

Wider Europe

Transnational education partnerships in Central Asia, South Caucasus and Western Balkans



© British Council 2024 licensed under a
Creative Commons Attribution Non-Commercial
4.0 International License
(<https://creativecommons.org/licenses/by-nc/4.0/>).

This research was commissioned
by the British Council and authored
by Times Higher Education.

Times Higher Education Project Team

Dr Ishan Cader
David Prentice
Allison Cheung

Special thanks to (in alphabetical order):

British Council Global Project Team

Ellie Buchdahl
Nilgün Yalçın Felchner
Nicola Norton
Kevin Prest
Clare Sears

British Council Country Teams:

Stela Durutovic
Jamilya Gulyamova
Nargiz Hajiyeva
Addeh Hovassapian
Majlinda Mazelliu
Zaza Purtseladze
Nadia Trubova

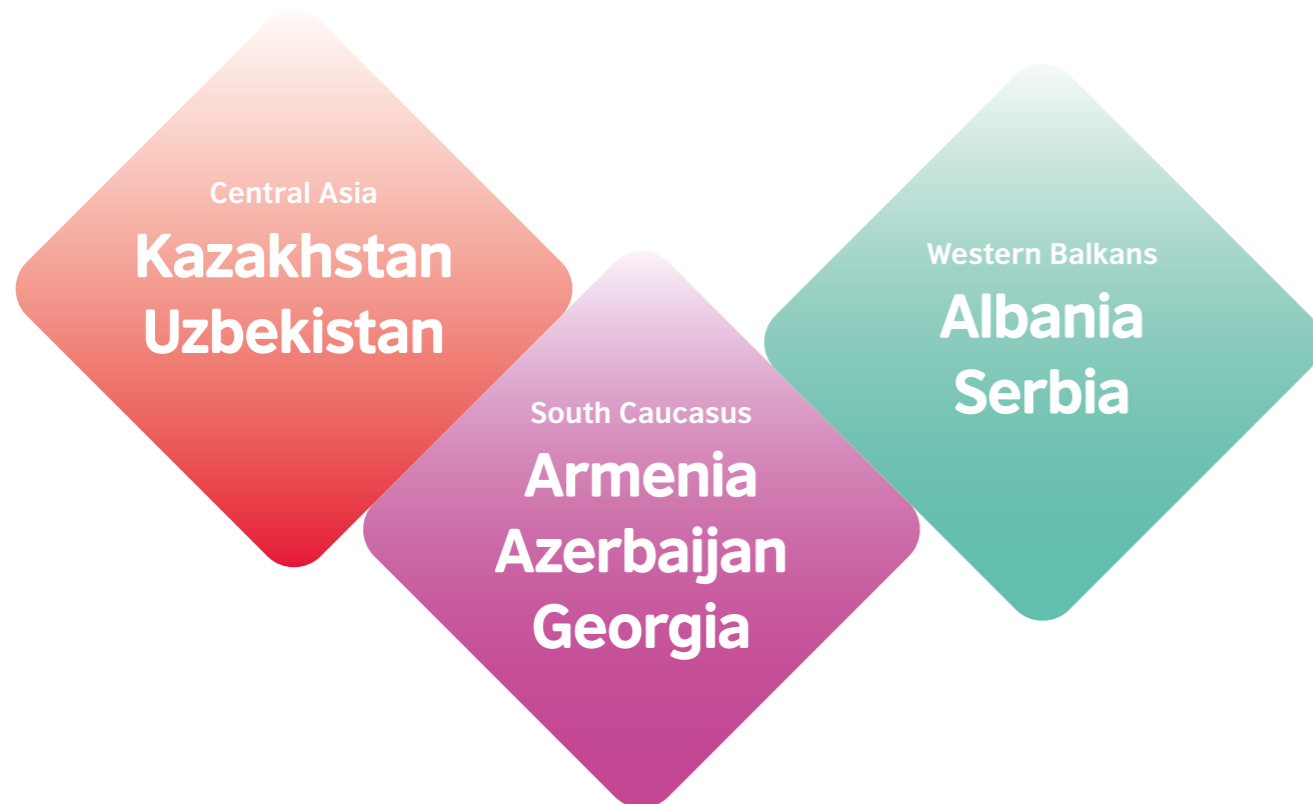
Contents

1 Introduction	04
1.1 Project overview	05
2 Methodology	06
2.1 Limitations of study	06
3 Central Asia	07
3.1.1 Kazakhstan introduction	07
3.1.2 Kazakhstan TNE mapping	10
3.1.3 Kazakhstan stakeholder insights	13
3.2.1 Uzbekistan introduction	16
3.2.2 Uzbekistan TNE mapping	19
3.2.3 Uzbekistan stakeholder insights	21
4 South Caucasus	24
4.1.1 Armenia introduction	24
4.1.2 Armenia TNE mapping	28
4.1.3 Armenia stakeholder insights	30
4.2.1 Azerbaijan introduction	31
4.2.2 Azerbaijan TNE mapping	33
4.2.3 Azerbaijan stakeholder insights	35
4.3.1 Georgia introduction	38
4.3.2 Georgia TNE mapping	41
4.3.3 Georgia stakeholder insights	43
5 Western Balkans	49
5.1.1 Serbia introduction	49
5.1.2 Serbia TNE mapping	52
5.1.3 Serbia stakeholder insights	54
5.2.1 Albania introduction	57
5.2.2 Albania TNE mapping	59
5.2.3 Albania stakeholder insights	61
6 Conclusions and recommendations	62
Annex A	64
Lists of all the TNE programmes undertaken by UK universities in each of the countries.	64
UK TNE in Albania	64
UK TNE in Serbia	65
UK TNE in Armenia	66
UK TNE in Azerbaijan	66
UK TNE in Georgia	69
UK TNE in Kazakhstan	70
UK TNE in Uzbekistan	72
Annex B	75
Lists of all the TNE programmes undertaken by non-UK universities in each of the countries.	75
Non-UK TNE in Kazakhstan	75
Non-UK TNE in Armenia	83
Non-UK TNE in Azerbaijan	85
Non-UK TNE in Georgia	86

1 Introduction

The Wider Europe region comprises 15 countries spanning multiple geographic and cultural regions, including Central Asia, the South Caucasus and the Western Balkans. The region has a diverse set of demographic and socio-economic contexts, and a variety of interactions with UK higher education through transnational education (TNE).

This study has been commissioned by the British Council to understand the environment for TNE in seven countries:



The study contributes to a growing body of literature around the opportunities and challenges for UK universities to enhance their TNE activities globally, and to provide specific detail about those opportunities and challenges in these countries.

The British Council has been active for several years in promoting higher education partnerships between the UK sector and countries across the region. Between 2018 and 2023, the Creative Spark programme funded 50 partnerships with UK higher education institutions and the creative sector in Armenia, Azerbaijan, Georgia, Kazakhstan, Kyrgyzstan, Ukraine and Uzbekistan. The aim was to develop English language learning as well as entrepreneurship and enterprise skills for students and young entrepreneurs across the seven countries.¹

¹ Creative Spark: Higher Education Enterprise Programme (2018), British Council

Nevertheless, as Figure 1 below shows, the overall region is relatively under-represented in terms of UK TNE globally. TNE can be defined as 'education delivered in a country other than the country in which the awarding institution is based'.² Uzbekistan is by some distance the largest market, with the other countries remaining marginal in terms of enrolments. As such, all markets can be regarded as having significant potential for growth in terms of UK TNE.

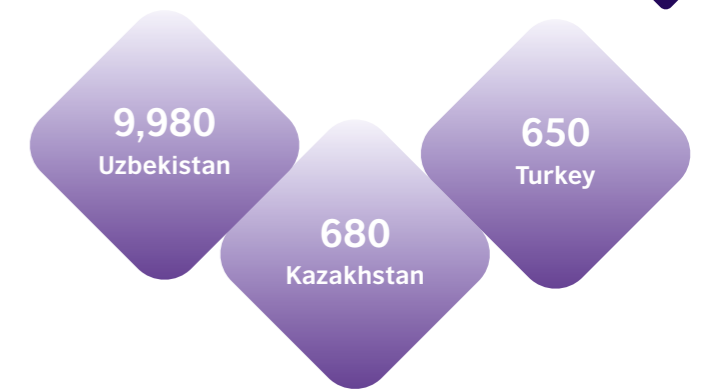
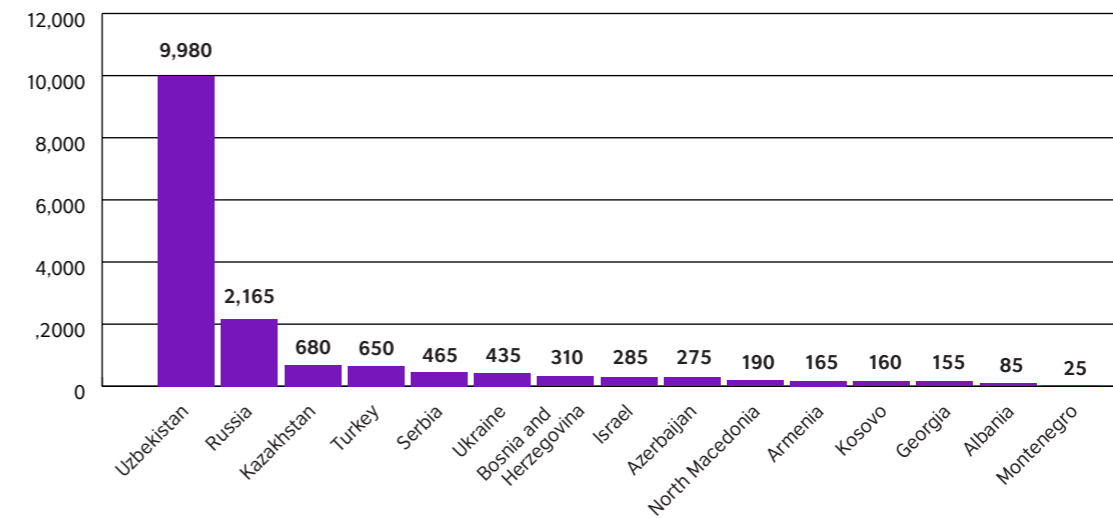


Figure 1. UK TNE enrolments in countries classified in the Wider Europe region, 2022-23. Source: HESA Aggregate Offshore Record



1.1 Project overview

Enabling environments for UK TNE in different countries can include many aspects: demand for UK higher education, international student recruitment opportunities, level of maturity of domestic higher education, economic development ambitions, regulatory systems and domestic government policies on education in general. This study represents an opportunity to undertake a discovery of the conditions in the seven countries that can enable or discourage UK TNE.

The project objectives are:

1. To assess the current scale of UK and non-UK TNE activity in the seven countries of the study, including the existing models of TNE.
2. To gain further insight into the barriers and opportunities and incentives for TNE, including economic and policy drivers.
3. To understand the regulatory environments for foreign TNE in each country, and whether these can support the enhancement of UK TNE.
4. To understand the views of key stakeholder groups, including university officials and representatives from public bodies such as ministries of education.
5. To gain insight into current UK and non-UK TNE practices and provide recommendations to policymakers and the UK education sector for future TNE activities.

² Universities UK (2022)

2 Methodology

Three main methods were deployed to collect data and research:

1. TNE data mapping

The mapping of TNE activity was divided into UK and non-UK phases. The UK phase used Higher Education Statistics Agency (HESA) data to understand which UK universities had TNE partnerships in the seven countries. Web-based searches were then undertaken of the websites of each of these UK universities to establish the TNE partners in the host countries, the programmes, duration, mode of study, model of TNE and pricing. Where necessary, the TNE lead for each university was contacted to verify the information on the website.

HESA data from 2022–2023 was also used to analyse enrolment data from UK universities in each of the seven countries, providing insight into trends, levels of study and active models of TNE.

For non-UK TNE partnerships, information on each of the host countries' universities was requested from the ministries in each of the seven countries. In addition to this, university websites in the host countries were researched to ascertain whether partnerships were explicitly detailed on the website.

2. Desk-based research

Desk research involved the review and analysis of multiple sources of quality information and perspectives on two key areas for this project:

- i) The policy environment for higher education. This was found in national level official documentation, higher education news bulletins (including PIE News, Times Higher Education and University World News) and academic articles on TNE and internationalisation in the host countries.
- ii) The broader opportunities and barriers for TNE in the seven countries, including socio-demographic and economic development data to contextualise the higher education journey that each country is currently undertaking. Sources included World Bank and UNESCO data, national ministry data and academic articles.

3. Stakeholder interviews

Interviews were conducted in all seven country markets. Most interviews were conducted online, apart from in Azerbaijan and Georgia; visits were made to these countries and interviews with policymakers, ministry officials and university representatives conducted face-to-face. Participants were asked a range of questions related to the challenges currently impacting TNE relations. The aim was also to understand their preferences for the future development of TNE, including models, subjects, student recruitment, internationalisation and contributions towards broader government strategy. Interviews gained further information on regulatory concerns. From senior host country officials, they aimed to understand the future direction of higher education policy and how that will impact UK university providers.

2.1 Limitations of study

For the non-UK TNE partnerships part of the data mapping, it should be noted that TNE-based recruitment data is limited. Whereas HESA data provides a detailed overview of UK TNE enrolments, credible data for other countries is not readily available, and therefore cannot be used in this study.

3 Central Asia

3.1.1 Kazakhstan introduction

The ninth largest country in the world, Kazakhstan is the largest and wealthiest of the Central Asian states, in part due to its abundant natural resources. Kazakhstan shares borders with Russia, China, Kyrgyzstan, Uzbekistan and Turkmenistan, and is located next to the Caspian Sea, connecting it to the South Caucasus countries. The country contains substantial reserves of oil, natural gas, minerals and metals, making it a significant player in the global energy market.

Astana, formerly Nur-Sultan, is Kazakhstan's capital city and has a population of 1.43 million. Astana is a hub for political and economic activities and has grown considerably over the last few decades, with its population doubling since 2010. Almaty, the former capital, is the largest city in Kazakhstan with a population of approximately 2.2 million and remains an important cultural and economic centre. Other large urban centres include the regional cities of Aktobe and Shymkent, as well as Atyrau and Aktau – centres of the oil industry with access to the Caspian Sea.

The overall population of the country stands at approximately 20.03 million and is characterised by its ethnic diversity. Kazakhs are the largest ethnic group (70.65 per cent) followed by Russians, Uzbeks, Uyghurs, Ukrainians, Koreans, Dungans and other groups. In recent years, Kazakhstan's population has been growing rapidly, fuelled by factors such as improved access to healthcare, education and economic opportunities. 42 per cent of Kazakhstan's population is under the age of 25.³

While Kazakhstan's economy has historically been heavily reliant on its natural resources, efforts are underway to diversify and modernise key sectors such as agriculture, manufacturing and technology. The government has prioritised investment in education and innovation to nurture human capital and foster sustainable economic growth. This commitment is evident in significant budget allocations for education and research, reflecting Kazakhstan's aspiration to transition towards a knowledge-based economy. This diversification drive bodes well for Kazakhstan's long-term economic outlook.

World Bank statistics

Kazakhstan (2023)

Population
19.8m

Current GDP
\$259.7bn

Current GDP per capita
\$13,088.5

Life expectancy at birth (2022)

74 yrs



Outline of higher education system

Kazakhstan's universities were originally set up to help fulfil the needs of the Soviet economy, producing specialists who could help sustain the Soviet Union's objectives in an ideological sense as well as its industrial needs – particularly the oil and gas sector. By the end of the Soviet period, the Kazakhstan had 55 higher education institutions (HEIs) that enrolled 287,400 students. Higher education in Kazakhstan is currently experiencing a period of significant development with the creation of new universities and the introduction of new teaching methods, along with better infrastructure and student support.

This new period of development is partly driven by the country's growing student population and positive demographic trends, creating more demand for quality higher education provision. Another important aspect of recent higher education development has been the creation of a culture of academic integrity nationally. The League of Academic Integrity was established in 2018 as an independent organisation following the example of other associate university groups like the Russell Group the UK. The organisation is made up of ten universities spread throughout the country including the Kazakh-British Technical University and K. Zhubanov Aktobe Regional University.⁴

Universities in Kazakhstan are overseen by the Ministry of Science and Higher Education which provides leadership in the fields of higher and postgraduate education, language policy, science and quality assurance. According to official government statistics of the Republic of Kazakhstan, as of 25 December 2023, when the last set of official government data was published, there were a total of 112 universities in the country.

There are three main types of HEI in Kazakhstan:

Universities

Institutions of higher and (or) postgraduate education that carry out scientific and pedagogical activities in various fields, personnel training, fundamental and (or) applied scientific research, and are leading scientific and methodological centres.

Universities can be further categorised as follows:

Research University

A university that implements a five-year development programme approved by the Government of the Republic of Kazakhstan and uses the results of its activities to integrate education and science and generate and transfer new knowledge and technologies.

National Research University

A research university with a special status.

Other types of higher education institution in Kazakhstan include:

Academies

An academy is an organisation of higher and (or) postgraduate education that carries out scientific and pedagogical activities in a certain field and is a scientific and methodological centre.

Institutes

An institute is an organisation of higher and (or) postgraduate education that carries out scientific and pedagogical activities, as well as training personnel for professional activities.⁵

Out of the 112 universities recognised by the Ministry of Science and Higher Education, 67 of these are private institutions, 44 are public institutions, and one is categorised as 'Foreign Property'. The share of students enrolled in private institutions is 54.1 per cent, and 45.1 per cent in public institutions.⁶ Within Kazakhstan there is also one HEI categorised as 'autonomous', Nazarbayev University, which has a special status within the country, established by a special law passed in 2010. As part of its establishment, the university was made administratively independent from the Ministry of Science and Higher Education of Kazakhstan.

³ All population statistics are taken from Bureau of National Statistics Agency for Strategic Planning and Reforms of the Republic of Kazakhstan: <https://stat.gov.kz/en/industries/social-statistics/demography/publications/157662/>

⁴ Academic Integrity League: <https://adaldyq.kz/en/>

⁵ Glossary, Higher education in the Republic of Kazakhstan (2023):

<https://stat.gov.kz/en/industries/social-statistics/stat-edu-science-inno/publications/112867/>

⁶ <https://stat.gov.kz/en/industries/social-statistics/stat-edu-science-inno/publications/112867/>

Policy environment – internationalisation

The broad environment for TNE in Kazakhstan is positive with significant growth in recent years reflecting a favourable environment for foreign universities to operate. This growth has been driven by demand for education outstripping supply. Latest government statistics put the total number of enrolments across Kazakhstan at 635,157,⁷ and the government expects this to grow to more than one million by 2030.⁸ As a part of the Ministry of Science and Higher Education's New Economic Course of Development plan, 12 branches of 'leading foreign universities' are planned by 2029 alongside other forms of TNE such as dual degree and joint degree programme development, faculty development, and joint and split master and PhD programmes. Kazakhstan opened its first British international branch campus (IBC) in 2021 in Almaty – De Montfort University Kazakhstan. In September 2024 Coventry University also opened a campus in Astana, welcoming its first students.

Kazakhstan has ambitious targets for developing its academic offering to domestic students, but as part of its ambitions to become a 'regional academic mobility hub for the region', it has also set its sights on attracting inbound students and academic staff. These plans include opening branch campuses, as mentioned above, as well as expanding an academic mobility and exchange programme which aims to foster 1,400 foreign faculty exchanges by 2029.⁹ Of benefit to the wider Central Asian region is the permanent establishment of a body responsible for expanding regional cooperation. Headquartered in Kazakhstan, the Central Asian Higher Education Area (CAHEA) was launched in 2021 and counts Kazakhstan, Kyrgyzstan, Uzbekistan, Turkmenistan and Tajikistan as members. The CAHEA aims to align qualification frameworks, streamline document recognition, implement a region-wide credit system aligned with the European Higher Education Area and promote regional mobility. In 2010, Kazakhstan officially joined the Bologna Process, becoming the first Central Asian state to be recognised as a full member of the European Educational Area.

Regulatory environment

In the early years of independence post-1991, the Kazakhstan government began forming a regulatory structure that could create the conditions under which education reform could take place. This was done to satisfy the wider needs of higher education and professional training in the country, as well as to meet the demands of transitioning to a market-based economy. The passing of the Law on Education (1992) and the Law on Higher Education (1993) were important milestones in this regard, helping establish a new multilevel framework for higher education. The 1993 Law on Higher Education also permitted private universities to operate for the first time. One of the most visible changes in Kazakhstan's education landscape since these laws were passed has been the large number of private HEIs which now constitute the majority share of the local higher education market.

The regulatory framework in Kazakhstan applies the same rules when opening new academic programmes, regardless of the type of university. In terms of accreditation of courses, universities can select a quality assurance agency to carry out the accreditation process. They may also do so with foreign agencies recognised by the Ministry of Science and Higher Education. With regards to this, the Ministry maintains a register of recognised accreditation bodies, accredited education institutions and educational programmes. The Committee for Quality Control in Education and Science of the Ministry of Science and Higher Education of the Republic of Kazakhstan is another important part of the structure of government related to higher education. It is primarily responsible for state attestation and licensing (required every five years) as well as the accreditation of bodies of research, the authentication of diplomas and qualifications, and other related activities.¹⁰

⁷ <https://iqaa.kz/en/higher-and-postgraduate-education/higher-education-in-kazakhstan>

⁸ <https://www.timeshighereducation.com/news/open-branch-campuses-us-kazakhstan-tells-west#:~:text=The%20government%20expects%20last%20year's,shows%20no%20sign%20of%20ending>

⁹ Opening New Branches of Foreign Leading Universities in Kazakhstan, Ministry of Science and Higher Education Republic of Kazakhstan:

https://www.ceenqa.org/wp-content/uploads/Internationalisation_of_Kazakh_higher_education.pdf

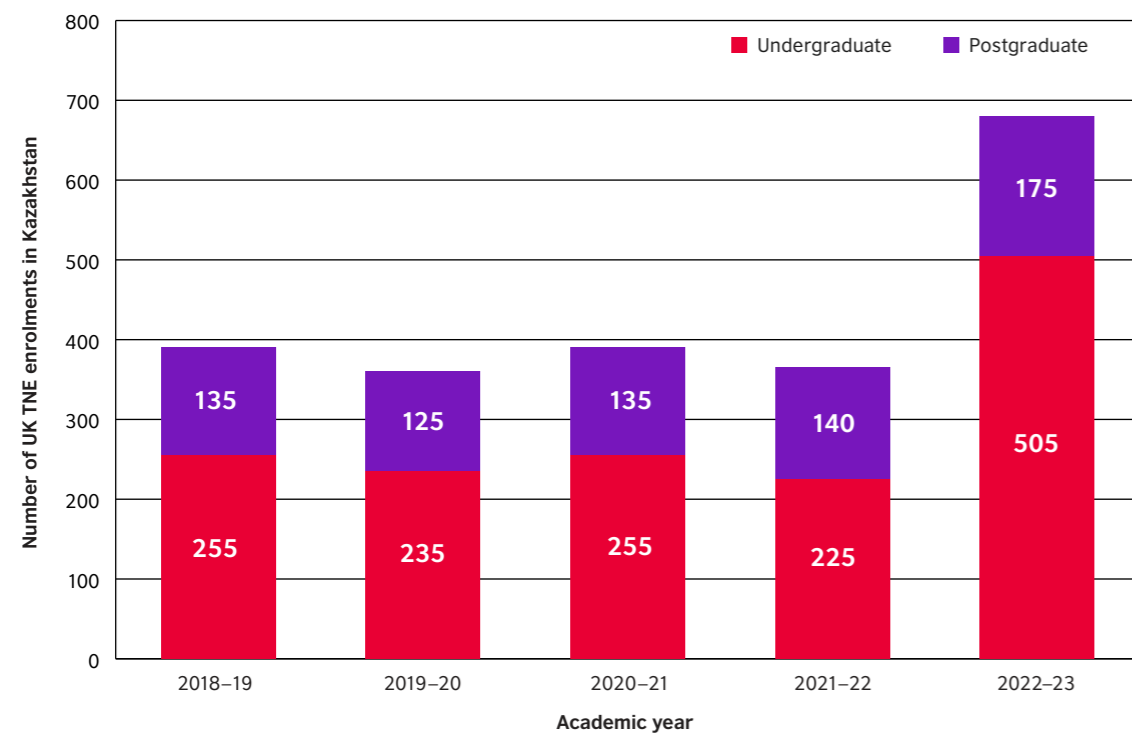
¹⁰ <https://www.enic-naric.net/page-Kazakhstan>

TNE snapshot summary

TNE between the UK and Kazakhstan has seen significant growth over the last few years as can be seen in the latest HESA data used in this report. This recent growth has established Kazakhstan as an emerging TNE market for UK HEIs. Driving this surge in enrolments has been the establishment of bricks and mortar style TNE with the opening of IBCs such as the De Montfort University Kazakhstan campus in Almaty. In the academic year 2022–2023, 680 students in the country enrolled in UK TNE programmes, marking an 86 per cent increase from the previous year. Other UK institutions choosing to deepen TNE operations with Kazakhstan include Coventry University, which opened a campus in Astana in September 2024, and Cardiff University, which signed an MOU with the Ministry of Science and Higher Education in August 2024 to establish an international research university in Astana. Admission to study at the new university is planned for September 2025.¹¹ The rest of the IBC landscape in Kazakhstan is made up of branches of HEIs from Russia, Europe (including Turkey), northeast Asia and North America. A full list of existing TNE programmes in Kazakhstan can be found in Annex B.

3.1.2 Kazakhstan TNE mapping

Figure 2: UK TNE enrolments in Kazakhstan over time
Source: HESA Aggregate Offshore Record. Data for 2018–19 and earlier excludes students registered with Oxford Brookes University.



¹¹ <https://qazalem.kz/en/news/world/618>

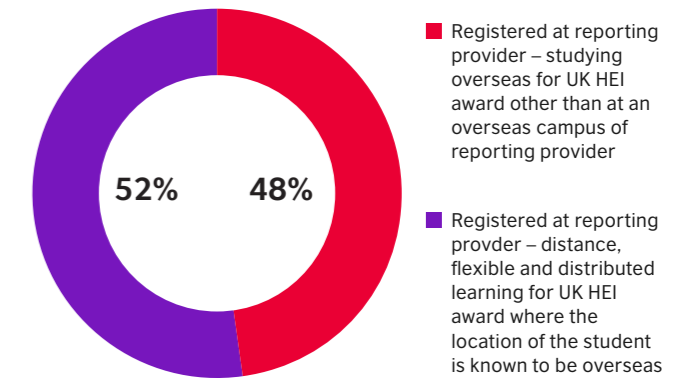
Figure 2 shows that prior to 2022–2023, UK TNE in Kazakhstan fluctuated, with moderate variances over the previous four years. UK TNE enrolments increased significantly in 2022–2023, with an 89 per cent rise. Most of this increase is due to the opening of the De Montfort University Kazakhstan international branch campus in Almaty, which accounts for 325 enrolments.

Table 1: Top ten UK HEIs in terms of TNE enrolments in Kazakhstan, 2022–23

Source: HESA Aggregate Offshore Record

No.	University	2022–23 Enrolments
1	De Montfort University	325
2	University of London (institutes and activities)	210
3	Heriot-Watt University	15
4	University of Aberdeen	15
5	King's College London	10
6	Arden University	10
7	University of Warwick	10
8	University of Sunderland	5
9	University of York	5
10	The Open University	5

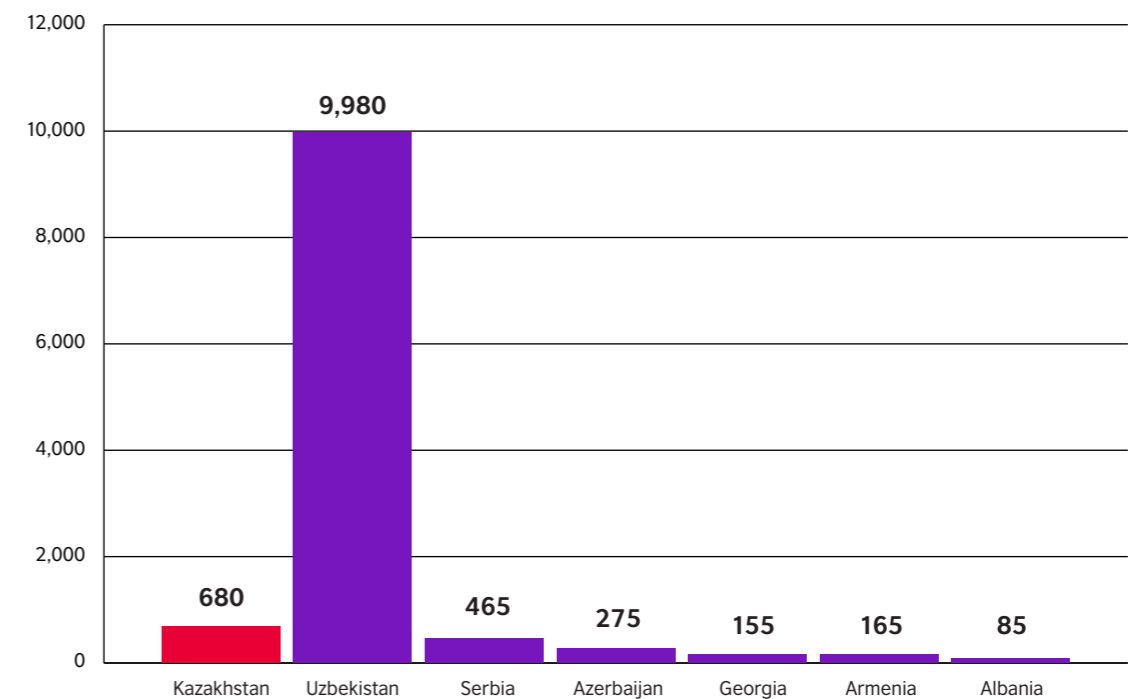
Figure 3: UK TNE in Kazakhstan by type of provision
Source: HESA Aggregate Offshore Record



As the TNE mapping in Annex A and Figure 3 regarding type of provision shows, 2022–2023 UK TNE enrolments in Kazakhstan covered two TNE delivery models. De Montfort University was the top UK TNE provider, offering the largest number of UK TNE programmes in Kazakhstan.

Figure 4 shows that Kazakhstan has the second highest UK TNE enrolments among all the other six countries in the region, following Uzbekistan, which takes the top position. We can see from the latest data that Kazakhstan has overtaken Serbia to become the second largest market for UK TNE out of the seven.

Figure 4: Kazakhstan: UK TNE in Wider Europe, 2022–23
Source: HESA Aggregate Offshore Record



TNE subject analysis

For UK TNE in Kazakhstan, subject provision is diverse, encompassing various disciplines including business, law, computer science and arts. The University of London is a major provider offering distance learning via an international teaching centre established in collaboration with the Kazakh-British Technical University. There are two other primary hosts of UK TNE in Kazakhstan: Heriot-Watt University, in partnership with Zhubanov Aktobe Regional University, and De Montfort University's campus in Kazakhstan, which offers a wide range of programmes from business to computer science and arts.

More than half of UK TNE degrees in Kazakhstan are offered at undergraduate level (63 per cent; 225 out of 360). University of London, De Montfort University, Coventry University and Heriot-Watt University offer the largest numbers of TNE degrees, including the diverse disciplines of undergraduate programmes discussed above.

3.1.3 Kazakhstan stakeholder insights

For Kazakhstan, in-country research was conducted in February and March 2023, covering locations in Aktau, Astana and Almaty, as well as with stakeholders in the UK. The following stakeholders were engaged in series of one-hour interviews:

- Five Kazakh universities, including public and private institutions, covering Aktau, Astana and Almaty
- Two UK institutions with ongoing TNE operations in the country
- The Ministry of Science and Higher Education of the Republic of Kazakhstan.
- The Internationalisation of Higher Education Unit at the National Center for the Development of Higher Education, Ministry of Science and Higher Education of the Republic of Kazakhstan.

Findings for Kazakhstan were primarily drawn from local Kazakh stakeholders and offer insights into current sentiments towards engaging the UK as a more cohesive higher education partner, including how UK universities can contribute to fulfilling Kazakhstan's higher education and economic development strategies in the medium and long term. UK-based stakeholders were also interviewed to gain insight into the broader UK approach to initiating TNE in Kazakhstan and the challenges and opportunities that arise as a part of that process.

Key opportunities for UK TNE in Kazakhstan

1

At a government level, plans to broaden the scope of universities beyond the national education system create a favourable environment for UK HEIs to leverage

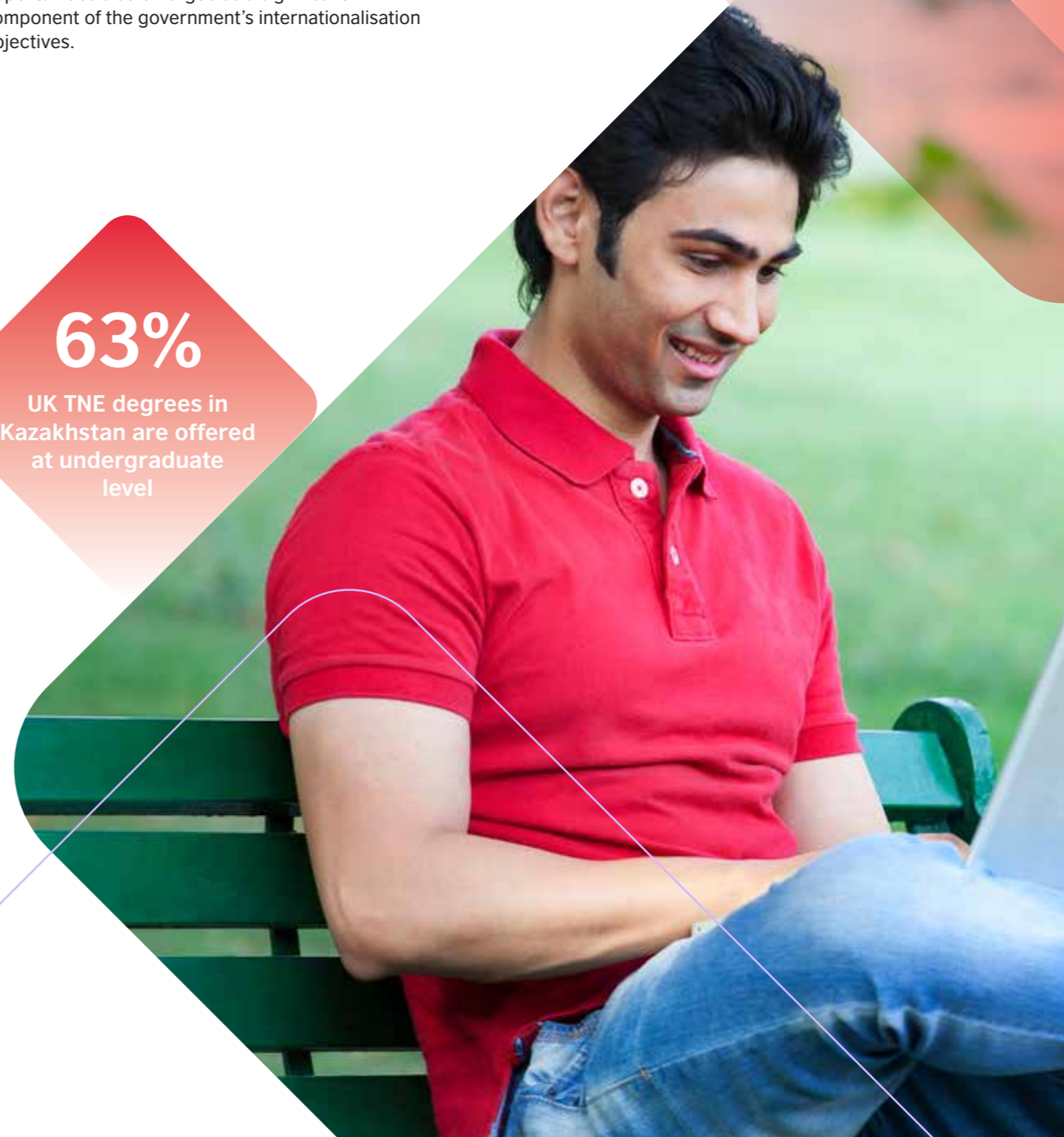
Interviews with the Ministry of Science and Higher Education and the Internationalisation of Higher Education Unit of the National Centre for Higher Education Development of the Ministry of Science and Higher Education all confirmed that the Kazakhstan government has ambitions to develop and grow foreign TNE presence in the country, with the UK being one of the preferred country partners. Recent improvements in TNE sustainability with regards to the breadth and depth of programmes between Kazakh and UK institutions was also noted by the Ministry, and these create a positive environment for further TNE collaboration. Kazakhstan university stakeholders in public and private institutions also cited internationalisation as a core value in their wider strategic objectives.

Through initiatives like the new Central Asian Higher Education Area (CAHEA), and by aligning with frameworks like the Bologna Process, Kazakhstan has ensured that rigorous quality assurance measures are in place across the higher education system, meeting international standards. Such efforts not only enhance the quality of education provided by Kazakhstan's public and private HEIs but also pave the way for robust partnerships with prospective foreign universities. As confirmed by the Ministry, Kazakhstan collaborates with international accreditation agencies, such as the British Quality Assurance Agency, to ensure its institutions meet high standards in higher education provision.

Private universities in the country are increasingly focusing on diverse types of TNE, emphasising double or dual degree programmes and extending into areas such as research collaborations and staff exchanges. UK TNE provision could position itself to aid the development of joint laboratories and research facilities within Kazakhstan to improve infrastructure quality. From the ministry's perspective, TNE models should prioritise a physical presence over online or distance learning due to infrastructure limitations, advocating for a flexible approach overall. Joint research opportunities also emerged as a significant component of the government's internationalisation objectives.

63%

UK TNE degrees in Kazakhstan are offered at undergraduate level



2

Ambitions to increase inbound foreign student numbers present opportunities for UK TNE programmes

Increased interregional mobility and ambitions to increase the overall number of foreign students in Kazakhstan create opportunities for British universities – in particular HEIs looking at the IBC model. British HEIs are well positioned to meet increased student numbers with high-quality TNE provision. The Kazakhstan government has created a favourable financial environment to attract foreign HEIs and has openly stated that its strategic goals include the opening of 12 branches of leading foreign universities in Kazakhstan by 2029. The newly-opened De Montfort University Kazakhstan campus in Almaty had already enrolled 325 students in the academic year 2022–2023, indicating strong demand for this type of UK-led TNE. International student recruitment was outlined by local university stakeholders and the ministry as a core area of importance for future internationalisation development within the country.

As noted in the stakeholder interviews, for UK TNE partners, international student recruitment was a ‘phase two’ type development in overall TNE provision in Kazakhstan. For stakeholders looking at TNE through the lens of the IBC model, or those looking at joint degree programmes, international recruitment offered a sustainable element to wider partnership development, ensuring financial sustainability and mitigating the financial risks of starting TNE operations. While UK-led TNE provision in Kazakhstan is still relatively new, and therefore mostly limited to Kazakhstani students, an international element should be a natural ambition if aligned with the demands of the Kazakhstani labour market and the wider regional economy.

As mentioned, there has been a marked increase in the number of international students studying in Kazakhstan, especially those from India studying medical sciences. The launch of the CAHEA will create opportunities for students from Kazakhstan’s neighbours – Kyrgyzstan and Tajikistan in particular – to study in the country and benefit from an education aligned with international quality assurance standards. China was also mentioned by the Internationalisation Unit as another potential source country due to cultural links, particularly within the ethnic Kazakh community in China’s Xinjiang Province.

3

Universities should align their TNE offerings to the domestic labour market with tangible links to industry, increasing their competitiveness

Interviews with numerous stakeholders on the ministry and university sides was confirmed that Kazakhstan’s higher education sector is seeing increased emphasis placed on collaboration between universities and local industries to define programme content. This collaborative approach reflects an acknowledgment of the need to align education with the evolving needs of the labour market. In one successful example, the Ministry worked with a UK university to design multiple degree programmes to meet the needs of local businesses in Kazakhstan’s burgeoning mining sector. The courses were designed to help the wider business needs of the mining companies and covered academic disciplines such as geophysics, computer science and electrical engineering. These courses are now in place and being taught at the partner institution.

To ensure the best possible chance of success, UK institutions should familiarise themselves with the wider objectives of the country’s national growth strategy when considering TNE programmes in Kazakhstan. Understanding and responding to the needs of the local labour market would allow British HEIs to tailor their course offerings to meet the specific demands of Kazakhstani students. This could attract more students to their programmes, enhancing the provider’s reputation and competitiveness in the market. It would also benefit British universities by improving relevance, employability of graduates, collaboration opportunities with industry, regulatory compliance and long-term sustainability.



Key challenges for UK TNE in Kazakhstan

1

Financial barriers and affordability

As noted by multiple stakeholders during the interviews, the main barrier of collaboration for UK TNE with Kazakh universities is financial affordability. The UK’s high cost of tuition is a drawback for most students in Kazakhstan. This applies to short courses as well as double or dual degree programmes, with UK fees substantially more than what Kazakhstani students would be required to pay domestically. Other EU countries were mentioned by various stakeholders in more favourable terms when discussing the financial aspect of engaging with overseas TNE partners – namely France and Germany. Furthermore, the higher travel and accommodation costs can make committing to a UK TNE programme a difficult prospect for many Kazakhstani students.

2

EU-based partnerships may be more attractive for Kazakh institutions and students

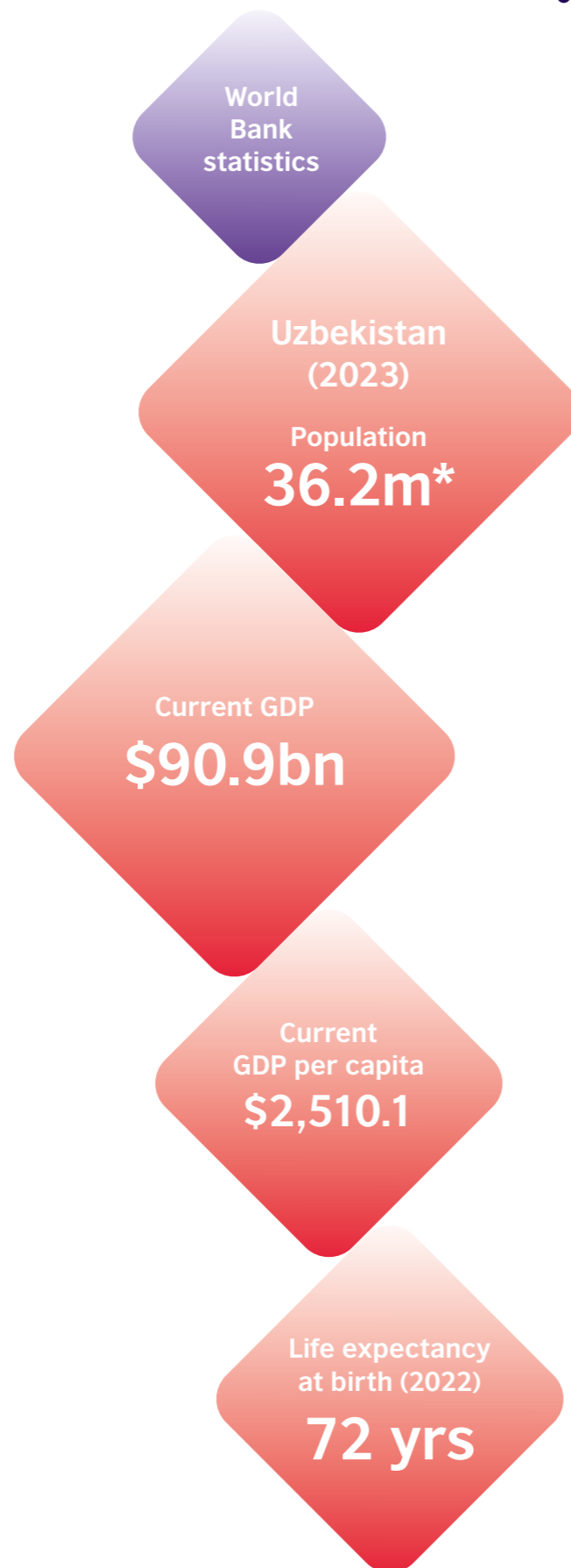
Lack of access to grants and scholarships were mentioned in the stakeholder interviews as potential hurdles to the development of UK TNE partnerships in Kazakhstan. EU-based universities were discussed in more favourable terms regarding access to grants, and the UK’s geographical distance compared with some of its Central and Eastern European peers was also mentioned as a disadvantage. One interviewee in a private Kazakh university noted that EU partners tended to be more accessible for different forms of TNE due to grants made available for students by the Kazakhstan government – and this included student exchanges and research collaborations. Along with a lower cost of living, a lower cost of travel from Kazakhstan and cheaper accommodation costs in general make EU partnerships more attractive and attainable for Kazakhstani students.

3.2.1 Uzbekistan introduction

Uzbekistan is a double landlocked country in Central Asia bordered by Kazakhstan to the north, Kyrgyzstan to the northeast, Tajikistan to the southeast, and Afghanistan and Turkmenistan to the south. Historically, Uzbekistan was a key centre along the ancient Silk Road, facilitating trade and cultural exchange between east and west. Nowadays, Uzbekistan is Central Asia's most populous country. Its 37.1 million people comprise almost half of the region's total population and live mainly in the Fergana Valley region in the easternmost part of the country. Economically, Uzbekistan is one of the fastest-growing countries in the world and experienced GDP growth of six per cent in 2023, according to World Bank national accounts data.¹²

The capital city of Uzbekistan and the largest city by population is Tashkent. Tashkent is also the largest city in the wider Central Asia region, with a population of 3.04 million. It serves as both the cultural and economic hub of Uzbekistan. As the country's capital, Tashkent is also host to a proportionally high number of the country's HEIs (82 at the beginning of the 2022–2023 academic year). Other significant urban centres include Samarkand, Bukhara and Khiva, renowned for their cultural significance, as well as Nukus, the capital of the autonomous Republic of Karakalpakstan, which spans Uzbekistan's northwestern border region.

Uzbekistan has experienced steady population growth in recent decades, from 21 million at the time of independence from the USSR in 1991 to its current level of 37.1 million. It has a youthful population with 30 per cent aged between zero and 14.¹³ This demographic trend has implications for higher education capacity, with universities and education institutions facing the challenge of accommodating a growing cohort of young people seeking higher education opportunities.



*Official Uzbekistan government data puts the figure at 37.1 million as of July 2024

¹² World Bank. GDP growth (annual %) – Uzbekistan: <https://data.worldbank.org/indicator/NY.GDP.MKTP.KD.ZG?locations=UZ>
¹³ <https://data.worldbank.org/indicator/SP.POP.0014.TO.ZS?locations=UZ&skipRedirection=true&view=map>

Outline of higher education system

Uzbekistan has witnessed a dramatic growth in the provision of higher education in recent years. Latest figures put the total number of higher education enrolments at 1.31 million. In the academic year 2013–2014 there were 66 higher education institutions in the country, compared with 219 a decade later in the academic year 2023–2024.¹⁴

This represents a 232 per cent increase during a ten-year period and is driven mainly by the opening of other types of HEIs that are not state institutions and fall into the following categories:

Non-state HEIs

These are essentially private universities. The number of non-state HEIs increased from four in 2016 to 65 in 2023 – for example, Sharda-Uzbekistan University, which was established in 2021 as the first independent, private university in Uzbekistan.

Foreign Universities

These are local universities which offer validated programmes. They should not be seen as international branch campuses. Westminster International University Tashkent is one such example. Their numbers increased from seven in 2016 to 30 in 2023.

The remaining HEIs in Uzbekistan are state HEIs and their branches. State HEIs in Uzbekistan fall into three main categories:

University

Provides academic programmes at the bachelor and master level. Universities also carry out scientific research in a wide range of disciplines and conduct training and upgrading of qualifications for specialists in different sectors.

Academy

Provides programmes in specific academic fields. Academies also conduct training and upgrading of qualifications for specialists in different sectors.

Institute

Provides programmes at the bachelor and master levels in specific branches of study within one area or discipline such as engineering and construction, medical programmes or agriculture. Institutes are also required to carry out scientific research.

Policy environment – internationalisation

The government of Uzbekistan has made the enhancement of higher education a focus in its economic and social development plans. As part of this, in 2019, the Presidential Decree of the Republic of Uzbekistan ‘Concept of Development of Higher Education of the Republic of Uzbekistan until 2030’ was approved. The decree defined strategic goals and priority areas for Uzbekistan's higher education development in the medium and long term. Expected outcomes include having at least ten universities from Uzbekistan included in the top 1,000 universities ranked worldwide, with the National University of Uzbekistan and Samarkand State University ranked among the top 500; and attracting branches of prestigious foreign universities to create a more competitive higher education environment.

January 2022 saw the adoption of the New Uzbekistan Development Strategy for 2022–2026, setting a path for the Uzbek economy. Developing higher education through human capital is central to the strategy, which outlines targets such as raising university enrolment rates to 50 per cent for high-school graduates, granting financial autonomy and academic freedom to public universities, promoting international collaborations, involving the private sector more in higher education, creating startup accelerators, and boosting research output. Goal 49 of the strategy is to ‘increase by 2026 the number of non-government higher education institutions to at least 50’.¹⁵ Overall, Uzbekistan's higher education reforms centre on granting autonomy to HEIs to encourage a further deepening of international engagement, with the intention that Uzbekistan should become an educational hub for Central Asia.

¹⁴ Statistics Agency Under the President of the Republic of Uzbekistan. Number of students in higher education organizations (total): <https://stat.uz/en/official-statistics/social-protection>

¹⁵ <https://uzembassy.kz/upload/userfiles/files/Development%20Strategy%20of%20Uzbekistan.pdf>

Regulatory environment

The Resolution of the President of the Republic of Uzbekistan no.200 dated 3 July 2023 'On measures aimed at effective public governance in the area of higher education, science and innovations as part of the ongoing administrative reform' defines the role of the Ministry of Higher Education, Science and Innovations as a regulator. The resolution makes it responsible for licensing activities in the field of education as well as for quality assurance and definition of norms and standards for education programmes. As well as providing the legal framework for governing higher education institutions, the ministry manages the policies and direction of the higher education system, including the funding of all higher education and secondary specialised education institutions in Uzbekistan. It also regulates and monitors the quality of education institutions and programmes, ensuring that they are aligned with the needs of the labour market, and promotes collaboration and partnerships between

education institutions, industry and other stakeholders. Furthermore, the ministry coordinates the training, retraining and professional development of staff and manages the integration of education with science and industry. Each institution in Uzbekistan, whether private or public, undergoes attestation every five years, regardless of their departmental subordination and organisational and legal form.

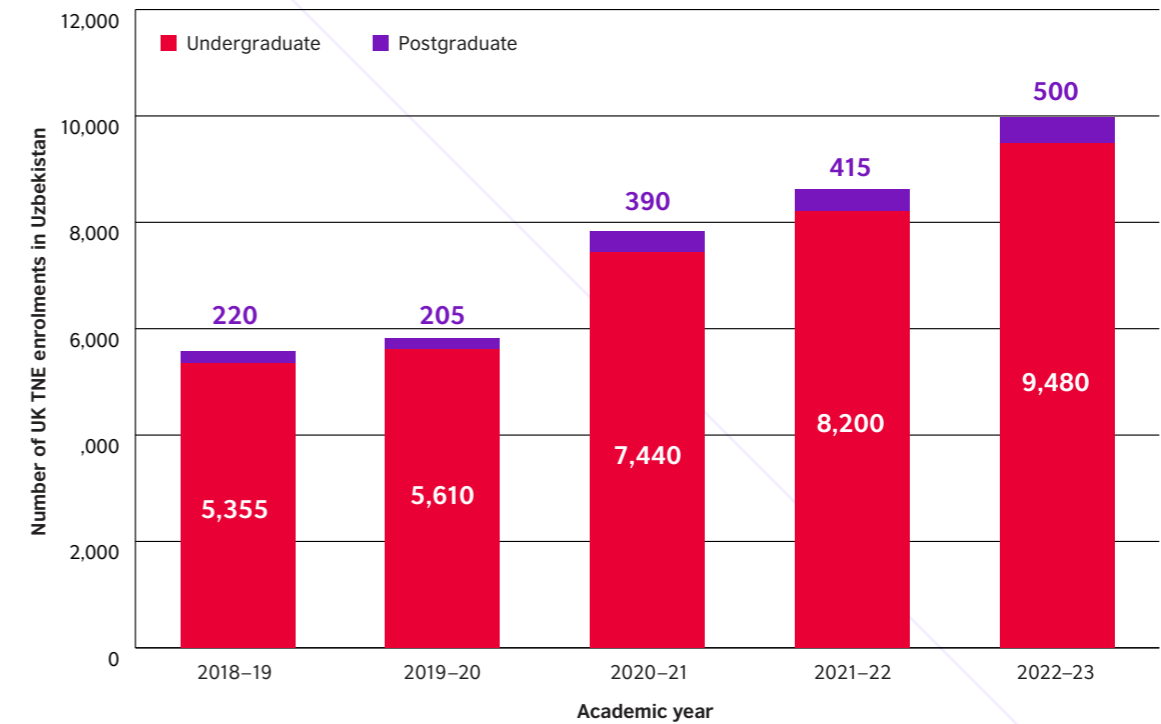
TNE snapshot summary

TNE between the UK and Uzbekistan has grown substantially. The country is now positioned tenth in overall TNE provision in Asia, with 9,980 students studying on UK taught programmes in the year 2022–2023. Between 2018 and 2022, 23 foreign higher education institutions established a campus in Uzbekistan, resulting in it becoming the nation with the third largest number of international branch campuses globally, behind China and the UAE. The majority of IBCs in Uzbekistan are branches of Russian institutions, but the landscape is diverse and includes universities from Malaysia, Italy, Singapore, Turkey, the Republic of Korea and the UK. UK TNE has a particularly strong reputation, in part due to Westminster International University in Tashkent (WIUT). WIUT was established in 2002 by the University of Westminster and the Foundation of the President of Uzbekistan as the first international university in Uzbekistan offering an education leading to UK degree qualifications.



3.2.2 Uzbekistan TNE mapping

Figure 5: UK TNE enrolments in Uzbekistan over time
Source: HESA Aggregate Offshore Record. Data for 2018–19 and earlier excludes students registered with Oxford Brookes University.

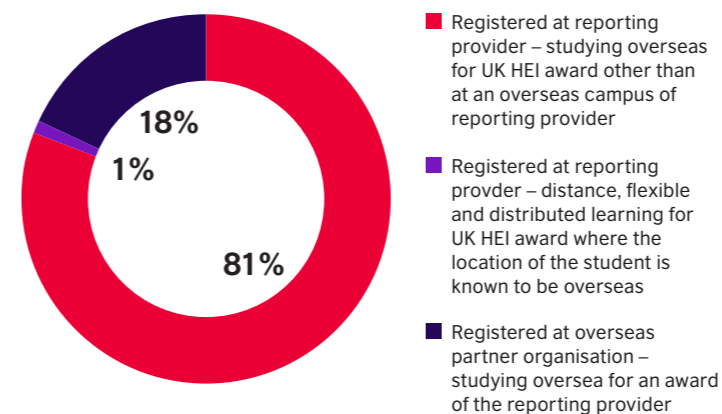


The data in Figure 5 shows that UK TNE in Uzbekistan has risen significantly in the last five years, with notably strong growth in both undergraduate and postgraduate enrolments. Over the last year, postgraduate enrolments grew 20 per cent and undergraduate enrolments increased by 15 per cent. The most significant rise in UK TNE enrolments happened in 2020–21, with a 35 per cent increase over the previous year.

Table 2: Top ten UK HEIs in terms of TNE enrolments in Uzbekistan, 2022–2023
Source: HESA Aggregate Offshore Record

No.	University	2022–23 Enrolments
1	University of Westminster	5,210
2	University of Sunderland	2,465
3	Bangor University	1,800
4	Royal Agricultural University	175
5	London South Bank University	150
6	Teesside University	85
7	University of London (institutes and activities)	55
8	King's College London	5
9	Arden University	5
10	Anglia Ruskin University	5

Figure 6: UK TNE in Uzbekistan by type of provision
Source: HESA Aggregate Offshore Record



As the TNE mapping in Annex A and the figure regarding the type of provision show, the 2022–23 UK TNE enrolments in Uzbekistan covered three TNE delivery models. University of Westminster, University of Sunderland and Bangor University offered the largest numbers of TNE degrees.

Figure 7: Uzbekistan: UK TNE in Wider Europe, 2022–23
Source: HESA Aggregate Offshore Record

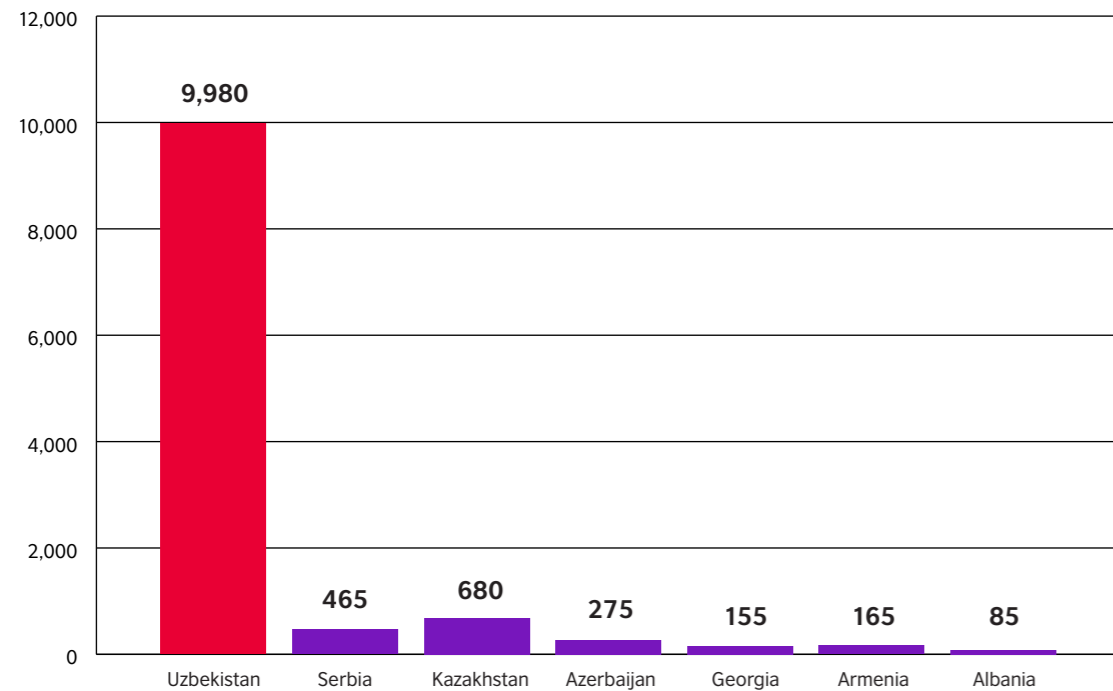


Figure 7 illustrates that among six other countries in the Wider Europe region, Uzbekistan stands out as the leader in UK TNE enrolments in the region, highlighting the country's significant role in the realm of UK TNE.

TNE subject analysis

For UK TNE in Uzbekistan, the Tashkent campus of the University of Westminster provides a variety of bachelor's and master's programmes, covering fields from finance to public health. The University of Sunderland, in collaboration with the Management Development Institute of Singapore Tashkent, also offers a diverse selection of UK TNE programmes, with fashion being among the courses and business programmes predominantly offered.

Most UK TNE degrees in Uzbekistan are offered at the undergraduate level (95 per cent; 9,480 out of 9,980 in 2022–23). A large proportion of UK TNE undergraduate programmes are delivered by the Management Development Institute of Singapore (MDIS) at Tashkent in Uzbekistan. This collaboration with MDIS is evident at several UK universities, including the University of Sunderland, Bangor University, Teesside University and the University of London.

3.2.3 Uzbekistan stakeholder insights

Interviews were conducted with the following from Uzbekistan's higher education sector in February and July 2024.

- Representatives from multiple universities in Uzbekistan, spanning administrative, academic and research departments
- Interviews with the locally based universities, including a well-established international university in Tashkent and two universities with recently established partnerships with UK HEIs
- Collaborating institutions, notably a prominent UK university actively engaged in validation processes, joint research initiatives and academic exchange programmes.

The findings are drawn from stakeholders based in Uzbekistan and one stakeholder based at a UK HEI. All four universities that contributed to these interviews were local Uzbekistani institutions offering UK-taught provision via their Tashkent campuses. They therefore offered an insight into how UK institutions could engage with their Uzbek counterparts, fulfilling Uzbekistan's higher education and economic development strategies.

Key opportunities for UK TNE in Uzbekistan

1 TNE agreements between UK HEIs and Uzbekistan's booming private university sector, backed by private investment, should be fully leveraged

Following the 2017 legislative changes that allowed private higher education institutions to open in Uzbekistan, there has been a surge in private universities opening in the country. An example of a newly-founded university engaged in UK TNE is the University of Digital Economies and Agrotechnologies in Tashkent (UDEA). UDEA successfully raised investment funding from Agrobank, the largest bank in Uzbekistan, in 2021. In 2022, UDEA was officially launched with the university welcoming its first students in autumn 2023. Most programmes offered by UDEA are developed in collaboration with and validated by Coventry University, with Coventry University providing course content adapted to the Uzbekistan context.

There are numerous tangible benefits to this kind of arrangement, as noted during the interview with the senior university manager at UDEA. A lack of existing infrastructure meant that a campus was built, and costs shared, mitigating the financial risk from both the local and UK sides. Having a private backer in Agrobank also supported the success of the TNE operation, with the bank committing to provide funding for the next five years for 200 full scholarships for students studying Coventry degree programmes. These scholarships cover both tuition fees and accommodation costs. Agreements like this offer a sustainable and financially rewarding model of TNE while also helping fulfil Uzbekistan's economic needs in key growth industries.

While this financial model is common internationally, UK institutions looking to develop their TNE footprint in Uzbekistan might start by broadening their collaborative networks with Uzbek universities, replicating successful models like the partnership between UDEA and Coventry University. These collaborations should not only focus on the validation of existing programmes but also on co-developing new ones that are specifically adapted to the socioeconomic and cultural context of Uzbekistan. This bespoke approach would ensure that the education provided was both relevant and in demand, addressing the distinct needs of Uzbek students and the demands of the local job market.



Moreover, it is vital to leverage private investment, as exemplified by UDEA's collaboration with Agrobank. UK HEIs could actively seek partnerships with local private investors and businesses in Uzbekistan to secure essential funding for infrastructure, programme development and scholarships. This financial support is crucial for creating a sustainable TNE model that ensures universities have the necessary resources to deliver high-quality education and foster long-term growth. There was confidence in the interviews conducted that this approach had the potential to be more widely replicated with other emerging private HEIs in Uzbekistan.

A critical aspect of this strategy would be to prioritise quality over quantity in terms of student recruitment and programme development. UDEA admits a smaller, high-calibre student cohort and so promotes a more personalised and effective educational experience. UK HEIs should encourage Uzbekistani institutions to adopt similar strategies, focusing on steady and sustainable growth that upholds rigorous academic standards.

2

Strong government-level support for integration into the global education system and a shortage of domestic provision create opportunities for UK TNE expansion

Pushed by ambitious government plans, Uzbekistan's universities are increasingly prioritising the alignment of local academic standards and processes with international educational benchmarks. Findings from the interviews underscored this and showed a discernible shift towards greater integration into the global education community, and a concerted push for further teaching and research collaborations in alignment with international standards. All these ambitions can be met by the introduction of further UK TNE provision in the country. The Uzbekistan government plans to elevate Uzbekistan's universities' global standing and increased TNE collaboration with UK partners would be welcomed. These collaborations could extend to specialised fields such as agriculture, and this would reflect the UK's expertise and Uzbekistan's desire to learn from leaders in specific academic fields. The partnership between the Royal Agricultural University (UK) and their local partner is a good example of this.

Regarding the different models of TNE in Uzbekistan, the stakeholder interviews indicated that the government did not prefer one model of TNE over another. Such flexibility should be seen positively by the UK's HEIs, some of which may be less inclined to invest in the IBC model in Uzbekistan. They should concentrate on establishing meaningful TNE programmes with local partners like London South Bank University and their franchise partnership with TEAM University in Tashkent. Furthermore, the stakeholders were confident that there was still demand for new TNE programmes, given the shortage of domestic higher education provision. There are currently over 100,000 Uzbekistani students studying abroad who could have chosen to study in Uzbekistan on TNE programmes instead. The domestic enrolment rate in Uzbekistan has risen considerably over the last five years, showing a strong upward trend for higher education in the country. UK TNE, with its highly regarded reputation for excellence and existing track record, is well positioned to expand in future.

3

UK TNE partners should pursue TNE collaborations based on wider economic development trends

As highlighted in stakeholder interviews, UK TNE partners are strongly urged to concentrate on subject-specific teaching and research collaborations in alignment with the broader economic development trends in Uzbekistan. These collaborative efforts ought to be centred on subjects that hold substantial importance for Uzbekistan and the wider Central Asia region. An example of this approach is that of WIUT. WIUT was founded in 2002, with the initial aim of establishing a business school. As one of the interviewees explained, 'It was done with purpose because there was really a shortage in terms of the qualified managers who could lead business in a more international kind of way.' Business programmes have remained the focus of the university since it opened, especially at undergraduate level. At postgraduate level, the choice of degrees has widened, with the university now offering a postgraduate degree in public health. These changes in course offering have occurred in response to both labour market demands and government priorities for higher education.

2

Financial constraints and scholarly mobility

Uzbekistan's universities are actively pursuing alignment of wider national economic development, the demands of the labour market and higher education provision. This presents a multitude of opportunities for joint projects led by UK HEIs aimed at providing relevant TNE offerings and advancing socioeconomic development in Uzbekistan. Given their advantageous positioning, reputation for excellence and familiarity with TNE more broadly, UK institutions are well equipped to contribute significantly towards these aspirations.

Key challenges for UK collaboration in Uzbekistan

1

Alignment with local educational standards and limited institutional capacity

Despite the eagerness for collaboration, challenges persist in aligning the UK education system with that of Uzbekistan. Implementing TNE initiatives requires seamless curriculum integration and compliance with regulatory frameworks, posing significant logistical and pedagogical hurdles to partnership development. Challenges include ensuring alignment of course content for credit transfer and addressing financial barriers for students participating in exchange programmes. As noted by the stakeholders, bridging the gap between UK and Uzbek education standards requires a tailored approach to create a collaborative ecosystem conducive to sustainable partnership outcomes. Although there is help at the organisational level, this process can be time consuming and difficult to navigate.

Financial barriers, including the affordability of study abroad programmes for Uzbek students and the availability of funding for collaborative research endeavours, pose formidable challenges to the expansion of UK TNE provision in Uzbekistan. Addressing these constraints demands innovative financing mechanisms, scholarship provision and grants aimed at facilitating scholarly mobility and fostering enduring partnerships anchored in mutual benefit and shared objectives. One example of a funding solution is the scholarship partnership between UDEA and Agrobank. The interviewee at UDEA explained that Agrobank provided investment to establish UDEA and was also providing 200 full scholarships to students at UDEA over a five-year period. These scholarships fully cover the tuition fees charged by Coventry University. Such arrangements with funding providers and sponsors are a potential way to alleviate some of the financial obstacles to students accessing TNE programmes in Uzbekistan.

4 South Caucasus

4.1.1 Armenia introduction

Armenia is a landlocked country in the South Caucasus region, which neighbours Turkey, Iran, Georgia and Azerbaijan. The capital city, Yerevan (population: 1.1 million), serves as the political, cultural and economic centre. Two thirds of Armenia's population reside in urban areas, with Yerevan making up over 35 per cent of the country's total population. Most of Armenia's universities, both public and private, are in the capital, as are all existing IBCs. Overall, Armenia's population stands at approximately 2.9 million, with a growth rate of around 0.3 per cent annually. The country has a relatively young population, with over 30 per cent of the population under the age of 25.

Armenia's economy has undergone significant transformation since gaining independence in 1991, transitioning from a centrally-planned system to a market-oriented one and subsequently embracing economic reforms aimed at liberalising trade and attracting foreign investment. In 2022, bilateral trade in goods with the UK more than doubled – the fastest growth rate in bilateral trade that Armenia recorded compared to other European countries. The 2023 Index of Economic Freedom ranked Armenia as the second freest economy in Eastern Europe and Central Asia, after Georgia.

Outline of higher education system

The number of HEIs in Armenia has changed significantly since 1991 when there were 14 in the country and just over 66,000 total enrolments. Only six years later in 1997, the number of HEIs had expanded to 103, despite fewer students being enrolled (56,000). By 2009, Armenia had 77 HEIs enrolling over 100,000 students.¹⁶ This rapid expansion was caused by an upsurge in private universities opening. However, many of these universities were run as business enterprises and were associated with a decreasing quality in educational provision. Most closed after Armenia's state institutions resumed part-time degree courses, which had stopped in the immediate post-independence years. The sector is now undergoing consolidation due to demographic shifts and Armenia's high levels of emigration, but demand for higher education remains strong.

World Bank statistics

Armenia (2023)
Population
2.9m

Current GDP
\$19.5bn

Current GDP per capita
\$6,572.2

Life expectancy at birth
72 yrs

The authorised state body for higher education in the Armenia is the Higher Education and Science Committee. This functions within the RA Ministry of Education, Science, Culture and Sports of the Republic of Armenia. The Ministry is responsible for 'ensuring the implementation of state policy aimed at the cooperation and integration of the fields of science and higher education'.¹⁷ This includes responsibility for regulation and legal framework creation for higher education; ensuring compatibility and recognition of Armenian degrees internationally; promoting international academic mobility for students; and fostering academic freedom and autonomy of higher education institutions.

24

¹⁶ <https://documents1.worldbank.org/curated/en/836691592826609834/pdf/SABER-Tertiary-Education-Country-Report-Armenia-2019.pdf>

¹⁷ About us. The Higher Education and Science Committee <http://hesc.am/en/e05f734e3a707251301869>

25

Although policy is decided by the Ministry, Armenia's HEIs exercise a high level of autonomy in how they are run, introducing new majors, adopting new curricula and teaching methods, and having budgetary oversight. The current number of higher education institutions in Armenia is 69.¹⁸ Among these are four types of institution:

University

Provides undergraduate, postgraduate and supplementary education in different branches of natural and sociological fields, science, technology and culture, as well as opportunities for scientific research and study.

Institute

Provides specialised undergraduate and postgraduate programmes and scientific research in several scientific, economic and cultural branches.

Academy

Dedicated to advancing education, science, technology and culture. Academies offer programmes for training and retraining specialists, along with postgraduate academic programmes.

Conservatory

A specialist higher education institution for music, providing qualification development and postgraduate academic programmes.

Policy environment – internationalisation

Armenia is an active member of the international higher education community, being part of the European Higher Education Area and the Bologna Process since 2005.¹⁹ As part of adhering to the Bologna Process, Armenia introduced reforms to internationalise the regulations of its degree programmes, introducing new degree structures which make use of the European Credit Transfer and Accumulation System (ECTS). However, despite the

benefits in reform implementation from being a signatory to Bologna, Armenia has only recently adopted a clear tertiary education strategy focused specifically on higher education internationalisation.

Armenia is at an early stage of development with respect to the internationalisation of its higher education sector. However, in 2022, the National Assembly of Armenia introduced an education strategy titled 'State Programme for the Development of Education in the Republic of Armenia until 2030'.²⁰ This sets out Armenia's strategic objectives over the next decade at all levels of education and is aligned with the United Nations 2030 Agenda. In particular, the strategy contributes towards UN Sustainable Development Goal 4: To ensure inclusive and equitable quality education and promote lifelong learning opportunities for all.²¹ One of the three main strategic objectives of the strategy is to 'internationalize and export education services and products, which should contribute to the full integration of the Armenian education system into the international educational space'.²²

The Erasmus+ initiatives play an important role in shaping strategies related to the internationalisation of higher education in Armenia. Armenia currently participates in Erasmus+ as a non-associated third country. This means that it cannot access all Erasmus+ activities but it is still able to participate in programmes including student and staff exchanges, capacity building projects and Erasmus Mundus joint master's programmes.²³ Erasmus+ in Armenia is administered by its National Erasmus+ Office. The Ministry of Education, Science, Culture and Sports (MoESCS) is also open to international cooperation in higher education on a bilateral basis. MoESCS has discussed introducing joint teaching and research programmes and exchange programmes with representatives from the UK, the Netherlands and India, among others.²⁴

¹⁸ Inside Higher Ed. Armenian Higher Education in the European Higher Education Area.

<https://www.insidehighered.com/blogs/world-view/armenian-higher-education-european-higher-education-area>

¹⁹ National Information Centres Armenia. Bologna Process. <https://armenic.am/bologna-process/?lang=en>

²⁰ State Programme for development of Education in the Republic of Armenia until 2030, 2022

²¹ https://neighbourhood-enlargement.ec.europa.eu/system/files/2022-12/C_2022_9597_F1_ANNEX%20I_EN_V2_P1_2376391.PDF

²² MoESCS press release - Make learning a way of life: RA ESCS Minister Zhanna Andreyan

<https://escs.am/en/news/16877>

²³ National Erasmus+ Office in Armenia. About the Programme <https://erasmusplus.am/about-programme>

²⁴ MoESCS. Diplomatic visits of the United Kingdom, the Netherlands and India <https://escs.am/en/news/15148>, <https://escs.am/en/news/18886>, <https://escs.am/en/news/16469>

Case study:**Armenia's Academic City**

One of the most significant developments in Armenia's higher education system is the introduction of the Academic City project by the government of Armenia. This government backed project will see universities relocated to a new site on the outskirts of the capital Yerevan, with the aim of creating a modern educational environment for quality higher education and research. The project is expected to help deliver on the targets of having at least four higher education institutions in the top 500 of the major international rankings, and at least doubling the number of foreign students in Armenia in the long term.

A model for the future

As part of the plans, universities will be merged to form six clusters, each focused on a specific academic or vocational area. Universities with similar research and teaching focuses will operate together. The four initial clusters that have been announced are educational (pedagogical), arts, technological and military clusters. The second phase will be the classical and medical clusters.

In addition to essential physical infrastructure, these sites will have accommodation for staff and students, sports facilities, entertainment facilities and a train link with Yerevan.

International partnerships

The Armenian government has already partnered with the Technical University of Munich (TUM), the University of the Arts London (UAL) and the Institute of Education (IoE) at University College London (UCL) to improve the conception and delivery of the Academic City project. UAL was chosen as it was formed through a merger of six smaller colleges, making it well-placed to advise on the best practice for forming and operating the arts cluster. Likewise, IoE was merged into UCL and has insight and understanding of the sensitivities and complications of the practice.

A gateway to TNE?

The initial construction phase of the project is projected to run to 2030. As part of Academic City's plans, there will likely be opportunities for UK universities to be involved in the creation of joint, double award or validated programmes. Two local universities have already approached UAL to develop an MA Animation programme and a TNE programme in fashion. Universities wishing to establish TNE programmes in Armenia should consider which university cluster and what TNE model (whether joint, double award or validated) would be most suitable based on their own teaching and research strengths. It is important to note that the Armenian government also intends for Academic City to host franchise universities or international branch campuses. They are open to the development of TNE programmes between domestic Armenian universities and foreign universities.

**Regulatory environment**

The general principles of legislation in the tertiary sector in Armenia were set out in the Law on Education, enacted in 1999.²⁵ Subsequent laws such as the Law on Higher and Postgraduate Professional Education, enacted in 2004 and amended in 2021, further set the legal framework for higher education, outlining standards for academic programmes, quality assurance and accreditation procedures.²⁶ Higher education in Armenia pre-1991 was highly centralised and strictly regulated by the state. While it remains a very regulated space, the tendency is to confine the state to general supervisory functions, giving way to specialist intermediary bodies to support tertiary level institutions.

The State Licensing and Accreditation Service is the government body established by the Ministry of Education, Science, Culture and Sports that operates in accreditation across the tertiary sector. In addition, the National Center for Professional Education Quality Assurance (ANQA), established in 2008, also acts as an independent foundation overseeing quality assurance processes. This includes institutional and programme accreditation across preliminary, vocational and higher education institutions.²⁷ ANQA actively engages in internationalisation activity, participating in forums such as the European Quality Assurance Forum (EQAF) and the International Network for Quality Assurance Agencies in Higher Education (INQAAHE).²⁸

TNE snapshot summary

UK TNE enrolments in Armenia grew from 95 in 2021–2023 to 165 in 2022–2023. Most of these enrolments are from two partnerships that CITY College has with the University of Sheffield and the University of York along with their local partner in Yerevan. Moving forward, the new Academic City project will likely play a role in how UK HEIs partner with their local Armenian counterparts regarding TNE, with UK HEIs already playing a role in providing consultancy and support for the development of the project. Armenia is host to a small number of branches of foreign universities – two from Russia and one from Ukraine. While not branch campuses, the country is also host to well-established foreign universities such as the American University of Armenia, the European University of Armenia and the Russian-Armenian University. Some of these universities also offer dual degrees in collaboration with partner institutions in the home country.

86%

increase in postgraduate
TNE enrolments versus
the previous year

25%

increase in undergraduate
TNE enrolments
in the same period

²⁵ Law of The Republic of Armenia on Education

<http://ijevan.yasu.am/wp-content/uploads/2015/05/L-A-W-OF-THE-REPUBLIC-OF-ARMENIA.pdf>

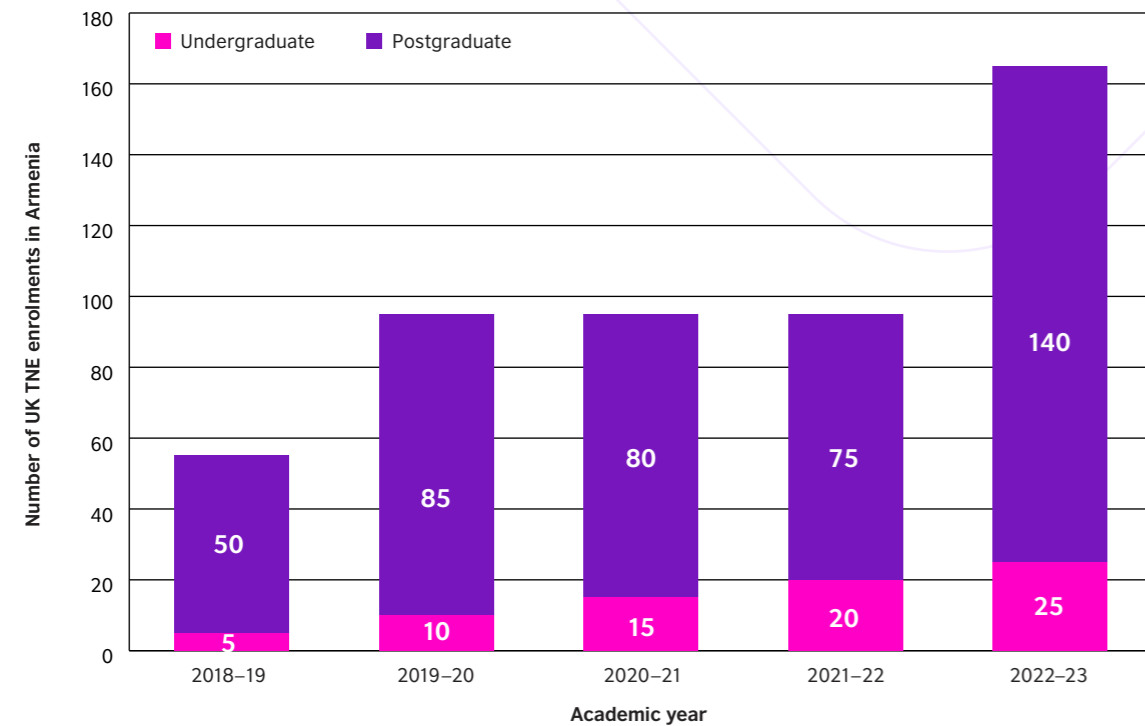
²⁶ UNESCO International Bureau of Education. World Data on Education. <https://unesdoc.unesco.org/ark:/48223/pf0000211297>

²⁷ National Center for Professional Education Quality Assurance Foundation (ANQA). About us: Mission. <https://www.anqa.am/en/about-us/>

²⁸ National Center for Professional Education Quality Assurance Foundation (ANQA). Internationalization: Membership. <https://www.anqa.am/en/internationalization/>

4.1.2 Armenia TNE mapping

Figure 8: Overall UK TNE enrolments in Armenia over time
 Source: HESA Aggregate Offshore Record. Data for 2018–19 and earlier excludes students registered with Oxford Brookes University.



The data in Figure 8 show that UK TNE in Armenia has risen overall in the last five years, with a significant increase over the last year – 165 overall enrolments in 2022–2023 up from 95 the previous year. This increase is led by a sharp increase of 86 per cent in postgraduate TNE enrolments versus the previous year. During the same period, undergraduate enrolments also increased 25 per cent, albeit from a small overall number of enrolments – from 20 in 2021–2022 to 25 in 2022–2023.

Table 3: Top five UK HEIs in terms of TNE enrolments in Armenia, 2022–2023
 Source: HESA Aggregate Offshore Record

No.	University	2022–23 Enrolments
1	University of York	60
2	The University of Sheffield	55
3	University of London (Institutes and activities)	15
4	The Open University	5
5	King’s College London	5

As the TNE mapping in Annex A and the figure regarding the type of provision show, the 2022–2023 UK TNE enrolments in Armenia covered two main TNE delivery models. The University of Sheffield, University of York and University of London were the three UK universities that offered the most TNE degrees.

Figure 9: UK TNE in Armenia by type of provision
 Source: HESA Aggregate Offshore Record

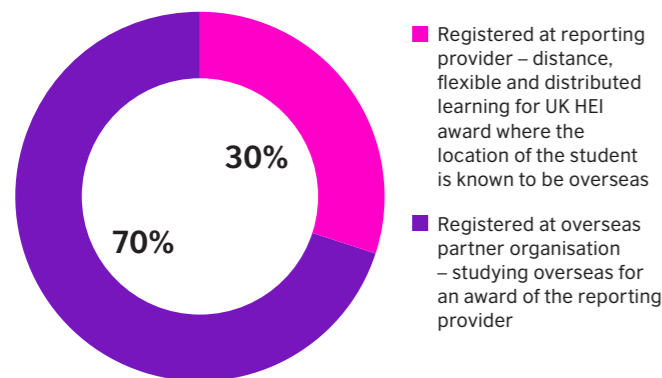


Figure 10: Armenia's TNE in the Wider Europe region
 Source: HESA Aggregate Offshore Record

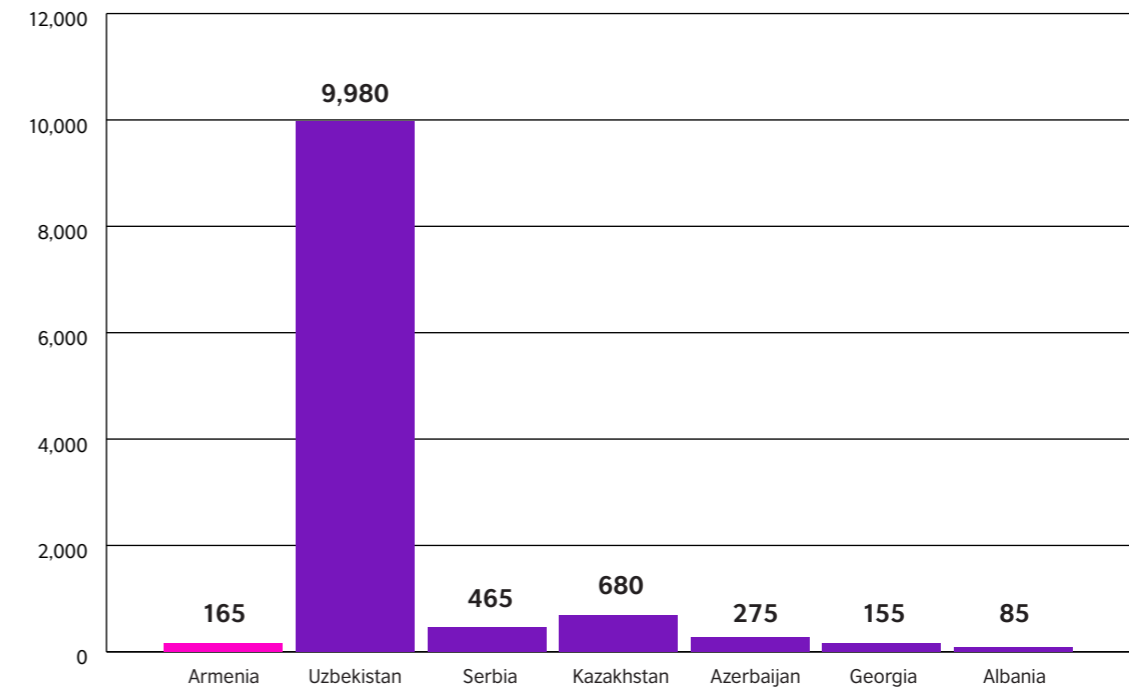


Figure 10 shows that Armenia has the third lowest UK TNE enrolments among all the other six countries in the region.

4.1.3 Armenia stakeholder insights

For Armenia, stakeholder interviews provided valuable perspectives into Armenia’s higher education landscape, internationalisation efforts and TNE partnerships with UK institutions. These included:

- Four representatives from a selection of Armenian universities
- Government officials involved in shaping Armenia’s higher education strategy.

Findings for Armenia highlighted the country’s goals for internationalisation and the importance of strategic partnerships with UK universities to achieve them.

TNE subject analysis

For UK TNE in Armenia, the largest proportion of provision is in postgraduate degrees related to business, such as Executive MBA programmes from the University of Sheffield and the University of York. CITY College, based in Greece, delivers Executive MBA programmes in Armenia and serves as the European campus of the University of York, which awards the programme. It is worth noting that until 2021–2022, the partnership was between CITY College and the University of Sheffield.

Most UK TNE degrees are offered at postgraduate level (85 per cent). The University of Sheffield, University of York and University of London offer TNE degrees, including business-focused postgraduate programmes, as discussed above. Most UK TNE programmes are delivered by CITY College in Armenia, including the MBA programmes offered by the University of Sheffield and the University of York.

Key opportunities for UK TNE in Armenia

1

Upgrading existing programmes and introducing new programmes in partnership with Armenian HEIs

It was noted by the government stakeholders interviewed that rather than establishing IBCs of UK universities in Armenia, there was an opportunity for UK institutions to upgrade existing programmes through direct partnerships. This approach would allow for the integration of international best practices while maintaining the autonomy and identity of Armenian universities. As well as student mobility exchanges, forming strategic collaborations with Armenian universities presents opportunities for joint research projects and faculty exchanges. University stakeholders were equally enthusiastic about working with UK providers for TNE provision – particularly taught provision in the form of double degree programmes – but pointed to the high cost of tuition as a potential barrier for Armenian students.

2

The doubling of foreign student numbers in Armenia by 2050 presents opportunities for UK HEIs looking to help fill domestic capacity

Armenia's plans to double the number of foreign students by 2050 presents an opportunity for increased TNE partnerships with international institutions. Armenian stakeholders emphasised the importance of enhancing existing programmes rather than establishing foreign branches, underscoring the significance of initiatives like the Erasmus scheme and bilateral cooperation. Moreover, there is a pressing need to align education with market demand and the labour market in Armenia, particularly in sectors such as education, agriculture, tourism and humanities. These are academic areas that UK TNE providers would be well placed to engage in, helping Armenia towards its ambitious educational goals.

Key challenges for UK TNE in Armenia

1

Financial constraints and funding dynamics post-Brexit

The aftermath of Brexit has significantly altered the funding landscape for collaborative initiatives. Previously, EU-funded grants facilitated partnerships, but the absence of such funding post-Brexit has created financial hurdles. It was noted by some of the university stakeholders that the reduction in EU-funded grants had impacted ease of collaboration with UK institutions, giving the UK's European peers a comparative advantage. Moreover, the affordability issue among Armenian students presents a significant challenge, particularly regarding franchise models of TNE. The reluctance of students to bear higher fees, especially when compared to the lower fee structures in place in most EU countries, impedes the expansion of partnerships.

2

Legislative and bureaucratic obstacles

Legal constraints and bureaucratic hurdles pose additional challenges to collaboration for UK HEIs. Regulations imposed by Armenian state universities restrict joint degree programmes, limiting the scope of partnership opportunities. Public officials interviewed also noted that there was resistance to change within the public university system in Armenia, making modernising educational programmes difficult. Furthermore, gaps in legislation concerning online or hybrid programmes further complicate collaborative efforts. As mentioned, the inability to utilise EU funds for UK collaborations post-Brexit exacerbates the situation.



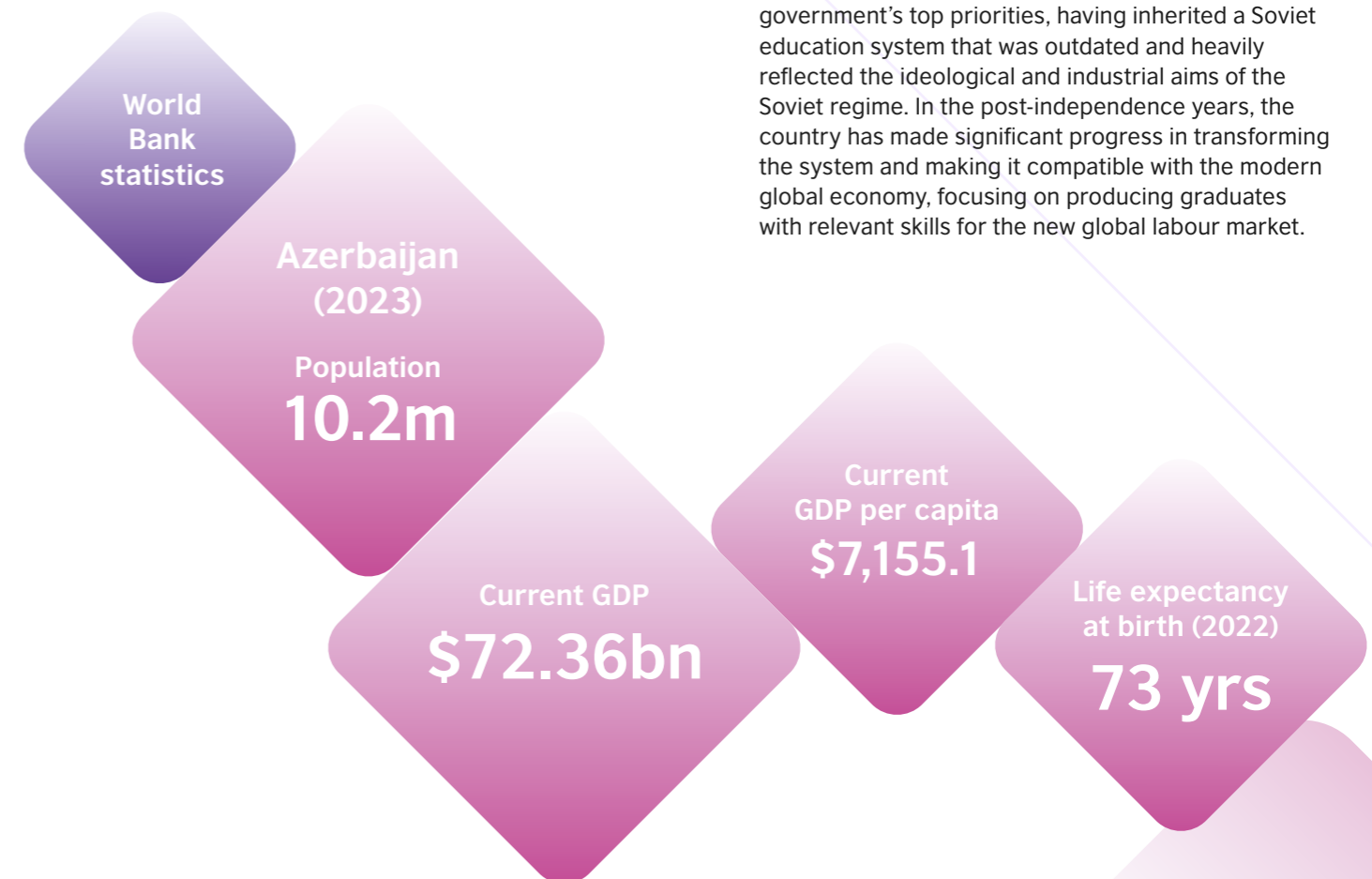
4.2.1 Azerbaijan introduction

Azerbaijan is a resource-rich country located in the South Caucasus region. It borders Russia to the north, Iran to the south, Georgia to the northwest, Armenia to the west and the Caspian Sea to the east, where the country holds significant offshore deposits of oil and natural gas. Azerbaijan gained independence from the Soviet Union in 1991 following the formal dissolution of the USSR. In total, the population of Azerbaijan stands at roughly 10.1 million people. Baku, Azerbaijan's capital, has a population of 2.236 million and serves as a major centre for commerce, industry and education. Most higher education institutions are based in Baku. Other significant population centres include Ganja, the country's second-largest city, and Sumgait, situated on the Caspian Sea coast.

Azerbaijan has made significant efforts to support economic diversification in recent years, although the economy remains heavily dependent on oil and gas outputs, which account for approximately 92 per cent of export revenue and over half of the state budget.²⁹ However, investment in education based on the percentage of government expenditure is significant (13 per cent in 2022) and reflects the government's commitment to human capital development and building a more knowledge-based economy.³⁰ The implementation of important programmes, such as the 'State Program on Increasing the International Competitiveness of the Higher Education System in the Republic of Azerbaijan for 2019-2023', have been carried out at the expense of the State Oil Fund.

Outline of higher education system

When Azerbaijan gained independence in 1991, improving the education sector became one of its government's top priorities, having inherited a Soviet education system that was outdated and heavily reflected the ideological and industrial aims of the Soviet regime. In the post-independence years, the country has made significant progress in transforming the system and making it compatible with the modern global economy, focusing on producing graduates with relevant skills for the new global labour market.



²⁹ <https://www.state.gov/reports/2023-investment-climate-statements/azerbaijan/#:~:text=The%20Azerbaijani%20economy%20remains%20heavily,increase%20in%20the%20previous%20year.>

³⁰ National Budget Brief: Azerbaijan. <https://www.unicef.org/azerbaijan/media/3691/file/National%20Budget%20Brief%202022.pdf>

The Ministry of Science and Education of the Republic of Azerbaijan is the central executive body responsible for the development of higher education. The ministry ensures the implementation of the state education policy and sets the framework for academic programmes, accreditation, and the overall governance of universities and other higher education institutions. The total number of students enrolled in higher education for the year 2022–2023 was 222,809.³¹ There are currently 40 state higher education institutions and 11 private higher education institutions in Azerbaijan, consisting of four main types³²:

University

Offers teaching and training in a broad range of subjects and also conducts scientific research.

Institute

Trains specialists in specific subject areas and offers in-service training. Institutes may be independent or part of a university.

Academy

Offers higher and in-service training programmes, alongside conducting scientific research.

Conservatoire

Specifically for the teaching of and training in music.

Policy environment – internationalisation

To boost the global competitiveness of Azerbaijani higher education institutions, in 2018 the ‘State Program on Increasing the International Competitiveness of the Higher Education System in the Republic of Azerbaijan for 2019-2023’ was approved by presidential decree.

This programme focused on two key areas:

1. Establishment of international double degree programs in priority areas for the country’s economy between prestigious higher education institutions of the world and higher education institutions in Azerbaijan; and
2. Funding doctoral-level education of Azerbaijani citizens abroad to train national personnel with high scientific- research skills for higher education institutions in Azerbaijan.³³

The 2024 budget of the State Oil Fund allocated 33.52 million manats (roughly 154 million GBP) to the programme.³⁴ As of 31 March 2024, the SOFAZ had allocated funds for 233 doctoral degree programmes abroad. After Turkey (84), the UK has hosted the second highest number of these scholars to date (52).³⁵

Azerbaijan adopted the Bologna Process in 2005 and subsequently became a member of the European Higher Education Area. The objective of this was to align Azerbaijan’s education system with the education systems of EU countries. These changes were fully absorbed into the country’s HEIs by the passing of the Law on Education in 2009, which made the goals of the Bologna Process legally binding. Other internationalisation efforts include Azerbaijan’s commitment to the Erasmus+ programme. Azerbaijani higher education institutions are highly active in EU higher education mobility programmes, including Erasmus+ and its predecessor programme, Tempus.³⁶ As a non-associated third country, Azerbaijan is not able to participate in the entire Erasmus+ programme but can participate in activities including student and staff exchanges and Erasmus Mundus joint degree programmes.

Regulatory environment

Azerbaijan has enacted reforms to bring the quality of its higher education sector in line with European and international standards for quality assurance. In 2019, the Azerbaijan government created the Education Quality Assurance Agency (TKTA).³⁷ TKTA’s primary objectives include granting accreditation to higher education institutions and improving and maintaining quality assurance at all levels of the Azerbaijan education system. TKTA participates as a full member of the Central and Eastern European Network of Quality Assurance Agencies in Higher Education (CEENQA) and the International Network of Quality Assurance Agencies in Higher Education (INQA/AHE).

³¹ Data from The State Statistical Committee of the Republic of Azerbaijan <https://www.stat.gov.az/?lang=en>

³² Overview of the Higher Education System https://www.erasmusplus.org.az/images/uploader/175cd-countryfiches_azerbaijan_2017.pdf

³³ State program on increasing the international competitiveness of the higher education system in the Republic of Azerbaijan for 2019-2023 <https://edu.gov.az/en/programmes/2019-2023-dovlet-programi>

³⁴ State Program on Raising Competitiveness of Higher Education in Azerbaijan in 2019-2023 <https://www.oilfund.az/en/projects/12>

³⁵ <https://oilfund.az/storage/images/7vghrlzul9.pdf>

³⁶ European Commission - Overview of the Higher Education System - Azerbaijan

https://www.erasmusplus.org.az/images/uploader/175cd-countryfiches_azerbaijan_2017.pdf

³⁷ Education Quality Assurance Agency (TKTA) <https://www.tkta.edu.az>

TNE snapshot summary

UK TNE enrolments in Azerbaijan grew from 230 in 2021–2023 to 275 in 2022–2023. 170 of these enrolments came via distance learning in areas such as business, for example, the Executive MBA programmes from the University of Sheffield and the University of York. The other type of UK TNE that is most prevalent in the country is dual awards offered by UK HEIs and local partners that specialise in the petroleum and oil industry. Notable examples of non-UK TNE in Azerbaijan include the French-Azerbaijani University, created as a joint project led by the University of Strasbourg and the Azerbaijan State Oil and Industry University (ASOIU). Several Russian state universities also operate branch campuses in Baku, concentrating in the fields of medicine, humanities, and oil and gas engineering. The presence of Russian IBCs reflects Azerbaijan’s historical and cultural connections to Russia, with the Russian language retaining its importance post-independence and the number of students enrolled in programmes with Russian as a medium of instruction growing in the country.

4.2.2 Azerbaijan TNE mapping

Figure 11 shows that UK TNE in Azerbaijan has fluctuated in the last five years. A significant drop in undergraduate enrolments in 2021–2022 recovered in 2022–2023, but numbers are still lower than in 2018–2019 (95 enrolments). At postgraduate level, enrolments increased by 27 per cent in this five-year period, from 185 in 2018–2019 to 235 in 2022–2023. Overall enrolments grew 19 per cent in 2022–2023 from the previous year.

Figure 12: UK TNE in Azerbaijan by type of provision
Source: HESA Aggregate Offshore Record

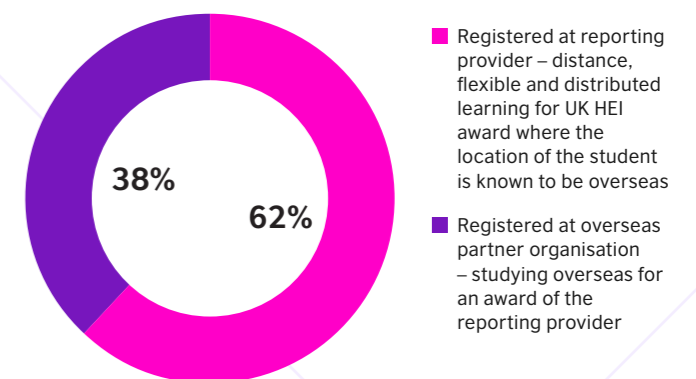


Figure 11: Overall UK TNE enrolments in Azerbaijan over time
Source: HESA Aggregate Offshore Record. Data for 2018–19 and earlier excludes students registered with Oxford Brookes University.

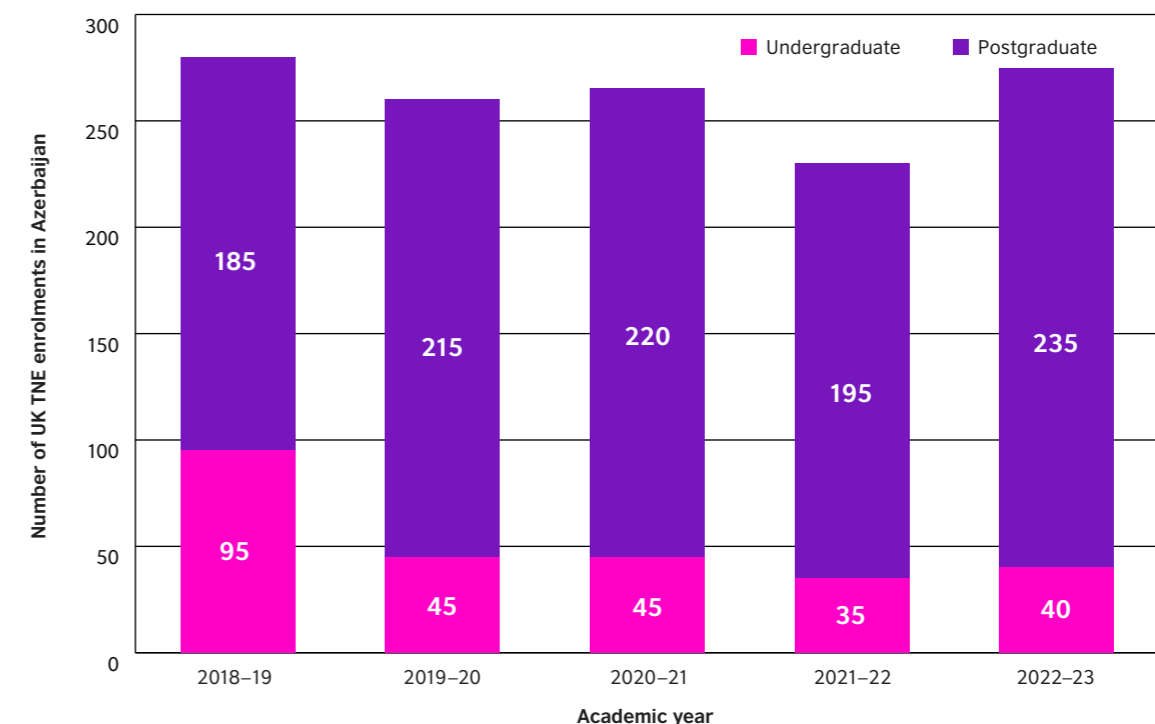


Table 4: Top ten UK HEIs in terms of TNE enrolments in Azerbaijan, 2022–2023
Source: HESA Aggregate Offshore Record

No.	University	2022–23 Enrolments
1	The University of Sheffield	55
2	University of York	50
3	University of London (institutes and activities)	30
4	King's College London	25
5	Heriot-Watt University	15
6	University of Aberdeen	10
7	University of Chichester	5
8	The Open University	5
9	University of Leicester	5
10	University of Liverpool	5

As the TNE mapping in Annex A and the figure regarding the type of provision show, the 2022–2023 UK TNE enrolments in Azerbaijan covered two TNE delivery models. The University of Sheffield was the top provider offering the largest number of UK TNE programmes in Azerbaijan.

Figure 13: Azerbaijan's TNE in the Wider Europe region
Source: HESA Aggregate Offshore Record

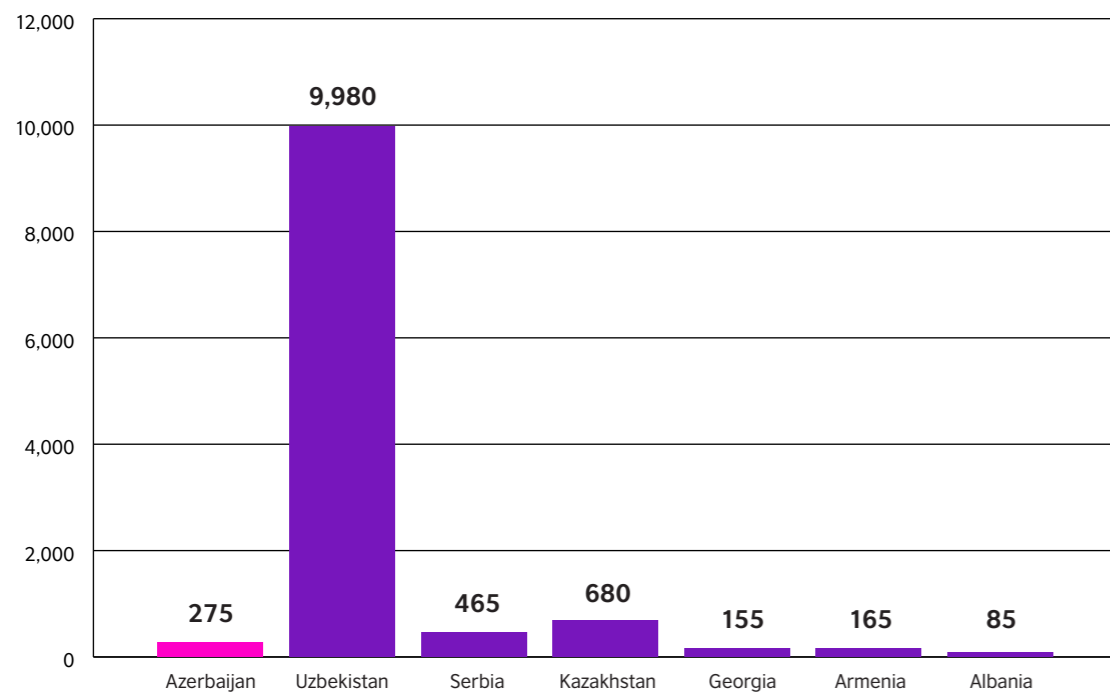


Figure 13 indicates that Azerbaijan is positioned near the middle in terms of UK TNE enrolments, ranked fourth among the other six countries in the Wider Europe region.

TNE subject analysis

For UK TNE in Azerbaijan, the largest proportion of provision is in degrees related to business such as the Executive MBA programmes from the University of Sheffield and the University of York. The second type of offering is engineering, with examples such as petroleum engineering and chemical engineering offered by Heriot-Watt University and delivered by Baku Higher Oil School.

The largest proportion of provision in 2022–2023 was in postgraduate degrees (85 per cent; 235 out of 275) and prominent examples were the MBA programmes discussed above. The majority of UK TNE in Azerbaijan is delivered through online learning as illustrated by the types of provision. CITY College, validated by the University of York and previously by the University of Sheffield, delivers UK-awarded TNE in Azerbaijan.

4.2.3 Azerbaijan stakeholder insights

For Azerbaijan, in-country research was conducted with the following stakeholders in January 2023 in Baku, as well as two online interviews.

- Senior public servants representing the Ministry of Science and Education
- Seven universities, based in Baku
- Representatives from the UK Department of Business and Trade (DBT)
- One UK university with transnational education provision in Azerbaijan.

The findings are primarily drawn from Azerbaijani stakeholders, who provided in-depth insight into the current state of TNE in Azerbaijan, including the operational management of programmes, incentives and challenges for TNE, and programme requirements linked to Azerbaijan's future economic development.

For UK stakeholders, the DBT representatives echoed many of the insights of the Azerbaijan Ministry of Education, highlighting potential opportunities based on the current strength of the bilateral relationship between the UK and Azerbaijan. Subjects such as IT, renewables and energy were put forward as potential areas where the UK could support.

Although the University of Warwick delivered an MSc in Renewable Energy with an Azerbaijan university partner in 2022–2023, this was not included in the HESA record for 2021–2022 (which was the only available dataset during the initial research for this project). As such, Warwick were not contacted for interview. However, another TNE provider in Azerbaijan, the University of York, was interviewed. The University of York delivers TNE through CITY College Thessaloniki, which runs hybrid executive MBA programmes in Greece, Albania, Serbia, Armenia, Azerbaijan and Georgia. It is a unique model in which CITY College acts as the 'European Campus' of the University of York and has fly-in faculty for residential weekends in each of the countries during the programmes to have face-to-face contact with students. The remaining learning is undertaken online. The degree is a joint degree between the University of York and University of Strasbourg. Whilst a unique TNE programme, its enrolment numbers are relatively low, and thus the feedback relating to it did not significantly impact the findings below.

Key opportunities for UK TNE in Azerbaijan

1 Strong government support for engaging international universities, and broader national ambition for rankings

Interviews at the ministry outlined that Azerbaijan had an explicit policy for the internationalisation of higher education. Primarily this is driven by increasing scholarship opportunities for Azerbaijani students to study abroad, and secondly through government-backed transnational education (TNE) within Azerbaijan. There are around 400 state scholarships annually for sending students abroad; the UK has been highlighted as a preferred destination.

With regard to TNE, the ministry has financially supported the development of high-profile dual degree programmes, most recently the MSc in Renewable Energy at Azerbaijan State Oil and Industry University, in conjunction with the University of Warwick. There are currently two further dual degree programmes between Azerbaijan universities with US universities, and one each with Turkey, Israel and South Korea. Furthermore, the French-Azerbaijani University (UFAZ) was created in 2016, following a special presidential decree and agreement with the French President. UFAZ offers several programmes developed in conjunction with universities in Strasbourg, Rennes and Montpellier. It was also mentioned that there were two Russian IBCs in Azerbaijan, but there was no further appetite to develop these.

The most promising models for UK TNE in Azerbaijan are dual degree programmes, in the mould of the University of Warwick's partnership, and a 'national' university agreement such as UFAZ. Whilst both models are currently financially supported by the Azerbaijani government, it was stressed that if a university had its own resources to undertake the investment in Azerbaijan, this would also be possible. In other words, future TNE development is not solely contingent on government financial support. It should be noted, however, that the dual degree programme ambition of the government is limited. Any future programmes will need to adhere to the government's economic priorities and address gaps in educational provisional that the Azerbaijan higher education sector cannot currently serve.

This latter point is similar to the feedback from Azerbaijani universities regarding their own ambitions for internationalisation. The primary driver of

developing engagements and TNE with foreign universities is to a) introduce new subject areas that currently lack domestic expertise, and b) enhance the training and research opportunities for university staff. There was no indication that increasing international student recruitment was a driver in internationalisation. Similarly, the government officials acknowledged that foreign TNE in Azerbaijan could support increasing international recruitment, but there was no ambition to become a TNE hub. Rather, the focus of both government and universities was to enhance the quality of education experienced by Azerbaijani students and support economic development.

Aside from dual degrees and joint national branded universities, there are potentially other ways that UK universities could engage in Azerbaijan. For example, ASOIU mentioned that the University of Warwick provides eight modules for programmes at ASOIU and dissertation supervision for ASOIU master's students, and sends fly-in faculty to teach modules. Furthermore, there are opportunities for ASOIU students to have mobility to Warwick for a semester of study.

The final point that government and university stakeholders emphasised around developing TNE was in improving the domestic HE sector's quality and visibility in order to improve their position in global educational rankings. It is believed that cultivating TNE can bring about changes in research culture, internationalisation and reputation. The latter point is seen as particularly important, and with it the belief that UK universities in particular can support the reputational improvement of Azerbaijani universities globally.

2

Desire for programme diversification

Both ministry and university stakeholders in Azerbaijan highlighted the potential for UK universities to support the higher education sector in Azerbaijan by diversifying the range of subjects being taught, and to align the curriculum with the skills needs for the Azerbaijani economy of the future. One of the reasons for pursuing high-profile dual degree programmes with foreign universities is to upskill students and staff with subject expertise and broader skills that are currently lacking in Azerbaijan. The MSc in Renewable Energy, co-developed by the University of Warwick, is one example of this, as it feeds directly into the Azerbaijan government's ambition to develop a new green energy infrastructure.

Other dual degree programmes developed with foreign universities also have focused programme portfolios. For example, Baku State University has specific programmes with an Israeli university for biotechnology, with a Kazakhstan university for chemistry, and with a French university for law. In other examples, disciplinary-specific universities in Azerbaijan have developed strong TNE relationships for those subject areas. These include Baku Engineering University's high-profile partnership with a South Korean university involving 400 students in 3+1 programmes, fly-in faculty and staff training and development. Azerbaijan State Pedagogical University (ASPU) has also developed dual degrees, but seeks to provide more diversification within their programme offer for educational studies, taking into account pedagogical best practice developed in the UK as well as practitioner-based skills in the curriculum. As such, even when developing new disciplinary portfolios may not be of direct interest to subject-specific universities in Azerbaijan, they are still interested in leveraging TNE relationships to renew and update their curriculum, skills, staff training and exposure to global practice and research in those existing subject areas.

It should also be noted that some universities expressed potential interest in developing online or hybrid offerings at postgraduate level, to meet an increasing interest in study from people who are already in work and may not wish to leave work to return to study on a full-time basis. Developing world-leading online and flexible learning collateral for the Azerbaijani higher education market at postgraduate and executive education levels is something that UK universities may have opportunities to support.



Key challenges for UK TNE in Azerbaijan

1

Cost of TNE degrees

Despite the enthusiasm for growing TNE relationships with the UK, one consistent feedback from both ministry officials and universities in Azerbaijan was the perception that UK degrees were too expensive for the Azerbaijan market. Higher education in Azerbaijan is free for students (or at least low cost compared to the UK), and some universities that have struggled to create long-term successful TNE with the UK highlighted that cost was the main factor. Success can be enabled through government sponsorship of dual degrees, effectively paying students' fees, but also subsidising the cost of programme development, fly-in faculty and other training and partnership management costs.

There are several models of fee structuring for TNE in Azerbaijan, depending on the partner country. Like those of the UK, US TNE programmes can be difficult to maintain due to higher fees, but successful ones have been sponsored by the US embassy. Other unique fee and cost relationships were highlighted – one dual degree programme with a Kazakh university was free for students as the Kazakh partner did not charge any fees; for another programme with a French university, the Azerbaijani university partner paid for the fly-in faculty; and finally, for a programme with a Chinese university, students had to pass an exam to be eligible for a scholarship to fund the 2+2 mobility degree.

Ministry officials in Azerbaijan especially highlighted the fact that for UK (and US) universities, the government-funded dual degree programmes might not be attractive due to the relatively lower revenue that they might generate. As such, the ministry was more interested in UK universities with established specialisms that could support Azerbaijan's economic and energy ambitions, and that offered the potential of another high-profile dual degree programme like that between the University of Warwick and ASOIU.

For UK universities, careful modelling of fee returns would need to be made and market research carried out with prospective student groups to understand the demand for higher-fee programmes. Whilst there is a thriving middle class in Azerbaijan, particularly in Baku, there is far less of a culture of families directly funding higher education for their children compared to other markets. Government funding for domestic university places and generous competitive scholarships for Azerbaijan students abroad mean that there is less demand for fee-paying education.

2

Choosing the right TNE model and a competitive environment for UK universities with other countries providing TNE programmes

A related challenge to the tuition fee levels is how to determine the actual model of TNE that would be best suited to both UK and Azerbaijan stakeholders. From discussions with the ministry, there was broad support for increasing TNE with the UK without clear commitment to a preferred model of engagement. Whilst the dual degree programme involving the University of Warwick was perceived as an example of best practice, the ministry also noted that there could be limitations on the number of dual degrees that the government could fund. UFAZ was also held up as a model that could work, but this would be reliant on higher level national leadership to engage on a bilateral agreement to create an endeavour. Furthermore, there seemed no ambition to develop international branch campuses, nor to create any regulatory function, nor a desire to see franchise arrangements develop. For online degrees, support seemed ambiguous, with no existing regulatory barrier for foreign universities to deliver online degrees in Azerbaijan, but equally no drive to pursue it further at this stage. However, it was acknowledged by at least one university that hybrid learning could serve an important function in reskilling and adult learning programmes, and that UK expertise would be welcomed in this area.

Whilst Azerbaijan has far lower levels of TNE than Central Asian countries such as Kazakhstan or Uzbekistan, the ministry is engaging with many countries. There is a diverse set of current foreign TNE providers in high profile programmes, including the US, Germany, France, Israel, South Korea, Georgia, Russia, Kazakhstan and China. Other countries mentioned for future cultivation of TNE and internationalisation of education relations included Turkey, Iran, Japan and Pakistan. Whilst the ministry emphasised that broader foreign relations with the UK were strong, and that this could be leveraged for the further development of TNE relations, Azerbaijan is a country that has diverse multilateral relations. It is a key part of the broader global Turkic community, has connections with the Islamic world (including the Middle East), and has proximal relations in central Asia and Europe. This means that the UK faces a competitive environment for TNE, with potentially limited opportunities given the emphasis on domestic upskilling rather than the long-term internationalisation of its student base.

4.3.1 Georgia introduction

Georgia is in the South Caucasus region at the eastern end of the Black Sea. It borders Russia to the north, Azerbaijan to the southeast, Armenia to the south and Turkey to the southwest. Georgia's overall population stands at 3.7 million. The capital city, Tbilisi, is the political and administrative centre of the country and has a population of just over 1.24 million. Tbilisi is home to the country's major institutions of higher education, including Tbilisi State University, the oldest university in the South Caucasus, and Tbilisi State Medical University, the largest medical university in the South Caucasus. Other major metropolitan areas include Kutaisi and Batumi. Both cities contribute significantly to the country's economic activity and are centres of commerce and industry as well as education. Overall, Georgia's urban population is 60 per cent, putting it slightly below Armenia (63 per cent) and slightly above Azerbaijan (57 per cent).

World Bank statistics

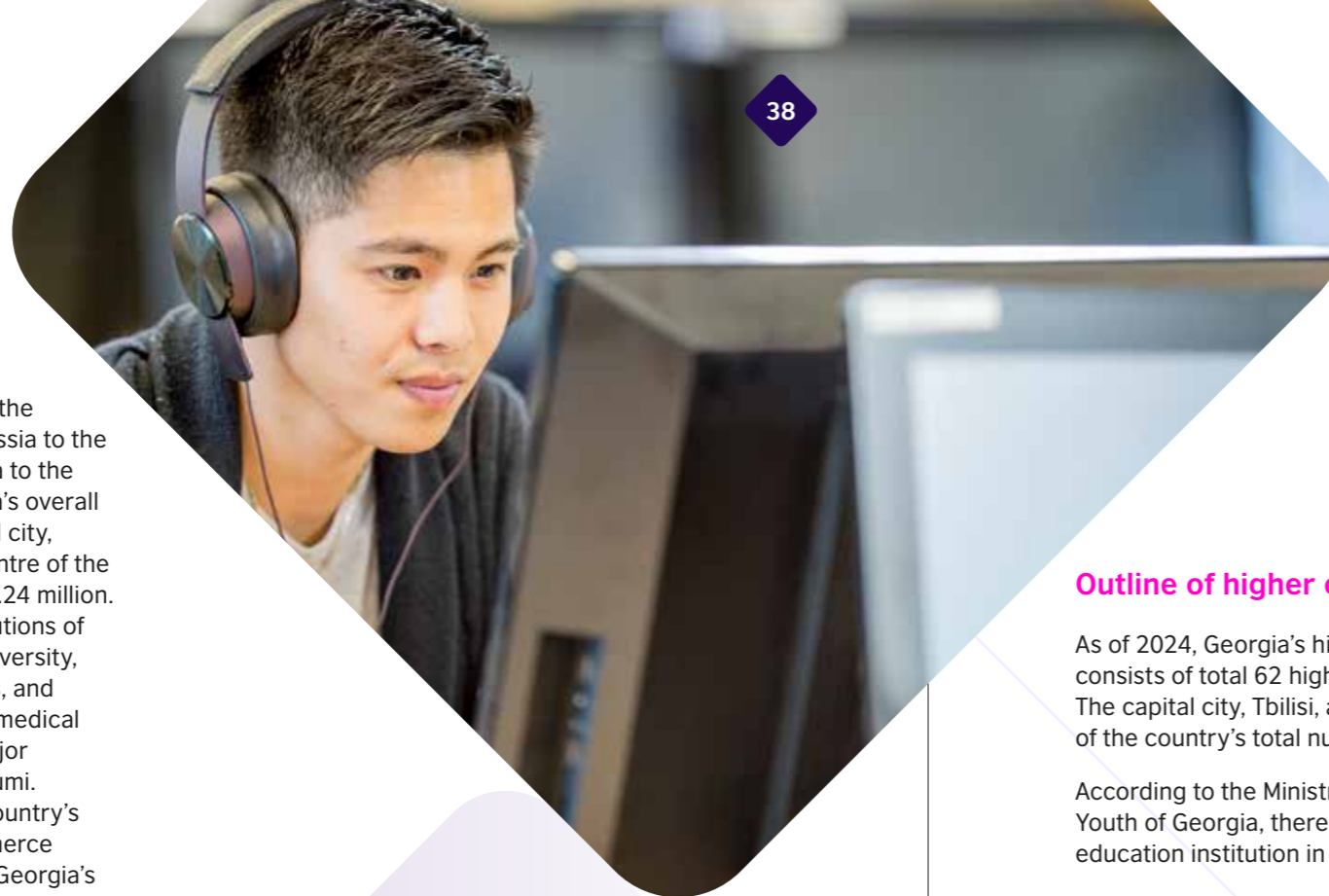
Georgia (2023)

Population
3.7m

Current GDP
\$30.5bn

Current GDP per capita
\$8,210

Life expectancy at birth (2022)
71.7 yrs



Outline of higher education system

As of 2024, Georgia's higher education sector consists of total 62 higher education institutions.³⁹ The capital city, Tbilisi, accounts for 40 out of 62 of the country's total number of HEIs.

According to the Ministry of Education, Science and Youth of Georgia, there are three types of higher education institution in the country.⁴⁰

University

Carries out higher educational programmes of all three stages and scientific research.

Teaching University

Implements the first and second cycles of higher academic education (no doctoral programmes).

College

Provides professional higher educational programmes only in the first cycle of higher academic education i.e. bachelor's degrees.

There are more private institutions than public institutions in Georgia's higher education sector (43 private, 19 public), despite overall enrolments being higher at public institutions. 60.6 per cent of the total number of students study in state higher education institutions (97,800 students) and 39.4 per cent in private institutions (63,500 students).⁴¹ Enrolments at private universities are anticipated to rise in the coming few years, mainly driven by overseas students and Georgia's emergence as an education hub. According to official government data, student admissions increased by 10.4 per cent (4,700) in the 2022–2023 academic year compared to the same period of the previous year.⁴²

Demand from international students surged after the relocation of Indian students from Ukraine in 2022 after the full-scale Russian invasion. Georgia has continued its efforts to appeal to international students by investing in government-backed internationalisation projects focused on international accreditation and quality assurance, as well as offering programmes in English language to attract foreign students. These programmes are integral to the country's overarching strategy of enhancing global educational ties. The total number of recorded international students, according to Georgia's national statistics office, was 30,701 in the academic year 2023–2024. This was more than double the number from just three years before in 2020–2021 (14,617).⁴³

Policy environment – internationalisation

Georgia has proactively shaped its policy environment for higher education, aiming to enhance quality and competitiveness within the sector. Key policy initiatives have been launched, such as improving the quality and relevance of education, strengthening research and innovation, and fostering internationalisation. Georgia became a full member of the Bologna Process in 2005, which created the conditions for this. The country subsequently restructured its education system into three cycles (BA, MA and PhD) and implemented the European Credit Transfer and Accumulation System (ECTS) and quality assurance mechanisms to ensure the education system's compatibility at the international level. More specifically, the government has initiated efforts to promote international collaboration in higher education by partnering with universities and organisations from various countries. Georgia actively participates in international programmes like Erasmus+. Moreover, Georgia has taken significant steps to consolidate its research, innovation and technology sectors by becoming an associate member of Horizon 2020 and Horizon Europe.⁴⁴ These endeavours have provided Georgian scientists with opportunities to engage in EU competitions and collaborate with European counterparts. They aim to enhance

³⁹ Number of Higher Education Institutions by Form of Ownership and Regions of Georgia

<https://www.geostat.ge/en/modules/categories/61/higher-education>

⁴⁰ Higher Education system of Georgia, Ministry of Education, Science and Youth of Georgia – <https://mes.gov.ge/content.php?id=131&lang=eng>

⁴¹ <https://www.geostat.ge/media/51768/Indicators-of-Higher-Education-Institutions%2C-2022-2023.pdf>

⁴² <https://www.geostat.ge/media/51768/Indicators-of-Higher-Education-Institutions%2C-2022-2023.pdf>

⁴³ Number of Foreign Students In Institutions by Programmes and Sex

<https://www.geostat.ge/en/modules/categories/61/higher-education>

⁴⁴ https://research-and-innovation.ec.europa.eu/strategy/strategy-2020-2024/europe-world/international-cooperation/association-horizon-europe/georgia_en

academic mobility, facilitate exchange programmes and foster research cooperation, thus contributing to the overall internationalisation of Georgia's higher education system.

Regulatory environment

In Georgia, the regulatory framework for higher education relies on crucial regulatory entities like the Ministry of Education, Science and Youth of Georgia, which holds a significant responsibility in supervising and controlling higher education. The National Center for Educational Quality Enhancement (NCEQE) also plays a pivotal role in monitoring and regulating the higher education sector. The NCEQE was created in 2010 with the purpose of improving educational quality throughout the country. It is responsible for accrediting institutions and programmes while also conducting quality assessments to uphold and enhance educational standards.⁴⁵ Georgia's quality assurance mechanism was further strengthened when it became a member of the European Association for Quality Assurance in Higher Education (ENQA) in 2019. Despite being an ENQA affiliate since 2013, the granting of full ENQA membership for Georgia was an important step in strengthening the internationalisation aspect of its higher education system and entering the European Higher Education Area. It has allowed more internationalisation of higher education, greater student and staff mobility, and improved quality of education.⁴⁶

In terms of international accreditation, the University of Georgia is affiliated with the European Network of Information Centers (ENIC) and the National Academic Information Centers (NARIC).⁴⁷ This network is an initiative established by the European Commission, with the primary goal of enhancing the academic recognition of diplomas and study periods among the Member States of the European Union, European Economic Area (EEA) countries and Turkey. The affiliation demonstrates Georgia's commitment to global academic standards and quality assurance. Participation in the Lifelong Learning Programme also encourages mobility and collaboration with European institutions, contributing to the alignment of Georgia's regulatory framework with international standards.

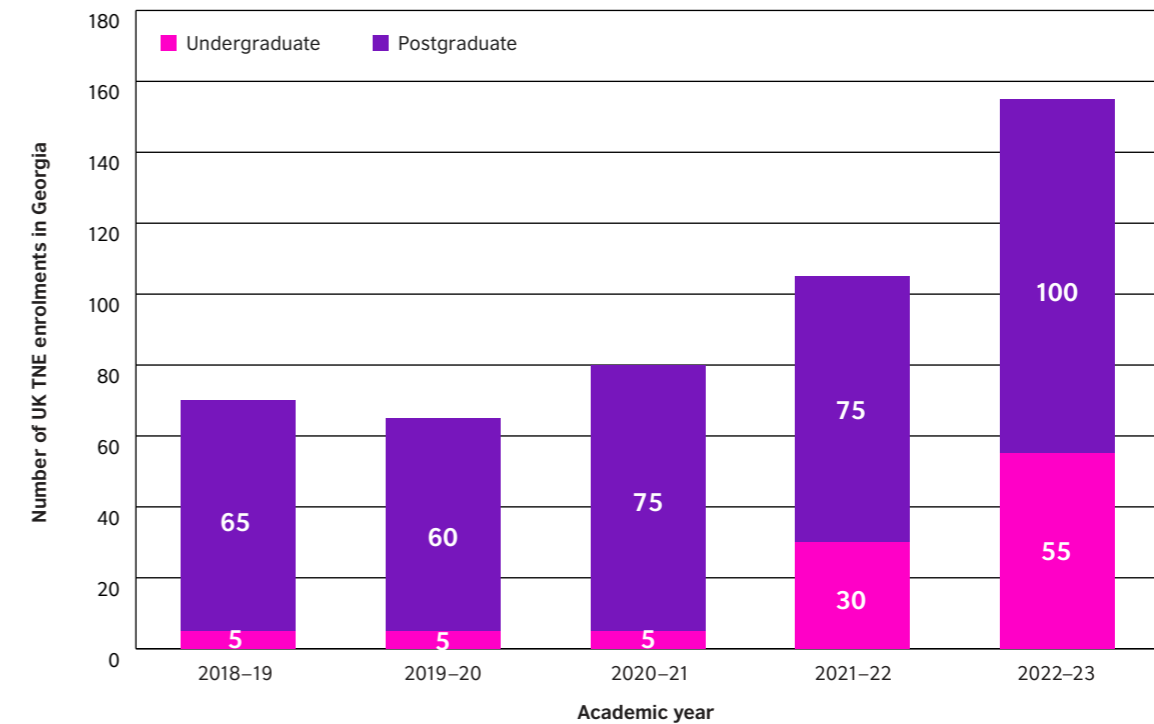
TNE snapshot summary

Georgia's overall UK TNE enrolments have grown over the last year from 105 in 2021–2022 to 155 in 2022–2023. Most remain distance learning, but franchise type agreements are also present in the country, such as the BA Political Science and BA Business and Management programmes offered by the University of Buckingham and delivered by the British University in Georgia. Private and public universities in the country have TNE arrangements with foreign universities. The focus of non-UK TNE in Georgia centres around establishing joint programmes with European universities in countries such as France, Austria and Germany. Several TNE programmes also exist with US HEIs. Unlike some other former Soviet states, Georgia does not have much TNE in collaboration with Russian higher education institutions.



4.2.2 Georgia TNE mapping

Figure 14: Overall UK TNE enrolments in Georgia over time
Source: HESA Aggregate Offshore Record. Data for 2018–19 and earlier excludes students registered with Oxford Brookes University.

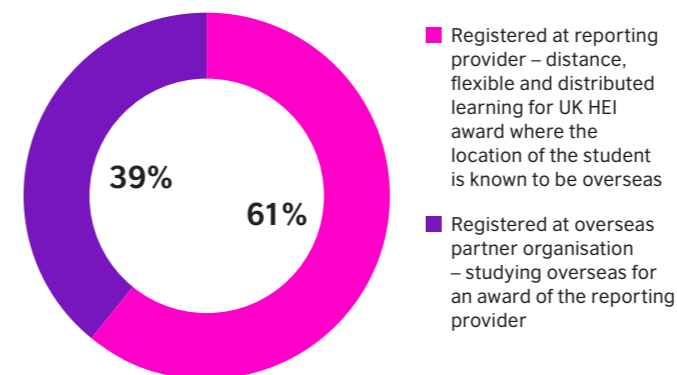


The data in Figure 14 show that UK TNE in Georgia has grown steadily over the last five years, with rapid development in both postgraduate and undergraduate enrolments in the last two years. There was a significant rise in UK TNE undergraduate enrolments from five in 2020–2021 to 55 in 2022–2023, representing a 1,000 per cent increase.

Table 5: Top nine UK HEIs in terms of TNE enrolments in Georgia, 2022–2023
Source: HESA Aggregate Offshore Record

No.	University	2022–23 Enrolments
1	The University of Sheffield	25
2	University of Buckingham	25
3	University of London (institutes and activities)	20
4	King's College London	20
5	University of York	15
6	University of Reading	10
7	The Open University	5
8	The University of Manchester	5
9	University of Oxford	5

Figure 15: UK TNE in Georgia by type of provision
Source: HESA Aggregate Offshore Record



⁴⁵ <https://eqe.ge/en/page/static/5/chven-shesakheb>

⁴⁶ Pipia, E., Margishvili, L., Parjanadze, N. (2024). Internationalization and Sustainability of Higher Education Through Education Quality Assurance Mechanisms in Georgia. In: Akgün, B., Alpaydin, Y. (eds) Global Agendas and Education Reforms. Maarif Global Education Series. Palgrave Macmillan, Singapore. https://doi.org/10.1007/978-981-97-3068-1_12

⁴⁷ International Accreditation: ENIC-NARIC (Europe), The University of Georgia – <https://www.ug.edu.ge/en/international-accreditation>

As the TNE mapping in Annex A and the figure regarding the type of provision show, the 2022–2023 UK TNE enrolments in Georgia covered two TNE delivery models. The University of Sheffield, University of Buckingham, University of London and King's College London hosted most UK TNE enrolments in Georgia.

Figure 16: Georgia's TNE in the Wider Europe region
Source: HESA Aggregate Offshore Record

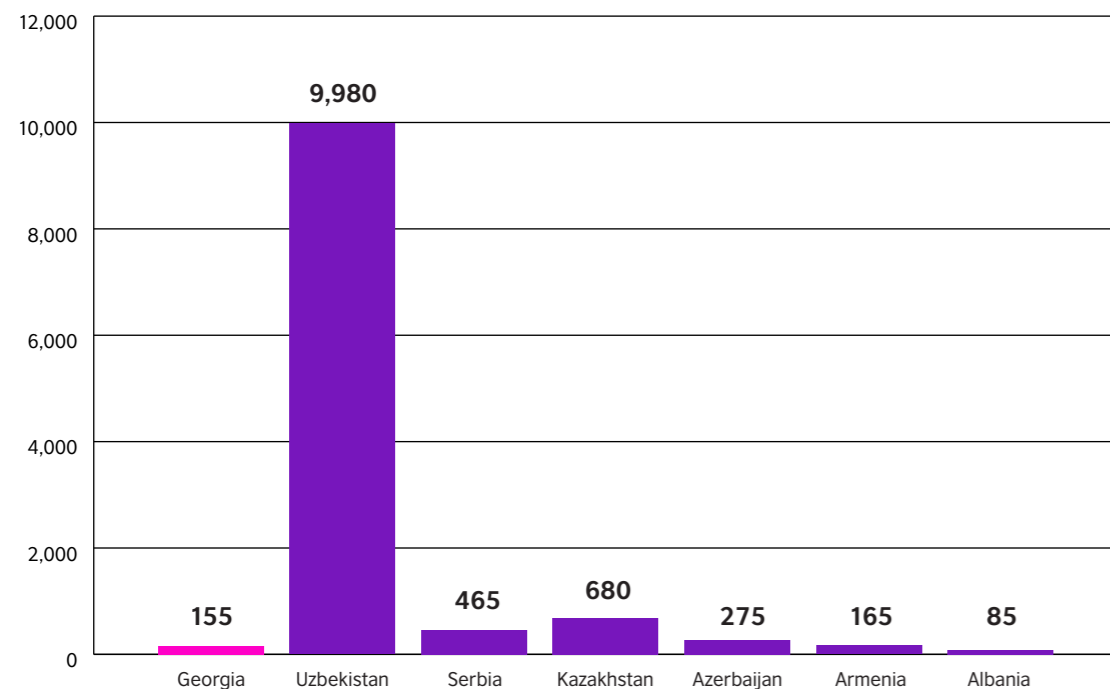


Figure 16 shows that Georgia has the second lowest UK TNE enrolments among all six countries in the Wider Europe region.

TNE subject analysis

For UK TNE in Georgia, the largest proportion of provision is in degrees related to business, such as the Executive MBA programmes from the University of Sheffield and the University of York, and the BBA Business and Management from the University of Buckingham. Like Albania, Armenia and Azerbaijan, CITY College (validated by the University of York and previously the University of Sheffield) delivers UK-awarded TNE in Georgia. There is also a BA Political Science offered by the University of Buckingham and delivered by the British University in Georgia.

Most UK TNE degrees are postgraduate level (64 per cent; 100 out of 155 enrolments). The University of Sheffield and University of Buckingham offer the largest numbers of postgraduate TNE degrees, including the MBA programmes discussed above.



4.3.3 Georgia stakeholder insights

Overview

For Georgia, in-country research was conducted in February 2023, in Tbilisi, Kutaisi and Batumi. The following stakeholders provided one-hour interviews:

- Six universities, including public and private institutions, covering Tbilisi, Kutaisi and Batumi
- The Minister for Education, Science and Youth
- Senior policymakers at the Ministry of Education and Science
- Chair of the Committee on Education, Science and Youth Affairs, Parliament of Georgia
- The Centre for International Education
- The National Centre of Educational Quality and Enhancement
- Representatives from the UK Department of Business and Trade (DBT) based at the UK Embassy in Georgia.

UK-based stakeholders were interviewed online to gain insight into the broader UK approach to higher education in Georgia. Interviews were conducted with a UK university and their affiliate partner institution delivering TNE in Georgia, as well as representatives from the UK Department of Business and Trade and Universities UK International.

Due to the current low level of UK TNE in Georgia, feedback from UK stakeholders was more limited. The overall sense from UK stakeholders was that Georgia is somewhat of an unknown entity for the UK university sector, which requires awareness raising as a potential market if it is to draw the attention of UK universities from a strategic development point of view.

As such, the findings are primarily drawn from Georgian stakeholders. They offer an opportunity to assess the current sentiments towards engaging the UK as a more cohesive higher education partner, including how UK universities can contribute to fulfilling Georgia's higher education and economic development strategies in the medium and long term.

Key opportunities for UK TNE in Georgia

1

UK universities can leverage growing international recruitment in Georgia, attracting foreign students in Georgia to UK TNE programmes

Georgia has had year-on-year increases in the number of foreign students enrolled in Georgian universities, increasing from 11,390 in 2018 to nearly 30,800 in 2023. Even though growth accelerated in January 2022 due to the influx of students coming from Ukraine following the Russian invasion, there had still been significant organic growth in the years preceding. The last five years of ever-increasing international recruitment have demonstrated the domestic higher education sector's economic importance to the national economy. Revenues from international recruitment and the associated payments of foreign students living and buying goods and services in Georgia were believed to outweigh all the revenue from Georgia's wine export industry.

Most international students – as many as 80 per cent – are from India. Whilst India presents a strong pipeline of future students, there is also a desire amongst Georgian stakeholders to ensure that they do not become over-reliant on one market and they are keen to diversify international recruitment. A large majority of international student enrolments are for medical subjects. Consolidating medicine as an international recruitment driver could help turn Georgia into an international medical education hub, particularly if there were the additional attractiveness of foreign TNE medical programmes, including those from the UK.

It was noted by some private universities that UK TNE delivered in Georgia in the form of joint and dual degrees could increase the attractiveness of Georgia for international academic staff as well as international students. Increasing international academic staff is also an ambition of universities; it is seen as an affirmation of their globalising journey, as well as the fact that it contributes to their ranking in global university indices that reward universities with higher proportions of international staff.

In terms of the models of TNE delivery, there was less certainty around the kind of TNE engagements that could be created, but both government officials and university stakeholders in Georgia were keen to stress flexibility. International students were thought to be most likely attracted to Georgian universities that had



dual degree programmes with UK universities, with the potential to study part of the programme in the UK. IBCs may also be potentially attractive for international students (as well as local students), but the financial, regulatory and operational mechanisms are not in place yet to strategically facilitate IBCs. There are currently two American universities that operate ‘branches’ – Webster University Georgia and San Diego State University – though these both run their programmes out of other existing local university premises, rather than being standalone branch campuses.

Virtually all the universities in Georgia are experiencing growth in international students, who generally enrol into English language taught (ELT) degree programmes. Many universities in Georgia offer ELT degrees, though there is a greater density of these in Tbilisi. Kutaisi International University (KIU) is a notable example of a regional university that has been specifically designed to be ‘international’ from the outset and has been in an institutional partnership with Technical University of Munich since its inception.

Overall, the internationalisation potential of Georgia is strong and Georgia has been moving rapidly towards becoming one of the most internationalised higher education markets in the region. There is a clear willingness to engage UK universities for TNE relations and UK universities could benefit both themselves and the ambitions of Georgia’s higher education stakeholders to accelerate international recruitment into TNE programmes.

2

The Georgian government supports the growth of foreign TNE and is prepared to take the necessary steps to facilitate more UK TNE engagement

Interviews with the Minister for Education, Science and Youth Affairs, the higher education lead from the Parliament of Georgia, and civil servants from the ministry and the National Centre for Educational Quality Enhancement all confirmed that the Georgian government’s ambition is to grow foreign TNE presence in Georgia, with the UK being the one of the preferred country partners.

The government has taken steps to ensure that Georgia becomes an attractive partner for higher education. For example, by virtue of its alignment with

the Bologna Process, robust quality assurance and accreditation systems have been implemented across the sector. Both the Georgian government and Georgian universities are encouraging a culture of meeting global standards of education and practice to better position partnership building with foreign universities.

The Georgian government has directly funded the creation of TNE programmes and has indicated its willingness to provide further support for Georgian universities to develop TNE, including with the UK. The most prominent of the existing TNE arrangements, with San Diego State University, has been implemented across three public universities in Georgia, and was funded by the Georgian government with approximately five million USD. Interviews with the Ministry of Education and Science indicated an additional 2.2 million USD available to fund joint and dual degree programmes and, were there to be positive signs and approaches from UK institutions to set up TNE in Georgia, then additional funds could be put forward to support TNE partnership development.

In terms of models of TNE, the ministry indicated that whilst IBCs would be attractive, the scale would be limited, with the likelihood of a maximum of five IBCs. The government is ready to provide land, facilities and infrastructure for IBC development, and is also keen to include the private sector in Georgia. Domestic private universities such as Caucasus University and Kutaisi International University are seen as potential future partners in IBC development and are backed by wealthy private investors with an interest in accelerating profitability in the higher education sector.

Other positive overtures from the Georgian government to encourage TNE include a low tax regime – the whole education sector is free from VAT. In addition, alongside public funding, the government has worked with international organisations such as the World Bank to provide funding to higher education programmes that will improve Georgia’s economic status and productivity. This could include funding joint and dual programmes if they could be shown to contribute directly to the World Bank’s agenda for Georgia.

Georgia is actively seeking to create global



3

There is high positive regard and demand for UK higher education in Georgia, the wider region and the source markets where Georgia currently recruits

All stakeholders indicated a high level of regard for UK higher education, with many seeing it as a global gold standard in terms of quality and reputation. For example, interviews at Georgia’s Centre for International Education (the primary organisation for providing scholarships to Georgian students studying abroad) revealed that applications to universities in the UK are the highest out of any destination countries in Europe. The UK is also the study destination with the highest number of awarded scholarships for Georgian students.

Georgian universities are in general agreement that UK TNE will provide a positive added dimension to local students’ higher education experience, and locally delivered UK programmes will widen access to UK higher education for local students. Most stakeholders at Georgian universities agree that there is demand for joint and dual degree programmes with UK universities, as well as more short-term mobility options to study in the UK as a part of a joint programmes.

engagements and open the border to international higher education. Recognition agreements have been created with India and China, and Georgia continues to work closely with the European Union and many of its constituent members on creating mobility programmes, staff exchanges and research partnerships. There were official Georgian parliamentary and ministry visits to Bangkok and Shanghai in early 2024 to develop joint and dual degree programmes with leading universities.

Private universities in Georgia are generally more proactive in seeking TNE partnerships with the UK, though there are still no substantial partnerships developed. The British University of Georgia, located in Tbilisi, offers two different degree programmes validated by the University of Buckingham, but these only attracted ten new enrolments in 2021–2022. This speaks to a broader issue for UK TNE in Georgia (covered in more detail in section 6), that whilst there is demand and positive regard for UK higher education, there is minimal history in actually developed TNE in Georgia, and as such there is somewhat of a ‘blank slate’ that requires greater engagement from both sides.

In terms of UK stakeholders, representatives from the Department of Business and Trade (DBT) and Universities UK commented that UK universities were showing greater interest in TNE opportunities, including universities in the Russell Group and higher-ranked institutions that have not historically delivered high-volume TNE. The reasons for this are twofold. Firstly, current UK government policy and discourse around international student recruitment is perceived as becoming more hostile and potentially restrictive, mirroring some trends in Canada, Australia and the Netherlands. If recruitment of international students directly to UK home campuses is restricted, then TNE offers the opportunity to mitigate some of that revenue loss. Secondly, there are discussions about longer-term approaches to making sure recruitment is sustainable, not just in terms of revenue and enrolments, but also on the impact of the environment and other factors such as contributing to debt and ‘brain drain’. In short, there may be rising sector-wide demand for TNE development in the coming years, and Georgia’s macro-conditions and welcoming environment could offer a good basis for fulfilling some of that demand.

An aligned issue is the source of international students in Georgia. Currently, India is the largest market for recruitment, though ministry sources would like to diversify this, and have strengthened ties with China with an ambition to recruit 20,000 students to Georgia in the next five years. Other target markets for Georgia, such as Nigeria, Egypt, Russia, Ukraine and Turkey, also express high demand for UK education. Developing UK TNE partnerships in Georgia could therefore serve the purpose of bolstering recruitment from these countries, particularly where they might be vulnerable to change in UK government policy (for example, Nigerian recruitment being affected by the UK’s student family visa policies) or other economic conditions (such as currency devaluation making it more expensive for Egyptian students to come to the UK).

Overall, demand for UK education within Georgia is strong at government, institutional and student levels. However, as UK TNE is currently underdeveloped, there will be much relationship building needed to ensure future successful TNE partnerships. High demand for UK higher education from further afield in Georgia's target international student recruitment markets could also serve UK universities, with Georgia acting as an offshore hub for UK universities.

4

UK universities can position themselves as enablers of Georgia's higher education globalisation journey, gaining first-mover advantage in the development of a potential education hub

The British Council's 2023–2025 Transnational Education Strategy, released in late 2023, has two action points that are relevant to opportunities for UK universities in Georgia. First, 'Action 2' to create 'an enabling environment for TNE in other countries and promote the quality of UK TNE internationally', and second, 'Action 4' to 'support TNE to contribute to transformation of local education systems'. These speak to two key ambitions of the Georgian government: to improve the quality of higher education to global standards and to turn Georgia into an international education hub.

UK DBT representatives within Georgia noted that there was strong willingness from both Georgian government and private actors to enable UK universities to lead in the promotion of Georgia as an international education hub. The hub is not just meant to service increasing international recruitment, but also to contribute directly to Georgia's own economic transformation. Technology and innovation are becoming more important and there is a desire to create more degree programmes with innovation, entrepreneurship and digital skills embedded in them. UK universities are in prime position to facilitate this process due to the high quality and innovation in their curricula and research-based teaching and learning.

As mentioned, the prevalence of medical studies as a choice for international students provides the opportunity to develop Georgia into a medical education hub, potentially a broader MedTech hub. This could be appealing to UK universities and medical technology companies that could take advantage of local tax laws and position MedTech in a strategic location on the 'New Silk Road,' aligning with the

Georgian government's desire to be a key regional logistics hub. Although this is an ambitious vision, there is an opportunity to develop it with UK universities involved from the outset, gaining the UK first-mover advantage and the position as Georgia's key partner in realising its educational and economic visions.

UK stakeholders noted that UK universities could sometimes move cautiously when developing TNE. If there is to be genuine international education hub development in Georgia, there would need to be greater awareness raising of the tangible opportunities in Georgia and a clear understanding of what kind of portfolio would best serve both the UK and Georgian interests.

Georgian stakeholders see the UK as important in its global higher education journey. It was noted that Georgia does not want to become over-reliant on one or even a few key global partnerships. Although EU ascension is a priority, the Georgian government seeks strong relations with China, Central Asian countries and Middle Eastern nations as well as the UK and US to maximise opportunities to globalise. There is definitive indication from both government policymakers and universities in Georgia that they are ready to embrace internationalisation, participate in global rankings, attract more international staff and improve international research links. The UK could play a potentially important role in this, circling back to the British Council's TNE strategic aim of supporting the development of education systems in other countries.



Key challenges for UK TNE in Georgia

1

Higher tuition fees for UK programmes may not be feasible to scale local recruitment

There is a perception that UK TNE degrees will be too expensive for local students, as the fees charged for international students coming to the UK are often ten times those of EU-located universities. Depending on the type of TNE model offered by UK universities in Georgia, fees would need to be closer to those of the private universities in Georgia, which are significantly less than what an international student pays to study in the UK. To encourage UK universities to enter the market in Georgia, government subsidies or incentivisation packages may have to be developed.

However, whilst there may be a natural limit to scaling local recruitment into UK TNE programmes if the fee levels are perceived to be too high, a key driver for UK universities entering Georgia may be international recruitment. UK universities would still need to be competitive to recruit and would need to research and market test tuition levels to gauge realistic fees for international students. For example, the MD Medical programme (taught in English) for international students at Caucasus University is approximately 4,700 GBP per year; a UK university entering into a joint or dual arrangement would need to ascertain whether that was a feasible revenue for a TNE student.

2

UK university expectations and lack of awareness of Georgian market may impede progress

UK stakeholders generally confirmed that universities have not shown exceptional interest in Georgia so far. Georgia remains something of an unknown quantity in terms of doing education business, and this is borne out by the low TNE enrolments and number of universities delivering TNE in Georgia at present. Of more concern were some of the experiences that Georgian universities had already had with UK universities in trying to create TNE partnerships. Two universities in Georgia (both private) expressed disappointment with the communication and length of time it had taken to start conversations with UK universities. They also noted that when potential partnership and TNE arrangement progressed, the expectations placed upon them in terms of recruitment were too high.

From the Georgian side, greater awareness needs to be built about the country, education system, regulatory system and international student recruitment opportunities for UK universities to be able to approach TNE partnership creation with a sense of purpose. From the UK side, Georgian institutions felt that there was a transactional attitude from UK universities rather than a collaborative and equitable approach. This can be remedied through better communications and setting expectations.

3

European Union-based partnerships may be more attractive for Georgian institutions and students

In practice, due to Georgia's ongoing alignment process with the EU, there is more solid partnership-building activity with the EU's education institutions. This resonates through the education sector, and not just in the higher education component; parliamentary representatives conveyed that a new European School will be opening in September 2024, funded by the EU for six eastern European country partners.

There is a higher likelihood of EU university TNE being funded by scholarships from the Georgian government and by Erasmus or other EU funds. Furthermore, where funding is not available, fees are likely to be lower than UK universities. On the other hand, lower fees for international students at EU-based universities mean that Georgians are more likely to travel to study in those destinations, lessening the incentive for EU universities to operate TNE within Georgia.

Whilst UK-length degrees are recognised in Georgia, the domestic system in Georgia is still four years for a bachelor's degree and two years for a master's degree, like many EU countries. This can make mapping curriculum and standards more efficient when creating joint or dual degree programmes, due to the equivalency in credits. However, NCEQE and government stakeholders did not believe this to be an insurmountable problem.

Overall, certain macro-conditions related to Georgia's alignment with the EU make the universities in the EU a key competitor threat to UK universities in Georgia. However, with relatively little TNE developed so far, there is still an opportunity for the UK sector to gain first-mover status in Georgia for future TNE development.

4

Uncertainty around skills and portfolios for teaching, learning and assessment, and models of TNE activity

Some Georgian public and private institutions have already introduced English language taught degrees and have a body of staff who can teach those courses. However, there is uncertainty about how many Georgian students will be able to take up full-time study in the English language. Recruiting academic staff with the skills to teach modules in new subject areas such as data science, artificial intelligence and sustainability in the English language is also a concern for some Georgian institutions.

There are key pedagogic differences between the UK and Georgian higher education systems. Georgian stakeholders are keen to introduce UK programmes as it is believed that skills development in critical and innovative thinking, work readiness and communications are already embedded in the UK curriculum. However, they are also aware that Georgian academic staff may not have the skills to convey these elements. UK TNE would therefore also have to enable staff development, and solutions to how this could be funded (such as through staff exchange fly-in faculty training) would need to be considered in partnership creation.

Interviews with Georgian universities showed that there were no developed mechanisms to test future portfolio offers for domestic or international students. As such, any UK TNE programmes in the future would need rigorous assessment of demand levels amongst target student groups. Global market insight data into student recruitment is not used, and this is an area that UK universities could potentially support.

Georgian stakeholders at the ministry and parliament stated that they were ready to be flexible to accommodate different models of TNE and work with the UK to ensure that preferences are met. This could include changing laws, introducing new instruments, or even changing taxation regulations to facilitate UK university entry. UK stakeholders insisted that where there was clarity in regulations, operations and taxes, they were more likely to make efficient decisions.

5 Western Balkans

5.1.1 Serbia introduction

Serbia's location puts it at the crossroads of central Europe and the Balkan states. A country of 6.6 million people, Serbia was a member of the multiethnic union of Yugoslavia until the 1990s and became a stand-alone sovereign republic in 2006. Serbia applied to join the EU in 2009 and became an official candidate for membership in 2012. Serbia's accession negotiations with the EU are ongoing as of 2024.

The capital city Belgrade has a population of just over 1.3 million and is the country's political and economic centre. Belgrade and Serbia's second largest city, Novi Sad, host nine out of ten of Serbia's private universities and five out of eight of Serbia's public universities. The cities of Niš, Kragujevac and Novi Pazar host the remaining three of Serbia's public universities. Serbia's urban population is increasing, with the proportion of the population living in urban areas reaching 57 per cent in 2023.

Serbia's population has been decreasing since the early 2000s and fell from 7.2 million to 6.6 million between 2013 and 2023 at an average rate of -0.8 per cent per year. This has been attributed to a combination of high outward migration and low birth rate. Moreover, Serbia has an aging demographic profile. 20 per cent of the population is now aged 65 or over and the median age in Serbia is 43.9 years, as of 2024. This increasingly older population presents a challenge to Serbia's economy, healthcare system and higher education sector.

According to World Bank data, in 2023, Serbia had an overall GDP of 75.5 billion USD and a GDP per capita of 11,270 USD. Furthermore, the World Bank expects that the Serbian economy will grow at a rate of three to four per cent over the medium term. This growth is mainly driven by increases in consumption and investment, as well as a strong export sector.

Serbia (2023)

Population
6.7m

Current GDP
\$75.5bn

Current GDP per capita
\$11,270

Life expectancy at birth (2022)
72.7 yrs



Outline of higher education system

The Ministry of Education, Science and Technological Development is the government authority in charge of higher education in Serbia. It makes recommendations on educational policies and is responsible for financial resource allocation and the overall development of higher education. Separately, the National Council for Higher Education (NCHE), an independent body comprised mainly of academics appointed by the National Assembly, is responsible for strategic planning and decision making on issues such as standards for internal assessment and quality evaluation. The NCHE has a separate working body, the Accreditation and Quality Evaluation Commission, which handles accreditation and evaluation tasks.

There are 20 universities in Serbia (nine public universities and 11 private universities accredited by the NCHE). The largest of these is the University of Belgrade, which at current levels enrolls almost 50 per cent of the country's total students. Scientific research is organised across 83 research institutes, among which are 15 centres of excellence. The total number of students attending Serbia's public and private universities and faculties of vocational studies exceeds 250,000. The Serbian higher education system has two types of study. The first are academic studies at universities – usually a three- to four-year bachelor programme carrying 180-240 credits; the second are applied studies, taken either at colleges of applied studies or at universities – these types of courses are shorter in duration at one to two years and typically carry between 60-120 credits.

20
Universities

83
Research
institutes

15
Centres of
excellence

Across the study levels in Serbia there are five types of higher education institution, as defined in the Law on Higher Education:⁴⁸

University

An independent higher education institution that carries out educational and scientific research. An institution of higher education has the status of a university if its study programmes cover a minimum of three academic fields.

Faculty, or Academy of Art

A higher education institution within a university carrying out academic study programmes and developing scientific research. Faculties usually have the status of a legal body, but they cannot exist independently and need to be a constituent part of a university.

Academy of Applied Studies

An independent higher education institution that integrates educational, research, professional and artistic activities. Academies offer basic, master's and applied studies, and must have at least five accredited programmes in at least two fields.

College of Academic Studies

An independent higher education institution that provides academic study programmes in the professional, artistic and scientific fields at the undergraduate and master's level.

College of Applied Studies

An independent higher education institution that offers degrees at different levels in specialist academic studies. Colleges of Applied Studies are vocational in nature and are designed to prepare students for the job market. Following completion, students are not able to apply for a PhD.

⁴⁸ <https://www.nat.rs/wp-content/uploads/2019/01/Zakon-o-visokom-obrazovanju-2017-ENGL.pdf>

Policy environment – internationalisation

Serbia does not have a centralised national strategy specifically aimed at internationalisation in higher education. However, the public policy document 'Strategy for Education Development in Serbia by 2030', adopted in June 2021, integrates internationalisation and mobility as focal points for future education development. Along with the accompanying Action Plan 2021–2023, it sets out two objectives relating to internationalisation: i. to increase the number of incoming mobilities of staff, students and researchers and ii. to increase the number of outgoing mobilities of staff, students and researchers. The strategy also outlines the financial aspects attributed to these goals such as allocation of funds.⁴⁹

Serbia is a member of several international organisations and bodies working towards increasing internationalisation in higher education. Serbia joined the Bologna Process in 2003 and is a member of the European Higher Education Area, aligning its higher education system to other members through degree comparability, a shared European credit system (ECTS) and equivalent higher education quality assurance mechanisms. After joining the Bologna Process, Serbia adopted the Law on Higher Education in 2005 supporting the implementation of Bologna principles across its higher education system. Further reforms followed in 2006 adopting standards for accreditation, paving the way for the start of the process of accreditation of higher education institutions in 2007.

Participation in several regional programmes shows Serbia's commitment to the internationalisation of its higher education system. The country has been a full programme member of Erasmus+ since 2019, having previously participated in Erasmus+ programmes as a partner country.⁵⁰ Serbia is also a member of the Central European Exchange Program for University Studies (CEEPUS).⁵¹ CEEPUS is an exchange programme which seeks to enable academic mobility for students and faculty between its 15 member countries in central and southeastern Europe. In 2015, the Ministry of Education, Science and Technological Development nominated Foundation Tempus as the Serbian National office for CEEPUS. Foundation Tempus is also the body responsible for coordinating Erasmus+ in Serbia.

⁴⁹ <https://eurydice.eacea.ec.europa.eu/national-education-systems/serbia/mobility-and-internationalisation>

⁵⁰ <https://tempus.ac.rs/erasmus>

⁵¹ <https://tempus.ac.rs/what-we-do/ceepus>

⁵² <https://www.nat.rs/wp-content/uploads/2019/01/Zakon-o-visokom-obrazovanju-2017-ENGL.pdf>

⁵³ <https://eurydice.eacea.ec.europa.eu/national-education-systems/serbia/higher-education>

⁵⁴ <https://www.nat.rs/en/about-nat>

⁵⁵ <https://www.ceenqa.org/members/full-members/serbia>

Regulatory environment

The provision of higher education in Serbia is regulated by the Law on Higher Education (2018).⁵² This law also established the NCHE. The NCHE consists of 17 members appointed by the Serbian National Assembly and has the objective of developing and enhancing the quality of higher education in Serbia. It is responsible for ensuring high standards for internal assessment, quality evaluation and the issuance of work permits in the Serbian higher education system. Its activities relating to accreditation and evaluation are performed by a separate body – the Accreditation and Quality Evaluation Commission.⁵³

The quality assurance body for higher education in Serbia is the National Entity for Accreditation and Quality Assurance in Higher Education (NEAQA).⁵⁴ The objective of the NEAQA is to increase the competitiveness of the Serbian higher education system by raising quality in alignment with European and international standards.⁵⁵ The NEAQA is a member of the Central and Eastern European Network of Quality Assurance Agencies in Higher Education (CEENQA), a member of the International Network for Quality Assurance Agencies in Higher Education (INQAAHE) and has been granted affiliate status with the ENQA.

TNE snapshot summary

Current levels of TNE in Serbia are low, and UK-led TNE enrolments remain in the low hundreds. Serbia's approach to TNE, however, is focussed on quality over quantity, with the two dual and joint degrees offered by LSE and Middlesex University providing high-quality UK provision in partnership with the University of Belgrade. These programmes lean on UK-designed syllabi to attract local students. They have been a strong addition to the TNE landscape in the country since their establishment several years ago. Online enrolments in the country make up a large proportion of overall UK-based TNE, with 58 per cent of enrolments categorised as distance learning. Examples include the University of Sheffield and its partnerships with CITY College in Thessaloniki, Greece. CITY College has branches in other southeast European cities, including Belgrade, and offers programmes such as its Executive MBA. The partnership is due to come to an end in 2024, however, with CITY College being granted the status of University of York Europe Campus.

5.1.2 Serbia TNE mapping

Figure 17 shows that UK TNE in Serbia has steadily and significantly increased over the last five years. Between 2018–2019 and 2022–23, there was a 90 per cent increase in the change rate (from a total of 245 enrolments in 2018–2019 to 465 in 2022–2023).

Figure 18: UK TNE in Serbia by type of provision, 2022–23
Source: HESA Aggregate Offshore Record

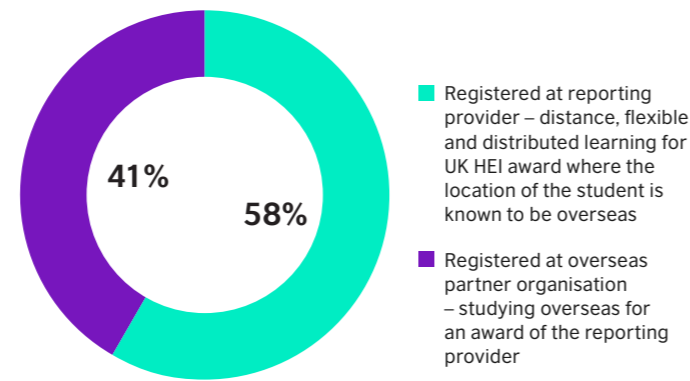


Figure 17: Overall UK TNE enrolments in Serbia over time
Source: HESA Aggregate Offshore Record. Data for 2018–19 and earlier excludes students registered with Oxford Brookes University

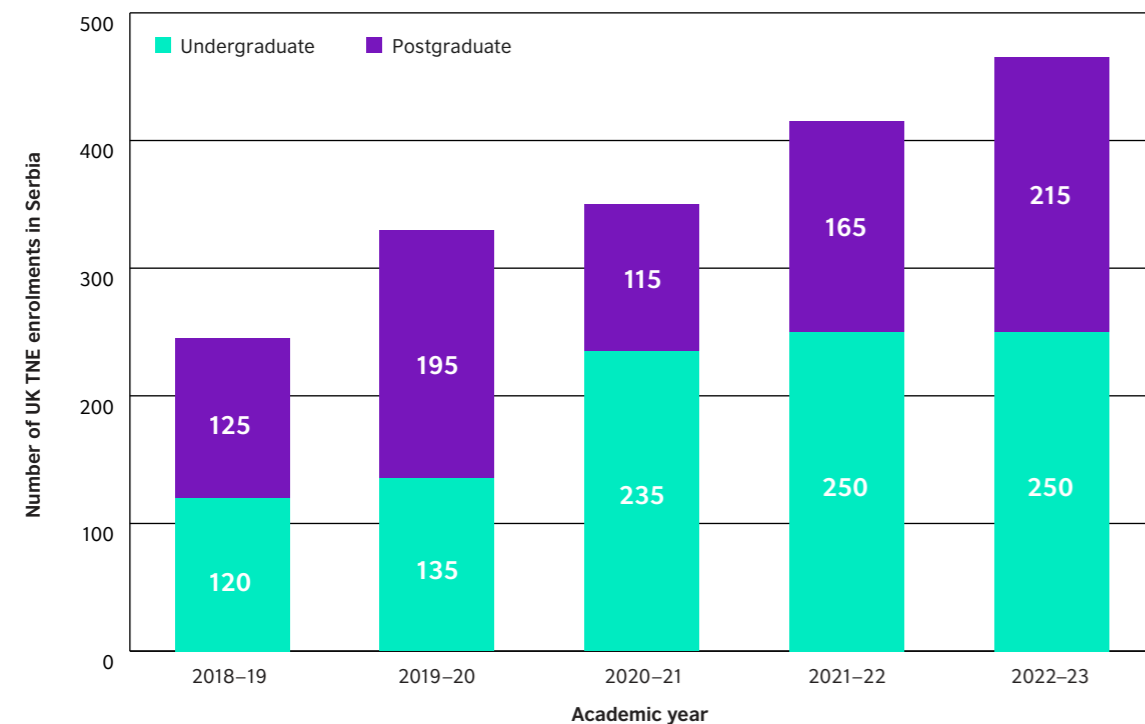


Table 6: Top ten UK HEIs in terms of TNE enrolments in Serbia, 2022–2023
Source: HESA Aggregate Offshore Record

No.	University	2022–23 Enrolments
1	University of London (institutes and activities)	190
2	Middlesex University	80
3	The University of Sheffield	55
4	University of York	60
5	The Open University	10
6	University of Derby	5
7	Robert Gordon University	5
8	SOAS University of London	5
9	University of Salford	5
10	Heriot-Watt University	5

As the TNE mapping in Annex A and the figure regarding the type of provision show, the 2022–2023 UK TNE enrolments in Serbia covered two TNE delivery models. The University of London and Middlesex University offered the largest numbers of TNE degrees.

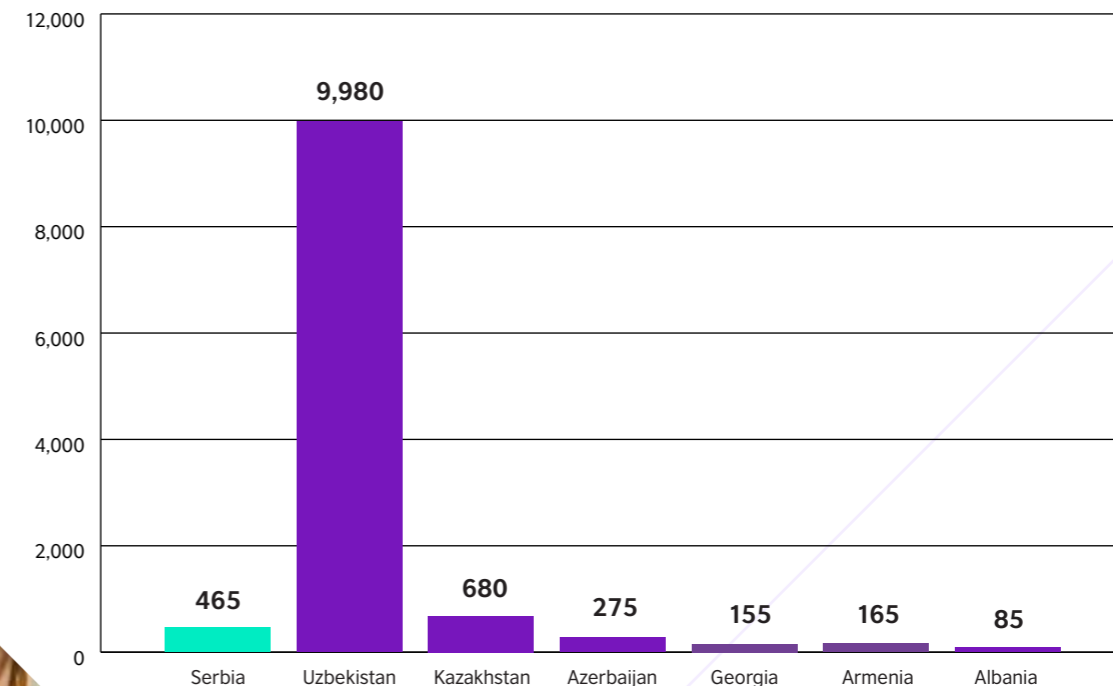
Figure 19 shows that Serbia has the third highest UK TNE enrolments among all the other six countries in the Wider Europe region.

TNE subject analysis

The majority of UK TNE in Serbia is in the business disciplines. Middlesex University offers an MSc International Business Management in collaboration with the University of Belgrade. There is also the University of London offering a BSc in Business Management and a BSc in Economics and Finance in collaboration with the University of Belgrade and run jointly with the London School of Economics (LSE). Meanwhile, an Executive MBA programme is offered by the University of York via its partner CITY College. Though based in Greece, CITY College acts as the European campus of York.

For UK TNE in Serbia, a large proportion of provision in 2022–2023 was in undergraduate degrees (54 per cent; 250 out of 465). The University of London and Middlesex University offer the largest numbers of TNE degrees, including the business-focused programmes discussed above. They are followed by the University of Sheffield and University of York, the other top UK TNE providers in Serbia.

Figure 19: Serbia's TNE in the Wider Europe region
Source: HESA Aggregate Offshore Record



5.1.3 Serbia stakeholder insights

For Serbia, in-country interviews were conducted with one ministry stakeholder and three university stakeholders:

- An official spokesperson for the Ministry of Education
- Two vice deans and a deputy dean at the largest public university in Serbia.

Key opportunities for UK TNE in Serbia

1

UK HEIs can position themselves as key partners in the development of double or dual award degree programmes with Serbian universities

A growing mode of TNE in Serbia is double award master's and undergraduate degrees. For example, the Faculty of Economics and Business at the University of Belgrade administers two double award undergraduate programmes in Economics and Finance and Business and Management in collaboration with the London School of Economics (LSE). The programmes are delivered at the University of Belgrade in English according to LSE-designed syllabi and curricula, with teaching, learning and examination all taking place locally in Belgrade. LSE professors review and grade the examinations; in turn, these grades are recognised by the University of Belgrade. This means that students on the programmes are eligible for two degrees, one from LSE and one from the University of Belgrade.

Well-ranked UK HEIs are well positioned to explore potential collaboration with their Serbian peers in this area, leveraging the UK's reputation of academic excellence to create and establish dual and double award degrees at both the undergraduate and master's level. It should be noted that Serbia's higher education sector is modestly sized in terms of the overall number of HEIs, but the autonomous nature of individual faculties within large public universities creates a favourable environment for establishing such forms of TNE. UK HEIs interested in engaging Serbian HEIs in this area are advised to concentrate on a specific academic discipline and narrow down one or two courses for development which not only reflect the institutions' academic strengths, but also pose a meaningful value add to their Serbian partners.

Another example of UK-led TNE in this format is the double award master's programme in International Business and Management offered by the University of Belgrade alongside the University of Middlesex, established in 2011. Teaching takes place locally at the University of Belgrade while the University of Middlesex provides the programme syllabus and validation. The programme enrolls an average of 15 students annually and is an example of a long-term, sustainable TNE partnership that other UK universities could emulate in Serbia. UK universities looking to establish TNE programmes in Serbia should consider the possibility of adopting a similar validation model to the double degree programmes.

A common theme that emerged among interviewees was their positive opinion of the UK university sector. Interviewees praised the high quality of teaching and research at UK universities. In addition, one interviewee highlighted LSE's strong brand as a significant contributing factor to the success of the University of Belgrade's Economics and Finance programme. During negotiations for establishing TNE programmes in partnership with Serbian institutions, UK universities should highlight the strong global reputation of UK universities in general alongside their own reputation for teaching and research excellence.

Double award programmes like these are aligned with the ministry's goals of advancing higher education internally with a firm focus on quality provision and helping improve lecturing standards. Therefore, UK HEIs with a track record of teaching and research excellence are well placed to establish successful programmes in partnership with their Serbian counterparts.

2

UK HEIs should look at wider regional cooperation

Leveraging regional partnerships within the Balkan region presents an opportunity for UK HEIs to enhance transnational education initiatives. By collaborating with Serbian institutions and other institutions in neighbouring countries, UK HEIs can tap into shared resources and expertise. The ministry stakeholder specifically named Croatia, Bosnia and Herzegovina, Montenegro, and Albania as other countries in the Balkans that had a shared sense of regional cooperation, in part based on relationships that had been formed through participation in the Erasmus scheme. A shared culture, and in some cases, language, were also referenced by the ministry stakeholder, who emphasised the willingness toward cross-border collaboration in higher education.

3

The flexibility of collaborating with smaller universities should be explored

Partnering with smaller universities provides opportunities for more agile and responsive joint degree programmes – particularly at master's level. As noted by the ministry stakeholder, their smaller scale would enable faster decision-making and administrative processes. In addition, the University of Belgrade is composed of independent faculties which are highly autonomous. Universities interested in developing a TNE programme with the University of Belgrade should contact the faculty relevant to the proposed degree programme directly.

Key challenges for UK TNE in Serbia

1

Administrative hurdles and visa issues hinder student and staff mobility

The ministry spokesperson emphasised administrative challenges as a potential barrier to increased TNE in Serbia. These hurdles often stem from bureaucratic processes within both Serbian institutions and their UK counterparts, necessitating dedicated resourcing to manage paperwork and logistics effectively. It should be noted that programmes require periodic reaccreditation. Visa complications also emerged as an area of concern with the Ministry of Education spokesperson, especially for students and staff participating in exchange programmes with UK universities. This concern was echoed by the vice dean and deputy dean interviewed, who both suggested that the challenging and complicated process to gain a UK visa was a significant barrier for both students and staff. Advocating for a streamlined visa process would help facilitate a smoother transition for participants in Serbia-UK TNE programmes.

1

Regulatory challenges

One interviewee highlighted that regulatory constraints were a potential limiting factor on the size of TNE programmes in Serbia. The University of Belgrade's joint programmes with LSE have a maximum quota of 30 students per year. One reason for the quota is to ensure that the programme can maintain its high standard of personalised teaching and learning. Another reason is to comply with the set of regulatory constraints which universities in Serbia must meet to maintain their programme accreditations. These constraints include measures related to the number of students and staff, as well as the physical space available at the university. Another interviewee stated that the quota was in place as their university operates close to the upper limit of their regulatory capacity in terms of student enrolment. UK universities intending to establish TNE programmes in Serbia in a similar manner should understand these regulatory restrictions when exploring TNE programmes with prospective Serbian partner universities.

3

Cost of tuition

Interviewees highlighted that the disparity between the tuition fees charged for degree programmes offered in the UK and Serbia was a continuous and considerable challenge for TNE development. The yearly programme cost of the dual diploma in International Business Management operated by the University of Belgrade with Middlesex University is approximately 4,700 GBP. While this tuition fee amount is significantly lower than domestic and international student tuition fees in the UK, it is relatively expensive compared to other domestic-taught Serbian degree programmes. The higher cost is a sizeable obstacle to increasing programme enrolment. Universities wishing to establish TNE programmes with Serbian universities should consider whether to set lower tuition fees, considering the lower cost of competing domestic programmes in Serbia.

Scholarships are one route of mitigating some of these financial challenges. On the double award degree programmes at the University of Belgrade, students pay tuition fees separately to each institution, paying approximately 2,500 GBP per year to LSE and 1,500 GBP to the University of Belgrade, as of July 2024. Students are eligible for a partial waiver of their tuition fees to the University of Belgrade in the form of a scholarship for strong academic performance. Although the joint programmes are slightly costlier than the average domestic programme in Serbia, the total cost is well below that of an international student studying a programme directly at LSE.



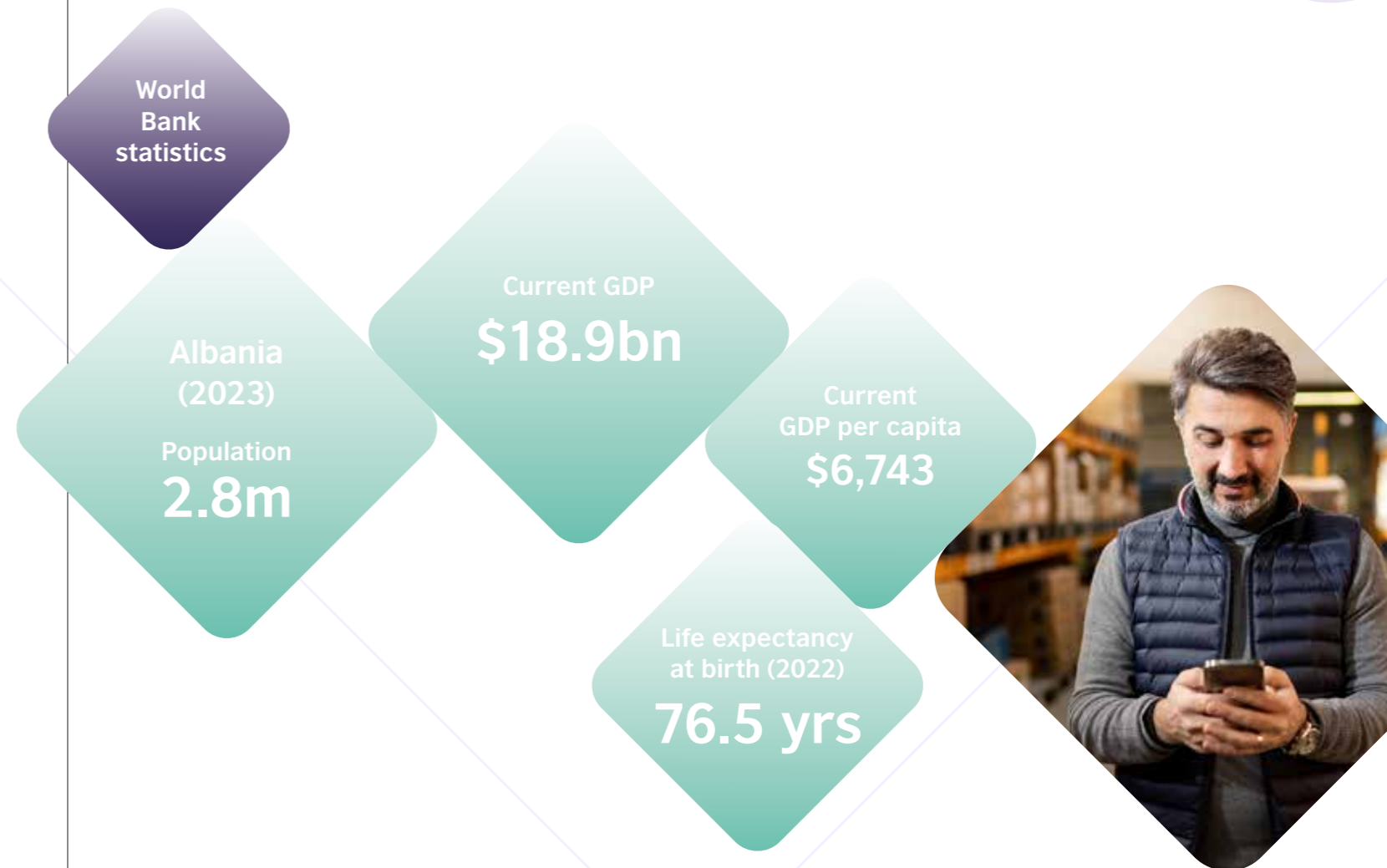
5.2.1 Albania introduction

Located in southeastern Europe on the Balkan Peninsula, Albania's strategic location has historically made it a meeting point of various cultures and civilisations. Albania was a part of the Ottoman Empire until 1912, when it became an independent state. More recently, Albania applied for EU membership in 2009, was granted candidate status in 2014, and began the screening process for full membership in 2022 as part of the EU enlargement policy.

The capital city, Tirana, with a population of 520,000, is both the cultural and economic centre and is home to most of the country's public and private higher education institutions. Albania's urban population has been steadily increasing (64.6 per cent of total population as of 2023), with Tirana experiencing significant growth because of urbanisation in recent years.

Albania has a population of approximately 2.8 million people, with a young demographic profile. A significant percentage of the population is under the age of 25, with the country's median age standing at 35.8 as of 2023. The demographic composition of Albania is linked to its higher education capacity, with a growing demand for educational opportunities among young people.

Albania's economy has undergone significant transformation since the early 1990s, transitioning from a centrally-planned system to a market-oriented economy. According to the World Bank, Albania had a GDP of 18.9 billion USD in 2022, with a GDP per capita of 6,743 USD. The International Monetary Fund (IMF) recently stated that Albania has one of the most resilient and stable economies in the Western Balkan region, projecting its economic prospects to 'remain robust' with good general levels of financial performance.⁵⁶



⁵⁶ IMF Executive Board Concludes 2023 Article IV Consultation with Albania <https://imf.org/en/News/Articles/2024/01/12/pr23007-albania-imf-exec-board-concludes-2023-art-iv-consult>

Outline of higher education system

There are a total of 41 domestic universities in Albania, classified into different categories, according to the Ministry of Education and Sport. The ministry sets policies and standards for higher education institutions and oversees their implementation. In total, 15 public institutions in Albania and 26 private institutions fall under these four categories:

University

Typically provide undergraduate and graduate degree programmes. They are composed of at least three faculties which also engage in academic research. Examples include the University of Tirana (public) and the European University of Tirana (private).

Academia

Specialised in specific academic disciplines. They often focus on providing advanced education and research in areas such as arts, science and professional training. They can offer undergraduate and postgraduate programmes, as well as opportunities for research.

University College

Often smaller in size and focus on specific fields of study or vocational training. They offer bachelor's degrees in various disciplines and vocational certificates and diplomas. They play an important role in providing practical skills and training for specific careers.

Professional College

Offer diploma or associate degree programmes that are shorter in duration compared to traditional bachelor's degrees – up to two years. They help bridge the gap between academic learning and the needs of the labour market.

Policy environment – internationalisation

Since 2000, Albania has actively pursued the internationalisation of its higher education sector through legislative reforms and the adoption of broader European norms and standards via the Bologna declaration, which it signed in 2003. The integration into the Bologna Process has been challenging for Albania's higher education system. Issues such as aligning domestic qualifications with European standards (in terms of intended learning outcomes, content and teaching methodology) and improving the quality of education have been central to these challenges.⁵⁷ Efforts to align Albanian universities with European standards have also been shaped by the National Strategy for Education 2021–2026. Although this includes all cycles of education from pre-school to higher education, there are some specific measures and aims that are applicable to the higher education sector in Albania. These include specific objectives related to the internationalisation of higher education along with improvements in the assessment framework, research infrastructure and ICT infrastructure for public higher education institutions.

Regulatory environment

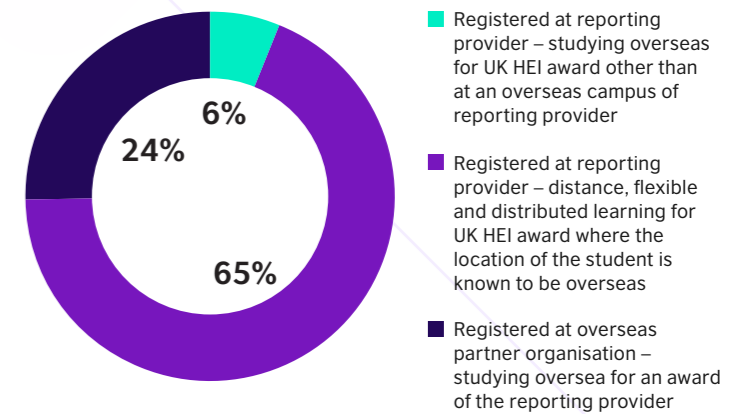
The broad regulatory environment for TNE in Albania is positive. Foreign institutions seeking to establish branch campuses or offer joint programmes must obtain approval from the Ministry of Education and Sport and comply with several regulations and accreditation standards. Accreditation by the Albanian Quality Assurance Agency (ASCAL) is mandatory for all institutions offering higher education programmes, ensuring compliance with academic standards and quality assurance criteria.

⁵⁷ Karafili E, Aliaj B, Sula A, et al. (2024) The Challenges of Higher Education Reform in Albania in the Post-Communist Transition Period. Innovation and Evolution in Tertiary Education [Working Title]. IntechOpen. Available at: <http://dx.doi.org/10.5772/intechopen.1005534>.

TNE snapshot summary

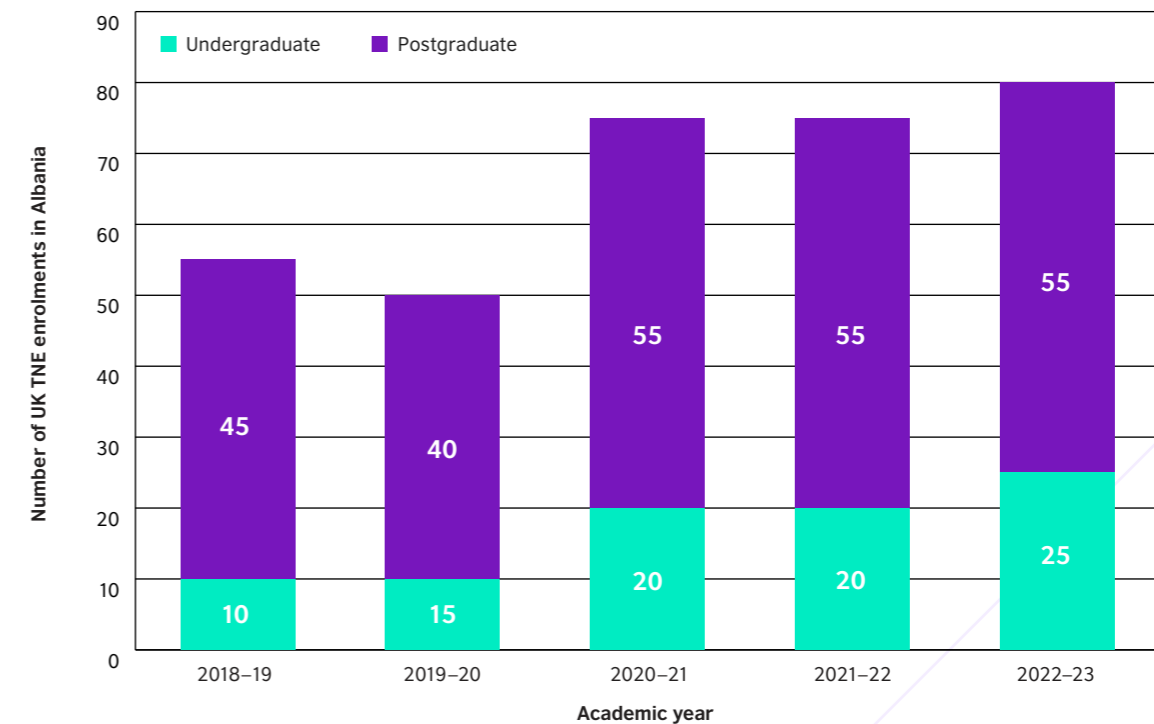
The wider market for TNE in Albania is limited and remains in the early stages of development across all formats. No UK HEIs have established international branch campuses, although EU-based HEIs have recently announced plans to do so. Examples include the College of Europe opening a campus⁵⁸ and the National University of Distance Education, Spain (UNED), opening a campus in Gjirokastër in the south of Albania. The UNED campus will include mixed study modalities and will connect its courses with cultural heritage, tourism and other aspects of economic development.⁵⁹ Current UK TNE figures for Albania show that most enrolments are categorised as online or distance learning.

Figure 21: UK TNE in Albania by type of provision
Source: HESA Aggregate Offshore Record



5.2.2 Albania TNE mapping

Figure 20: Overall UK TNE enrolments in Albania over time
Source: HESA Aggregate Offshore Record. Data for 2018–19 and earlier excludes students registered with Oxford Brookes University



⁵⁸ <https://www.politico.eu/article/college-of-europe-new-campus-albania/>

⁵⁹ <https://www.cna.al/english/aktualitet/miratohet-vendimi-manastirliu-hapet-kete-vit-universiteti-i-njohur-i-i397360>

Table 7: Top nine UK HEIs in terms of TNE enrolments in Albania, 2022–2023

Source: HESA Aggregate Offshore Record

No.	University	2022–23 Enrolments
1	University of York	25
2	University of London (Institutes and activities)	10
3	University of Greenwich	5
4	The Open University	5
5	University of Sunderland	5
6	University of Salford	5
7	Heriot-Watt University	5
8	Liverpool John Moores University	5
9	King's College London	5
10	University of Oxford	5

As the TNE mapping in Annex A and Figure 21 regarding the type of provision show, 2022–2023 UK TNE enrolments in Albania covered multiple TNE delivery models.

Figure 22: Albania's TNE in the Wider Europe region

Source: HESA Aggregate Offshore Record

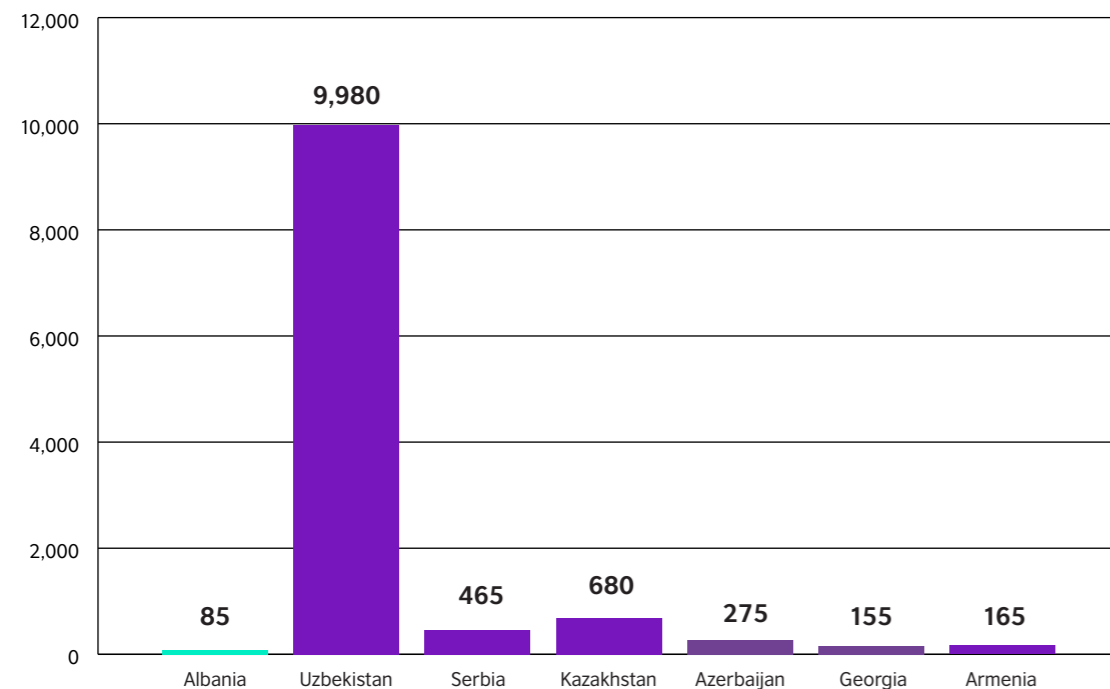


Figure 22 shows that Albania has the lowest UK TNE enrolments among all the other six countries in the region.

TNE subject analysis

For UK TNE in Albania, the largest proportion of provision is in degrees related to international affairs and international development. Examples are the BSc International Relations from the University of London and University of York. A postgraduate-level example is the Master of Public Administration – International Development offered by the University of York and delivered online.

The majority of recorded UK TNE in Albania is offered at the postgraduate level (69 per cent). The University of London and University of York offer the largest numbers of TNE degrees, including the programmes discussed above.

Most UK TNE programmes are delivered at recognised teaching centres in Albania, including degrees offered by the University of London and the University of York. 20 programmes offered by these two UK universities are delivered in this type of collaboration.



5.2.3 Albania stakeholder insights

For Albania, in-country interviews were conducted with one ministry stakeholder and an administrator from a private university based in Tirana:

- An official spokesperson for the Ministry of Education
- One private Albanian university.

Key opportunities for UK TNE in Albania

Albania's focus on internationalisation is combined with government support and infrastructure development

As noted by the ministry official, the position of the Albanian government is that the country generally sees TNE in favourable terms and is open minded regarding its support of different types of TNE, including IBCs. The ministry official highlighted the potential benefits of these initiatives for both the education sector and the country, including economic development and improved education standards. This indicated a commitment to investment in education and leveraging partnerships for mutual benefit. Also noted was the readiness of the government to provide infrastructure and streamline procedures to facilitate the establishment of TNE activities, demonstrating a conducive environment for collaboration. This would be welcomed by the domestic university stakeholders, who made note of administrative and organisational capacity reaching its limits and therefore impacting the efficiency and effectiveness of collaboration with overseas partners.

Key challenges for UK TNE in Albania

Financial constraints and affordability could limit accessibility for Albanian students

As noted by the university stakeholder, tuition affordability would be a significant barrier for Albanian students when looking to enrol on UK-based TNE programmes charging UK fee levels. Albanian students may face financial constraints when it comes to tuition fees at UK universities, which are on average much higher than those at Albanian institutions. This could limit the number of Albanian students able to participate in exchange programmes or joint degrees. The high cost, or perceived high cost, of UK TNE programmes was also noted by the ministry as one of the primary challenges. This needs consideration when proposing initiatives such as student exchanges or establishing international branch campuses. Balancing the cost effectiveness of educational initiatives with their long-term sustainability is essential for ensuring success and impact.

6 Conclusions and recommendations

UK higher education is highly reputable, well respected and an aspirant in terms of future partnership building in each of the seven countries. However, each country has different approaches to building those relations with the UK sector, with some being far more proactive than others. The following conclusions and recommendations assess the future potential according to sub-region.

Central Asia

The Central Asian countries of the study present the most likely sources of TNE growth for the UK sector. Uzbekistan is the most mature in terms of established TNE, has the most proactive government in terms of internationalisation of higher education and has private investors willing to back high-profile TNE such as international branch campuses. Kazakhstan can be thought of as a key emerging market. There are lower TNE enrolment numbers than Uzbekistan, but with new TNE ventures such as Heriot-Watt University's partnership with K. Zhubanov Aktobe Regional University, there is greater visibility for Kazakhstan. Moreover, Kazakhstan's government is set on transforming the domestic higher education sector through international partnerships, mirroring the journey of Uzbekistan.

Both countries remain active in cultivating UK higher education ties, as they are also interested in research partnerships and elevating their domestic sector's global university rankings and reputation. Partnerships with the UK (and other foreign universities) are seen as one way of achieving this, with higher-ranked foreign universities increasingly becoming a target for partnership.

In addition, both Central Asian countries have well-defined economic development programmes that UK universities can consider in terms of the TNE programme offer in Central Asia. Kazakhstan particularly has an explicit policy of aligning foreign university programmes to the economic needs and regional development ambitions of the country.

However, for both countries, financial barriers to accessing TNE programmes are an issue. Access to TNE is dependent on government scholarships for individuals or broader programme subsidies for the universities involved in TNE. For Uzbekistan, there is an additional challenge of alignment with local education standards and working with institutions with limited capacity and experience in internationalisation.

International branch campuses and joint and dual degree programmes (with significant branding of the foreign TNE institution) are the current favoured models of TNE in both Kazakhstan and Uzbekistan.

South Caucasus

The South Caucasus markets had the greatest variation in opportunities and challenges for UK TNE, despite superficial demographic similarities and obvious geographic proximity that often sees them bound together. A key economic difference is Azerbaijan's oil wealth, which allows it to provide more funding towards specialist TNE programmes and scholarships for students. Similarly, Georgia's acceleration towards a liberal capitalist economy since 2003 has led to the proliferation of private investors in education and a higher number of private universities.

All three markets in the South Caucasus are relatively 'youthful' in terms of UK TNE, beginning from a very low base of TNE enrolments. Whilst all three have ambitions to recruit more international students, Georgia's journey to internationalisation of students is further along. It represents the most concrete opportunity for UK TNE to capitalise on, as UK universities would be serving an already significant international student market within Georgia. Armenia has a stated policy goal to double international students by 2050 but is at an earlier stage in this journey. Similarly, Azerbaijan's focus is on enhancing education and opportunities for domestic students.

It is possible that Georgia could be a genuine TNE micro-hub, with a focus on medical education and technology. Increasing TNE could have knock-on impacts on Armenia and Azerbaijan if more UK universities sought to position in that sub-region. However, all three countries require significant awareness-raising as potential markets among the UK sector. Furthermore, the lower numbers of international students in Armenia and Azerbaijan mean that UK universities would be more reliant on domestic students for TNE recruitment, and therefore subject to the lower uptake of high fee-paying education.

There are limited opportunities for IBC development in the South Caucasus, with perhaps no more than five in Georgia being an ambition. Joint and dual degree programmes appear to be the most popular in terms of government choice, and financially feasible in Azerbaijan.

Western Balkans

The Western Balkan countries of Albania and Serbia both represent relatively underdeveloped markets for UK TNE partnerships. Even though Serbia had 410 TNE enrolments in 2021–22 (the second highest out of the countries involved in the study), these were mainly through online learning and partnership with a single institution.

Albania has the greater focus on internationalisation of higher education, with TNE, including branch campuses, outlined as a means of achieving greater exposure to global standards in teaching and research. Serbia, on the other hand, has more of a focus on regional co-operation, with UK TNE potentially playing a bridge role with universities in Croatia and Bosnia and Herzegovina.

However, in both countries, the key issue of affordability remains for students, with the perception that UK degrees delivered through TNE would be too expensive. There is less subsidisation of TNE in Albania and Serbia compared to other countries like Azerbaijan. Furthermore, it was noted that there were significant systemic differences between the UK and the region's higher education institutions, making programme alignment and even partnership management more challenging.

Lists of all the TNE programmes undertaken by UK universities in each of the countries.

UK TNE in Albania

UG: undergraduate
PG: postgraduate

UK university	Partner organisation	Type of activity	Partnership type	Fee (per academic year unless otherwise specified)	Level of study	Subject
Arden University		Registered at reporting provider - distance, flexible and distributed learning for UK HEI award where the location of the student is known to be overseas			UG	
Heriot-Watt University		Registered at reporting provider - distance, flexible and distributed learning for UK HEI award where the location of the student is known to be overseas			PG	
The Open University		Registered at reporting provider - distance, flexible and distributed learning for UK HEI award where the location of the student is known to be overseas			UG	
University of Greenwich		Registered at reporting provider - studying overseas for UK HEI award other than at an overseas campus of reporting provider			PG	
University of Salford		Registered at reporting provider - distance, flexible and distributed learning for UK HEI award where the location of the student is known to be overseas			PG	
University of Sunderland		Registered at reporting provider - distance, flexible and distributed learning for UK HEI award where the location of the student is known to be overseas			PG	
University of York	Online Recognised Teaching Centre (Albania centre not listed)	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 HEI award where the location of the student is known to be overseas		Online: GBP 10,200 Standard BSc: GBP 7,600 Graduate BSc: GBP 5,638	UG, PG	MPA International Development BSc International
University of London (institutes and activities)	Recognised Teaching Centre (Albania centre not listed)	Registered at reporting provider - distance, flexible and distributed learning for UK HEI award where the location of the student is known to be overseas		Standard BSc: GBP 7,600 Graduate BSc: GBP 5,638	UG	BSc International Relations

UG: undergraduate
PG: postgraduate

UK university	Partner organisation	Type of activity	Partnership type	Fee (per academic year unless otherwise specified)	Level of study	Subject
Heriot-Watt University		Registered at reporting provider - distance, flexible and distributed learning for UK HEI award where the location of the student is known to be overseas			PG	
Middlesex University		Registered at overseas partner organisation - studying overseas for an award of the reporting provider	Collaborative partnership		UG, PG	MSc International Business Management
Robert Gordon University		Registered at reporting provider - distance, flexible and distributed learning for UK HEI award where the location of the student is known to be overseas			PG	
SOAS University of London		Registered at reporting provider - distance, flexible and distributed learning for UK HEI award where the location of the student is known to be overseas			PG	
The Open University		Registered at reporting provider - distance, flexible and distributed learning for UK HEI award where the location of the student is known to be overseas			UG	
The University of Salford		Registered at reporting provider - distance, flexible and distributed learning for UK HEI award where the location of the student is known to be overseas			PG	
The University of Sheffield	CITY College	Registered at overseas partner organisation - studying overseas for an award of the reporting provider	Partnership		PG	Executive MBA programme
University of York	CITY College	Registered at overseas partner organisation - studying overseas for an award of the reporting provider	Partnership		UG, PG	The Pan-European Executive MBA: MBA in General Management, MBA in Marketing, MBA in Finance, MBA in Logistics and Supply Chain Management, MBA in Health Care Management, and MBA in Human Resource Management
University of Derby		Registered at reporting provider - distance, flexible and distributed learning for UK HEI award where the location of the student is known to be overseas			PG	
University of London (institutes and activities)	University of Belgrade	Registered at reporting provider - distance, flexible and distributed learning for UK HEI award where the location of the student is known to be overseas		Standard BSc: GBP 7,600 Graduate BSc: GBP 5,638	UG, PG	BSc Business Management, BSc Economics and Finance

UK TNE in Armenia

UG: undergraduate
PG: postgraduate

66

UK university	Partner organisation	Type of activity	Partnership type	Fee (per academic year unless otherwise specified)	Level of study	Subject
The University of Sheffield	CITY College	Registered at overseas partner organisation - studying overseas for an award of the reporting provider	Dual degree		PG	Executive MBA programme
University of York	CITY College, University of York Europe Campus	Registered at overseas partner organisation - studying overseas for an award of the reporting provider	Dual degree		PG	Executive MBA programme
University of London		Registered at reporting provider - distance, flexible and distributed learning for UK HEI award where the location of the student is known to be overseas				

UK TNE in Azerbaijan

UG: undergraduate
PG: postgraduate

UK university	Partner organisation	Type of activity	Partnership type	Fee (per academic year unless otherwise specified)	Level of study	Subject
Anglia Ruskin University		Registered at reporting provider - distance, flexible and distributed learning for UK HEI award where the location of the student is known to be overseas				
Arden University		Registered at reporting provider - distance, flexible and distributed learning for UK HEI award where the location of the student is known to be overseas				
City St George's, University of London		Registered at reporting provider - distance, flexible and distributed learning for UK HEI award where the location of the student is known to be overseas				
Heriot-Watt University	Baku Higher Oil School	Registered at reporting provider - distance, flexible and distributed learning for UK HEI award where the location of the student is known to be overseas				Petroleum Engineering (Reservoir Evaluation and Management) Chemical Engineering (Oil and Gas Technology)
King's College London		Registered at reporting provider - distance, flexible and distributed learning for UK HEI award where the location of the student is known to be overseas				
Robert Gordon University		Registered at reporting provider - distance, flexible and distributed learning for UK HEI award where the location of the student is known to be overseas				

UK TNE in Azerbaijan (continued)

UG: undergraduate
PG: postgraduate

67

UK university	Partner organisation	Type of activity	Partnership type	Fee (per academic year unless otherwise specified)	Level of study	Subject
Teesside University		Registered at reporting provider - distance, flexible and distributed learning for UK HEI award where the location of the student is known to be overseas				
The Open University		Registered at reporting provider - distance, flexible and distributed learning for UK HEI award where the location of the student is known to be overseas				
University of Aberdeen		Registered at reporting provider - distance, flexible and distributed learning for UK HEI award where the location of the student is known to be overseas				
University of Chichester		Registered at reporting provider - distance, flexible and distributed learning for UK HEI award where the location of the student is known to be overseas				
University of Law		Registered at reporting provider - distance, flexible and distributed learning for UK HEI award where the location of the student is known to be overseas				
University of Leicester		Registered at reporting provider - distance, flexible and distributed learning for UK HEI award where the location of the student is known to be overseas				
University of Liverpool		Registered at reporting provider - distance, flexible and distributed learning for UK HEI award where the location of the student is known to be overseas				
University of Salford		Registered at reporting provider - distance, flexible and distributed learning for UK HEI award where the location of the student is known to be overseas				
The University of Sheffield	CITY College, Thessaloniki	Registered at overseas partner organisation - studying overseas for an award of the reporting provider	Dual degree	GBP 5,500	PG	Executive MBA Program (MBA in General Management, MBA in Marketing, MBA in Finance, MBA in Logistics and Supply Chain Management, MBA in Health Care Management, and MBA in Human Resource Management)
University of Warwick	Azerbaijan State Oil & Industry University (ASOIU)	Registered at reporting provider - distance, flexible and distributed learning for UK HEI award where the location of the student is known to be overseas				

UK TNE in Azerbaijan (continued)

UG: undergraduate
PG: postgraduate

UK university	Partner organisation	Type of activity	Partnership type	Fee (per academic year unless otherwise specified)	Level of study	Subject
University of York		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 HEI award where the location of the student is known to be overseas	Dual degree	GBP 5,500	PG	Executive MBA Programme (MBA in General Management, MBA in Marketing, MBA in Finance, MBA in Logistics and Supply Chain Management, MBA in Health Care Management, and MBA in Human Resource Management)
University for the Creative Arts		Registered at reporting provider - distance, flexible and distributed learning for UK HEI award where the location of the student is known to be overseas				
University of London (institutes and activities)		Registered at reporting provider - distance, flexible and distributed learning for UK HEI award where the location of the student is known to be overseas				
University of Suffolk		Registered at overseas partner organisation - studying overseas for an award of the reporting provider				

UK TNE in Georgia

UG: undergraduate
PG: postgraduate

UK university	Partner organisation	Type of activity	Partnership type	Fee (per academic year unless otherwise specified)	Level of study	Subject
King's College London		Registered at reporting provider - distance, flexible and distributed learning for UK HEI award where the location of the student is known to be overseas				
The Open University		Registered at reporting provider - distance, flexible and distributed learning for UK HEI award where the location of the student is known to be overseas				
The University of Buckingham		Registered at overseas partner organisation - studying overseas for an award of the reporting provider	Validated	BBA Business and Management: GEL 21,550 or USD 8,093 or GBP 6,334 BA Political Science: GEL 29,550 or USD 11,097 or GBP 8,681	UG	BBA Business and Management
University of Law		Registered at reporting provider - distance, flexible and distributed learning for UK HEI award where the location of the student is known to be overseas				
The University of Manchester		Registered at reporting provider - distance, flexible and distributed learning for UK HEI award where the location of the student is known to be overseas				
University of Reading		Registered at reporting provider - distance, flexible and distributed learning for UK HEI award where the location of the student is known to be overseas				
The University of Sheffield	CITY College	Registered at overseas partner organisation - studying overseas for an award of the reporting provider	Dual degree		PG	Executive MBA programme
University of York	CITY College, University of York Europe Campus	Registered at overseas partner organisation - studying overseas for an award of the reporting provider	Dual degree		PG	Executive MBA
University of London (institutes and activities)		Registered at reporting provider - distance, flexible and distributed learning for UK HEI award where the location of the student is known to be overseas				

UK university	Partner organisation	Type of activity	Partnership type	Fee (per academic year unless otherwise specified)	Level of study	Subject
Arden University		Registered at reporting provider - distance, flexible and distributed learning for UK HEI award where the location of the student is known to be overseas				
Brunel University London		Registered at reporting provider - distance, flexible and distributed learning for UK HEI award where the location of the student is known to be overseas				
Coventry University		Registered at overseas partner organisation - studying overseas for an award of the reporting provider			UG	Bachelor's Degrees in UK Common Law (LLB) Business Administration
De Montfort University		Registered at reporting provider - studying overseas for UK HEI award other than at an overseas campus of reporting provider		Business, Computing, Design UG programmes or DMUK's: USD 12,500 or GBP 9,750 MBA: USD 20,000 or GBP 15,600	UG, PG	BA Business and Marketing BA Business Entrepreneurship and Innovation BA Business Economics BSc Finance and Investment BA Advertising and Marketing Communications BSc Cyber Security BSc Business Data Analytics BSc Computer Science BA (Hons) Graphic Design BA (Hons) Graphic Design (Illustration) MA (Global) Master of Business Administration DMUK International Foundation Pathway Programme
Heriot-Watt University		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 HEI award where the location of the student is known to be overseas				BSc Electrical and Electronic Engineering BSc Petroleum Engineering, and Energy Management BSc Computer Engineering
King's College London		Registered at reporting provider - distance, flexible and distributed learning for UK HEI award where the location of the student is known to be overseas				

UK university	Partner organisation	Type of activity	Partnership type	Fee (per academic year unless otherwise specified)	Level of study	Subject
Robert Gordon University		Registered at reporting provider - distance, flexible and distributed learning for UK HEI award where the location of the student is known to be overseas				
Nottingham Trent University		Registered at reporting provider - distance, flexible and distributed learning for UK HEI award where the location of the student is known to be overseas				
The Open University		Registered at reporting provider - distance, flexible and distributed learning for UK HEI award where the location of the student is known to be overseas				
University of Aberdeen		Registered at reporting provider - distance, flexible and distributed learning for UK HEI award where the location of the student is known to be overseas				
University of Bath		Registered at reporting provider - distance, flexible and distributed learning for UK HEI award where the location of the student is known to be overseas				
University of Chichester		Registered at reporting provider - distance, flexible and distributed learning for UK HEI award where the location of the student is known to be overseas				
The University of Manchester		Registered at reporting provider - distance, flexible and distributed learning for UK HEI award where the location of the student is known to be overseas				
University of Salford		Registered at reporting provider - distance, flexible and distributed learning for UK HEI award where the location of the student is known to be overseas				
University of Sunderland		Registered at reporting provider - distance, flexible and distributed learning for UK HEI award where the location of the student is known to be overseas				
University of Warwick		Registered at reporting provider - distance, flexible and distributed learning for UK HEI award where the location of the student is known to be overseas				
University of York		Registered at reporting provider - distance, flexible and distributed learning for UK HEI award where the location of the student is known to be overseas				

UK TNE in Kazakhstan (continued)

UG: undergraduate
PG: postgraduate

72

UK university	Partner organisation	Type of activity	Partnership type	Fee (per academic year unless otherwise specified)	Level of study	Subject
University of Derby		Registered at reporting provider - distance, flexible and distributed learning for UK HEI award where the location of the student is known to be overseas				
University of London (Institutes and activities)	Kazakh-British Technical University Teaching Centre in Almaty	Registered at reporting provider - distance, flexible and distributed learning for UK HEI award where the location of the student is known to be overseas				

UK TNE in Uzbekistan

UG: undergraduate
PG: postgraduate

UK university	Partner organisation	Type of activity	Partnership type	Fee (per academic year unless otherwise specified)	Level of study	Subject
Anglia Ruskin University		Registered at reporting provider - distance, flexible and distributed learning for UK HEI award where the location of the student is known to be overseas				
Bangor University	Management Development Institute of Singapore (MDIS) at Tashkent	Registered at overseas partner organisation - studying overseas for an award of the reporting provider		UZS 32,256,000 or USD 2,613 or GBP 2,032	UG	Bachelor of Science (BSc) in Banking and Finance Bachelor of Science (BSc) in Business Economics Bachelor of Science (BSc) in Finance, Investment and Risk Bachelor of Science (BSc) in Industrial Management Bachelor of Science (BSc) in International Hospitality and Tourism Management Bachelor of Science (BSc) in Applied Travel, Tourism and Hospitality Management Bachelor of Science (BSc) in Computer Information Systems for Business
London South Bank University	TEAM university	Registered at reporting provider - studying overseas for UK HEI award other than at an overseas campus of reporting provider		UZS 38,348,000 or USD 3,106 or GBP 2,416	UG	BA (Hons) Entrepreneurship with International Business (TEAM) BA (Hons) Entrepreneurship with Digital Innovation (TEAM) BA (Hons) Entrepreneurship with Marketing (TEAM)

UK TNE in Uzbekistan (continued)

UG: undergraduate
PG: postgraduate

73

UK university	Partner organisation	Type of activity	Partnership type	Fee (per academic year unless otherwise specified)	Level of study	Subject
Oxford Brookes University						
SOAS University of London		Registered at reporting provider - distance, flexible and distributed learning for UK HEI award where the location of the student is known to be overseas				
Teesside University	Management Development Institute of Singapore (MDIS) at Tashkent	Registered at reporting provider - studying overseas for UK HEI award other than at an overseas campus of reporting provider		UZS 32,256,000 or USD 2,613 or GBP 2,032	UG	Bachelor of Arts (Hons) Human Resource Management Bachelor of Arts (Hons) Project Management Bachelor of Arts (Hons) International Business
University of Sunderland	Management Development Institute of Singapore (MDIS) at Tashkent PTU - Pharmaceutical Technical	Registered at reporting provider - studying overseas for UK HEI award other than at an overseas campus of reporting provider		UG programme: UZS 32,256,000 or USD 2,613 or GBP 2,032 PG: UZS 57,416,000 or USD 4,651 or GBP 3,617 Foundation: UZS 35,000,000 or USD 2,835 or GBP 2,205	UG, PG	Accounting and Finance 3+0 Business and Financial Management 3+0 Business and Marketing Management 3+0 Joint Franchise Business and Management 3+0 Joint Franchise Fashion Product and Promotion 3+0 Joint Franchise MBA (Finance, HRM, Marketing) Foundation Certificate in Pharmaceutical Sciences (Not-integrated) Foundation Certificate in Biosciences (Non-integrated)

UK university	Partner organisation	Type of activity	Partnership type	Fee (per academic year unless otherwise specified)	Level of study	Subject
University of Westminster	Westminster International University in Tashkent	Registered at reporting provider - studying overseas for UK HEI award other than at an overseas campus of reporting provider		UG or Foundation: UZS 32,993,400 or USD 2,672 or GBP 2,079	UG, PG	Certificate of International Foundation Studies
				PG: UZS 49,490,100 or USD 4,009 or GBP 3,118		BA (Honours) Business Management with two pathways Marketing/Finance
University of London (institutes and activities)	Tashkent State University of Economics (TSUE) - International School of Economics and Finance (ISEF)	Registered at reporting provider - distance, flexible and distributed learning for UK HEI award where the location of the student is known to be overseas		PG Certificate: UZS 16,496,700 or USD 1,336 or GBP 1039	UG	BA (Honours) International Commercial Law
						BSc (Honours) Economics with Finance
						BSc (Honours) Finance
						BSc (Honours) Business Information Systems
						MSc Business Intelligence and Analytics
						MSc Applied Economics
						MSc in Public Health Science
						MSc Research Methods
						MA Human Resource Management and Talent Development
						MA International Business Management (and pathways)
						MA Learning and Teaching (and pathways)
						LLM in International Commercial Law
						Postgraduate Certificate in Teaching and Learning

Lists of all the TNE programmes undertaken by non-UK universities in each of the countries.

Central Asia Non-UK TNE in Kazakhstan

University	Partner organisation	Country	Partnership type	Subject
Kazakh National Academy of Arts	Azerbaijan State University of Culture and Arts	Azerbaijan	Double degree programme	Art Criticism Film studies
Al-Farabi Kazakh National University	Baku State University	Azerbaijan	Double degree programme	Maritime and Energy Law
Caspian University of Technology and Engineering named after Sh. Yessenov	Baku State University	Azerbaijan	Double degree programme	International Relations
	Azerbaijan State Maritime Academy	Azerbaijan	Double degree programme	Maritime Navigation
Eurasian National University	Belarusian State University of Informatics and Radioelectronics	Belarus	Double degree programme	Automation and Control
Zhangir Khan West Kazakhstan Agrarian Technical University	Belarusian State University of Food and Chemical Technologies	Belarus	Double degree programme	Technology of Processing Industries
Toraigrov University	Belarusian State Technological University	Belarus	Double degree programme	Natural Science
Taraz International Innovation Institute named after Sherkhan Murtaza	Varna Free University	Bulgaria	Double degree programme	Computer Science
Turan-Astana University	Varna Free University	Bulgaria	Double degree programme	Art
Kazakh Agro-Technical Research University	Northwestern University of Agriculture and Forestry	China	Double degree programme	Food Technology

University	Partner organisation	Country	Partnership type	Subject
Karaganda Technical University	Shihezi University	China	Double degree programme	Mechanical Engineering
Astana International University	University of International Business and Economics	China	Double degree programme	Business Administration
Abai Kazakh National Pedagogical University	University of Poitiers	France	Double degree programme	Economics
	University of Lorraine	France	Double degree programme	International Law
	INALCO	France	Double degree programme	International Relations
Al-Farabi Kazakh National University	University of Lorraine	France	Double degree programme	Mechanics and Energy Oil and Gas Business
	University of Reims Champagne-Ardenne (URHA)	France	Double degree programme	Mathematics
Kazakh Ablai Khan University of International Relations and World Languages	University of Poitiers	France	Double degree programme	Training of Foreign Language Teachers
Academy of Logistics and Transport	Technical University of Dresden	Germany	Double degree programme	Economics, Ecology and Infrastructure in High-Speed Rail Transport
Almaty University of Power Engineering and Telecommunications	Anhalt University of Applied Sciences	Germany	Double degree programme	Communications and Embedded Systems MBA International Trade Energy Business and Energy Management
Kazakh-American Free University	West Saxon University of Applied Sciences of Zwickau	Germany	Double degree programme	IT Management
Caspian University	Hochschule Wismar, University of Applied Sciences, Technology, Business and Design	Germany	Double degree programme	Private Law
International University of Information Technology	International University of Information Technology	Germany	Double degree programme	Computer Technology
Al-Farabi Kazakh National University	University of West Attica	Greece	Double degree programme	Systems Engineering
	Sapienza University of Rome	Italy	Double degree programme	World History

University	Partner organisation	Country	Partnership type	Subject
Eurasian National University	Osh State University	Kyrgyzstan	Double degree programme	Russian Language and Literature Translation Journalism Foreign Languages Physics
	Jalal-Abad State University	Kyrgyzstan	Double degree programme	Foreign Languages
	Kyrgyz National University	Kyrgyzstan	Double degree programme	Management Journalism Public Relations
	Riga Technical University	Latvia	Double degree programme	Logistics
Kazakh Automobile and Road Institute	Rezekne Academy of Technologies	Latvia	Double degree programme	Mechatronics in the Automotive Industry
Sarsen Amanzholov East Kazakhstan University	Vytautas Magnus University	Lithuania	Double degree programme	Accounting
Al-Farabi Kazakh National University	Kaunas University of Technology	Lithuania	Double degree programme	Technical Physics
Narxoz University	Mykolas Romeris University	Lithuania	Double degree programme	Law and Global Security
Esil University	University of Economics and Human Sciences in Warsaw	Poland	Double degree programme	Management
Atyrau University of Oil and Gas	Jan Amos Komeriski University of Applied Sciences	Poland	Double degree programme	Automation and Production Control
Eurasian National University	Pomeranian University in Stupsk	Poland	Double degree programme	History
Zhetysu University named after Ilyas Zhansugurov	University of Linguistics and Technology in Przasnysz	Poland	Double degree programme	Kazakh Language and Literature History
Kazakh National Agrarian Research University	Warsaw University of Life Sciences	Poland	Double degree programme	Water Resources Management
Kazakh National Women's Teacher Training University	University of Silesia in Katowice	Poland	Double degree programme	Foreign Languages

University	Partner organisation	Country	Partnership type	Subject
Al-Farabi Kazakh National University	Nicolaus Copernicus University in Toruń	Poland	Double degree programme	Food Chemistry and Technology
Shakarim University	University of Economics in Bydgoszcz	Poland	Double degree programme	Sports Management
Kenzhegali Sagadiyev University of International Business	National Louis University	Poland	Double degree programme	Management
Al-Farabi Kazakh National University	ISCTE – University Institute of Lisbon	Portugal	Double degree programme	Intelligent Control Systems
M. Kh. Dulaty Taraz Regional University	Polytechnic Institute of Bragança	Portugal	Double degree programme	Chemical Engineering and Processes Corporate Information Systems and Technologies
Astana IT University	International Management Institute of Saint Petersburg	Russia	Double degree programme	Digital MINI MBA "Digital Transformation Management"
Almaty Technological University	Plekhanov Russian University of Economics	Russia	Double degree programme	Hotel Business Finance Information Systems Economics
Almaty Management University	Saint Petersburg State University	Russia	Double degree programme	EMBA Strategic Management and Leadership
Atyrau University of Oil and Gas	Gubkin Russian State University of Oil and Gas	Russia	IBC	Oil and Gas Technologies
Sarsen Amanzholov East Kazakhstan University	Altai State University	Russia	Double degree programme	Physics Computer Science
Eurasian National University	Dubna State University	Russia	Double degree programme	Nuclear Physics Chemistry
	Peoples' Friendship University of Russia	Russia	Double degree programme	Economics Tourism Management International Business and Logistics International Law Philology International Relations Environmental Studies Pedagogy and Psychology Accounting
	Novosibirsk State University	Russia	Double degree programme	Economics International Business

University	Partner organisation	Country	Partnership type	Subject
Eurasian National University	Saint Petersburg State University	Russia	Double degree programme	Philology
	Altai State University	Russia	Double degree programme	Economics Geography Restaurant and Hotel Business Management International Business History
	Bashkir State Pedagogical University named after M. Akmulla	Russia	Double degree programme	Pedagogy and Psychology
	Astrakhan State University	Russia	Double degree programme	Social Pedagogy
	Tyumen State University	Russia	Double degree programme	Judicial power and criminal justice
	Tomsk State University	Russia	Double degree programme	Physics Regional Studies History
	Moscow Institute of Electronic Technology	Russia	Double degree programme	Design Radio-Electronic equipment Construction
	North-Caucasus Federal University	Russia	Double degree programme	Information Security Systems
	Zhetysu University named after Ilyas Zhansugurov	Altai State University	Russia	Double degree programme
West Kazakhstan State University	Saratov State University	Russia	Double degree programme	Social Pedagogy
Kazakh Agro-Technical Research University	Peoples' Friendship University of Russia	Russia	Double degree programme	Landscape Architecture Agrobiotechnology
Al-Farabi Kazakh National University	Dubna State University	Russia	Double degree programme	Nuclear Physics

Non-UK TNE in Kazakhstan (continued)

University	Partner organisation	Country	Partnership type	Subject
Al-Farabi Kazakh National University	Peoples' Friendship University of Russia	Russia	Double degree programme	Economics Management Project Management Marketing International Logistics International Relations World Economy International Law Philosophy Russian Literature Mathematics and Computer Science Tourism Physics Russian Language and Literature Russian Philology
	Ural Federal University	Russia	Double degree programme	Sports Psychology Social Work Geography Energy Diplomacy
	Belgorod State University	Russia	Double degree programme	Tourism Hotel and Restaurant Business Management
	National Research Nuclear University MEPhI	Russia	IBC	Nuclear Physics and Technology Informatics and Computer Science Secure High-Performance Computing Systems and Technologies
Kazakh-Russian Medical University	Novosibirsk State Medical University	Russia	Double degree programme	Pharmacy
Korkyt Ata Kyzylorda University	Tomsk Polytechnic University	Russia	Double degree programme	Ecology
M. Kozybayev North Kazakhstan University	Arctic State Agrotechnological University	Russia	Double degree programme	Food Technology Livestock Technology Forestry
Shakarim University	National Research Tomsk Polytechnic University	Russia	Double degree programme	Physics
South Kazakhstan State Pedagogical University (SKSPU)	Northern (Arctic) Federal University	Russia	Double degree programme	Training of Teachers of Russian Language and Literature
Auezov South Kazakhstan State University	Peoples' Friendship University of Russia	Russia	Double degree programme	International Law Management
Esil University	Gangnam University	South Korea	Double degree programme	Management Finance

Non-UK TNE in Kazakhstan (continued)

University	Partner organisation	Country	Partnership type	Subject
Korkyt Ata Kyzylorda University	Gangnam University	South Korea	Double degree programme	Foreign Languages
Shakarim University	Kyungdong University	South Korea	Double degree programme	Management Business administration Hotel Management Computer Technology and Software Smart Computing
Almaty Technological University	HTMI	Switzerland	Double degree programme	Tourism Management Hospitality and Events Management Restaurant and Hotel Business Management
	EU Business School	Switzerland, Spain	Double degree programme	BBA - Bachelor of Business Administration
Al-Farabi Kazakh National University	Istanbul University	Turkiye	Double degree programme	National History
Almaty Management University	Arizona State University	USA	Double degree programme	Global Management International Trade
M. Kozybayev North Kazakhstan University	University of Arizona	USA	Double degree programme IBC	Psychology in Education Primary Education and Inclusive Practices Special education and Inclusive Practice Biotechnology Information Systems in Management
	University of Arizona	USA	IBC	Plant Health Sciences Plant Science and Technology Food Safety Biotechnology Information Systems
Zhangir Khan West Kazakhstan Agrarian Technical University	Samarkand State University of Veterinary Medicine Livestock and Biotechnologies	Uzbekistan	Double degree programme	Veterinary Studies
Maqsut Narikbayev KAZGUU University	Tashkent State University of Law	Uzbekistan	Double degree programme	International Law
South Kazakhstan Medical Academy (SKMA)	Bukhara State Medical Institute	Uzbekistan	Double degree programme	Medicine
Auezov South Kazakhstan State University	National University of Uzbekistan named after Mirzo Ulugbek	Uzbekistan	Double degree programme	World History

University	Country	Location	Partnership type
Bearusian-Uzbek Joint Interdisciplinary Institute of Applied Technical Qualifications in Tashkent (Belarus)	Belarus	Tashkent city	IBC
Sharda University Uzbekistan	India	Andijan region	IBC
Amity University Tashkent	India	Tashkent city	IBC
Turin Polytechnic University in Tashkent	Italy	Tashkent city	IBC
Pisa University in Tashkent	Italy	Tashkent city	IBC
Japan Digital University	Japan	Tashkent city	IBC
Information Systems Management Institute (ISMA)	Latvia	Fergana region	IBC
Binary International University in Urgench	Malaysia	Khorezm region	IBC
Collegium Humanum – Warsaw Management University	Poland	Andijan region	IBC
Herzen State Pedagogical University of Russia (Herzen University)	Russia	Tashkent city	IBC
National Research Technological University MISiS in Almalyk	Russia	Tashkent region	IBC
Astrakhan State Technical University	Russia	Tashkent region	IBC
Gubkin Russian State University of Oil and Gas	Russia	Tashkent city	IBC
M. V. Lomonosov Moscow State University (Moscow State University)	Russia	Tashkent city	IBC
Plekhanov Russian University of Economics	Russia	Tashkent city	IBC
National Research Nuclear University MEPhI	Russia	Tashkent city	IBC
Moscow State Institute of International Relations (MGIMO)	Russia	Tashkent city	IBC
MEI National Research University, The Federal State Budget Higher Education Institution in Tashkent	Russia	Tashkent city	IBC
Russian University of Chemical Technology, The Federal State Budgetary Higher Educational Institution in Tashkent	Russia	Tashkent city	IBC
Saint Petersburg State University	Russia	Tashkent city	IBC
Tashkent branch of Russian National Research Medical University named after N.I. Pirogov	Russia	Tashkent city	IBC

University	Country	Location	Partnership type
Kazan Federal University in Jizzakh	Russia	Jizzakh region	IBC
S. A. Gerasimov All-Russian State University of Cinematography	Russia	Tashkent city	IBC
Management Development Institute of Singapore in Tashkent	Singapore	Tashkent city	IBC
INHA University in Tashkent	South Korea	Tashkent city	IBC
Bucheon University in Tashkent	South Korea	Tashkent city	IBC
Ajou University in Tashkent	South Korea	Tashkent city	IBC
Korea International University in Fergana	South Korea	Tashkent city	IBC
Yeoju Technical Institute in Tashkent	South Korea	Tashkent city	IBC
The University of Economics and Technology in Tashkent (Türkiye)	Türkiye	Tashkent city	IBC
Webster University Curriculum Implementation Center, Tashkent	USA	Tashkent city	IBC

South Caucasus
Non-UK TNE in Armenia

University	Partner organisation	Country	Partnership type	Subject
Brusov State University	Dalian University of Foreign Languages	China	Double degree programme	Professional Pedagogy (Chinese Language and Literature)
Yerevan State University	Le Mans University	France	Double degree programme	Mathematics
	University of Bourgogne-Franche-Comté	France	Double degree programme	Optics Applied Microbiology Microbiology Biotechnology
Brusov State University	Sorbonne University	France	Double degree programme	Doctoral and master's programmes in Comparative Literature, Publishing
European University of Armenia	EKLYA School of Business	France	Joint diploma programme	
National Polytechnic University of Armenia	Grenoble INP	France	Double degree programme	

Non-UK TNE in Armenia (continued)

84

University	Partner organisation	Country	Partnership type	Subject
Armenian State University of Economics	Brest Business School	France	Double degree programme	MBA
Armenian State Agrarian University	Weihenstephan-Triesdorf University of Applied Science	Germany	Double degree programme	Agrarian Management
Brusov State University	Martin Luther University Halle-Wittenberg	Germany	Double degree programme	Political Science Linguistics (German)
Armenian State University of Economics	West Saxon University of Applied Sciences of Zwickau	Germany	Double degree programme	Master's Management with Computer Science
International Scientific Educational Center of NAS RA	University of Tuscia	Italy	Double degree programme	Human Rights and Security Financial Administration Marketing and Quality
European University of Armenia	EURAC Research	Italy	Joint diploma programme	
	Poliarte Academy of Fine Arts and Design	Italy	Joint diploma programme	
International Scientific Educational Center of NAS RA	WSB University	Poland	Double degree programme	Management
National Polytechnic University of Armenia	Polytechnic Institute of Bragança	Portugal	Joint diploma programme	
Yerevan State University	Belgorod State University	Russia	Double degree programme	Pharmacy
Brusov State University	Peoples' Friendship University of Russia	Russia	Double degree programme	Intercultural Communication in Tourism
National Polytechnic University of Armenia	Moscow State Technical University named after N.E. Bauman	Russia	Joint diploma programme	
	Ural Federal University	Russia		
Armenian State University of Economics	Peoples' Friendship University of Russia	Russia	Double degree programme	International Trade
Gavar State University	University of Coruna	Spain	Double degree programme	Master's of Environment in Nature Protection and Natural Resource Management

Non-UK TNE in Armenia (continued)

85

University	Partner organisation	Country	Partnership type	Subject
Armenian State Agrarian University	Texas A&M University	USA		Diploma in Agribusiness
University of Architecture and Construction of Armenia jointly with Armenian State University of Economics	Rutgers University	USA	Franchise Agreement	Fundamentals of Project Management

Non-UK TNE in Azerbaijan

University	Partner organisation	Country	Partnership type	Subject
French-Azerbaijani University	University of Strasbourg University of Rennes	France	Dual degree programme	Geophysical Engineering Oil and Gas Engineering Chemical Engineering Computer Science
Baku State University	Hebrew University of Jerusalem	Israel	Double degree programme	
Azerbaijan University	University of Tuscia	Italy	Double degree programme	MBA
Baku Eurasian University	University of Genoa	Italy	Dual degree programme	Tourism Economics
Moscow State University		Russia	IBC	Philology Chemistry Economics Management Psychology Applied Mathematics
Baku Engineering University	Inha University	South Korea	Double degree programme	
Western Caspian University	University of Business and International Studies (UBIS)	Switzerland	Double degree programme	MBA
Azerbaijan State Agricultural University	Ege University	Türkiye	Double degree programme	
Azerbaijan University	Kharkiv National University of Radio Electronics	Ukraine	Dual degree programme	Computer Engineering (bachelor and master)

Non-UK TNE in Azerbaijan (continued)

University	Partner organisation	Country	Partnership type	Subject
Azerbaijan State Pedagogical University	The George Washington University	USA	Dual degree programme	
ADA University	The George Washington University	USA	Dual degree programme	
	American University	USA	Dual degree programme	Bachelor of Law Master of Law

Non-UK TNE in Georgia

University	Partner organisation	Country	Partnership type	Subject
Ivane Javakishvili Tbilisi State University	Lumière University	France	Dual degree programme	Bachelor's in Tourism
Caucasus University	Rennes School of Business	France	Dual degree programme	Bachelor's in Business Administration
	Technical University of Applied Sciences Wildau	Germany	Dual degree programme	Master's in Digital Logistics Management
	New Jersey City University	USA	Dual degree programme	Bachelor's in Cybersecurity
	Fairleigh Dickinson University	USA	Dual degree programme	Bachelor's in Hospitality Management
	Fairleigh Dickinson University	USA	Dual degree programme	Bachelor's in Computer Science
Saint Andrew the First-Called Georgian University	Northern Kentucky University	USA	Dual degree programme	Master's in Cybersecurity

