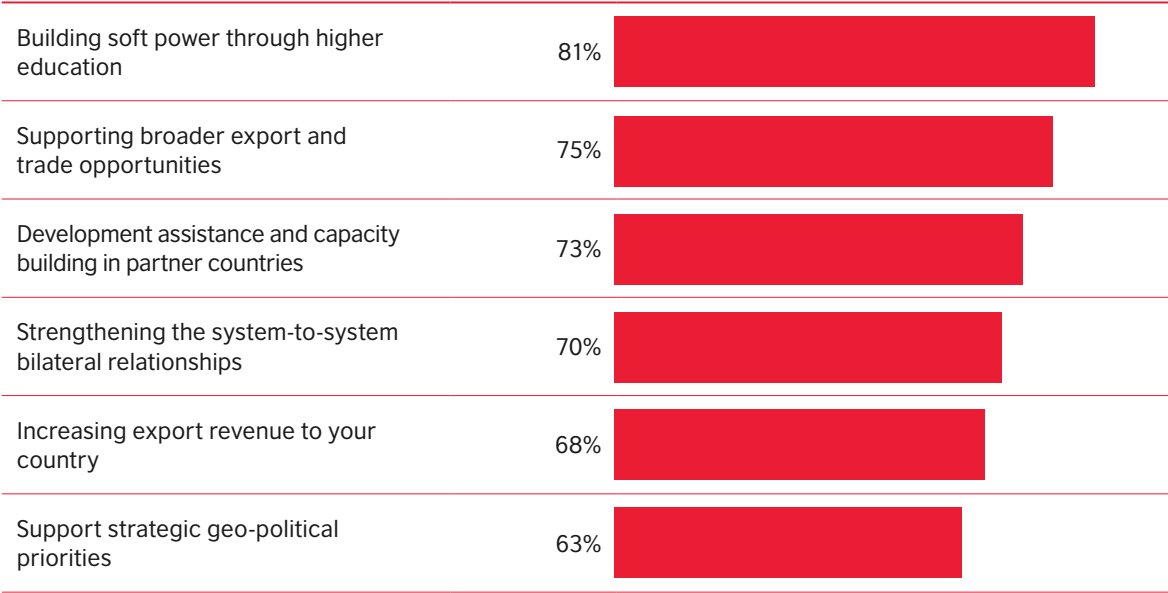
Using the normalised scores, branch campuses placed higher importance on the following:

- building soft power through higher education (81 per cent)
- supporting broader export and trade opportunities (75 per cent)
- development assistance and capacity building in partner countries (73 per cent)
- strengthening system-to-system bilateral relations (70 per cent).

This difference between the IBCs and other forms of TNE is likely explained by the long-term commitment of the IBCs to the country hosting TNE, expressed through investment in physical presence, teaching and research infrastructure, which heavily relies on the recruitment of staff locally. Compared with other delivery types, IBCs tend to cost more, and require significant financial investment. In addition, most IBCs are registered as local higher education institutions and operate under the relevant country's legislation. The value proposition of the branch campuses is locally embedded, they are likely to resemble local institutions through the provision of campus experience, and strong system-to-system relations are critical to their success locally and engagement with policymakers.

15. There are 13 locations named as part of the University of Arizona Microcampus Network on the university's website: <https://microcampus.arizona.edu/>.

Figure 11: Value of TNE to the UK according to the international branch campuses



7. The impacts of Covid on global partnerships

7.1 Impacts on institutional relations and TNE students

The Covid-19 pandemic has highlighted the importance of long-term international partnerships. Many interviewees noted that their relations with overseas partners had strengthened. Travel restrictions meant that activities such as those of exam boards were shifted online without difficulty. But on the impacts of Covid and the absence of international travel, there was a reasonably consistent split between views of how institutions were impacted and of how students were impacted.

Similarly, several interviewees – in, for example, Uzbekistan and the UK – thought that Covid had strengthened the institutional partnership because the replacement of international travel by video meetings had resulted in much more frequent liaisons with partners. Some (e.g. in Egypt) reported an initial panic at the start of the first lockdown because the UK partner could not visit for two years. But there were differing views on the longer-term impacts on the partnerships. One thought that once the ‘new normal’ had settled in, the pandemic ultimately would have less impact on the TNE partnership than initially expected or feared.

One interviewee (in Pakistan) thought the pandemic represented a missed opportunity: institutions should have ‘*used technology to raise their game*’ in the absence of students – for example, in terms of developing online-specific pedagogy in the manner of the

massive online open course companies. In that instance, little institutional growth had taken place, and quality assessment deteriorated.

The pandemic had more complex impacts on students. These in part reflected the online readiness of the host institution. Some respondents – for example, in Pakistan – were proud of how effective the pivot was at their institution, while reporting that students more generally were let down because ‘*no one was ready for lockdown*’.

A few stated that the impact on the student experience was unambiguously negative. The integrity of hastily arranged online assessment methods was called into question and was a huge concern. Students in rural Pakistan suffered the most because of a lack of connectivity.

Impacts on Egyptian students generally were seen in a fairly gloomy light. Student learning suffered, learning outcomes suffered, results declined, and employability declined. The negative knock-on effect, it was thought by one respondent, would last for 10 years.

However, the experience with the shift to online teaching varied, and so did the student experience. A representative of Cardiff Metropolitan University provided positive examples of how the pandemic had transformed the student experience for those studying with its TNE partners. The forced move to online teaching and meetings in the UK meant that the geographical barriers to engagement disappeared. Students studying at overseas centres could engage in live virtual lectures, workshops and seminars

alongside their counterparts in Cardiff. Staff meetings and learning and teaching conferences could take place virtually, bringing together all those teaching both the home and franchise programmes. The Cardiff Metropolitan Student Union had also opened up its virtual events and activities to TNE students, building a stronger and more supportive student community that was borderless.

In general, all the representatives of UK universities confirmed that the pandemic and the national lockdowns had accelerated both the development of digital learning technologies and the competency and willingness of staff in both the home campus and the TNE partnership to use these new tools for teaching and meetings. This had led to a stepwise improvement in the student experience in the TNE partnerships, where students could increasingly access live and asynchronous lectures from the home campus, as well as teaching materials shared via the virtual learning environment and, in some cases, gain access to the home campuses' digital library resources.

7.2 Liberalisation of online provision globally

Covid was seen by many as an accelerator of a trend towards online and distance learning that was already underway. Most interviewees described the shift to online higher education provision at their institutions in response to Covid. A common theme was the utility of online education in accommodating the complexity of study commitments with family or work responsibilities. But there was no such consensus on the relative merits of online versus face-to-face contact in terms of the quality of the teaching and learning.

In Egypt, it was felt that Covid resulted in improved technology-enhanced learning. Regulations had been temporarily loosened to permit the delivery of one entire semester online. Most exams went online (final year exams remained on campus). But the pandemic pivot has not yet changed the fact that fully online degrees are not recognised in Egypt. One respondent realised that face-to-face teaching and learning is the best medium ('being in the classroom is best').

In several examples, only certain universities were allowed to teach online. However, since Covid, this has widened to allow more institutions to continue teaching online. In some instances, the courses were delivered locally, and some were aimed at students overseas.

The pivot towards online education during Covid resulted in the liberalisation of distance learning and online degrees. Interviewees from the Philippines highlighted that universities and students found that online education is not inferior to face-to-face teaching.

Regulatory relaxation of online learning took place in Vietnam and the Philippines. In the past, only the national Open University could deliver online programmes. Since Covid, this has expanded to a larger group of universities. Investment in online technology and pedagogies can be fully utilised if online access to education is continued. In countries with limited physical infrastructure, this results in widened access to higher education learning.

In India, some of the newly established 'Institutions of Eminence' have ambitious student enrolment targets of thousands of students. For some, a viable way to achieve the targets is if some of the students are educated online. In a push to achieve a 50 per cent gross enrolment ratio target for higher education, as indicated in India's National Education Policy of 2020, the Universities Grants Commission granted almost 900 autonomous colleges permission to teach remotely¹⁶.

16. <https://www.universityworldnews.com/post.php?story=20220318062021430> and <https://timesofindia.indiatimes.com/india/ugc-to-let-900-autonomous-colleges-offer-online-degrees/articleshow/89710850.cms>.

8. Insights from the evidence

The evidence provides important insights into the value of TNE partnerships for different stakeholders across a range of country contexts. It also points to the potential of TNE to deliver value as higher education systems mature and change in the future.

8.1 The range of motivations

The evidence reveals the range of motivations for HEIs to engage in TNE and for countries to variously allow or encourage that engagement. Perceptions of value are intrinsically related to motivations.

The survey gives essential insights into the perceived value of TNE for partner countries, as reported by the TNE partner institutions. In rank order, these are:

- improved quality of higher education (with a normalised score of 0.88 on a scale of 0-1)
- increased diversity of HE and improved international outlook (with a normalised score of 0.86)
- increased competitiveness of the local HEIs (with a normalised score of 0.81)
- increased supply of HE (with a normalised score of 0.80).

The interviews provide a richer picture of the motivations and drivers for each country to engage in TNE. The value they seek to obtain is directly related to these. The actual value – and more prolonged-term impact – delivered is affected by the conditions in the country (see 8.3). Table 4 summarises some of the country-level drivers of TNE engagement.

Table 4: TNE motivations and drivers at the national level

Country	TNE motivations and drivers
Nigeria	<ul style="list-style-type: none"> • increasing access to quality HE; filling the gap between supply and demand • labour-market-led demand resulting in demand for online master's degrees and other continuous professional development qualifications • reducing brain drain • increasing research capacity.
Greece	<ul style="list-style-type: none"> • closing the supply-demand gap, especially in terms of the qualitative characteristics (e.g., unmet demand in specific subjects, availability of postgraduate programmes) • TNE as an alternative route to higher education for students without have access to public HE programmes • a recent (2021) government initiative, in collaboration with the British Council, aiming to use TNE to achieve the following targets: <ul style="list-style-type: none"> • promote the internationalisation of Greek universities • strengthen the international reputation and visibility of Greece as a study destination for international students • reverse brain drain by reducing the number of outbound students and by attracting Greek academics from abroad • private sector providers focusing on expanding the supply of higher education programmes, particularly at the postgraduate level • strengthening the internationalisation outlook of Greek universities with particular emphasis on dual and joint degree programmes • improving the employability prospects of graduates in a highly competitive and challenging local employment market • at the policy and government level, raising Greece's visibility as a destination for international students.

Country	TNE motivations and drivers
Egypt	<ul style="list-style-type: none"> • contributing to national success through enhancement of knowledge and skills • internationalisation of the institution • revenue generation • more comprehensive relationships with international bodies and organisations • providing a quality education • delivering an enhanced student experience and student services.
Pakistan	<ul style="list-style-type: none"> • prestige and positioning • internationalisation of the curriculum • professional and technical expertise, technology and knowledge transfer • access to higher education • delivering more choice for students • delivering an enhanced student experience • employability • revenue.
Uzbekistan	<ul style="list-style-type: none"> • expanding the supply of higher education • marrying local relevance through validation with the prestige of a UK degree • nurturing entrepreneurship.

Country	TNE motivations and drivers
Philippines	<ul style="list-style-type: none"> • encouragement by CHED • contribution to capacity building in niche subject areas of national importance • widened access to international higher education programmes in the country • postgraduate research degrees through TNE upskilling the faculty at the relevant HEIs • enhanced international competitiveness of Philippine universities through building the skills base of staff • contribution to the internationalisation of the curriculum and institution • boost to online education has seen a boost since Covid.
Malaysia	<ul style="list-style-type: none"> • very well-established part of the higher education system, both through partnerships and international branch campuses • private universities looking for innovative, quality international programmes that can stand out in a crowded market • significant contribution to Malaysia's appeal as an international education hub • expected to strengthen the quality of education, contribute to the development of niche subject area and complement existing education provision.
South Africa	<ul style="list-style-type: none"> • highly complex and politicised operating environment, relying on excellent understanding of the local context and long-term commitment with a well-defined purpose to serve the students and the local community • as employment-driven qualifications relevant to the labour market, TNE qualifications counteract the high levels of graduate unemployment • strong commitment to the purpose of education to create capabilities that advance people and the local economy.

Country	TNE motivations and drivers
UK	<ul style="list-style-type: none"> • new opportunities for research collaborations • pathways drawing on a greater pool for master's and PhD students • widening the UK HE global footprint • revenue generation • third-stream income (revenue from commercial or other activities) • natural extension of the internationalisation of the UK higher education strategy • supporting two-way flows of student exchanges.

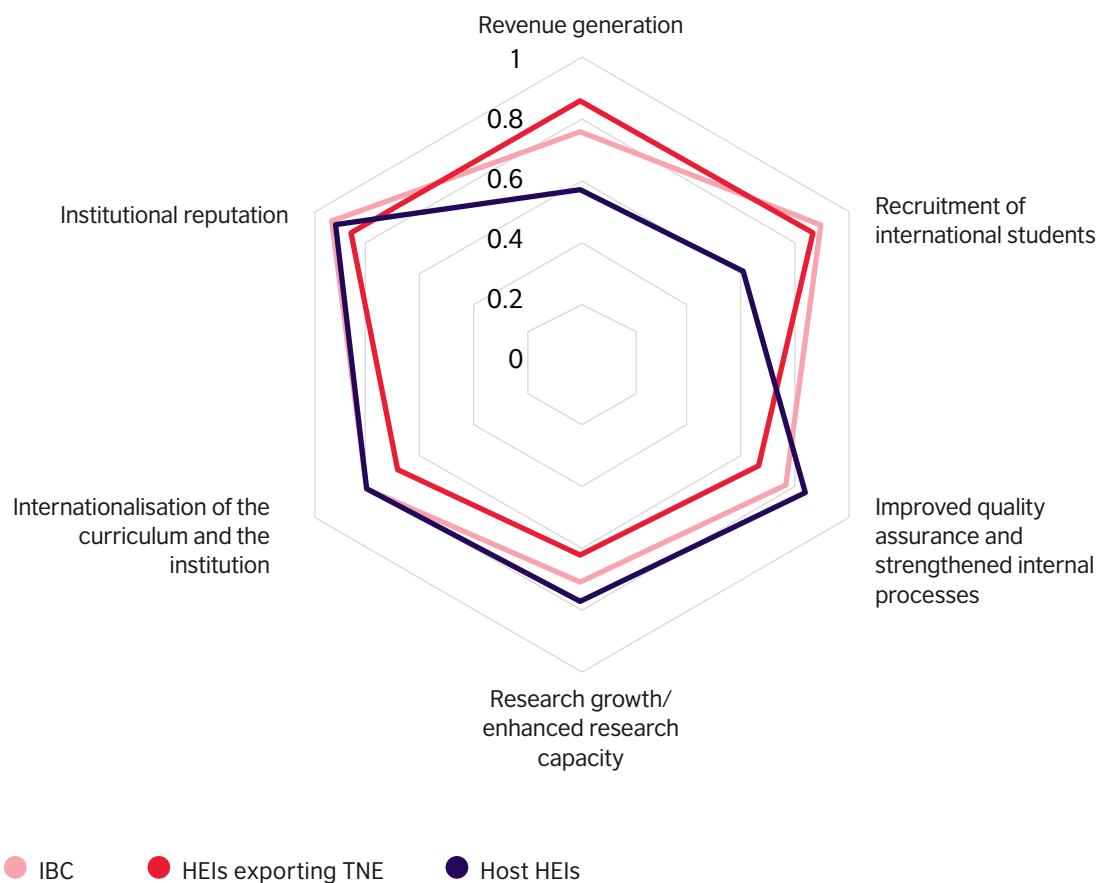
The survey also provides evidence of TNE's perceived value for higher education institutions. The six most important identified benefits are:

- institutional reputation
- internationalisation of the curriculum and the institution
- revenue generation
- recruitment of international students
- research growth and enhanced research capacity
- improved quality assurance and strengthened internal processes

8.2 Different perceptions of value

Perceptions of value differ and are affected by a range of factors, notably the context of the country and the strengths of HEIs. Findings from the survey illustrate the different perceptions of TNE's value to institutions, as seen by UK HEIs, their international branch campuses and partner country HEIs. Figure 12 compares their views across the six most important identified values.

Figure 12: Value of TNE to the institutions engaged in TNE partnerships



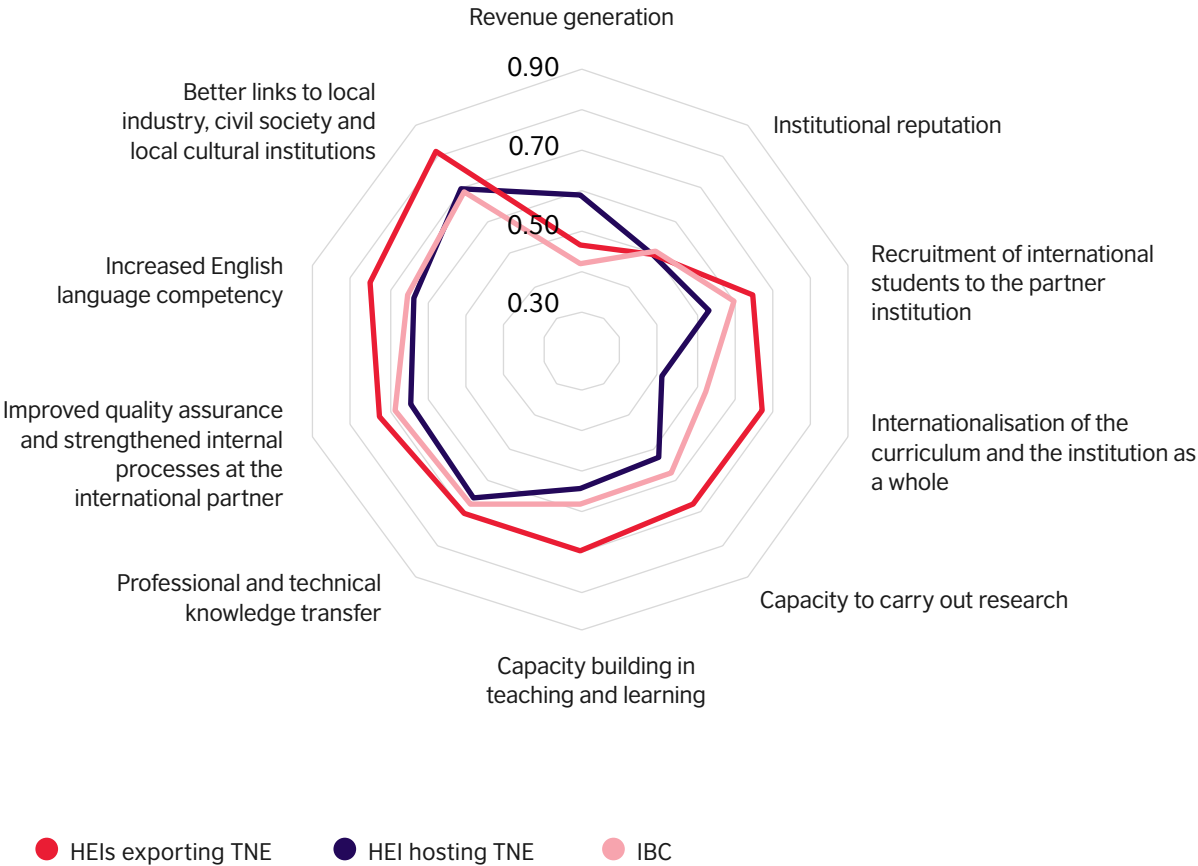
Note: The survey data is normalised on a scale of 0 to 1 to enable comparisons between the three groups of HEIs: those exporting TNE programmes, host HEIs and the IBCs.

Institutional reputation is perceived to be of paramount value to all HEIs. HEIs exporting TNE (mainly UK and a few Australian) place greater importance on revenue generation and the international student recruitment. However, their partner HEIs see capacity building in research, quality assurance and the internationalisation of the curriculum and the institution as a whole to be much more valuable. Overseas partner HEIs attached very little importance to the recruitment of international students.

IBCs appear to be between the local HEIs and their international partners. Their priorities are aligned with both those of their home campus and the local HE context.

There are also different perceptions about the importance of a range of factors to HEIs hosting TNE. The chart below triangulates perceptions of value from the respective HEIs exporting TNE, the host HEIs and the IBCs.

Figure 13: How important is each of the following factors to the institution hosting TNE programmes?



Overall, UK HEIs believe revenue generation has much greater importance to their overseas partners than it has in reality. The overseas institutions place much greater value on capacity building in teaching, learning and research, increasing English language competency, professional and technical knowledge transfer and improved quality assurance and internal processes.

In line with the earlier findings, the IBCs occupy the space between the local institutions and the priorities of the home institution.

Figure 14 shows little difference in the values between HEIs and their international branch campuses. Priorities are fairly aligned, with the exception of revenue generation, where the pressure to generate income appears to be lower than that on the home campus.

Equally, the IBCs appear relatively aligned with the priorities of their host country, and place higher value on soft power through higher education, development assistance and capacity building, and support for geopolitical priorities.

Figure 14: Value of TNE to the exporting country



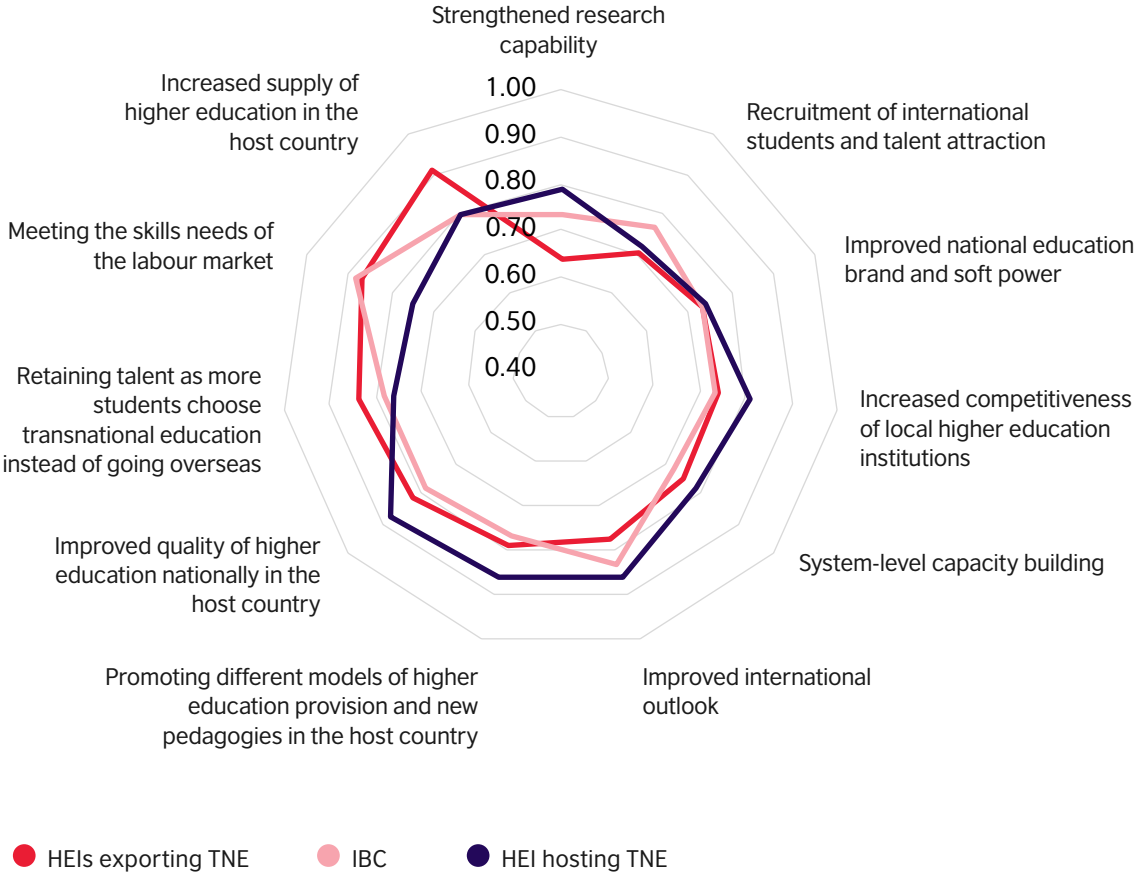
The perceptions of the value of TNE to the host countries are triangulated to include perspectives from the HEIs in the host countries, IBCs and the institutions exporting TNE (mainly UK universities).

UK HEIs place a stronger emphasis on TNE's value in increasing the supply of HE (with a normalised score of 0.91); a much higher weightings on meeting the skills needs of the labour market (with a normalised score of 0.87); and also on retaining talent, as more students choose transnational education

instead of going overseas (with a normalised score of 0.84).

While host countries might have been preoccupied initially with increased supply of higher education, the priorities have evolved over the years, and most of the host countries place greater value on the quality of teaching provision, increasing the diversity of HE delivery in the country, strengthened research capacity and increased competitiveness of the local institutions.

Figure 15: How important is each of the following factors to the host country?



The perceptions of value reported by IBCs are generally more closely aligned with those of the partner country HEIs than the exporting HEIs, with the notable exception of meeting the skills needs of the labour market, on which both the exporting HEIs and IBCs placed a much heavier emphasis than TNE partners. This is likely to reflect the strong focus in the UK sector on promoting graduate employability, which is a key performance indicator for UK universities but generally has lower prominence in the HE sectors of other countries. It is likely that this preoccupation with employability as a key driver of curriculum design and assessment has crossed from the

exporting HEIs to their IBCs, but not to their TNE partners to the same extent.

The interviews provide further evidence of differences in perceptions of motivations and the value sought.

An important conclusion from the evidence is that benefits are not mutually exclusive. The interviews and case studies provide many examples where all the partners have obtained value from TNE, albeit of different types. What is critically important is that partners have a clear understanding of the value each is seeking to obtain, and that they can accommodate this.

8.3 Motivations and value change over time

The evidence provides a compelling picture of how motivations and the value looked for are never static. They change over time at different rates. This applies to both countries and their institutions (the research finds that the main benefits to the country broadly mirror the benefits to the HEIs). Typically, the balance of motivations evolves as conditions in the country change. The primary evidence from the interviews and case studies illustrates that the role of TNE changes as national higher education systems mature. While the initial value for countries lies in demand absorption, as governments continue to improve their access to HE the focus shifts from the quantity to the quality of HE provision.

TNE providers do not always recognise this. So, while most survey respondents from the UK perceive the leading role for TNE as absorbing excess demand for higher education, HEIs hosting TNE programmes rate the quality of TNE as having the highest priority, followed by the promotion of different higher education delivery models and an improved international outlook. Overall, the interviews and case studies point to a strong focus on enhanced quality of HE, supported by a significant capacity building role for TNE partnerships. Government-led initiatives in several studied countries aimed at using TNE partnerships to build capacity in niche subject areas and upskill faculty staff to postgraduate degrees (master's and PhD) through double and joint degree programmes.

There is a direct relationship between countries' gross enrolment rates, their GDP and

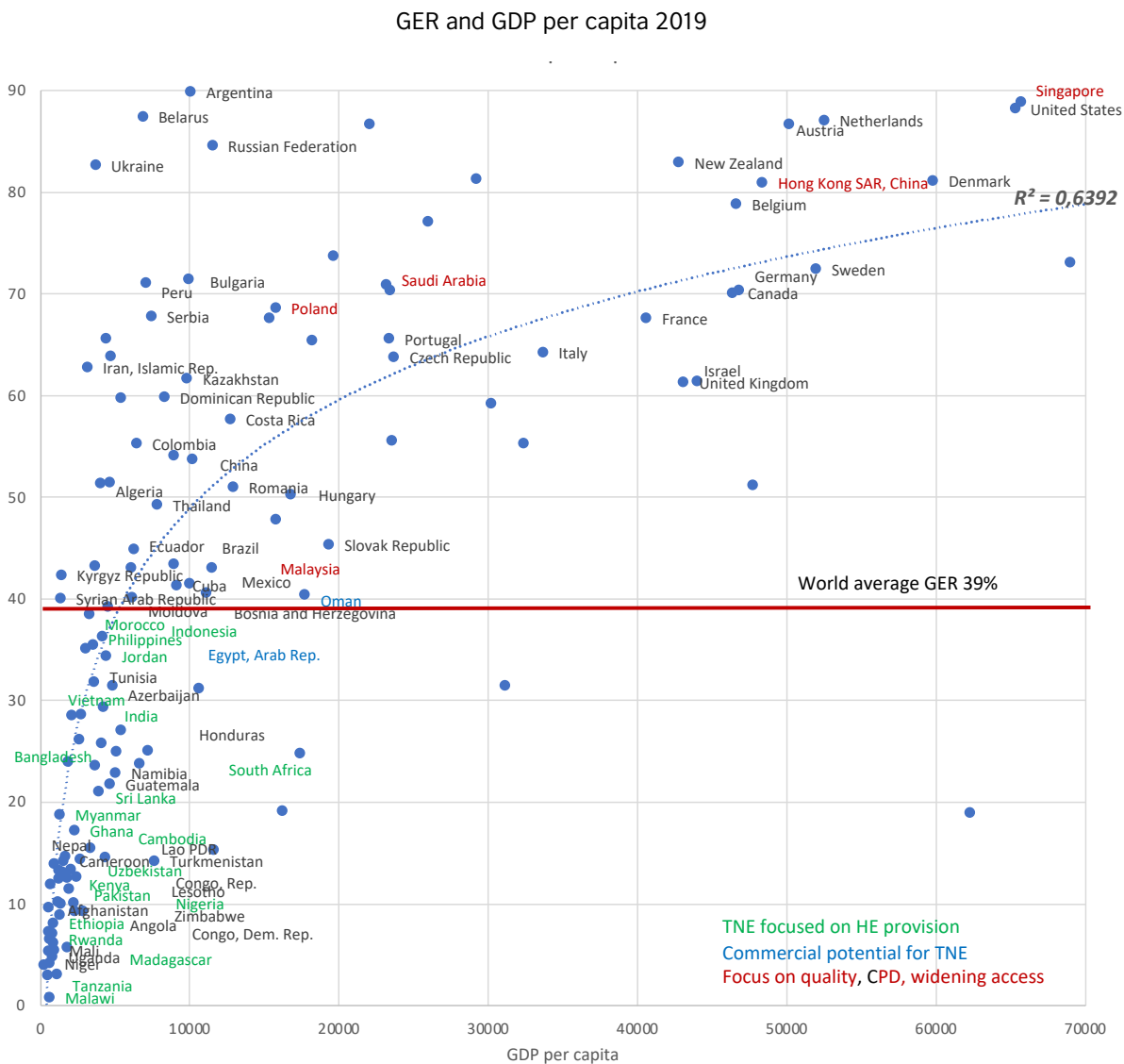
the role of TNE. Here, we identify three distinct functions of TNE:

- TNE focused on strengthening the higher education provision. This draws on countries where TNE is likely to have a demand absorption function – those are most likely south of the best fit line and with gross enrolment ratios (GERs) below the world's average rate of 39 per cent¹⁷.
- TNE focused on quality, CPD and widening access. The countries with GERs above the world average are likely to be increasingly preoccupied with the quality of tertiary education provision. As the countries' education provision matures over time, the role of TNE is likely to shift from providing higher education to improving its quality. Additional roles for TNE include meeting the demands of the labour market and responding to the CPD needs of the workforce. It complements local provision of higher education and widens access to HE for atypical student groups, such as mature learners, those with working or family responsibilities, women, and those of low socioeconomic status.
- TNE with commercial potential for TNE. These countries can be either above or below the world average GER. However, their high levels of gross domestic product per capita and disposable income signal higher spending potential and an ability to spend on private higher education.

Over the space of 20 years, the world's average gross enrolment ratio has more than doubled – from 19 per cent in 2000 to 39 per cent in 2020. As a result, the TNE partnerships are likely to reflect the priorities of the local higher education systems they are part of.

17. <https://data.worldbank.org/indicator/SE.TER.ENRR>.

Figure 16: Quality vs quantity of TNE



Source: Authors' analysis based on the World Bank database: Education Statistics – All Indicators. Last updated 20 December 2020. Data accessed on 20 May 2022. GDP per capita data: World Development Indicators. GDP per capita (current US\$). Last updated 27 April 2022. Data accessed on 20 May 2022.

China provides a good example. It provided the second highest number of survey responses after UK HEIs and therefore the perspective of Chinese HEIs features prominently. Over the past two decades, China has increased its gross enrolment participation in tertiary education from 8 per cent in the 2000s to 58 per cent in 2020¹⁸. Taking a longitudinal view of the evolution of the local higher education system explains how the role of TNE is shifting from the provision of access to higher education to the provision of high-quality programmes. Many newly accredited programmes are in areas that the government prioritises, such as STEM at the postgraduate level.

The internationalisation of the higher education provision is another ambition of the Chinese Ministry of Education. Before the pandemic, China was a significant study destination for international students, an appeal which spread beyond its immediate neighbouring countries and has, along with the Belt and Road initiative¹⁹, recruited many students.

As national and educational contexts change, the evidence points to the increasingly significant role played by TNE in counteracting brain drain and contributing to local economic and urban development. However, to fully utilise the potential of TNE in talent attraction, a supportive visa environment is required for international researchers, academics and students. For as long as other countries' talent attraction policies are more appealing than those of the host country, it is highly likely that even with the best TNE provision, the country will be a net exporter of talent.

As national and educational contexts change, the evidence points to the increasingly significant role played by TNE in counteracting brain drain and contributing to local economic and urban development

18. <https://data.worldbank.org/indicator/SE.TER.ENRR>.

19. More details on China's Belt and Road initiative can be accessed here . <https://www.ebrd.com/what-we-do/belt-and-road/overview.html>

8.4 Regulatory and government support are critical

At national level, the evidence highlights the critical role of a supportive regulatory and government support in generating benefits associated with the broader value and impact of TNE activities. At institutional level, it points to a clear link between the strategic emphasis on impact by UK HEIs and the realisation of value for partner country local communities and key stakeholders.

The research also reveals a transformative journey of the TNE landscape, where there is a shift from commercially oriented outcomes for UK HEIs and local institutions, to broader value and impact for almost all key stakeholder groups, especially in partner countries.

There are important implications for policymakers and institutions' strategies (discussed in section 9 below).

Figure 17 presents a taxonomy for the relationship between countries' higher education capacity, outcomes, regulatory and government support, and strategy focus. The four taxonomy categories are not mutually exclusive. For example, a partner country can have TNE in both A and B, or C and D categories. The exact category (e.g., A or B; C or D) will depend upon the strategic focus (e.g. commercial versus broader impact) of the TNE partnership. Hence, this taxonomy can help institutions to analyse the existing positioning and, most importantly, the sustainability of their TNE partnerships. Also, this taxonomy can support policymakers in partner countries in creating the necessary conditions for impactful international partnerships.

Category A refers to early-stage TNE activities based on excessive unsatisfied demand in the host country and mainly driven by commercial motives. Either TNE regulatory frameworks are at an early stage of development, or TNE is left unregulated. As capacity in most offshore TNE partner countries has been expanding, closing most demand-supply gaps, this type of TNE is no longer relevant for most major partner countries. In the years to come, the capacity development of offshore higher education systems will continue to grow. Therefore, UK universities pursuing TNE primarily as a demand absorption mechanism need to reconsider their strategy. Policymakers in a partner country with these characteristics should consider ways to provide regulatory and other support to existing TNE institutions, and facilitate their transition from Category A to Category B and then to Category D as the capacity of the local system grows.

Category B refers to TNE activities delivered in a country with substantial unsatisfied demand. Unlike Category A, there is high regulatory or government support, coupled with strategic emphasis by the UK university on the generation of broader value. In its early stages, this type of activity may require substantial investment by the UK university and the local partners. To achieve high regulatory and other support, policymakers need to act proactively and provide some considerable investment. The impact and value generated through this type of TNE have the prospect of moving to Category D as the capacity of the partner country develops.

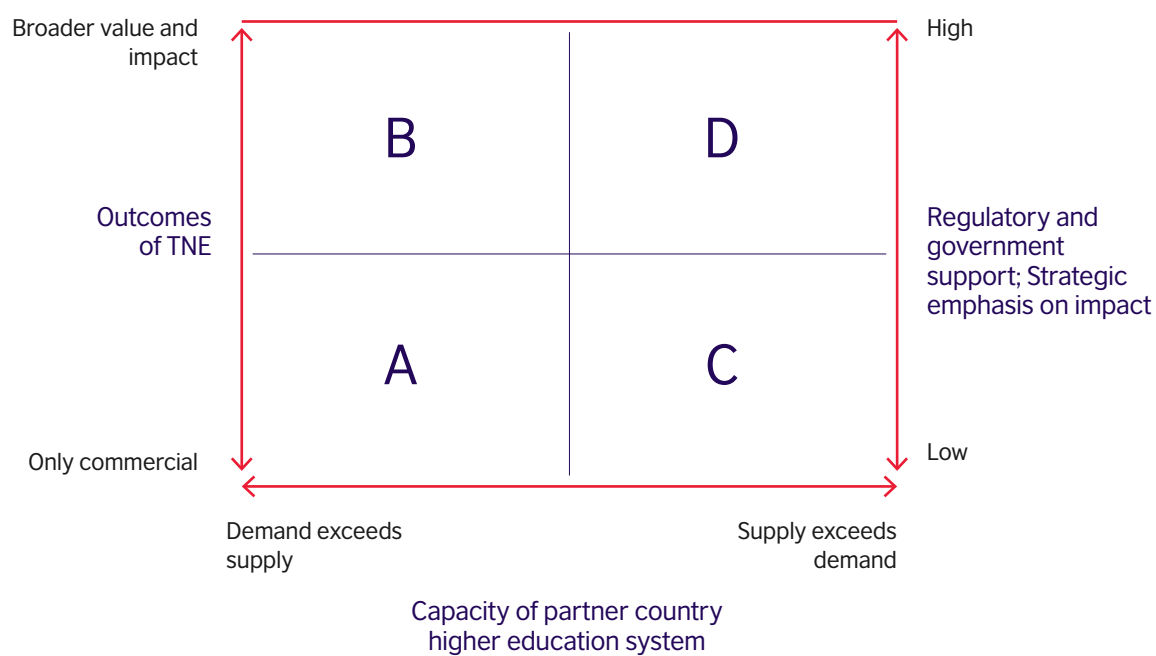
Category C refers to an unsustainable scenario of TNE provision. The research evidence shows that in a competitive HE market, where supply exceeds demand, TNE has to provide a diversified offering in terms of academic

portfolio and broader value. In Category C, there is limited diversification, a focus strictly on commercial outcomes, and a failure to expand outcomes to broader value and impact. This can be due to a lack of regulatory and government support or of appropriate strategic emphasis by UK HEIs, or both. Policymakers should work jointly with such TNE institutions to support their transition to Category D, or potentially help them consider exiting the market.

Category D refers to TNE activities offered in mature HE systems where supply exceeds demand, and generating substantial broader value and impact for the key stakeholder

groups. Partner countries develop their global standing and attract international students. These activities are supported by the local regulatory frameworks and government initiatives. Also, there is a clear strategic emphasis by UK universities on broader value and impact for most key stakeholder groups. Considering the research evidence about the growing strategic importance of TNE as part of a global delivery model (Tsiligiris and Ilieva, 2022), policymakers and TNE institutions in partner countries should aim to achieve and maintain a Category D TNE provision and policy environment.

Figure 17: Taxonomy of TNE relationships



8.5 Covid has changed the landscape

Distance and online education received a significant boost through the global pandemic. HEIs and governments invested significantly in IT infrastructures and methodologies which support online learning. In addition, many governments have liberalised online and distance education programmes. This provides additional incentives to reach remote student groups across geographies with little awareness of UK education. In addition to delivering programmes to students irrespective of physical distance, online education provides the much-needed means to upskill workforces through continuing professional development. Overall, many CPD courses and microcredentials do not attract regulatory oversight and enjoy recognition by employers.

9. Implications

The research provides strong evidence that TNE partnerships make significant contributions to global and national agendas and the UN SDGs. It further suggests that, given the right conditions, TNE has considerable potential to deliver much greater value. Insights from the evidence are important in considering how TNE partnerships can be developed and delivered to maximise this value. This section highlights the implications for government policymakers and HE institutions.

9.1 UK government

There is strong evidence that TNE can play a strategic role in advancing UK government agendas. The examples in the report illustrate that TNE contributes significant value in delivering the SDGs, including unlocking women's potential and educating girls at the tertiary level and beyond. Hitherto, there has been a primary focus on the ability of research activities to contribute to the UK's global ambitions. There should be a similar focus on transnational education partnerships. Policymakers should recognise the potential of TNE partnerships to deliver effectively and efficiently across a range of key strategic areas for the UK.

However, if that potential is to be fulfilled, it is critical that the UK government (as well as UK HEIs) explicitly recognise and respond to partner countries' agendas. This must involve shaping policy interventions around the benefits of UK TNE for host countries, aligning with the reported perceptions of the key stakeholders involved. While UK policymakers have their own objectives in terms of export revenue and soft power, UK HEIs will not be able to deliver these through transnational partnerships unless those partnerships are seen by host governments as contributing

value to their country. Currently the agendas of the UK and partner country governments are insufficiently aligned to achieve maximum benefit for both (Healey, 2021).

Examples, where there is a much greater potential for TNE to contribute to strategic priorities beyond the UK export agenda include:

- Enhancing research partnerships by developing government-supported dual and double postgraduate programmes, particularly at the PhD level. This will achieve the following:
 - Tackling the risks stemming from reductions in global demand for PhD studies in the UK. This will widen access to PhD studies in the UK to bright students without the economic means to study in the UK full-time.
 - Supporting overseas governments' capacity building strategies through high-quality yet cost-effective faculty training. This is likely to be particularly valuable in the current frugal funding environment, characterised by reductions in public funding for education and global economic slowdown. This may be very effective in India, Pakistan, Nigeria and Vietnam, among other countries.
- Broadening existing teaching partnerships to deliver on higher levels of national and institutional priorities, such as research collaborations and student and staff exchanges funded by the Turing scheme. This will be particularly impactful at the postgraduate level, where greater mobility of doctoral students and researchers will strengthen teaching and research partnerships.

- Explicitly responding to SDGs and partner countries' government agendas through transnational education. The evidence presented in this report provides a clear justification of the rich and broad impact of TNE in partner countries. It also suggests that there is a significant untapped potential to generate SDG-related impact, from existing as well as new TNE partnerships. Doing so could have major positive impact for the UK in strengthening its reputation and diplomatic value as a partner committed to long-term global partnership.
- Increasing and targeting reciprocal funding. Overseas governments fund several dual and double degree programmes at the doctoral level. The impact and reach of these programmes will expand significantly if the UK government reciprocates and financially supports such programmes. This will strengthen the long-term partnerships between HEIs in the UK and those overseas, and position UK HEIs favourably as partners of choice when institutional development programmes are announced locally (for example, Brazil's CAPES PrInt²⁰).
- At the undergraduate level, TNE widens access to educational opportunities to populations whose needs are not met at present. Our research shows that TNE has enabled higher education participation for students who are economically disadvantaged or from ethnic minorities, for a larger proportion of female students, and for those with disabilities or family or work responsibilities. Financial aid can contribute to upscaling undergraduate courses to atypical student populations, and ensure a significantly larger proportion of the overall population is empowered to be economically active.
- Many countries are experiencing demographic declines. In addition to limited access to tertiary education, upskilling an aging workforce continues to be a challenge. The interviews carried out for this research reveal a huge potential for continuous professional development, microcredentials and qualifications required by the labour market. Whereas the recognition of TNE degrees poses difficulties in a range of countries, they are valued by the labour market. A good example of this is the popularity of online degrees in Nigeria: while popular with employers, their academic recognition remains a challenge. System-to-system engagement for improved degree recognition is critical, both for undergraduate degrees acquired through TNE and career-advancing professional qualifications, especially those delivered online.

20. <https://eaesp.fgv.br/en/capes-print>.

9.2 Overseas governments

This report has compiled a significant body of evidence on the contribution of TNE partnerships to host countries, local HEIs and communities. Specifically, TNE partnerships contribute to increasing the supply of higher education provision and improving the quality of local provision. In so doing, they counteract brain drain and contribute to the local economic and urban development. The research highlights and provides specific examples of TNE partnerships delivering a wide range of benefits for HEIs in countries, including:

- institutional capacity building in teaching and research
- introducing new courses and disciplines in niche subject areas to the higher education sector
- widening access to tertiary education to underrepresented student groups (e.g. more women, students from disadvantaged educational or socioeconomic backgrounds, and students with disabilities)
- faculty development
- building research capacity and developing research excellence
- enhancing student experience.
- In many countries, partnerships are valuable contributors to national government agendas, for example:

- building sustainable communities and widening participation in higher education for women, disadvantaged socioeconomic or ethnic groups, and students with disabilities
- driving economic development and providing highly skilled graduates for businesses.

TNE already delivers significant value for countries and their HEIs, but it has considerable potential to provide much greater value. The evidence found that national regulatory frameworks and government incentives in countries are critical catalysts for realising TNE's broader value and impact.

Therefore, governments may wish to review their regulatory frameworks and develop these to promote and support TNE partnerships. The research shows that many governments are already liberalising their regulatory framework to encourage greater collaboration between their domestic HEIs and overseas institutions.

Governments should also consider funding and other incentives to encourage HEIs to develop TNE that contributes to national agendas.

9.3 Higher education institutions

HEIs need to be honest and self-critical about their motives for engaging in TNE, so that the objectives are clear to potential partners and all internal stakeholders. As already noted, the research found a wide range of motives. While these are not mutually exclusive, there are potential trade-offs. For UK HEIs, for example, while it is possible that TNE partnerships that build long-term capacity in host countries could also generate significant export revenues, the nature of developmental alliances is that they gradually transfer educational technology to the partner country and reduce the financial return to the exporting HEI over time. Similarly, TNE partnerships focused on building national prestige by linking elite institutions at the doctoral training level could, in principle, be financially profitable but, in practice, are unlikely to match the scale of undergraduate franchises and validations. TNE failures have sometimes been attributed to unclear objectives and a failure to build robust, objective business cases for the venture. Therefore, the risks should be properly evaluated and, where possible, mitigated.

HEIs should place strategic importance on TNE partnerships as an extension of their core operation. This could include considering TNE as a pathway to recruitment and globally promoting an institutional sustainability agenda.

Many TNE types of delivery have a student mobility component. Often, the direction of travel is from an overseas partner institution to the UK. The Turing scheme presents an

opportunity to engage with TNE partners, an engagement which can be strengthened if outbound students from the UK are placed with the respective TNE partner HEIs.

This research shows a degree of mismatch between the priorities of the local partners and how the UK HEIs perceive these priorities. A better understanding of the areas of mutual interest may result in fewer but stronger partnerships, which may have a significantly more significant impact.

Specific recommendations include:

- Understanding of the TNE partners and what drives the partnership from their perspective. Good and clear communication of the benefits of the TNE for all involved will ensure that expectations are well managed. Benefits of TNE are not mutually exclusive.
- TNE partnerships are a natural extension of the HEIs' strategic priorities. Securing the visibility of TNE in their mission statements and strategies will contribute to whole-university support.
- While TNE is used for student recruitment and revenue generation, many of the long-term benefits remain invisible for UK HEIs' senior teams. The long-term value TNE brings needs to be well understood to dispel misconceptions about the transactional nature of TNE.
- Research collaborations should be enhanced to fully utilise TNE partnerships. Many research partnerships can benefit from stronger collaborative teaching cooperation.

- Mobility schemes can be enhanced to strengthen TNE partnerships. One example is the UK's Turing scheme, which can be extended to support the mobility of TNE researchers at the masters' and doctoral level.
- TNE can contribute to sustainable student recruitment, where the student is in control of the location of the studied modules, and programmes are flexible and evolve around the students.
- TNE programmes are likely to attract much greater scrutiny in future, and they may fall under the regulatory oversight of two countries. Students' outcomes and employability are likely to be critical both for the regulatory bodies in the UK, and those overseas.

One of the many lessons learnt during the pandemic is that TNE can mitigate risks. When student and academic mobility halted international travel, much institution-to-institution engagement shifted online. As a result, student and staff mobility was largely replaced by programme mobility. Some TNE partnerships were strengthened, and significant economies were generated when exam boards and assessments took place online. This also provided the means of much more environmentally sustainable international higher education.

As higher education systems globally mature, so will TNE partnerships, and the focus will shift from quantity of higher education provision to quality of delivery. Strong engagement and communication improve the understanding between the partner HEIs. The research shows that many overseas HEIs are ready to expand their TNE collaboration to include research. Widening these agreements to include areas of mutual interest is likely to sustain the partnerships in the long term.

One of the many lessons learnt during the pandemic is the TNE can mitigate risks. When student and academic mobility halted international travel, much institution-to-institution engagement shifted online

10. Further research

The research has provided a substantial body of evidence on the value of TNE partnerships. The 'TNE Impact' repository established as part of this research will continue to capture TNE impact case studies. Shortly, there will be additional calls for the submission of impact case studies, to achieve 200 submissions by 2023.

There is a need for further research into capturing the transformative value of TNE for students and graduates. During the present research, it emerged that a multitude of impacts are created through TNE, particularly at the individual student level. For example, it was mentioned several times during the interviews that through TNE, some graduates have completely changed their lives. It would be valuable to capture some of these life-changing stories, as these will provide further insights into the value of TNE.

One interviewee suggested that research is needed to compare graduates' life journeys and career paths from TNE partnerships with those from local universities.

Students with disabilities sometimes are not able to access international study for health reasons or because of the medical checks required to obtain student visas. It would be extremely valuable for understanding the impact of TNE to explore the number of students with disabilities who study on UK TNE programmes. For example, UK universities could consider capturing this in their TNE data.

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