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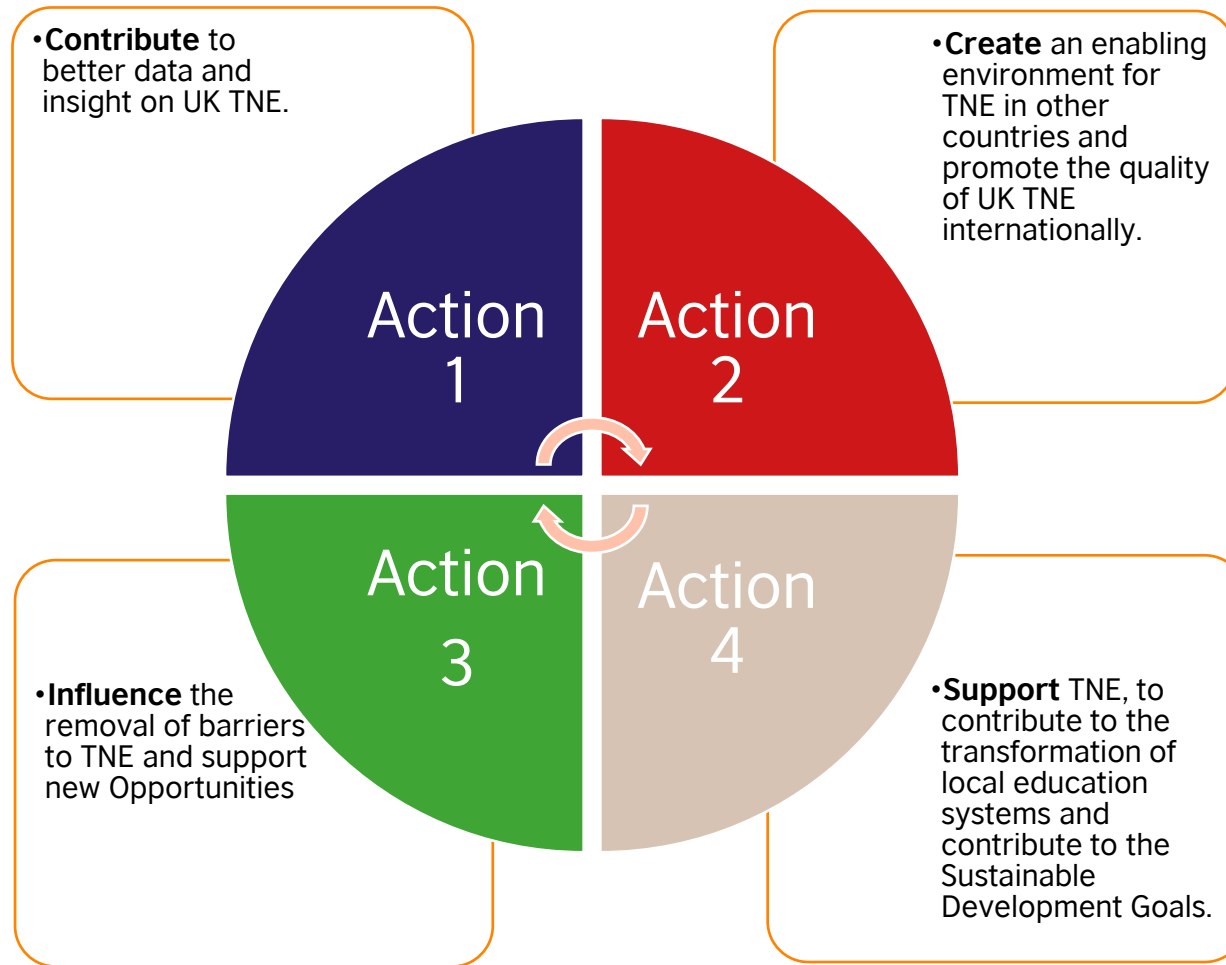
Regional TNE Mapping: Interim Report

Tashkent, 5 March 2024

British Council's Global TNE Strategy

In the realm of global education, the British Council is not just a participant but a shaper of the future. Our vision is to **facilitate and develop scalable and sustainable UK TNE globally.**

Our strategy outlines four key actions for the next two years



Project Introduction and Scope

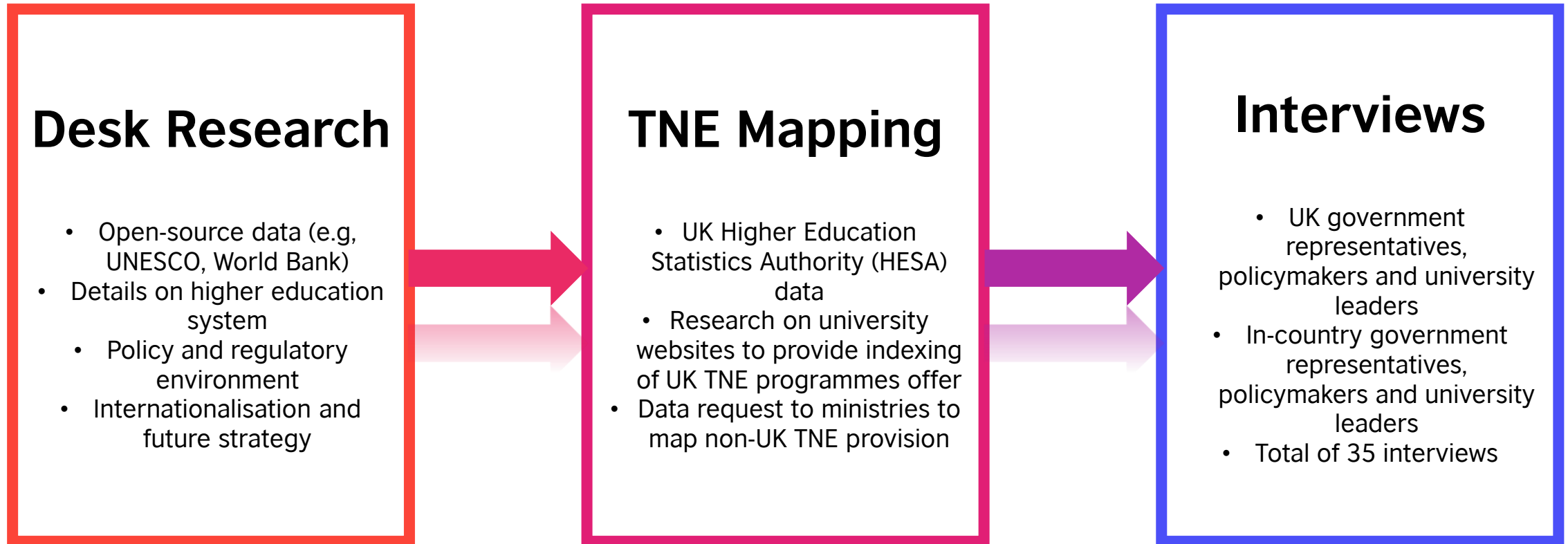
This project aims to identify the opportunities and challenges for UK Transnational Education (TNE) across three geographical clusters in the 'Wider Europe' region (non-EU countries), further divided into three sub-regions

Balkans	South Caucasus	Central Asia
Albania	Armenia	Kazakhstan
Serbia	Azerbaijan	Uzbekistan
	Georgia	

Outcomes:

- Map existing UK and non-UK TNE
- Provide insight and actionable recommendations for UK and partaking country stakeholders to enhance UK TNE relations

Project Approach and Methods





Country Analysis

Central Asia- Overview

Kazakhstan

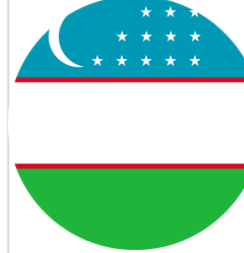


Universities
92 Public
33 Private

Population, million	19.2
GDP per capita, current \$	10,373
Gov. expenditure on tertiary education \$ million (2019)	564.3
GER for Tertiary Education (% 2019)	61.7
% enrolled in tertiary private institutions	53.6

- Member of Bologna Process and the first Central Asian nation to join the European Higher Education Area (EHEA)
- A reform law in 2018 allows universities to establish endowment funds, open international campuses, and create startup companies within HEIs.
- Internationalisation is a key priority.
- International students aligns with the government's trilingual policy, promoting the use of Kazakh, Russian, and English in education.

Uzbekistan



Universities
115 Public
95 Private

Population, million	34.2
GDP per capita, current \$	1,983
Gov. expenditure on tertiary education \$ million (2021)	225.1
GER for Tertiary Education (% 2019)	12.6
% enrolled in tertiary private institutions	3.4

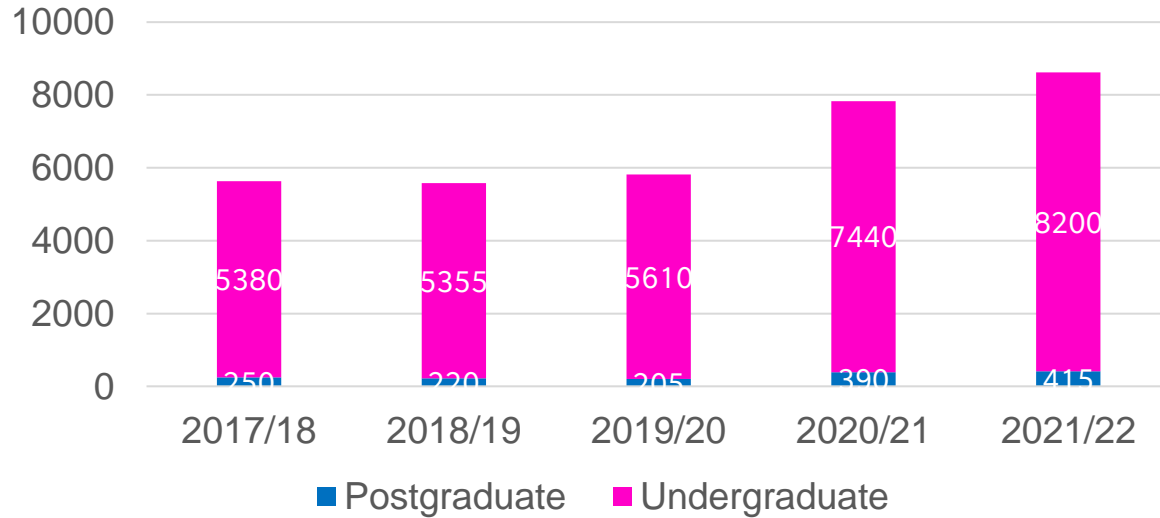
- From 77 to 210 HE Institutions between 2016 and 2023.
- The government of Uzbekistan has made the enhancement of HE a central focus in its economic and social development plans:
 - University enrolment rates to reach 50% for high-school graduates by 2030
 - Granting financial autonomy and academic freedom to public universities, promoting international collaborations
 - Prioritized internationalising its HE system by forming agreements with foreign countries: 30 international branch campuses from countries including Russia, South Korea, Japan, India, UK and Italy.

Uzbekistan – Student Mobility

Country of origin		Destination country		Key Indicators	
Turkmenistan	2,233	Kyrgyzstan	51,605	Students abroad:	
Pakistan	763	Russian Federation	27,397	Total number of mobile students abroad	109,945
Russian Federation	572	Kazakhstan	26,130	(% of total mobile students)	1.7
Kazakhstan	526	Korea, Rep.	7,641	Outbound mobility ratio	19.1
Afghanistan	337	Türkiye	2,423	Students hosted:	
Kyrgyzstan	333	Belarus	2,352	Total number of mobile students hosted	5,503
Tajikistan	225	Latvia	1,710	(% of total mobile students)	0.1
India	159	Ukraine	1,503	Inbound mobility rate	0.7
Korea, Rep.	137	Poland	1,368		
China	83	Japan	1,048		

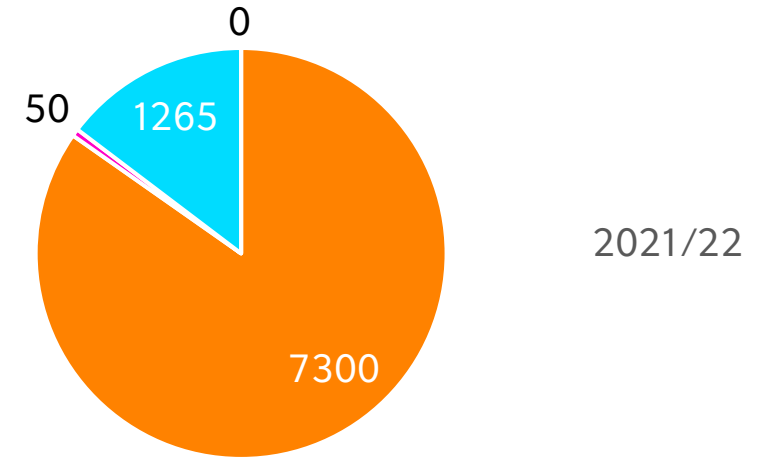
Uzbekistan - TNE

Uzbekistan TNE enrolments



The University of Westminster Tashkent Campus offer a range of Bachelor's and Master's programmes ranging from Finance to Public Health

The University of Sunderland, in partnership with Management Development Institute of Singapore Tashkent, also offers a wide array of UK TNE, including Fashion. Business courses predominate.



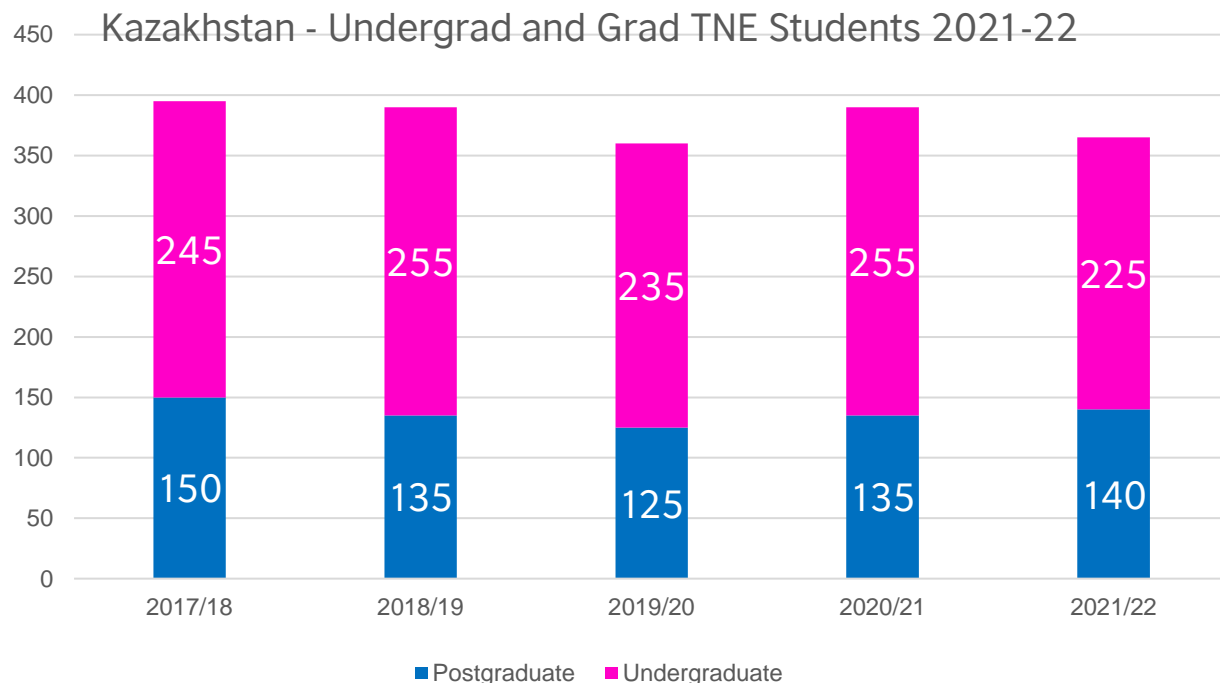
- Registered at reporting provider - studying overseas for UK HEP award other than at an overseas campus of reporting provider
- Registered at reporting provider - distance, flexible and distributed learning for UK HEP award where the location of the student is known to be overseas
- Registered at overseas partner organisation - studying overseas for an award of the reporting provider
- Any other student studying overseas for an award of the reporting provider

	2021/22
The University of Westminster	5080
The University of Sunderland	2085
Bangor University	1260
London South Bank University	85
Teesside University	50
University of London (Institutes and activities)	15

Kazakhstan – Student Mobility

Country of origin		Destination country		Key Indicators	
Uzbekistan	26,130	Russian Federation	71,368	Students abroad:	
India	4,453	Türkiye	2,911	Total number of mobile students abroad	91,860
Turkmenistan	3,294	Czechia	2,395	(% of total mobile students)	1.4
Russian Federation	1,487	Kyrgyzstan	1,985	Outbound mobility ratio	12.2
Kyrgyzstan	1,161	United States	1,745	Gross outbound enrolment ratio	...
China	989	Poland	1,468	Students hosted:	
Mongolia	973	Germany	1,218	Total number of mobile students hosted	40,742
Tajikistan	613	United Kingdom	1,201	(% of total mobile students)	0.6
Afghanistan	415	Korea, Rep.	797	Inbound mobility rate	5.5
Türkiye	316	Canada	696		

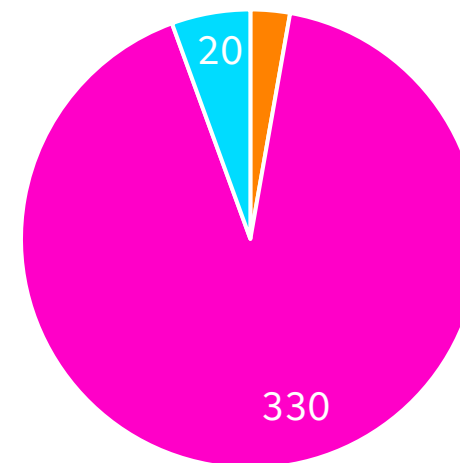
Kazakhstan- TNE



Apart the University of London's distance learning provision, there are two main hosts of UK TNE in Kazakhstan:

- Coventry University and Narxoz University - Law and Business programmes
- De Montfort University campus - programmes ranging from Advertising to Graphic Design

Type of Activity 2021-22



- Registered at reporting provider - studying overseas for UK HEP award other than at an overseas campus of reporting provider
- Registered at reporting provider - distance, flexible and distributed learning for UK HEP award where the location of the student is known to be overseas
- Registered at overseas partner organisation - studying overseas for an award of the reporting provider

	2021/22
University of London (Institutes and activities)	200
Coventry University	20
Heriot-Watt University	20
The Open University	10
De Montfort University	10
The University of Salford	10
The University of Warwick	10
The University of Aberdeen	10
Arden University	10
University of Derby	5

Caucasus- Overview

Armenia



Population, million	2.9
GDP per capita, current \$	4,966
Gov. expenditure on tertiary education \$ million (2022)	47.8
GER for Tertiary Education (% 2019)	51.5
% enrolled in tertiary private institutions	10

Universities
26 public
33 private

- The Law on Higher and Postgraduate Professional Education sets the legal framework for higher education in Armenia. The National Center for Professional Education Quality Assurance (ANQA) oversees quality assurance processes.
- The Armenia Transformation Strategy 2050 is the government's roadmap outlining 16 socio-politico-economic development goals for the next 30 years. The Ministry of Education, endorsed its Education Development Strategy 2030 in 2022.

Azerbaijan

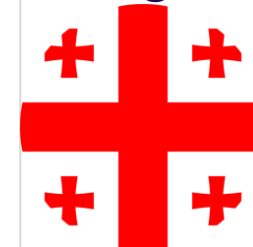


Population, million	10.1
GDP per capita, current \$	5,388
Gov. expenditure on tertiary education \$ million (2021)	318.7
GER for Tertiary Education (% 2019)	31.5
% enrolled in tertiary private institutions	8.9

Universities
38 public
11 private

- “State Programme on Increasing the International Competitiveness of the Higher Education System in the Republic of Azerbaijan for 2019-2023” focuses on two key areas:
 - (i) international dual degree programs, engaging foreign teachers to enhance scientific potential, and improving academic publications
 - (ii) strengthening academic capacity by addressing legal, financial, and practical issues for citizens pursuing doctoral education in reputable foreign universities.
- “State Program for the Education of Azerbaijani Youth in the Top-ranked Foreign Universities for 2022-2026”

Georgia



Population, million	3.9
GDP per capita, current \$	5,023
Gov. expenditure on tertiary education \$ million (2021)	49.9
GER for Tertiary Education (% 2019)	63.9
% enrolled in tertiary private institutions	34.8

Universities
19 public
43 private

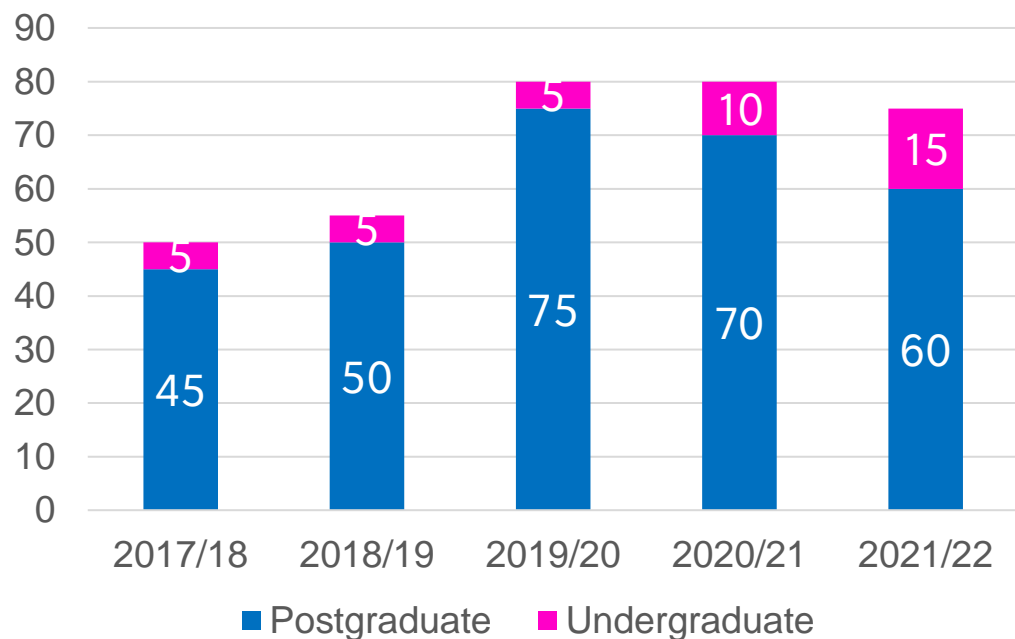
- Part of the Bologna Process
- The government has promoted international collaboration in HE by partnering with universities from other countries.
- Georgia has adopted the Unified National Strategy of Education and Science for 2030, accompanied by an action plan for 2022-2024.
- The National Center for Educational Quality Enhancement (NCEQE) regulates the higher education sector

Armenia – Student Mobility

Country of origin		Destination country		Key Indicators	
Russian Federation	2,082	Russian Federation	3,891	Students abroad:	
India	2,014	Germany	782	Total number of mobile students abroad	6,561
Georgia	851	United States	301	(% of total mobile students)	0.1
Iran, Islamic Rep.	332	France	277	Outbound mobility ratio	7.1
Syrian Arab Republic	250	Ukraine	126	Gross outbound enrolment ratio	...
Iraq	196	United Kingdom	123		
Jordan	188	Greece	81	Students hosted:	
Turkmenistan	121	Czechia	77	Total number of mobile students hosted	6,735
Lebanon	107	Italy	77	(% of total mobile students)	0.1

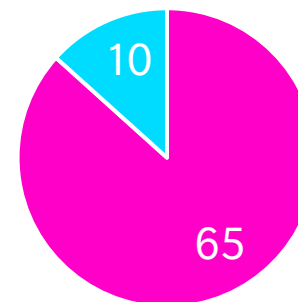
Armenia- TNE

TNE Enrolments in Armenia



Almost all of the UK TNE delivered in Armenia is an executive MBA program delivered by City College. Based in Greece, City College are the European campus of the University of York, who award the executive MBA programme. (Until 2021-22 the partnership was between City College and the University of Sheffield)

TNE in Armenia by type of provision, 2021/22



- Registered at overseas partner organisation - studying overseas for an award of the reporting...

	2021/22
	2
The University of Sheffield	40
The University of York	25
University of London (Institutes and activities)	10

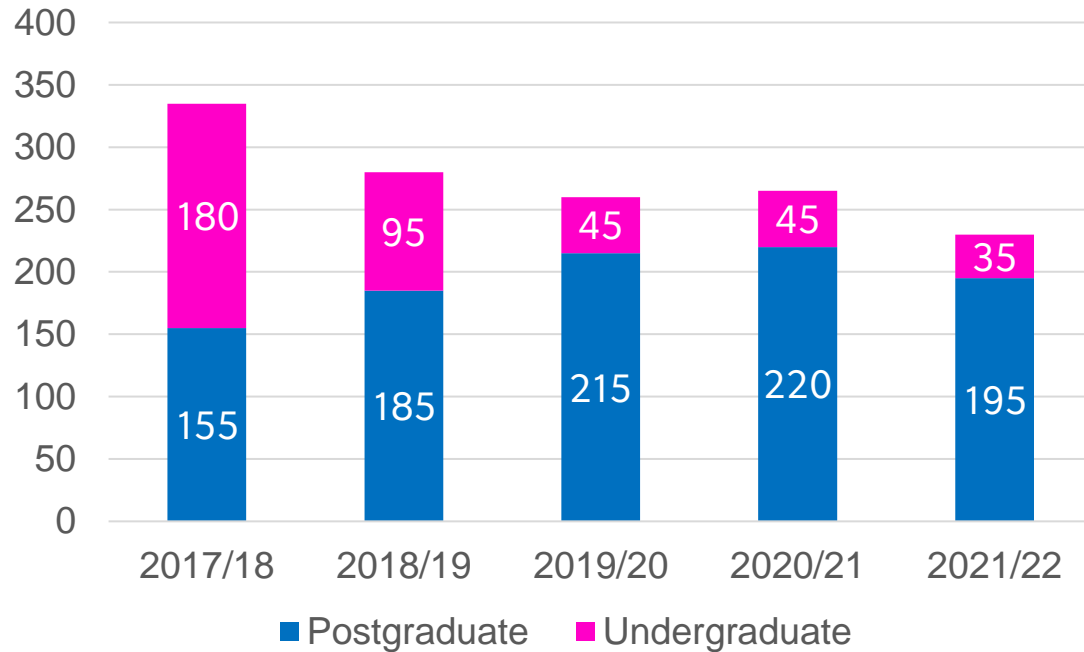
Azerbaijan – Student Mobility

Country of origin		Destination country		Key Indicators	
Türkiye	2,870	Türkiye	23,772	Students abroad:	
Iran, Islamic Rep.	1,160	Russian Federation	10,946	Total number of mobile students abroad	48,097
Russian Federation	477	Ukraine	4,375	(% of total mobile students)	0.8
Georgia	440	Germany	1,484	Outbound mobility ratio	19.3
Iraq	293	Georgia	907	Students hosted:	
Syrian Arab Republic	138	Poland	890	Total number of mobile students hosted	6,377
Pakistan	122	Hungary	705	(% of total mobile students)	0.1
India	118	Italy	684	Inbound mobility rate	2.4
China	103	France	643		
Nigeria	94	United States	556		

(Source: UNESCO UIS Database)

Azerbaijan - TNE

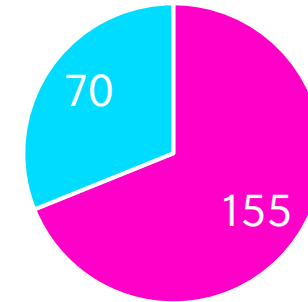
TNE Enrolments in Azerbaijan



The majority of UK TNE is delivered through online learning.

City College (validated by University of York and previously the University of Sheffield) deliver UK-awarded TNE in Azerbaijan.

www.britishcouncil.org



Type of Activity 2021-22

- Registered at reporting provider - studying overseas for UK HEP award other than at an overseas campus of reporting provider
- Registered at reporting provider - distance, flexible and distributed learning for UK HEP award where the location of the student is known to be overseas
- Registered at overseas partner organisation - studying overseas for an award of the reporting provider

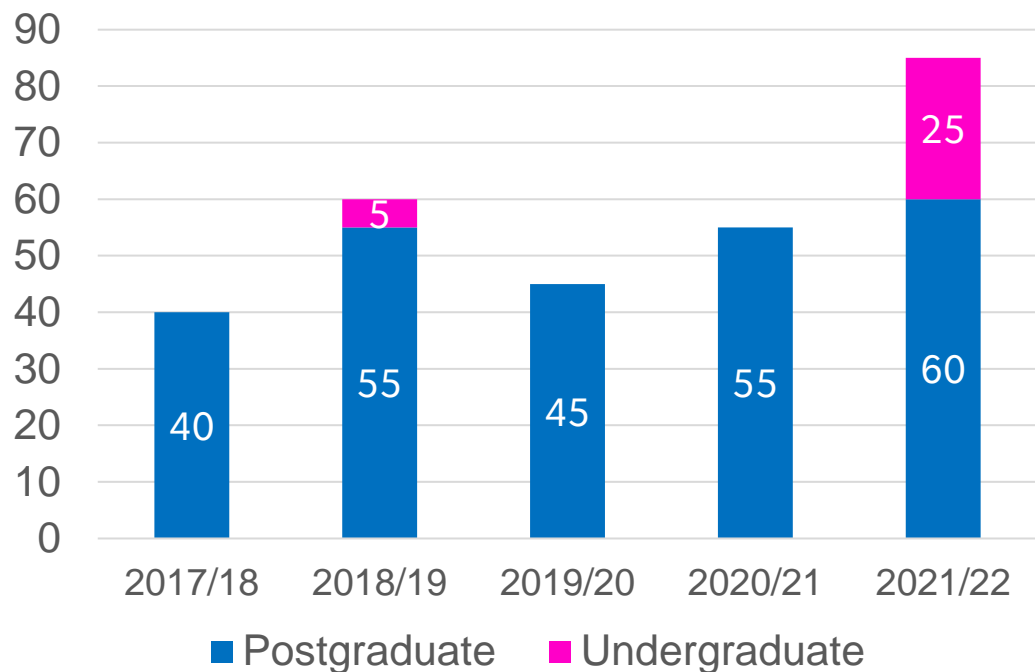
The University of Sheffield	55
University of London (Institutes and activities)	25
The University of York	15
Heriot-Watt University	20
The University of Chichester	15
King's College London	10
The University of Aberdeen	5
The Open University	5
University of Suffolk	5
The University of Salford	5

Georgia – Student Mobility

Country of origin		Destination country		Key Indicators	
India	8,811	Germany	1,997	Students abroad:	
Israel	989	Ukraine	1,477	Total number of mobile students abroad	9,240
Azerbaijan	907	Armenia	851	(% of total mobile students)	0.1
Jordan	872	Russian Federation	763	Outbound mobility ratio	5.7
Nigeria	813	Türkiye	653	Students hosted:	
Egypt	601	United States	583	Total number of mobile students hosted	17,527
Iran, Islamic Rep.	538	Azerbaijan	440	(% of total mobile students)	0.3
United Kingdom	500	France	266	Inbound mobility rate	10.7
Russian Federation	323	United Kingdom	200		
Türkiye	310	Austria	194		

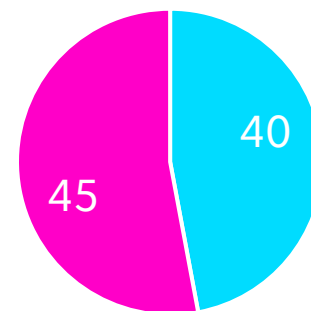
Georgia - TNE

TNE Enrolments in Georgia



Like Albania, Armenia, and Azerbaijan, City College (validated by University of York and previously the University of Sheffield) delivers UK-awarded TNE in Georgia.

TNE in Georgia by type of provision, 2021/22



- Registered at overseas partner organisation - studying overseas for an award of the reporting provider

	2021/22
The University of Sheffield	25
University of London (Institutes and activities)	15
The University of Buckingham	10
The University of Reading	10
King's College London	5
The Open University	5
The University of Law	5
The University of Manchester	5
The University of York	5

Western Balkans- Overview

Albania



Universities
15 Public
26 Private

Population (million)	2.8
GDP per capita (current \$)	6,743
Gov. expenditure on tertiary education (\$ million 2020)	112.1
GER for Tertiary Education (% 2019)	58.8
% enrolled in tertiary private institutions	18.5

- Albania is implementing important structural reforms that will support equitable growth, raise productivity and competitiveness in the economy, create more jobs, and improve governance and public service delivery. Special attention on tourism, agriculture, and digitization
- Albania signed the Bologna Declaration in 2003. The Bologna process has launched some strategic challenges and for the Higher Education Institutions, an obvious challenge is that of internationalization.
- The implementation of the Bologna System has affected aspects of the higher education system in Albania, from higher education policies, research, and structural aspects in the organization of studies or the administration of higher education.
- An agreement between the Ministry of Education of Albania and the Quality Assurance Agency of Great Britain was signed to carry out assessment and certification of quality and same standards of all higher education institutions in Albania.

Serbia



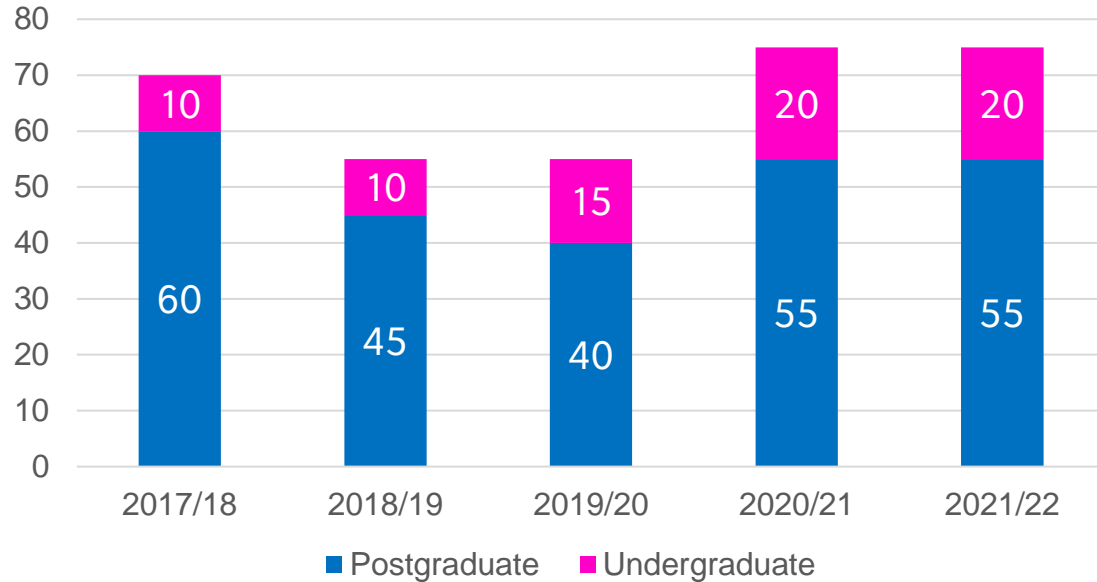
Universities
8 public
10 private

Population (million)	6.7
GDP per capita (current \$)	9,511.5
Gov. expenditure on tertiary education (\$ million 2021)	572.2
GER for Tertiary Education (% 2019)	67.7
% enrolled in tertiary private institutions	13.6

- Serbia is a transit and migrant-sending country. According to the Organisation for Economic Cooperation and Development, 50,000 Serbian citizens emigrate each year to Western European countries.
- Migrants are predominantly younger and of reproductive age and professionals who are in demand in both Serbia and EU labour markets (e.g., medical professionals, IT technicians, drivers, construction workers). Serbia is one of the countries in Europe and the world that are losing their population the fastest
- Strategy for the Development of Education in Serbia by 2030 focuses on improving accessibility, quality, relevance, and equity in higher education. As well as state universities, there are 63 Colleges of Applied Sciences delivering tertiary-level awards

Albania - TNE

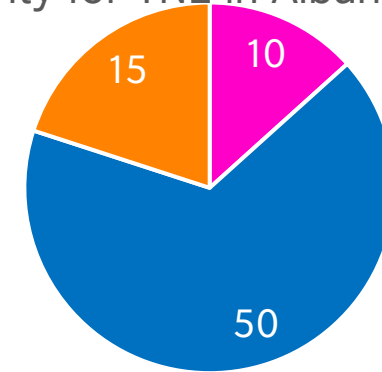
Albania Total TNE by Postgraduate & Undergraduate



The majority of UK TNE in Albania is undertaken through online learning.

The relatively low number of TNE enrolments makes subject mapping difficult; the University of York offers an MPA in International Development which has a few Albanian enrolments.

Type of Activity for TNE in Albania 2021-2022

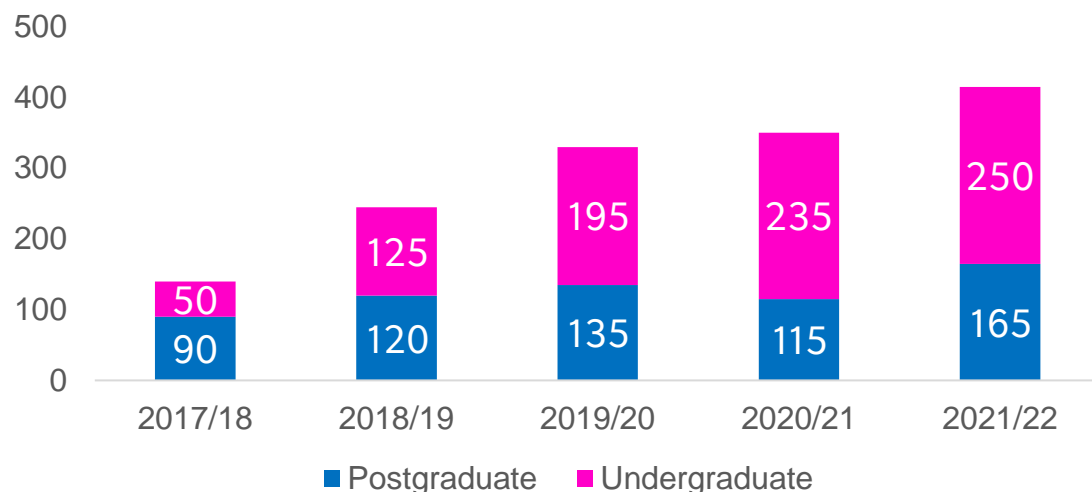


Registered at overseas partner organisation - studying overseas for an award of the reporting provider

	2021/22
University of Greenwich	15
University of York	10
University of London	10
Arden University	5
Heriot-Watt University	5
The Open University	5
University of Salford	5
University of Sunderland	5

Serbia - TNE

Serbia Total TNE by Postgraduate & Undergraduate



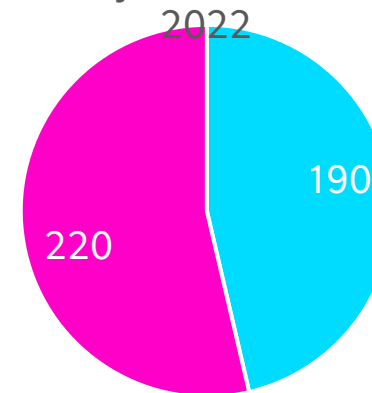
The majority of UK TNE in Serbia is in the Business disciplines.

Middlesex University offer an MSc International Business Management in collaboration with the University of Belgrade

An Executive MBA programme is offered by the University of York via its partner City College. Though based in Greece, City College act as the European campus of York.

The University of London delivers BSc in Business Management and BSc in Economics and Finance in collaboration with the University of Belgrade

Type of Activity for TNE in Serbia 2021-2022



- Registered at overseas partner organisation - studying overseas for an award of the reporting provider
- Registered at reporting provider - distance, flexible and distributed learning for UK HEP award where the location of the student is known to be overseas

	2021/22
University of London	155
Middlesex University	125
University of Sheffield	50
University of York	20
Heriot-Watt University	5
Robert Gordon University	5
SOAS University of London	5
Open University	5
University of Salford	5
University of Derby	5

Key Insights

UK TNE Provision in Wider Europe

TNE Enrolments in 2021-22



Thank you

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British Council

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