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TNE - What we know

# Local contexts and environments

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# Introduction

British Council has researched TNE for over two decades and has built up a wealth of knowledge and understanding of the role TNE plays and the environments in which it operates.

This brief summarises some of the findings from British Council research papers published since summer 2022 which relate to Action 3 within our TNE Strategy: “Contribute to a better understanding of the local context and facilitate a regulatory and operational environment to best support TNE partnerships”.

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



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# Local contexts and environments

## Key factors

Transnational education (TNE) operates in diverse modalities across a wide range of contexts, and our knowledge base is constantly evolving. The precise local operating environment depends on a number of variables, including: the role of government; the status of research partnerships; the role of public and private providers; and (not least) the English language proficiency of staff and students.

## The role of government

The expanding global environment for TNE is driven in a number of countries by long-term national plans for growth and building capacity. The following examples are drawn from contrasting contexts that differ in scale, but where the common factor is the role of TNE growth in public policy.

- In 2021-22, **Egypt** was the fifth largest market for UK TNE, with 23,815 students enrolled on UK tertiary education courses in country. Egypt is experiencing the largest overall population increase in the Middle East, with a projected average annual growth rate up to 2030 of 1.7%. Around 51% of the Egyptian population are under 25, making it one of the largest youth populations in the world. The need, therefore, is for the tertiary education sector to develop capacity to meet the demand created by population growth. *The Egyptian government's vision is for foreign TNE to support this capacity development, and [...] also introduce new skills and subject areas into the higher education provision that are not currently delivered by the domestic system* ([Transnational Education in Egypt](#) page 10).
- **Vietnam** is the 20th largest UK TNE market, with approximately 7,500 students in 2022. The UK is the leading provider of TNE in Vietnam, with 101 distinct programmes. The largest group of UK TNE partnerships in Vietnam is franchised degree programmes. Vietnam's ambitious Higher Education Development Strategy envisions tertiary education becoming the country's core competitive strength, and that by 2045 *Vietnam will be ranked among the countries with advanced higher education systems*. This strategy includes priorities for international cooperation, including international branch campuses of prestigious foreign universities in Vietnam. ([Transnational Education in Viet Nam](#) page 14)
- With fewer than 1,000 students per year on UK tertiary education courses, **Romania** is not currently a major host country for UK TNE. But recent Romanian legislation is moving towards internationalisation of education, the development of international partnerships and the improvement of recognition processes. Academic staff perspectives on future development reveal an openness to developing joint degree programmes, [micro-credentials](#) (short, on demand, online courses, with certification on completion), online education and research collaborations. Forthcoming legislation for internationalisation includes:
  - supporting the development of joint and integrated study programmes
  - development and recognition of micro-credentials
  - financial incentives to enhance internationalisation
  - supporting international partnerships
  - regulation of joint, double or multiple degrees study programmes.

Our knowledge and understanding of local contexts can create a more enabling environment for opportunities. For example, our work with the Higher Education Commission in Pakistan supported the development of their National TNE Policy. The policy has three components which British Council has deep knowledge of, including: Guidelines for Pakistani institutions offering foreign qualifications in Pakistan; Guidelines for the establishment of off-shore campuses outside Pakistan; Guidelines on the quality assurance and regulatory requirements that will be an essential reference for UK providers.

## Research partnerships

Our report on [The Value of TNE Partnerships](#) identifies the global potential for improved research and teaching partnerships. As well as its intrinsic value, research engagement with overseas partners, especially in the form of joint Masters and PhD programmes, can supply faculty development that will upskill teaching staff for TNE courses at undergraduate level. The status of research partnerships, however, varies from country to country.

In sub-Saharan Africa, for example, the largest host countries are [Nigeria](#) and [South Africa](#), where demand for TNE degrees is currently focused on postgraduate qualifications, mostly delivered online. In [Brazil](#), given the strong language-based preference for regional mobility, there is currently no substantial engagement with TNE programmes, although the UK ranks second as a research collaborator, and existing research links could be expanded to embrace teaching partnerships. Another 'priority' country with strong TNE potential is [Mexico](#), which has a long research history with the UK, ranked fourth most frequent collaborator in co-authored papers, but very few current teaching partnerships.

## Public and private sectors

There are significant contrasts in ease of engagement for TNE programmes in public and private university sectors across different contexts. For example, in [Brazil](#), public universities focus mainly on research, while the growing demand for tertiary education is largely met by private universities. In [India](#), private universities tend to be far more agile in forming and developing TNE partnerships: a typical partnership might begin on a small scale, for example as a student exchange programme, growing organically to an institution-wide teaching and research partnership. And in [Peru](#), existing TNE initiatives are restricted to a small number of private universities, as the process in the public universities is heavily bureaucratic, discouraging their participation.

There is also scope for greater proactive engagement with professional bodies and employers. Although recognition of online degrees remains an issue in many countries, employers are increasingly prepared to accept professional qualifications and micro-credentials obtained online. This may be of particular relevance in low- to middle-income settings.

## Language proficiency

Our research also reveals a strong link in many countries between English language competence and the tertiary internationalisation agenda. One of the greatest barriers impacting the operation of TNE partnerships, reported by both UK and local institutions, is low levels of English language proficiency amongst students who will need more English language support. Of the cross-section of 15 countries selected for our study of the [global TNE environment](#), seven fall into the Low Proficiency band in the 2023 [EF English Proficiency Index \(EPI\)](#), with Saudi Arabia categorised as Very Low Proficiency.

|              | EF EPI Ranking<br>(out of 113 countries) |
|--------------|--|
| Pakistan     | 64                                       |
| Turkey       | 66                                       |
| Brazil       | 70                                       |
| Indonesia    | 79                                       |
| China        | 82                                       |
| Egypt        | 83                                       |
| Mexico       | 89                                       |
| Saudi Arabia | 108                                      |

In [Brazil](#), there is a preference for regional languages as the medium of instruction, and levels of English language proficiency consequently remain low amongst academic staff as well as students. Language requirements in [Turkey](#) are demanding: IELTS 6.5 for students and IELTS 7 for teachers. In [Mexico](#), English language skills are needed by staff, even though courses can be delivered in Spanish. There is a strong link between aspirations towards greater internationalisation, as evidenced in [Indonesia](#), and the need for significant improvement in English language competence.

## Information sharing

Given all these variables, there is the need for a good deal of agility when addressing future themes in TNE collaboration.

Establishing scalable and sustainable TNE partnerships is dependent on arriving at a shared understanding of local financial environments, regulatory requirements and approval processes, including the qualifications required by regulated professions.



## To find out more

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

[Research and insight | British Council](#)

[Opportunities and insight | British Council](#)

For comprehensive information on the UK government's International Education Strategy, including TNE policy, see this [2023 progress update](#).

On the scale of UK TNE in Egypt, see our report on [Transnational Education in Egypt](#) pages 16-18. On the move towards a more competitive environment for TNE in Vietnam, see our report on [Transnational Education in Viet Nam](#). On the Romanian policy for international partnership growth, see our report on UK-Romania Transnational Education, page 13.

Our report on [The Value of TNE Partnerships](#) (2022) reveals differing, though not mutually exclusive, perceptions of value and benefits between UK Higher Education (HE) institutions and host institutions. Our environment reports present landscape studies across 15 selected countries:

|                           |                             |                              |
|---------------------------|-----------------------------|------------------------------|
| <a href="#">Brazil</a>    | <a href="#">Mexico</a>      | <a href="#">Saudi Arabia</a> |
| <a href="#">China</a>     | <a href="#">Nigeria</a>     | <a href="#">South Africa</a> |
| <a href="#">Egypt</a>     | <a href="#">Pakistan</a>    | <a href="#">Spain</a>        |
| <a href="#">India</a>     | <a href="#">Peru</a>        | <a href="#">Turkey</a>       |
| <a href="#">Indonesia</a> | <a href="#">Philippines</a> | <a href="#">Vietnam</a>      |

An overarching [Global Environment](#) report synthesises findings from the 15 studies.

For granular analysis of English language proficiency around the globe, see the

[EF English Proficiency Index 2023](#)

In contrast to earlier reports on English as a Medium of Instruction (EMI), which have focused on tertiary contexts, see this report which examines [EMI in basic education in low- and middle-income countries](#)

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