
Strengthening UK-Georgia partnerships in higher education



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Executive summary

This research, commissioned by the British Council in Georgia, assesses how UK-Georgia transnational education (TNE) partnerships can be strengthened. Drawing on data analysis and in-country research with Georgian policymakers and university stakeholders, the project outlines opportunities and challenges for UK universities in Georgia and recommendations to progress TNE partnerships.

Georgia presents a potentially exciting opportunity for UK universities to rethink their TNE strategies and operations. This opportunity could serve a mutually beneficial dual purpose: to fulfil the Georgian government's ambition to become an international education hub, and, for UK universities, to locate TNE operations within a sustainable pipeline of future international students.

Despite this potential, the current UK TNE activity in Georgia is very low, with only 105 enrolments in 2021–2022, the majority through online learning programmes. As such, the level of actively developed TNE partnerships between UK and Georgian institutions is negligible. Furthermore, there were only 250 Georgian students recruited to UK universities in 2021–2022, pointing towards a low mobility trend between the two countries. Therefore, the baseline to develop TNE is low; Georgia is not a priority market for the UK's International Education Strategy¹. It is clear from interviews with stakeholders in Georgia and the UK that raising awareness of Georgia as a study destination and potential educational partner would be a priority to move forward any strengthening of ties, given that Georgia remains an unknown quantity to the UK sector.

There are many positive factors that might allow Georgia to become a realistic UK TNE hub in the future. Principally, the government of Georgia, along with its universities and students, holds UK higher education in high regard. Indeed, the UK is the partner of choice. It is preferred over the European Union (EU), for which Georgia is doing so much to become a Member State, or the US, which already has established some high-exposure TNE through San Diego State University. The Georgian government has indicated that it is willing to move forward with expediency to attract UK institutions. This is therefore an opportune time for UK universities to learn more about the educational environment in Georgia.

Secondly, Georgia has experienced rapid increases in international student recruitment since 2018, making it one of the key hubs for international recruitment

in the South Caucasus and Central Asian region. UK universities stand to benefit from this trend, with the source markets for international recruitment being of relevance to UK universities as well. There is a belief in Georgia that the UK can support its globalisation drive, which would further enable higher education in Georgia to enhance its economy and development. TNE in Georgia can therefore serve both UK and Georgian strategic interests.

There are of course some challenges, aside from the UK sector's lack of awareness of the potential of Georgia. Georgia has established a robust quality assurance and recognition regime, aligned with the Bologna process. However, there are only limited mechanisms for establishing TNE beyond the special agreements that have brought into being the San Diego State University TNE and the Georgia French University. It is also possible that expectations from UK universities around enrolments, fees and revenue sharing may become a barrier for effective partnerships with Georgian institutions. Finally, despite the enthusiasm and ambition to grow TNE in Georgia, there are currently no priorities regarding which models of TNE should be developed, nor has there been genuine market testing of subjects that could be offered.

However, with such little existing TNE between the two countries, there is effectively a blank slate to start working from. Government support from both sides is the key to accelerating partnership development. Leveraging existing strengths in market, such as large volume recruitment of international student to medical programmes in Georgia, could also be the basis for developing a specific or thematic form of TNE centred around MedTech (research and industry about medical technologies).

This report's recommendations focus on short-, medium- and long-term actionable goals:

- ensuring equivalency for UK qualifications in Georgia;
- enabling UK TNE models in Georgia through clear regulations, operating models and financial incentives;
- UK universities supporting institutional transformation in Georgia, including opportunities for academic and administrative staff as well as students;
- UK universities supporting and benefitting from turning Georgia into a region-leading international education hub.

¹ UK International Education Strategy (2019). https://assets.publishing.service.gov.uk/media/5ccab348e5274a1ac5ce280c/International_Education_Strategy_Accessible.pdf

Project overview and methodology

Project context

This research was commissioned by the British Council to ascertain the opportunities and challenges for universities from the UK to establish TNE in Georgia, a country in the South Caucasus region. Since the end of the Cold War and independence from the Soviet Union, Georgia has undergone tremendous reform to become a democratic state with a market economy and ambitions to join the EU. The government of Georgia intends to develop an international education hub as a part of a wider drive to foster a knowledge-based economy.

The National Education and Science Strategy of Georgia 2030 highlights the promotion of the English language and internationalisation of higher education as key goals. Enhancing TNE partnerships between the UK and Georgia came to prominence during the Wardrop dialogue annual bilateral meeting between the two countries in January 2023.

Despite Georgia's ambitions, educational partnership development between the two countries is relatively underdeveloped. Georgia has established TNE relationships with the US and France, amongst other countries, but the UK is seen by many stakeholders in Georgian government and universities as a priority higher education system to engage with to fulfil future educational and economic ambitions.

The Georgian government requires a roadmap to develop TNE partnerships with the UK. This research was commissioned to assess the needs and ambitions of stakeholders in Georgia and the UK, to better understand how to arrive at that roadmap, and to put forward clear recommendations, whilst also assessing the barriers that need to be overcome to make future processes efficient and successful.

Research methodology

The following research methods were used.

1) Desk research

To understand the educational and economic context of Georgia, reports and legislative documents were reviewed. This included laws and regulations issued by the Ministry of Education, Science and Youth Affairs of Georgia, the National Center for Educational

Quality Enhancement, and other relevant sources of information on Georgian higher education. In addition, World Bank reports on Georgia were researched to understand the economic evolution and future direction of Georgia, particularly regarding skills needs and future priority sector development.

Several Georgian university websites were also researched, primarily to understand the course portfolio and tuition fees.

To understand the approaches and barriers to TNE development from the UK side, a variety of policy documents, strategy documents and funding websites were analysed. This included guidance from Universities UK International, the British Council, the Newton Fund, Turing Scheme and UK Research and Innovation (UKRI). A sample of UK university websites were also analysed to understand Georgia-specific mobility scholarships and opportunities.

2) Data analysis

Several data sources were analysed to baseline the Georgian higher education and TNE market, as well as other important socioeconomic and demographic indicators. World Bank and UNESCO open databanks were accessed to provide data on Georgian higher education, and UK Higher Education Statistics Authority data was used to provide analysis of TNE and student mobility trends between the UK and Georgia.

3) Interviews and focus groups

The research sought a diverse array of opinions and perspectives about higher education in Georgia and the prospects for establishing greater TNE with the UK. Overall, 30 individuals from Georgia were engaged in either interviews or focus group discussions. This included representation from three public universities, four private universities, the Ministry of Education, Science and Youth Affairs, the Parliament of Georgia, the National Center for Educational Quality Enhancement (NCEQE), the Center for International Education, and the UK Embassy in Georgia. A further five individuals were interviewed from the UK perspective, representing two educational institutions, Universities UK and the Department for Business and Trade.

Country overview

Background

Georgia is a strategically important country in the South Caucasus region, straddling Europe and Asia. It has geographical proximity to historical and contemporary 'great powers,' having been within the sphere of influence of former Byzantine, Arab, Turkish, Persian and Russian empires. Nevertheless, Georgian national identity has persevered and can be traced back to classical antiquity.

Georgia, along with its neighbours Armenia and Azerbaijan, was under Russian and then Soviet control for much of the 20th century. Since achieving full independence in 1991, it has undergone a transition to a democratic nation with a well-functioning market economy. There has been a notable improvement in its economic growth since the non-violent Rose Revolution in 2003.

With a population of 3.9 million people, Georgia is a relatively small market for higher education, though the most recent gross enrolment ratio into tertiary education of 63.9 per cent (2019) is higher than neighbours Armenia and Azerbaijan. With an estimated 30,000 international students studying in Georgia in 2023, it is also the South Caucasus region's largest hub for international students.

Economy

Georgia is regarded as an economy with great potential. Classified by the World Bank as an upper middle-income country, its 2022 GDP growth rate of 10.4 per cent was the 13th highest in the world, and third in Europe behind Armenia (12.6 per cent) and Monaco (11.1 per cent).² Notably, Georgia is ranked seventh on the World Bank's 'East of doing business'

rank. Within that rank, Georgia is second globally on the metric for 'starting a business'.

Since 2014, Georgia has been a part of the EU Free Trade Area (FTA), which has pivoted the economy towards the EU – for example, adoption of the common market principles. Georgia has a relatively stable flow of foreign direct investment (FDI), which stood at approximately eight per cent of its overall GDP in 2022. European nations contribute 47 per cent of FDI in Georgia, primarily from the UK and the Netherlands. Bordering countries including Azerbaijan, Turkey and Russia account for a further 30 per cent of FDI. In terms of capital expenditure, the highest greenfield FDI in Georgia has come from Germany, Czech Republic, Egypt, Azerbaijan and Russia. The key sectors of investment for greenfield FDI are in financial services, energy, transport and construction. These trends are broadly aligned with Georgia's ambition to become a regional logistics hub.

Georgia has a flourishing tourist industry. Despite several shocks in the last four years, including Covid-19 and the war in Ukraine, its economic performance remains robust. However, it has been noted that there are spatial disparities with economic activity concentrating in the cities of Tbilisi and Batumi.³ Some other trends include increasing unemployment, struggles to create higher wage jobs, and a mismatch between the skills required by entrepreneurs and what is taught in the education system. Cognitive skills, socio-emotional skills and digital skills are some of the areas pointed out by the World Bank as needing rapid development in Georgia to ensure greater productivity, innovation, economic growth and better distribution of wealth and prosperity.⁴

² World Bank Open Data.

³ World Bank, 'Georgia: Systematic Country Diagnostic Update' (2023).

⁴ Ibid.

Higher education in Georgia

Overview

Georgia has a large and flourishing domestic higher education. There are 63 universities overall: 19 public universities, seven institutions that are overseen by the Georgian Orthodox Church, and 36 private universities. Most universities came into existence in the 21st century and have enabled a large increase in the gross enrolment ratio (GER) into tertiary education in Georgia, which stood at 63.9 per cent in 2019, the highest in the South Caucasus region.⁵

In 2023 there were 179,085 students in Georgian higher education institutions⁶, compared to 151,226 in 2019. 50.2 per cent of enrolments are by female students, demonstrating good gender equality indicators in terms of access to higher education. 2019 figures from the World Bank also show that 34.8 per cent of students were enrolled in private higher education institutions. This is significantly higher than neighbours Armenia and Azerbaijan, where private higher education enrolments are ten per cent and 8.9 per cent respectively.⁷

In terms of funding, government expenditure on tertiary education as a percentage of GDP was 0.4 per cent according to the most recent World Bank figures in 2018, which amounted to 70.2 million USD.⁸ Whilst the percentage spend on education is similar to its South Caucasus neighbours, a key difference is the role of private sector, which has been empowered and encouraged by the government to set up higher education provision. The embrace of market-led private

higher education can be seen as a part of Georgia's broader pivot to a modern liberal market economy. To enter university, students in Georgia must pass the Unified National Exams, administered by the National Examinations Center. Public university places are competitive and allocations are dependent on the score each individual student gains in their exam. This system does not apply to international students, who are required to apply directly to universities and comply with the admission requirements for international students that are set by individual institutions. The only mandatory requirement for international students is that they are interviewed by prospective universities.

An increasing number of Georgian universities offer degrees or modules taught in the English language, though there is an uneven distribution of this across the country. Higher education institutions are concentrated in the capital Tbilisi and surrounding region, with the second and third largest cities, Batumi and Kutaisi, also hosting universities that attract international students.

Georgian universities offer a wide range of subjects and have three universities that are globally ranked in the Times Higher Education World University Rankings 2024 (which is heavily research focused): Ilia State University, Georgian Technical University and Ivane Javakhishvili Tbilisi State University.⁹ Figure 1 below shows the disciplinary areas studied by students who graduated from Georgian higher education institutions in 2019.

- ◆ Science, Technology, Engineering, Mathematics
- ◆ Business, Administration and Law
- ◆ Education
- ◆ Engineering, Manufacturing and Construction
- ◆ Arts and Humanities
- ◆ Health and Welfare
- ◆ Social Sciences, Journalism and Information
- ◆ Natural Sciences, Mathematics and Statistics
- ◆ Services
- ◆ Information and Communications Technology
- ◆ Agriculture, Forestry, Fisheries, Veterinary

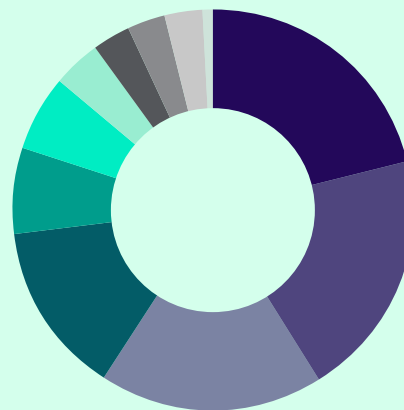


Figure 1. Disciplinary areas of graduating students in Georgia in 2019. Source: World Bank Open Data.

5 World Bank Open Data.

6 Ministry of Education, Science and Youth Affairs of Georgia.

7 World Bank Open Data.

8 Ibid.

9 Times Higher Education World University Rankings 2024.

The data from Figure 1 reveal that nearly 60 per cent of all study choices in Georgian universities are the fields of STEM, business, and law and education, with engineering, manufacturing and construction also accounting for a further 14 per cent of student choices. Disciplines which require more enrolments to meet Georgia's future economic skills needs include information and communications technology, which account for only three per cent.

National Higher Education Strategy

The 2022-2030 Unified National Strategy of Education and Science of Georgia provides the most comprehensive framework for understanding the current direction and ambition of higher education in Georgia. The strategy identifies some clear challenges to address, including enhancing the quality of higher education and increasing access and inclusivity, with an emphasis on evidence-based policymaking.¹⁰ More broadly the strategy is aimed at developing a highly skilled future workforce to allow Georgia to consolidate its globalising economic trend and increase productivity, innovation and wealth distribution.

The strategy also aligns with the government programme for 'building a European State'. As future ascension to the EU is a stated goal of Georgia, there is direct alignment of education strategy with the EU (for example, the strategic framework of European co-operation in education and training in the European educational space and beyond 2021–2030), and adoption of the higher education priorities of improving pedagogical training, continuous professional development for staff, recognising innovative teaching for career progression and ensuring the quality of education.¹¹

There is also an emphasis on digital skills development and widening access to adult learners to higher education. The strategy recognises that the population of Georgia is getting older in terms of mean age and that unemployment rates remain relatively high at 18.5 per cent in 2022. Lifelong learning and reskilling opportunities are therefore important aspects of developing new higher education pathways.¹²

In terms of the quality assurance of higher education, Georgia has been aligning its standards with the EU

since 2015, following the publication of the *Standards and Guidelines for Quality Assurance in the European Higher Education Area*, known as the ESG. Although the domestic focus of the National Higher Education Strategy is on enhancing quality assurance, widening access and ensuring future workforce development, there is also a strong focus on internationalisation. The EU-wide Erasmus scheme for short-term student mobility is a principal instrument for internationalisation of higher education in Georgia, with 10,400 scholarships issued and 37 Georgian higher education institutions creating partnerships in a total of 33 European countries.¹³

International partnership-forging for university development, teaching and research is a key pillar of the strategy. Notable successes have included the partnering of San Diego State University with three Georgian universities (Tbilisi State, Technical University of Georgia and Iliia State University), and the establishment of Kutaisi International University with the co-operation of Technical University of Munich. Nevertheless, there is no formal framework specifically for transnational education; rather these have been special initiatives supported by government and private investors.

The ministry officials interviewed in Georgia suggested strong commitment to increasing international recruitment and diversification of the sources of countries of international students coming to study in Georgia, even though no specific incentives or programmes were referenced in terms of accelerating the recruitment trend. They expressed the belief that increased transnational education programmes, including those from the UK, may help to diversify the subjects offered by Georgian universities and attract more students with the promise of a foreign (such as UK) joint or dual degree.

International students in Georgia

In the last ten years, Georgia has accelerated its recruitment of international students, a fact that has made higher education a key economic driver. As discussed later in section six, the realisation of increasing revenues from international students has facilitated a pivot in the Georgian government to make Georgia into an international education hub.

10 2022–2030 Unified National Strategy of Education and Science of Georgia.

11 Ibid, p.8.

12 Ibid, p.11.

13 Ibid, p.14.

As Figure 2 below shows, recruitment of international students almost tripled between 2018 and 2023, and Georgia now hosts over 30,000 international students. This is significantly higher than its neighbours Armenia and Azerbaijan, but also higher than Uzbekistan, a country with over 30 international branch campuses. The share of international students in Georgia was

17.4 per cent in 2023¹⁴, with most international students coming to study medical subjects. It should be noted that the large rise between 2022 and 2023 was partially a result of the war in Ukraine, with many African and Asian students having to flee Ukraine and find sanctuary in other countries to complete or restart their studies.¹⁵

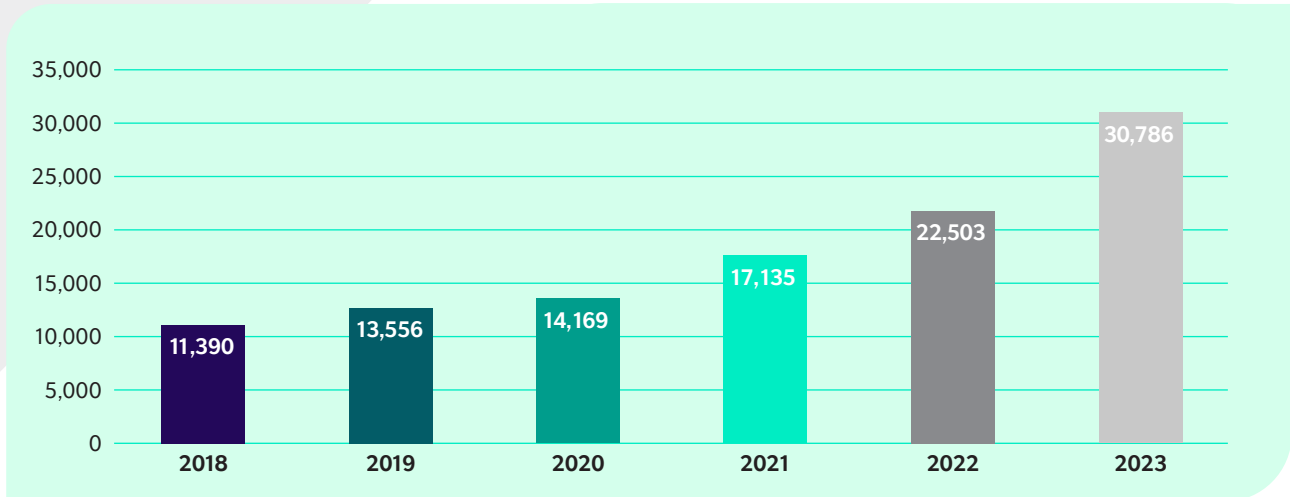


Figure 2. International students in Georgia. Source: Ministry of Education, Science and Youth of Georgia.

Figure 3 below shows that the main source of international students is overwhelmingly from India, which provides almost ten times more than the next highest source market, Israel.

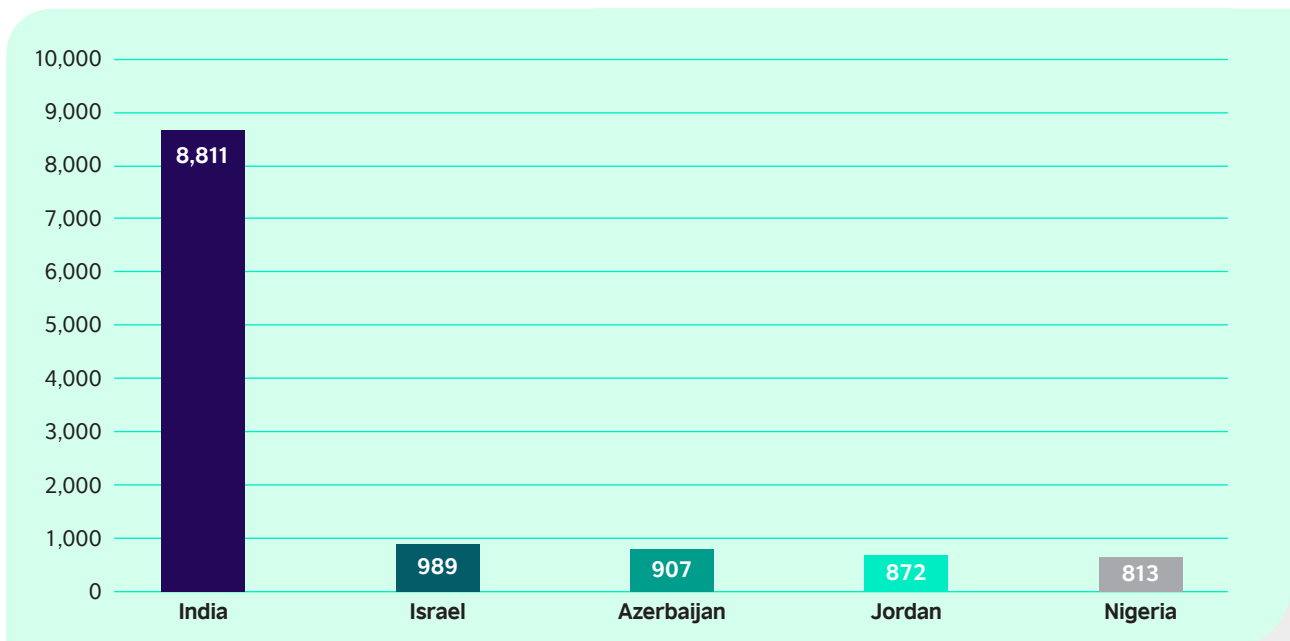


Figure 3. International Students in Georgia: Top five source countries in 2022. Source: UNESCO.

¹⁴ Ministry of Education, Science and Youth of Georgia.

¹⁵ The PIE News 'Georgia: internationals double amid Ukraine Crisis'. 6 July 2023.

Georgian students abroad

In terms of outbound destinations for Georgian students, Figure 4 shows that Germany was the top destination in 2022, with Ukraine second (note that this dataset was released in 2022, but may reflect 2021 figures, and

therefore not account for the start of the war in Ukraine). Compared to its neighbours, Georgia has a much lower rate of outbound students than Azerbaijan (which send over 22,000 to Turkey alone), and more like Armenia.

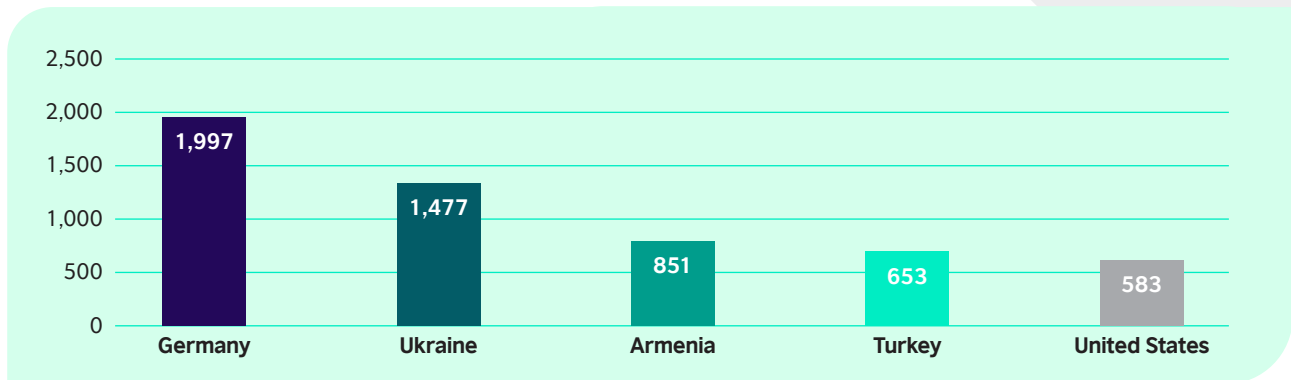


Figure 4. Top five study destinations for Georgian students, 2022. Source: UNESCO.

Figure 5 below shows the number of Georgian students coming to the UK for undergraduate and postgraduate study. Over the last five academic years, the number has remained between 215 and 250 students, with relatively low fluctuation or growth. The most significant change was a rise of 35 Georgian students recruited into postgraduate programmes in the UK in 2021-2022. Only three UK universities hosted 15 or more new enrolments from Georgia in 2021-2022 – City, University of London, King's College London, and The

University of Glasgow. The relatively low enrolments are likely due to higher tuition fee levels in the UK combined with relative lack of scholarship or part-funding opportunities. Interviews held at the LEPL International Education Center of Georgia confirmed that there was a higher rate of application for national scholarships to UK universities than any other country, but places were limited due to cost of tuition and that the pool of funding available for Georgian students was smaller, including UK university scholarships.

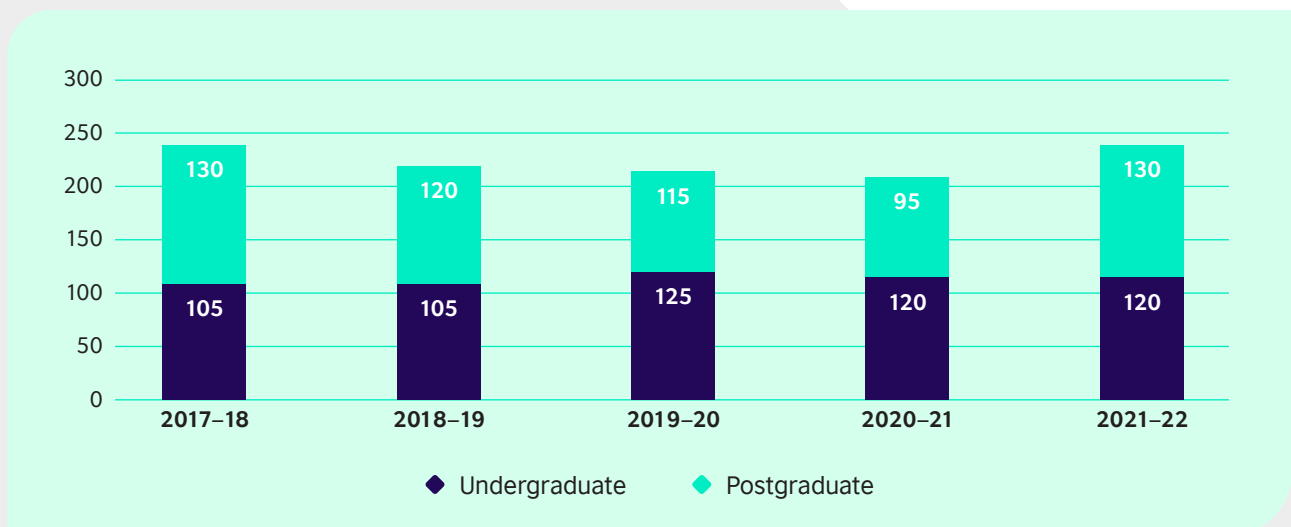


Figure 5. Georgian student enrolments in the UK. Source: HESA.

Finally, Figure 6 below shows the top five study choices for Georgian students across both undergraduate and postgraduate programmes in the UK. Business and management and social sciences are the most popular, accounting for 58 per cent of all course choices from Georgian students. This data is interesting compared to Figure 1 (study choices within Georgia), where social sciences accounted for just four per cent of all

courses taken at Georgian universities.

This insight could provide some indication to the type of course that might be popular for future UK TNE programmes in Georgia. However, the relatively low number of enrolments also mean that there is significant scope both to raise enrolment levels and to diversify the subject choices.

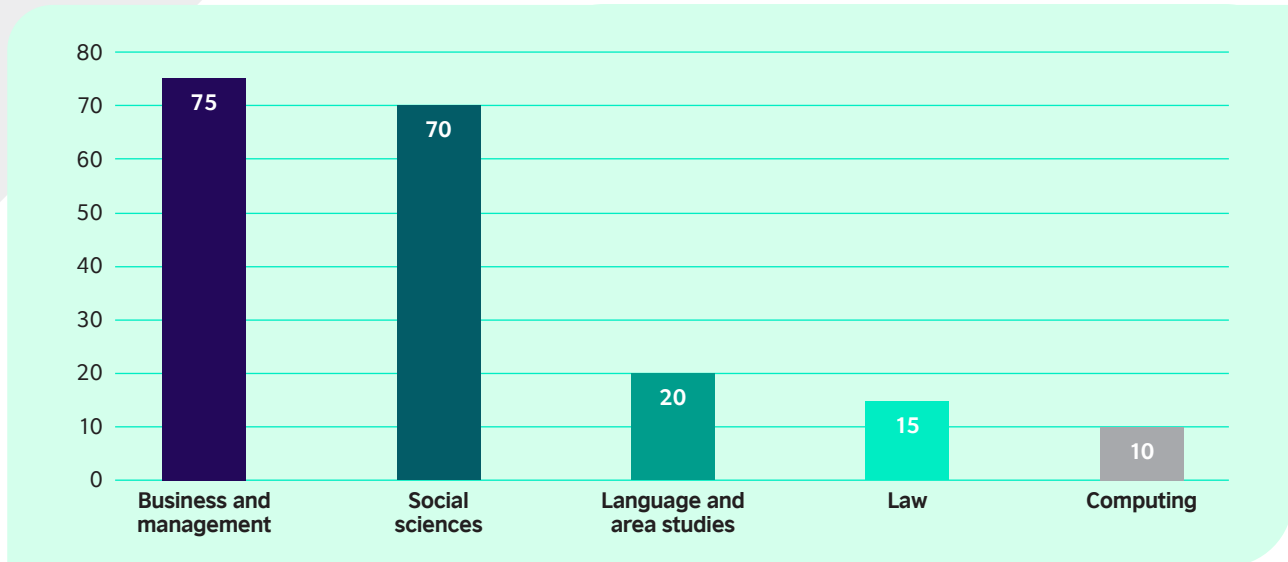


Figure 6. Top five study choices for Georgian students in the UK, 2021–2022. Source: HESA.

The regulatory environment

The Law of Georgia on Higher Education sets out the key powers, regulations and processes governing higher education in Georgia. It makes provision for the goals of higher education, the powers of parliament, the government, and the Ministry of Education and Science over higher education. It covers the licensing and accreditation of institutions in Georgia. It also outlines the creation of bodies to oversee a variety of processes for public higher education institutions, including the National Center of Education Quality Enhancement (NCEQE) and the National Examination Center.¹⁶ For internationalisation purposes, the activities of the International Education Center are also important.

There is also provision in the law for establishing both public higher education institutions (a legal entity of public law) and private higher education institutions (a legal entity of private law). This has been crucial for facilitating the growth of private sector higher education.¹⁷

The law also provides exact guidance on the structure of universities, including the roles of rector

and chancellor, as well as the rights of students. Article 50 of the law determines the recognition of educational credential issued abroad, and articles 57–77 deal specifically with the licensing of higher education institutions, institutional authorisation and programme accreditation processes. There is special provision for ‘regulated’ programmes, namely law, medicine and education.¹⁸

Other Georgian laws on higher education provide some guidance and legal provision for the operation of foreign institutions in Georgia. For example, the Law of Georgia on Higher Education (No 4792, 2011) specifically states that ‘an affiliate foreign higher education institution may carry out appropriate educational activities on the territory of Georgia, only after its compliance with the authorisation standards are verified under the procedures provided for by the international agreements and other legislative and subordinate normative acts of Georgia’.

The Law of Georgia on Education Quality Improvement also has an important regulatory function as it makes provision for authorisation and accreditation

¹⁶ Law of Georgia on Higher Education, pp.5-10.

¹⁷ Ibid, p.12.

¹⁸ Ibid, pp.39-43.

processes within Georgia. Article 19 of this law stipulates possibilities for higher education programmes (including joint programmes) to get accreditation from foreign institutions that are recognised by the NCEQE.

The NCEQE is the key national institution of accreditation processes and has been instrumental in creating the framework for joint programmes. The Higher Education Quality Assurance Department of the NCEQE is responsible for reviewing agreements or memoranda of understanding between local and foreign institutions that want to create joint programmes. Agreements must contain certain information pertaining to the governance, curriculum and quality assurance mechanisms for the joint programme. This is currently the key regulation covering TNE in Georgia.¹⁹ It is applicable only to joint programmes between two recognised institutions, meaning that there is no current provision for other forms of TNE such as international branch campuses, franchise arrangements or online learning.

The systems regulation, accreditation and quality assurance mechanisms developed by the NCEQE align with the Bologna process and European Area of Higher Education Quality Assurance Standards and Guidelines (ESG 2015) and have brought rigour to institutional and programme approval and accreditation processes in Georgia. International academic experts, local experts, students and labour market representatives are all invited to join validation committees in line with best practice with countries such as the UK. The NCEQE encourages all validations and revalidations to include labour market research to justify the programme. All final decisions are with the Authorisation and Accreditation Councils, which are independent from any other bodies. Each institution must put forward a new validation every six years.

The NCEQE has achieved significant results in terms of international recognition, transparency of issued qualifications and credibility. It is a member of organisations leading quality assurance internationally and across Europe, such as the European Association for Quality Assurance in Higher Education (ENQA) and the European Quality Assurance Register for higher education (EQAR). The NCEQE has also been recognised by the World Federation for Medical Education (WFME).

Since 2019, a revised National Qualifications Framework has integrated considerations of the

European Qualification Framework (EQF LLL) and European Higher Education Area Qualifications Framework (QF-EHEA). The National Qualifications Framework in Georgia unites all the different levels of education including higher education.

Tuition fees

Table 1 below shows a sample of tuition fees in Georgian universities, with both public and private universities represented. Fee information was taken from the university websites and is assumed to be up to date. It should also be noted that the Law of Georgia on Higher Education regulates the state study grants for Georgian students or foreign students that have passed the Unified National Examinations. The set amount for state study grants is 2,205 GEL (approximately 800 USD). The funding model is currently under review.

Each university has a different pricing model. Caucasus University did not differentiate fees for international students, but outlined both state and institutional grants for local students that would result in deductions to the fees stated here. As such, the fees in the table for Caucasus University can be assumed to be for international students as they would not be eligible for grants provided for takers of national exams.

Kutaisi International University, one of the newest private institutions in Georgia, has a significant difference in fee pricing for local and international students. Ilia State University did not advertise local fees at all (assuming that domestic students will receive public funding) and only has fees for international students. There is a difference in pricing between Ilia State University and Caucasus University, with much higher fees charged by Ilia State for computer engineering and medicine degrees.

Georgian Technical University, another state university, does not differentiate between local and international fees, but between Georgian language-taught or English language-taught programmes, with significantly higher fees for English language-taught programmes.

However, all fees for international students are less than what international students would pay for any programmes in the UK at bachelor's or master's level on an annual basis.

¹⁹ On approval of the rule on agreeing with the LEPL National Center for Educational Quality Enhancement of the Draft Agreement between the Implementing Institutions for the Implementation of Joint Higher Education Programmes, available at [here](#).

	Business administration	Computer engineering	Medicine
Caucasus University (private)	3,336 USD per year	1,852 USD per year	2,594 USD per year
Kutaisi International University (private)	–	835 USD per year (local) 5,940 USD per year (international)	–
Ilia State University (public)	3,500 USD per year (international only)	5,000 USD per year (international only)	6,200 USD per year (international only)
Georgian Technical University (public)	1,670 USD (Georgian language) 4,639 USD (English language)	1,670 USD (Georgian language) 4,639 USD (English language)	1,670 USD (Georgian language) 4,639 USD (English language)

Table 1. Comparison of university tuition fees. *Source: university websites.*

Transnational education in Georgia

This section provides insight into TNE in Georgia, including information on the foreign universities delivering TNE in Georgia and, where possible, details on enrolment trends and programme. Using publicly available or requested information, this section maps the TNE provision in Georgia to provide a baseline of activity and historic trends.

This section is divided into two main parts: first, UK TNE in Georgia, and second, non-UK TNE in Georgia.

UK TNE in Georgia: Higher Education Statistics Authority (HESA) analysis

HESA Aggregate Offshore Record (AOR) categorisation

UK TNE in Georgia was analysed using the UK Higher

Education Statistics Authority (HESA) Aggregate Offshore Record (AOR). The HESA AOR provides information on UK TNE degrees according to enrolments, level of study, mode of study, delivery model and institution. The dataset used for this analysis is limited to the most recent five academic years. The HESA AOR does not provide data on programmes recorded as UK TNE, nor does it identify partner institutions in Georgia where applicable (for example, for joint, dual or twinning degrees). This additional data has been manually researched through analysis of UK university websites.

Identifying the model of TNE is a key task of the TNE mapping exercise, though there are some limitations in the categories that are used by HESA AOR to capture TNE models. There are currently four categories in which UK universities can record their 'type of activity', and Table 2 below shows the approximate models of TNE that these could correspond to.

HESA AOR category – 'type of activity'	TNE model(s)
Registered at reporting provider – studying overseas for UK higher education provider award other than at an overseas campus of reporting provider	Joint/dual/twinning degree Franchise provision Validation agreement
Registered at reporting provider – studying overseas for UK higher education provider award at overseas campus of reporting provider	International Branch Campus (IBC)
Registered at reporting provider – distance, flexible and distributed learning for UK higher education provider award where the location of the student is known to be overseas	Online learning Distance learning Hybrid learning
Registered at overseas partner organisation – studying overseas for an award of the reporting provider	Joint/dual/twinning degree Franchise provision Validation agreement
Any other student studying overseas for an award of the reporting provider	

Table 2. Mapping HESA AOR types of activity to models of TNE delivery.

As Table 2 shows, some models of TNE delivery, including joint, dual or twinning degrees or degrees awarded through validation or franchise agreements, can be captured in two HESA AOR categories. The emphasis on the HESA AOR category is not the model of TNE, but how the student is registered. A student might be studying a UK TNE degree in their own country, but how they are captured in the HESA data is dependent on whether they are registered at their home institution or at the UK university. There is no way of definitively identifying from the data category whether the student is studying as a part of a joint degree with another degree awarding institution or undertaking a full UK degree in at an approved foreign partner (usually a private institution, but not always).

Even categories that appear to have straightforward mapping to the TNE model may also have nuances. For example, UK TNE enrolments at what may appear to be an international branch campus of a UK university may be registered in the category of 'overseas partner organisation' if the campus itself is a formal partnership between the UK university and a registered local business.

As such, although the HESA AOR is still the best means of establishing the kind of TNE models that UK universities operate, there is the potential for some inaccuracies and inconsistencies in the way data is both recorded and interpreted.

UK TNE enrolments in Georgia

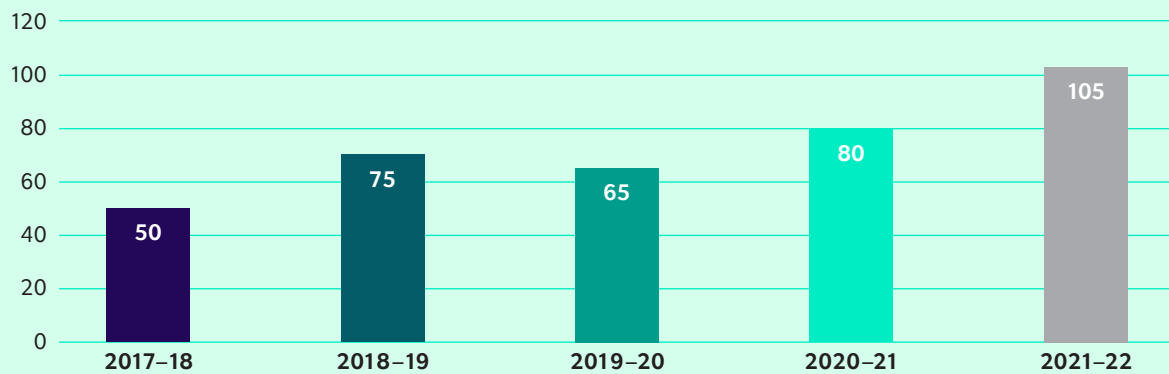


Figure 7. UK TNE enrolments in Georgia. Source: HESA Aggregate Offshore Record.

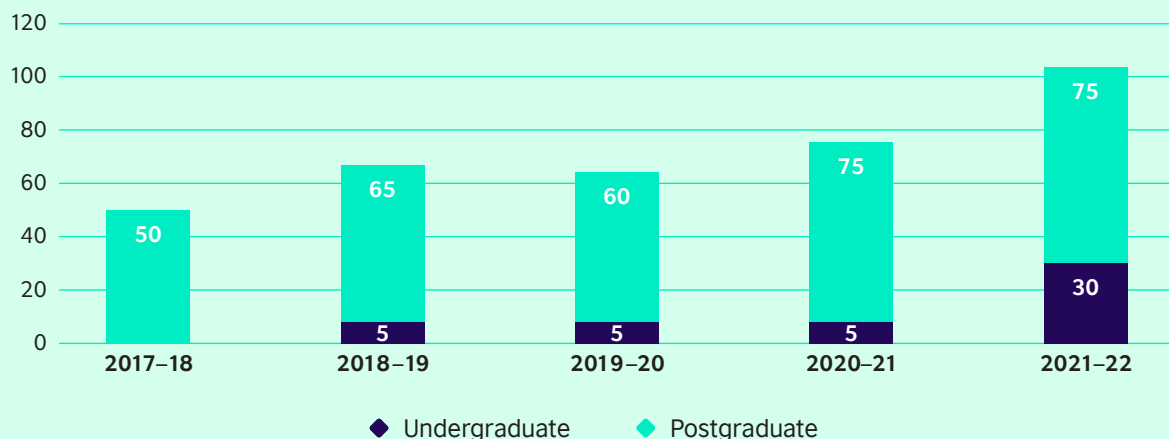


Figure 8. UK TNE enrolments in Georgia by level of study. Source: HESA Aggregate Offshore Record.

Figure 7 shows that UK TNE in Georgia more than doubled between 2017–2018 and 2021–2022, albeit starting from a relatively low enrolment base. Importantly, there has been post-Covid recovery in enrolment growth after a slight decline in 2019–2020.

Figure 8 shows how UK TNE enrolments are split between undergraduate and postgraduate enrolments. Over the last five academic years postgraduate recruitment has dominated UK TNE in Georgia, though there was a substantial increase in undergraduate enrolments in 2021–2022, with postgraduate enrolments remaining static.

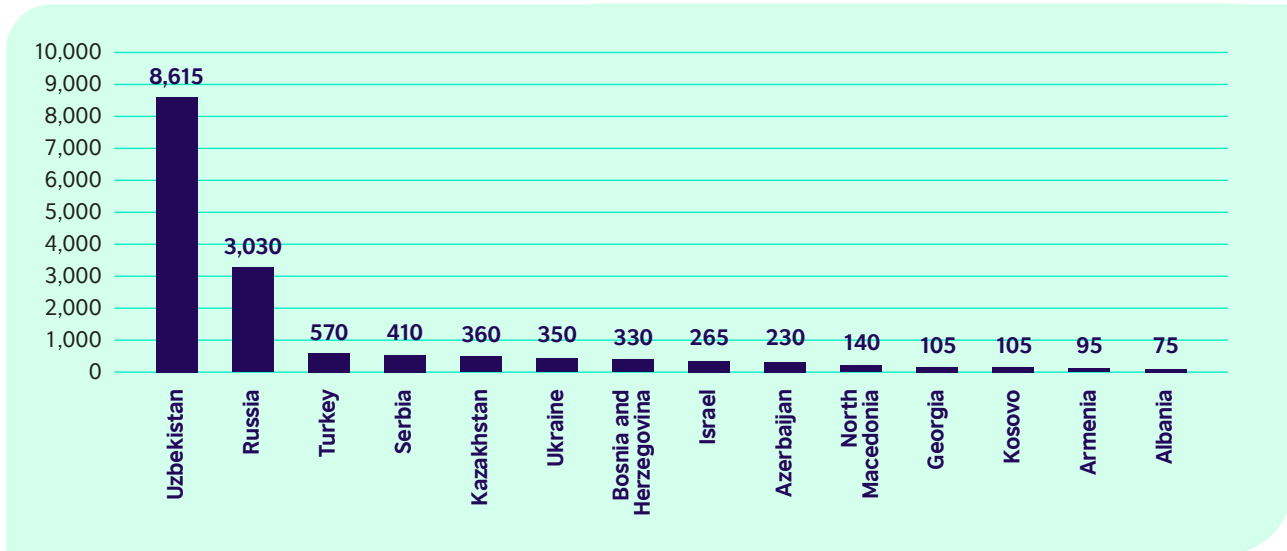


Figure 9. UK TNE Enrolments in countries classified in the British Council's 'Wider Europe' region, 2021-22. Source: HESA Aggregate Offshore Record.

Notwithstanding the growth in UK TNE in Georgia, Figure 9 exemplifies how Georgia remains a very small TNE market in comparison to other countries in the British Council's 'Wider Europe' region, a group of 14 non-EU countries. Georgia is in the lower third in this group in terms of UK TNE enrolment, with the same number as Kosovo. In terms of the South Caucasus micro-region, Georgia is ahead of Armenia, but currently has less than half of the UK TNE enrolments of Azerbaijan.

Country	Undergraduate percentage of UK TNE
Uzbekistan	95.2
Russia	83.3
Bosnia and Herzegovina	77.3
Kazakhstan	61.6
Serbia	60.2
Israel	42.3
Kosovo	38.1
Turkey	36.5
Ukraine	34.3
Georgia	28.6
Albania	26.7
North Macedonia	25.9
Armenia	21.1
Azerbaijan	15.2

Table 3. Percentage of UK TNE registered at undergraduate level, 2021-22. Source: HESA Aggregate Offshore Record.

Table 3 also compares Georgia's distribution of UK TNE across different levels of study compared to the whole Wider Europe region. Where Georgia has a relatively higher leaning towards postgraduate recruitment into UK TNE, Uzbekistan, Russia, Bosnia and Herzegovina, Kazakhstan, and Serbia all have over 50 per cent of UK TNE recruitment into undergraduate programmes. One potentially significant impact of this is that an undergraduate degree offers up to three years' worth of fee revenue, in comparison to one year's worth from many postgraduate courses. However, this depends on a) the actual differential in the fee level between undergraduate and postgraduate, and b) whether all three years are taken as TNE for undergraduate (for example in a 2+1 arrangement, the UK university may only earn fee revenue from the +1 component of the degree).

When assessing the relative number of UK TNE enrolments in relation to overall population, Georgia is currently performing in the middle of the Wider Europe group. Figure 10 below shows the ratio of UK TNE enrolled students per population. One in every 4,138 people in Uzbekistan is enrolled in UK TNE, compared to one in every 35,357 people in Georgia, and one in every 149,088 in Turkey.

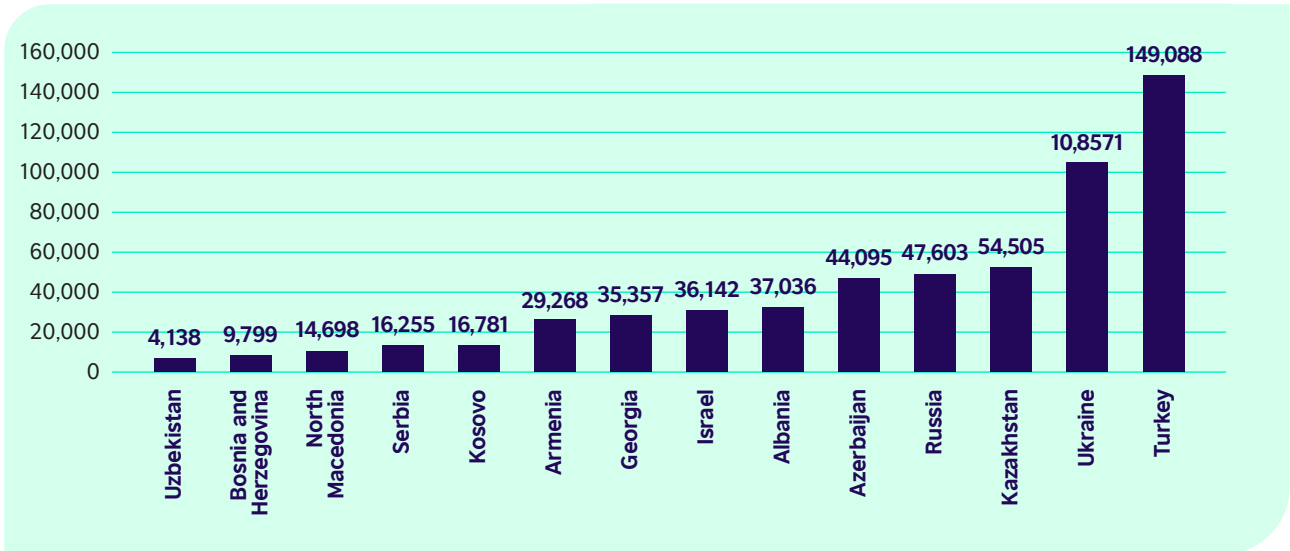


Figure 10. Ratio of UK TNE enrolments to overall population 2021-22 (e.g. Uzbekistan 1:4138). The ratio is calculated by dividing the total population by the UK TNE enrolments. The lower the number, the higher the proportion of UK TNE per population. *Source: HESA Aggregate Offshore Record and World Bank (for population).*

Figure 10 shows that while Georgia has significant scope to enhance the number of UK TNE enrolments relative to its size, it has more UK TNE engagement than Azerbaijan,

Russia, Kazakhstan, Ukraine and Turkey. Georgia is currently comparable to Israel and Albania in terms of relative level of TNE recruitment per population.

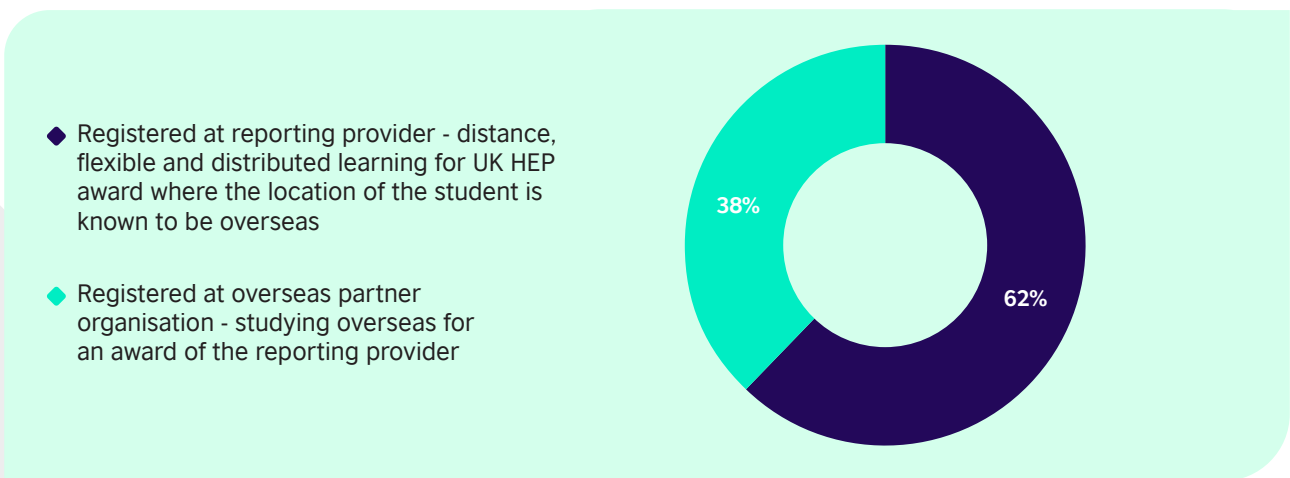


Figure 11. UK TNE enrolments in Georgia according to delivery model, 2021–22. *Source: HESA Aggregate Offshore Record.*

Figure 11 returns to the current UK TNE activity in Georgia, showing the different models of TNE as classified by HESA. 62 per cent of the 105 TNE enrolments are undertaken via distance or flexible learning, and 38 per cent are where the TNE student is registered at the UK university’s partner organisation. This category, as mentioned before, could include joint

or dual degrees, franchise arrangements, or validated degree awards. This data shows that the primary method of UK TNE engagement is through distance or hybrid modes of learning, and that there are no active international branch campuses of UK universities. There is no significant joint, dual or twinning degree programme between Georgian and UK universities.

Table 4 below shows which UK universities delivered TNE in Georgia in 2021–22. It is worth noting that both the University of Sheffield and University of York delivered TNE via CITY College Thessaloniki. CITY College is a private educational provider based in Greece, which operates as the ‘Europe Campus’ of the University of York, delivering several TNE degrees. Prior to 2021–22, it held a similar arrangement with the University of Sheffield. Both UK universities are represented in this dataset because University of Sheffield registered students were on ‘teach-out’ during 2021–22.

CITY College delivers an executive MBA programme to students across the Balkans and South Caucasus; this is a joint degree awarded by University of York and University of Strasbourg. CITY College fly in faculty to hired delivery centres every month in Georgia so students can engage in face-to-face teaching and tutorials. The remainder of the programme is delivered online. All 30 enrolments below for Sheffield and York are for this executive MBA.

UK university	2021–2022 enrolments
University of Sheffield	25
University of London (Institutes and activities)	15
University of Reading	10
The University of Buckingham	10
The Open University	5
King's College London	5
University of York	5
University of Manchester	5
The University of Law	5

Table 4. UK universities providing TNE in Georgia, 2021–2022. Source: HESA Aggregate Offshore Record.

University of London is the second largest provider of TNE in Georgia, all through distance learning. There are no recognised teaching centres of the University of London in Georgia. The University of Buckingham offers TNE degrees through the British University in Georgia, including a BA in Political Science and BA in Business Management, but only registered ten new enrolments in 2021–22. These are the only identifiable TNE programmes developed between a UK university and an institution in Georgia, which again points to the low level of TNE engagement between the two countries so far.

The analysis of HESA data overall demonstrates that there is significant scope for enhancing the UK TNE presence in Georgia. It ranks relatively lower within the Wider Europe region, broadly comparable to its neighbour Armenia. Due to the lack of bilateral TNE development between UK and Georgian institutions, there is no discernible curriculum profile; the largest UK TNE providers have operated through a conduit institution based in Greece and focused on MBA provision.

Non-UK TNE in Georgia

Table 5 shows the existing TNE programmes in Georgia that have been approved by the government and the NCEQE. However, it should be noted that the programmes that are offered by San Diego State University (SDSU) in partnership with three Georgian universities were not included in this list provided by the ministry. SDSU provides six bachelor's degree programmes.

Georgian Institution	Foreign Institution(s)	Qualification
Ilia State University	University of Glasgow (UK) University of Tartu (Estonia)	Master of Caucasus Studies
Ivane Javakishvili Tbilisi State University	Lumière University (France)	Master of Tourism Management
Caucasus University	New Jersey City University (US)	Bachelor of Science in Computer Science
Caucasus University	Rennes School of Business (France)	
Caucasus University	Fairleigh Dickinson University (US)	Bachelor of Tourism Management Bachelor of Science in Computer Science
Caucasus University	Technical University of Applied Sciences Wildau (Germany)	Master of Digital Logistics Management
Saint Andrew the First-Called Georgian University of the Patriarchate of Georgia	Northern Kentucky University (US)	Master of Science in Information Technology Security

Table 5. Non-UK TNE in Georgia, 2022–2023. *Source: Ministry of Education, Science and Youth Affairs of Georgia.*

The data shows that there is relatively limited non-UK TNE in Georgia, with Caucasus University the most active institution in creating TNE partnerships. Given the low level of TNE offered by UK universities in Georgia, this points towards Georgia being a highly underdeveloped market for TNE in general, with only one private institution seemingly proactive in creating TNE partnerships.

Assessing the opportunities and challenges for UK TNE in Georgia

Overview of stakeholder findings

To understand in greater depth the opportunities and challenges for UK TNE in Georgia, in-country research was conducted with a range of stakeholders in February 2023, covering locations in Tbilisi, Kutaisi and Batumi. The following stakeholders were engaged in series of 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;
- National Centre of Educational Quality and Enhancement;
- representatives from the UK Department of Business and Trade (DBT) based at the UK Embassy in Georgia.

In addition, 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.

The interviews provided a rich understanding of both the current landscape and future ambitions for UK TNE in Georgia, particularly from the perspective of Georgian stakeholders. It should be noted, however, that due to the current low level of UK TNE in Georgia, feedback from UK stakeholders was more limited. Georgia is neither on the list of priority markets outlined in the UK International Education Strategy, nor a market that has traditionally been either a source of international recruitment or TNE partnerships. The overall sense from UK stakeholders was that Georgia is a rather unknown entity for the UK university sector, which requires awareness raising as a potential market to draw the attention of UK universities from a strategic development point of view.

The findings below are primarily drawn from Georgian stakeholders, and 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

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

Interviews with ministry and parliament stakeholders revealed that 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 was accelerated by the war in Ukraine from January 2022, there had still been significant organic growth in the years preceding the war.

It was noted by ministry officials in Georgia that 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. In this way, higher education has begun to be considered as a serious business, attracting potential domestic investors and steering the government towards policies that will enable the growth of internationalisation.

Both ministry and university stakeholders indicated that the majority of international students – as much 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 to diversify international recruitment.

Furthermore, it was reported by the ministry that a large majority of international student enrolments are for medical subjects. This presents both a dilemma and an opportunity. On the one hand, there is a desire to diversify and introduce subjects such as artificial intelligence, data science, renewable energy and sustainability. On the other hand, consolidating medicine as a key international recruitment driver could help turn Georgia into an international medical education hub, particularly if there were the additional attraction of foreign TNE medical programmes, including those from the UK. However, with medical degrees having different regulatory, recognition and

equivalency requirements across borders, further details would need to be explored and finalised to assess future viability.

Both Georgian government policymakers and university stakeholders saw TNE partnerships with the UK as a way to diversifying the portfolio of programmes that international students can be recruited to, as well as ensuring global-standard quality of the curriculum, teaching and learning in Georgia. It was also noted by some private universities if UK TNE were delivered in Georgia in the form of joint or dual degrees, this might increase the attractiveness of Georgia for international academic staff as well as international students. Increasing international academic staff is also an ambition of universities as it seen to affirm their globalising journey and contribute to global university ranking indices that reward universities that have higher proportions of international staff.

Aside from India, other key student recruitment markets for Georgian universities include Azerbaijan, Israel, Jordan, Nigeria, Egypt and Iran. There is scope to extend this to other countries in South Asia, the Middle East and Central Asia. Whilst there is a desire to potentially increase recruitment from sub-Saharan Africa, there was an acknowledgement that the current visa regimes for studying in Georgia for many of sub-Saharan African countries could be a barrier to increasing recruitment from that region. Again, it is believed by stakeholders in Georgia that UK university presence will accelerate recruitment from new markets.

In terms of the models of TNE delivery, there is less certainty around what kind of TNE engagements can be created. However, both government officials and university stakeholders 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 a part of the programme in the UK. International branch campuses (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 Georgia (SDSU), though these both run their programmes out of other existing local university premises rather than being standalone branch campuses. SDSU Georgia offers three bachelor's programmes, all of which have international accreditation, either through the Western Association of Schools and Colleges accreditation, or through the Accreditation Board for Engineering and Technology (ABET).

Overall, virtually all universities in Georgia are experiencing growth in international students, who generally enrol on English language-taught degree programmes. Many universities in Georgia offer English language-taught degrees, though there is a greater density of these in Tbilisi. 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 Munich since its inception. However, outside of Tbilisi and KIU there are decreasing levels of academic English language competency in students and staff, which may impact locational choices for TNE programmes. However, as is the case with some countries, UK TNE programmes may also be delivered in local languages provided there are robust and trustworthy systems of quality assurance.

Overall, the internationalisation potential of Georgia is strong, and 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. UK universities could benefit both their own interests 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, civil servants from the ministry, and the National Center for Educational Quality Enhancement all confirmed that the Georgian government ambition is to grow foreign TNE presence in Georgia, with the UK being the one of the preferred country partners.

The government has taken several steps to ensure that Georgia becomes an attractive partner for higher education. Firstly, by virtue of its alignment with the Bologna process and membership of key European institutions and frameworks, robust quality assurance and accreditation systems have been implemented (as previously described in section 4.4). Interviews with universities in Georgia confirmed that these standards are rigorously adhered to and taken seriously. In fact, the broader culture of quality assurance it has engendered has seen Georgian universities seek professional accreditations in certain subjects prior to approaching foreign universities for partnerships. One university gave the example of gaining accreditation from the Royal Institute of British Architects (RIBA) for its architecture programmes. 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.

Secondly, 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, particularly around STEM subjects and sustainability-led programmes. 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 that there are an additional 2.2 million USD available to fund joint and dual degree programmes. The ministry did indicate that, 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. However, this is likely to be contingent on a broader strategic framework and memorandum of understanding between the two countries. The sentiment from the Georgian government is that if there are definitive indicators of progress on establishing TNE in Georgia, then the government can move quickly to create or amend laws and regulations to facilitate foreign university entry.

In terms of models of TNE, the ministry indicated that whilst IBCs would be attractive, no more than five IBCs would be realistic. There would also need to be further thought given to the type of IBCs prioritised, for example whether they would be embedded foreign campuses such as Webster or San Diego State University, which are essentially hosted within existing Georgian universities, or standalone campuses with new physical buildings and facilities. 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 KIA are seen as potential partners in IBC development and are backed by wealthy private investors with an interest in accelerating profitability in the higher education sector. Again, it was stated that if there were interest from UK institutions in setting up IBCs, the government would be willing to move quickly to create new IBC laws, regulations and operating mechanisms to ensure a smooth process.

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, provided that they can be shown to contribute directly to the World Bank's agenda for Georgia.

Finally, it was clear from interviews with senior government policymakers that they are actively seeking to create global 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 EU through its framework programmes Erasmus+ and Horizon Europe, and with many of its constituent members on creating mobility programmes, staff exchanges and research partnerships. Georgia is also a full member of the European Cooperation in Science and Technology (COST) and is preparing for Erasmus+

associated country status. 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. In this sense, Georgia is not pinning all its TNE hopes on the UK but is proactive in ensuring that its current globalising trajectory in higher education continues on as many fronts as possible.

3) There is high regard and demand for UK higher education in Georgia, the wider region and the source markets from where Georgia is currently recruiting.

All interviews with Georgia-based stakeholders, including students, 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. Despite Georgia's closeness to the EU and ambition to become a part of the bloc, Brexit does not seem to have harmed the UK's standing in terms of higher education. For example, interviews at Georgia's Center for International Education (the primary organisation for providing scholarships to Georgian students studying abroad) revealed that application to universities in the UK were 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 (though as shown in section 4.3, the overall number of Georgian students coming to the UK for university study is still relatively low).

From a Georgian government perspective, there is a recognition that UK universities are 'active' in the TNE sphere and knowledge about growing UK TNE activity in the wider region, particularly in Uzbekistan and Kazakhstan. Whilst there is no ambition yet to directly compete with those countries, the Georgian government will prioritise building relations with the UK should there be positive signals from the UK higher education sector. It is worth noting that some of the leading figures in the Georgian government for higher education (including the chair of the parliamentary committee for higher education) have had direct positive personal experiences of higher education in the UK and so are able to relate to its high quality and innovation, as well as aspects of the curriculum such as critical thinking and work-readiness that are less present in Georgian higher education. This contributes to the high regard for the UK HE system.

Georgian universities are in general agreement that UK TNE will provide a positive added dimension to students' higher education experience and widen access to the pool of local students that can access UK education. In terms of individual institutions' approaches to engaging with UK universities (for all academic matters, including research partnerships), most stakeholders at Georgian universities agreed 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.

It should be noted that public universities in Georgia have tended to pursue research partnerships rather than TNE partnerships, with private universities having so far been more proactive in seeking TNE with UK universities. Research partnerships have suffered since Brexit due to the loss of Erasmus+ funding to promote bilateral research. Tbilisi State University had close academic collaborations with University College London and University of Westminster (focusing on immunology), but the infrastructure and funding of these relationships were impacted by Brexit. As research was the main conduit for Georgian public university engagement with the UK, there is a lack of experience in the relationship-building side of TNE with the UK.

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 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 6.3), that while there is demand and positive regard for UK higher education, there is minimal history of developed TNE in Georgia, and as such there is something 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 are 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’. Again, TNE offers an opportunity to address international recruitment in a potentially more suitable way, where students would not necessarily travel and study for three years, making it more affordable for them. 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 serve 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 said they 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 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 level. However, as UK TNE is currently underdeveloped, there will be much work on the relationship-building front 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. Finally, policy concerns within the UK may also see a higher demand for TNE engagement from UK universities, with potential interest in leveraging the growing demand for UK education in Georgia and beyond.

4) UK universities can position themselves enablers of Georgia’s higher education globalisation journey, gaining first-mover advantage in potential education hub development.

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. Firstly, ‘Action two’ to create ‘an enabling environment for TNE in other countries and promote the quality of UK TNE internationally’, and secondly ‘Action four’ to ‘support TNE to contribute to transformation of local education systems’. These objectives speak to two ambitions of the Georgian government: to improve the quality of Georgian higher education to global standards, and to turn Georgia into an international education hub.

UK Department for Business and Trade (DBT) representatives within Georgia noted that there is strong willingness from both Georgian government and private actors to enable UK universities to lead in promoting Georgia as an international education hub. The hub is not only meant to service increasing international recruitment, but also to directly contribute to Georgia’s own economic transformation. Technology and innovation are becoming more important, and there is a desire to create more degree programmes that have innovation, entrepreneurship and digital skills embedded in them. UK universities are in a prime position to facilitate this process, due to the high quality and innovation in university curricula and research-based teaching and learning. In addition to this, it was noted that technology companies are subject to a low tax regime, with even technology company employees only paying five per cent tax. Aligning the development of an international education hub with the technology sector in Georgia could create a hub for tech-based recruitment across the region.

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 even a broader MedTech hub. This could be appealing to UK universities and medical technology companies that might 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 make Georgia into a key regional logistics hub as discussed in section 3.2. Although this is an ambitious vision, there is an opportunity for developing it with UK universities involved from the outset, gaining a first-mover advantage as Georgia's partner in realising its educational and economic visions.

Whilst Georgian universities expressed interest in developing more TNE partnerships with the UK, it is the Georgian government that has the clearer focus on developing an international education hub. One challenge discussed in the next section is the need to internally align this government ambition with the capabilities and resources of the universities. Nevertheless, the DBT based in Georgia emphasised that where the UK can contribute to the skills and economic development of Georgia, there could be potential funding sought from donor organisations such as the World Bank. This could contribute to resourcing educational partnerships if it can be evidenced that there is direct contribution to the World Bank's aims for Georgia.

UK stakeholders noted that UK universities can sometimes move cautiously when developing TNE. If there is to be genuine development of an international education hub in Georgia, there would need to be greater awareness raising of the real and tangible opportunities available, as well as a clear understanding of the kind of portfolio that would best serve both UK and Georgian interests. Georgian stakeholders felt that future enablement of UK TNE partnership building in Georgia could also be supported by UK funding instruments as well as Georgian ones – for example, schemes similar to the British Council's Going Global Partnerships fund for TNE programme development.

Finally, Georgian stakeholders interviewed saw the UK as important in Georgia's global higher education journey. It was noted that Georgia does not want to become over-reliant on one or even just a few key global partnerships. Even though 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.²⁰

Key challenges for UK TNE

Despite the enthusiasm for UK higher education and clear ambition of the Georgian government to accelerate partnership building with the UK university sector, there remain a number of potential challenges. Georgian universities were candid in addressing some of the negative experiences they had had in trying to build UK relationships. The government is also broadly aware of some of the potential limitations of moving forward with accelerated TNE development with the UK.

Likewise, UK stakeholders identified a few issues, particularly around Georgia not currently being prioritised for TNE expansion in government strategy, and the likelihood of universities pursuing TNE in markets that have already shown signs of growth. As a relatively youthful higher education market for TNE and internationalisation, Georgia has remained relatively unnoticed by UK stakeholders. Awareness-raising is key – an action that is likely to fall with the Georgian government.

Overall, there were four key challenges identified through the interviews with Georgian ministry officials and policymakers, Georgian public and private universities, and students.

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. The Center for International Education provides scholarships of 50 per cent of the tuition fees for Georgian students in the UK. 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 (see section 4.5 for more details on fees), which are significantly less than what an international student pays to study in the UK.

Georgia has one of the highest gross enrolment ratios into tertiary education in the region, and unlike neighbouring Azerbaijan, where most higher education is paid for by the state, there has been a developing culture of private fee payment by individuals due to the growth of private universities in Georgia. However, stakeholders admit that there will be an upper limit to this in terms of affordability. To encourage UK universities to enter the market in Georgia, government subsidies or incentivisation packages may have to be developed.

²⁰ More information can be found in British Council Transnational Education Strategy 2023-25, <https://www.britishcouncil.org/sites/default/files/transnationaleducationstrategy.pdf>

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 would be international recruitment more than local 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 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 and that it remains something of an unknown quantity in terms of doing education business, with a reality confirmed by the low TNE enrolments and low number of universities delivering TNE at present. The UK's International Education Strategy outlines priority markets (many with higher existing established TNE partnerships), and the UK's DBT will generally focus on those markets – for example, taking UK university delegations on partnership-building or fact-finding missions. The sense from the UK stakeholders was that there needed to be more explicit overtures from the Georgian government about attracting UK universities to make a major increase in activity a reality.

Of greater 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 communications and length of time it had taken to kick-start conversations with UK universities. They also noted that when the potential partnership and TNE arrangement progressed, the expectations placed upon them in terms of recruitment were too high. One UK university had requested that a minimum of 150 students would need to be recruited in the first year of the programme to make it viable. This was felt to be too much for the Georgian institution, whose preference was to establish the TNE programme with a maximum of 25 students in the first year before accelerating recruitment in year two and beyond. The gap in expectation is instructive for future TNE partnership development.

Georgian private universities believed that they had approached the partnership with flexibility, offering both dual degree options as well as validated programmes for the UK university. Despite this, they felt that the UK university partner was not fully engaged. The same Georgian institution had similar experiences with three different UK partners, expressing frustration at the length of time it took to move conversations forward in a meaningful way.

Whilst discussions never progressed to the stage of determining a financial model for the TNE partnership, Georgian universities felt that it may have been too expensive for them.

This experience involved just a few Georgian and UK universities and may not be reflective of the sector in wider sense. However, the lessons from it can be taken forward for future TNE partnership development. From the Georgian side, greater effort needs to be taken to build awareness about their 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 rather than a collaborative and equitable approach from UK universities, something that could be remedied through better communication and expectation-setting.

3) EU-based partnerships may be more attractive for Georgian institutions and students.

Throughout interviews with Georgian stakeholders, there was expressed ambition to forge closer ties with the UK sector. However, in practice, due to Georgia's ongoing alignment process with the EU, more solid partnership building activity is taking place with European educational 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.

Erasmus+ is a key driver of this process, and since Brexit, has focused Georgian universities' attention mainly on European partners. There is a thriving ecosystem of research partnerships with European universities, though as section 5.2 shows, there is still relatively underdeveloped EU TNE in Georgia. Related to the issue of tuition fees, 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 no available, fees are likely to be lower than those of UK universities. On the other hand, lower fees for international students within EU-based universities themselves mean that Georgians are more likely to travel to study in those destinations, lessening the incentive for EU universities to operate TNE within Georgia. Georgian policymakers pointed out that while the government was willing to invest in attracting foreign universities to set up TNE, historic funding barriers between the UK and Georgia could also be addressed from the UK side.

Nevertheless, there are examples of existing TNE and student mobility schemes that point towards more innovative and flexible models of TNE in the future, and that could engage UK, Georgia, and EU universities. Students interviewed at Ilia State University were studying a specialist master's

programme that allowed them to spend semesters at the University of Glasgow and the University of Tartu in Estonia. Likewise, one of the main TNE providers in Georgia offering UK-based programmes (CITY College Thessaloniki via the University of Sheffield and University of York), offers an executive MBA as a joint degree with the University of Strasbourg.

Private universities in Georgia are also balancing EU and UK stakeholders, reflecting a broader trend relating to the government pivoting towards both the UK and EU for supporting its internationalisation ambitions. KIU, for example, was developed with Technical University Munich (TUM), and retains very close and shared ties with the university, for example using their job advertising boards. At the same time, KIU is in discussion with several UK universities about developing research partnerships.

A final point is about equivalency, recognition and curriculum-mapping processes. 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, similar to 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, the National Center for Education Quality Enhancement (NCEQE) and government stakeholders do 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 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.

A fourth area that requires further consideration in the Georgian approach to TNE development is around the teaching and language skills needed by academic staff to conduct TNE programmes. Many 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 effectively be able to take up full-time study in the English language.

Some universities have embedded accredited English language teaching into their degree programmes; for example, KIU has a partnership with the British Council to include credit-bearing modules for English language in Georgian-language taught programmes. 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 a concern for some Georgian institutions,

though there are examples of UK TNE in other countries where teaching is delivered fully, or in part, in the local language.

In addition to this, there are key pedagogic differences between the UK and Georgian higher education systems. Georgian stakeholders were keen to introduce UK programmes, indicating that they believed skills development in critical and innovative thinking, work-readiness and communications to be already embedded in the UK curriculum. However, they are also aware that Georgian academic staff may not have the skills to convey these elements. Skills development is a focus of both the Georgian government and the World Bank. Although there is evidence of a strong research culture at Georgian universities, there is less evidence of professional training and development for teaching. UK TNE would therefore also have to enable staff development, and partnership creation would need to consider funding and infrastructure for this (such as through staff exchange fly-in faculty training).

Another dimension is the actual portfolio of programmes to introduce. Currently, the low level of UK TNE in Georgia is in business and management subjects. It has already been mentioned that medical subjects are the most popular for international students in Georgia, and that both government and universities would like to diversify the portfolio of courses. However, interviews with Georgian universities showed that there are no developed mechanisms to test future portfolio offers for domestic or international students. Any UK TNE programmes in the future would need rigorous assessing of demand levels amongst target student groups. Global market insight data into student recruitment is not being used, and is something that UK universities could potentially support with.

A final area relates to the potential models of TNE that could be undertaken in Georgia, which would be beneficial to both UK and local parties. Georgian stakeholders at the ministry and parliament stated that they are 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. Though this positivity should be welcomed, it may also be too 'open' in terms of not providing clarity to the UK market. UK stakeholders insist that where there is clarity in regulations, operations and taxes, they are more likely to make efficient decisions. Currently, only joint and dual degree programmes are covered in the regulations set forward by the NCEQE, and there are no clear guidelines on franchise or validation agreements, online learning or international branch campuses. It was stated by at least one policymaker in Georgia, and one university, that they believed online learning was currently not recognised by the government, but that regulations were being reviewed.

Summary of opportunities and challenges for UK TNE development in Georgia

Overall, UK stakeholders are not aware of the developing higher education landscape in Georgia and have very little engagement in TNE there. Research partnerships developed with Georgian institutions have been forged through individual relationships rather than through institutional strategy. Moreover, Georgia is not currently a strategic priority market in the UK's published International Education Strategy. The TNE opportunities in Georgia therefore need to be highlighted in a persuasive and engaging way to direct the attention of UK university leaders towards Georgia in a competitive global market for emerging TNE opportunities.

There are some positive conditions for UK TNE development in Georgia. The government is intent on internationalising Georgian higher education and has a high regard for the quality and reputation of UK higher education. Substantially growing international recruitment has created a belief that higher education can become an economic driver in Georgia. Accelerating high-quality foreign university presence through research and TNE is a stated ambition of the Georgian government, along with further increasing international recruitment and diversifying source markets. Stakeholders in Georgia believe the UK can support this global journey.

For UK universities, there are opportunities to embed in a location that is attracting more international students during a period where international recruitment to home campuses may be threatened, particularly from markets sensitive to policy changes and economic fluctuations. There is a strong opportunity to fulfil some of the ambitions of the British Council's TNE strategy in supporting the uplift of the host country's education system and to contribute to Georgia's higher education and economic development. There could also be opportunities to leverage existing strengths in Georgia and consolidate into a MedTech hub.

Potential barriers include the uncertainty of the financial model, as well as the lack of experience in developing TNE between the two countries. UK fees are perceived to be too high for domestic students, and the Georgian government will need to support its universities financially in enabling TNE with the UK. European universities, with lower fees and more similar degree structures, could prove more attractive for Georgian universities.

UK universities could seriously consider Georgia as a potential TNE hub, but they will need to further assess the portfolio of programmes that will be in demand from domestic and international students in Georgia. They will also need to approach partnerships with Georgian government, institutions and private actors in an equitable and mutually beneficial way.

Recommendations

Based on the assessment of key opportunities and challenges for developing UK TNE in Georgia, the following recommendations are provided to ensure that Georgian and UK stakeholders are aware of necessary steps that need to be taken to move forward with enduring, sustainable and mutually beneficial TNE. Four recommendations are provided in total. The first two provide enabling actions to facilitate TNE, and the final two provide guidance on supporting Georgia's ambitions to become a thriving international education hub, with the UK as its key partner.

Alongside these medium-term recommendations, it is also recommended that the Georgian Embassy in the UK host a discovery event for UK universities to showcase the Georgian government's ambition, clearly outline opportunities for UK TNE and discuss with transparency any potential incentivisation that could hasten TNE partnership development. If enough interest is generated at this initial event, it could open the opportunity for a DBT visit to Georgia to enable meetings and partnership-scoping opportunities.

1) Ensure equivalency with UK qualifications and develop guidelines and regulations for all forms of TNE.

Although the NCEQE in Georgia is already working on a process to ensure that UK bachelor's and master's programmes have full equivalency and recognition in Georgia, this process needs to be finalised before there can be any realistic further development of UK TNE in Georgia.

UK-based organisations such as the UK Quality Assurance Agency and UK-ENIC are specialist in international quality assurance and recognition alignment processes, and their engagement may also further the buy-in of future UK university partners in Georgia.

Once equivalency and recognition are formalised and published, the next stage should be an inter-governmental MoU between the two countries to set out the potential scope and ambition of TNE partnership development.

Finally, if there is enough interest from UK universities, a specialist UK-Georgia education board should be created to oversee the creation of guidelines and regulations to develop different forms of TNE, including joint and dual degrees, international branch campuses, franchise arrangements and online learning.

2) Enabling UK TNE in Georgia

The Georgian government has indicated that it is willing to fund and resource future TNE partnership development between the UK and Georgia. However, to encourage and hasten UK university interest, it is recommended that 'enablement' packages are developed to provide clarity and incentive for UK universities to operate in Georgia. Ideally, there would be enablement packages for all forms of TNE, but this should only be developed after establishing the level of interest from the UK sector.

The enablement package should include: a) the laws for establishing UK TNE in Georgia; b) operational guidelines on how to set up TNE in Georgia; and c) financial information regarding UK TNE in Georgia, including taxation, revenue share arrangements and Georgian government financial incentives to attract UK universities.

The Georgian government could also create a series of engagement events to introduce potential private investors and partners to UK universities, including those that might be interested in partnering for international branch campuses.

There is also potential for the UK government to further support and fund TNE development. This could be through direct funding of TNE joint or dual degree development, or through policy initiatives to ensure regulatory and accreditation-based alignments between UK and Georgian higher education institutions.

3) Supporting institutional transformation in Georgia

Although there are a number of English language-taught degrees in Georgian universities, there also needs to be more investment and training to develop a pipeline of English language based academic teaching and research to meet the Georgian government's ambitions. Alongside this, there should also be increased incentivisation to recruit international staff, which would serve internationalisation ambitions as much as increasing international student recruitment. UK universities can play a key role in this institutional transformation, providing best practice in academic teaching professional development, developing a new portfolio of English language-taught programmes, and using their experience and resources to increase and diversify international student recruitment in Georgia into UK TNE programmes.

4) Enabling a Georgian international higher education hub

Georgia's government has witnessed the benefits of rapidly increasing international recruitment and seeks to create an international education hub to consolidate these trends. UK universities could benefit from this, where international students coming to study in Georgia could be attracted to UK TNE programmes. This could also contribute to greater sustainability and diversity in the pipeline of

international students on UK degree programmes, with Georgia acting as a conduit for students receiving a high-quality UK education.

To truly establish a world-leading international education hub, the Georgian government, and any potential future UK partners, should conduct rigorous market testing as to the portfolio of programmes that should be offered. There have been examples in other countries where TNE hubs have struggled and individual universities have had to pull out due to lack of or bad market intelligence. The UK sector can support in this process, as many universities are attuned to using data analysis and market intelligence services to understand student demand and course preferences.

There is also the opportunity to turn Georgia into an education hub with thematic priorities, such as logistics (fulfilling the government's ambition to make Georgia the central logistics hub on the overland Silk Road trade routes) or medicine (thereby consolidating the existing trend of recruiting international students to medical subject programmes). There is an opportunity to 'think big', creating a MedTech hub and attracting the UK and international medical industries to work together on the medical education developing in the hub.

However, all of this involves not just bilateral government and institutional action, but also effective marketing and communications. One of the key 'macro' findings of this research is the relative lack of awareness of Georgia and its potential as a TNE hub. The Georgian government could invest in a campaign of attraction to bring UK universities to Georgia and increase its international reputation as a centre for educational excellence in existing and newer international recruitment source markets.



