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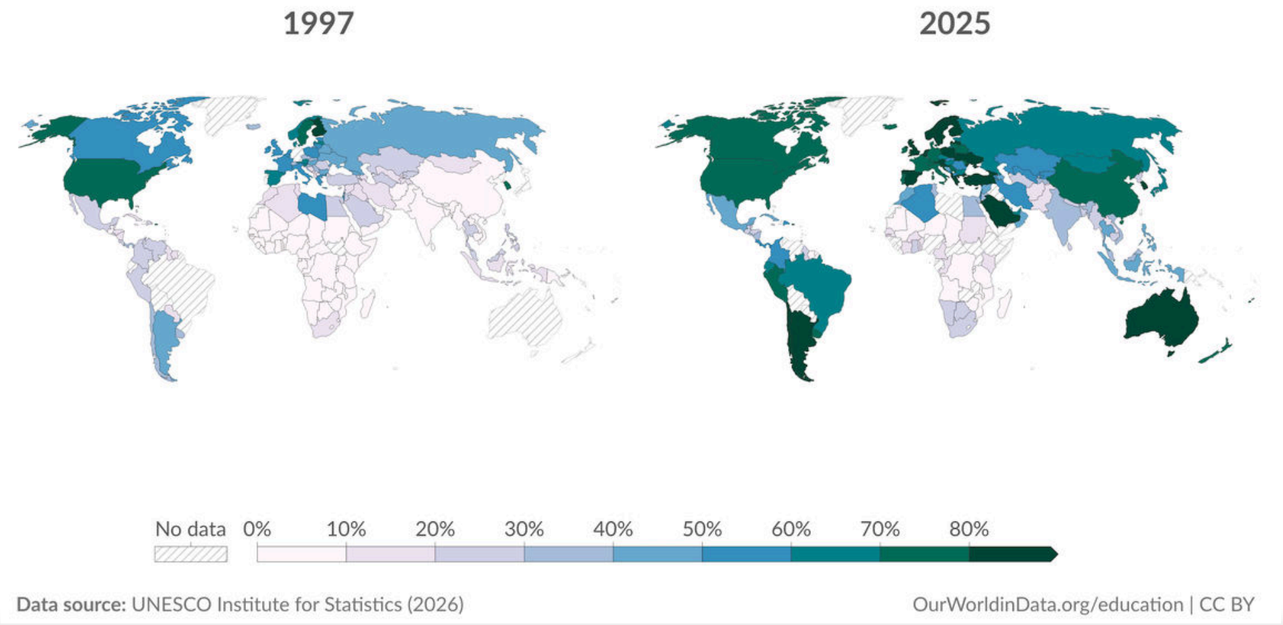
What is Transnational Education (TNE)? From evidence to emerging trends

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WHY TNE MATTERS



Data source: UNESCO Institute for Statistics (2026)

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GLOBAL EXPANSION OF HIGHER EDUCATION

Global tertiary education enrolment has **nearly tripled since 1997**, the year of the Lisbon Recognition Convention, increasing from **92.5 million students to 265.3 million in 2023**.

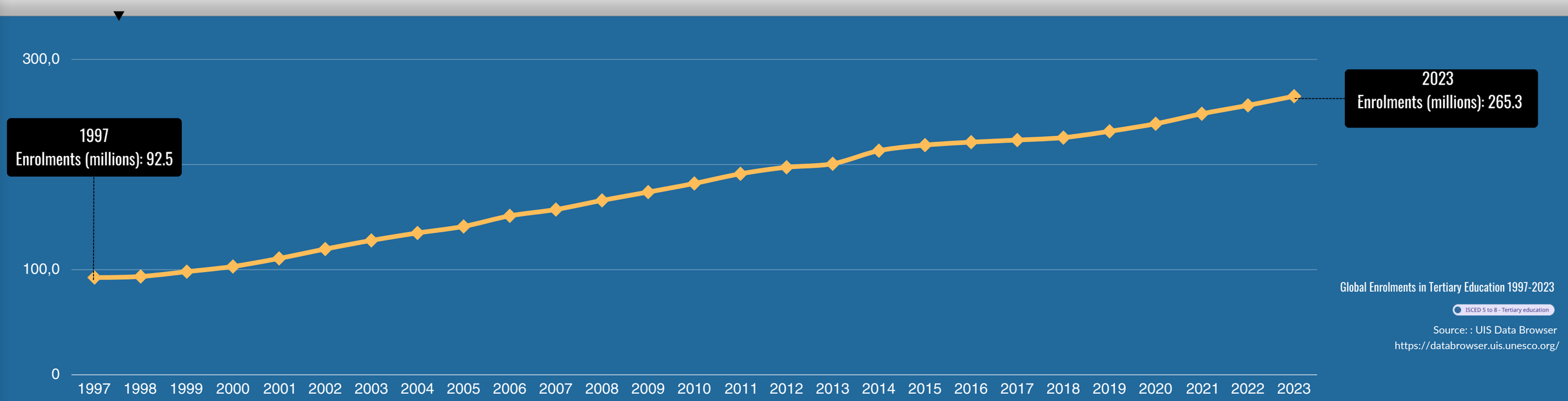
This expansion has been accompanied by major changes in tertiary education participation rates across world regions. Rising demand, uneven access and differences in national education capacity are creating new opportunities for international cooperation and alternative models of educational provision.

Why does it matter for TNE?

Transnational Education can help expand access to higher education by bringing programmes, institutions and academic expertise to students across jurisdictions.

Share of people enrolled in tertiary education, 1997-2025

https://ourworldindata.org/grapher/school-enrolment?enrolment_type=gross_enrolment&level=tertiary&sex=both



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WHY TNE MATTERS

Global student mobility

7.3M

Internationally mobile students

Share of tertiary students

~2.7%

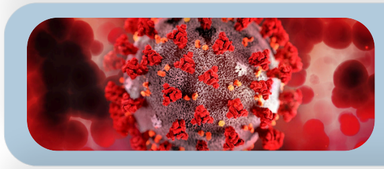
7.3M out of more than 269M worldwide

UNESCO https://www.unesco.org/en/higher-education

INTERNATIONAL STUDENT MOBILITY AND GEOPOLITICAL SHIFTS

International student mobility has more than tripled since 2000, reaching approximately 7.3 million students worldwide. Yet internationally mobile students still represent fewer than 3% of global tertiary enrolments.

International mobility is increasingly shaped by geopolitical uncertainty:



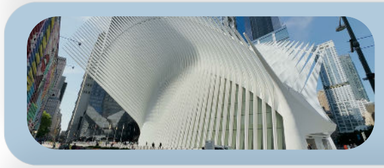
Pandemics and global disruptions:
COVID-19 demonstrated how quickly international travel and campus-based education can be interrupted.



Visa restrictions and immigration policies:
Stricter student visa requirements, enrolment caps and restrictions on accompanying family members are reshaping access to major destination countries.



War and armed conflict:
Conflicts disrupt universities, displace students and academics, damage educational infrastructure and interrupt academic cooperation.



Shifting education hubs:
Asian, Gulf and other emerging destinations are investing in international campuses and partnerships, diversifying traditional mobility routes.



Brain drain and national capacity:
Governments are increasingly exploring ways to expand access to international education domestically while retaining talent.

WHERE TNE DRIVES THE HE SECTOR

382 BRANCHES WORLDWIDE

40 HOME COUNTRIES

85 HOST COUNTRIES

76 CLOSED CAMPUSES

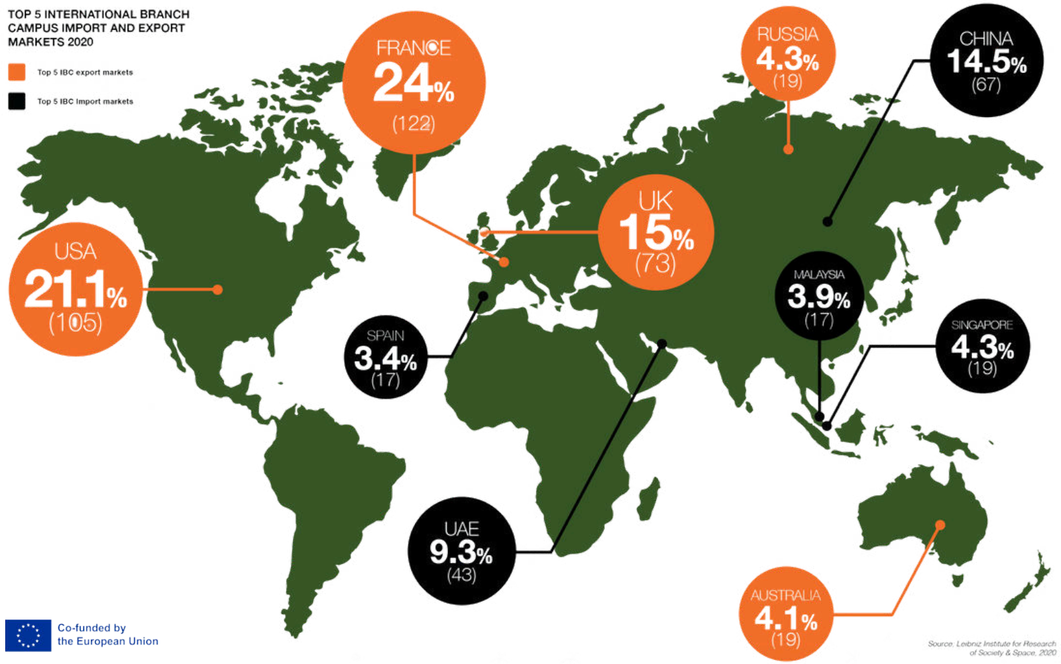
LARGEST **EXPORTERS**



LARGEST **IMPORTERS**

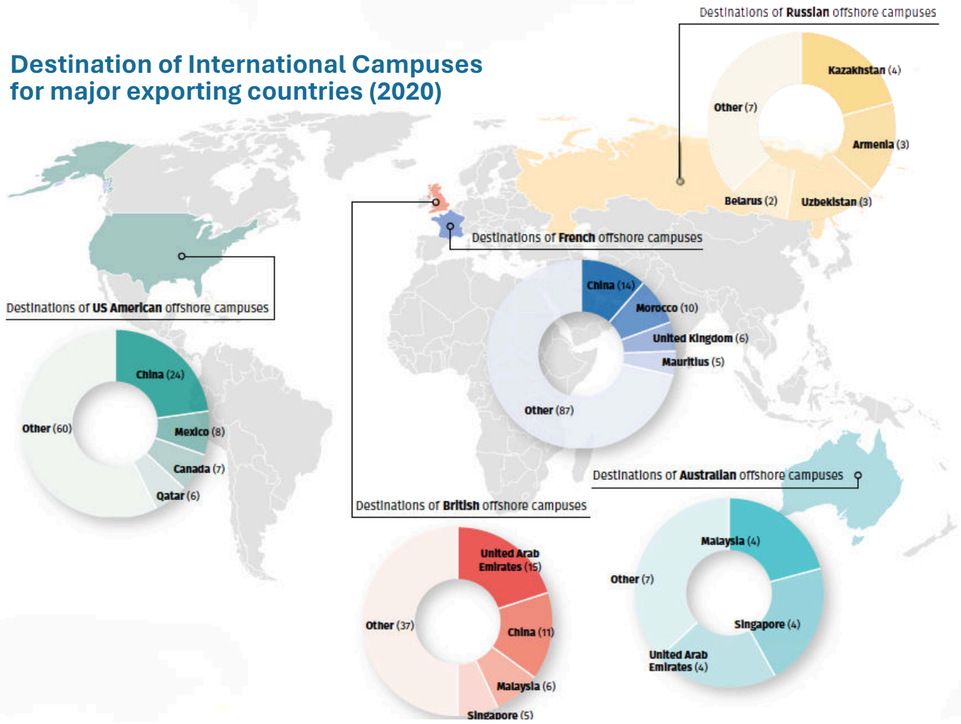


Source: Cross-Border Education Research Team (C-BERT) 2012-2026 International Campuses (Updated September 2026)

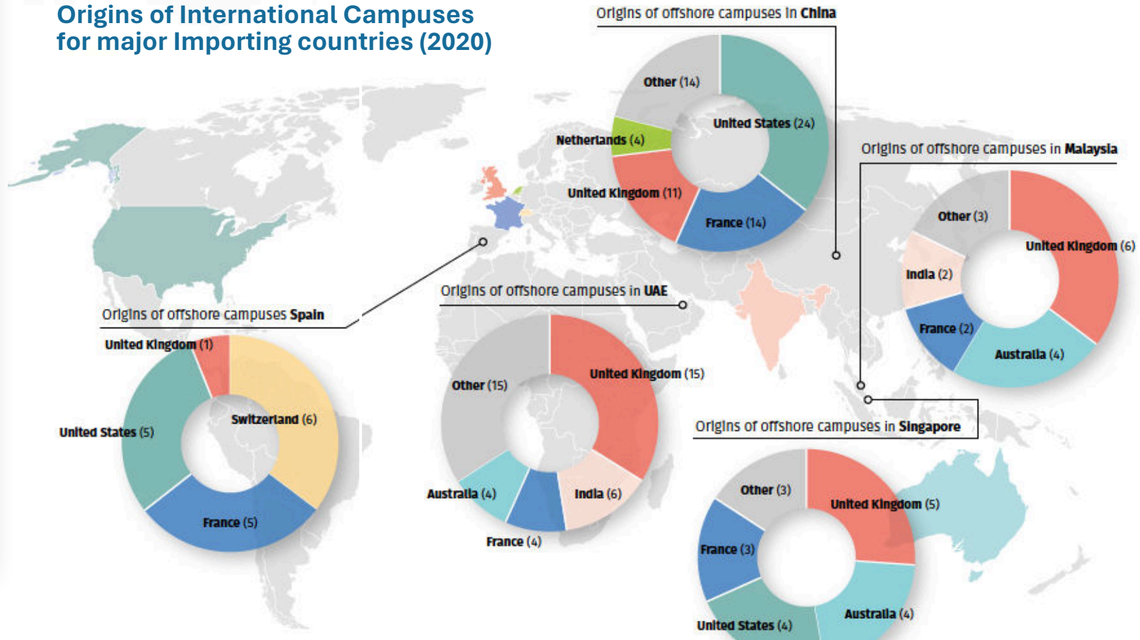


Source: : Kleibert, Jana M.; Bobée, Alice; Rottleb, Tim; Schulze, Marc (2020) : Global Geographies of Offshore Campuses, Leibniz-Institut für Raumbezogene Sozialforschung (IRS), Erkner

Destination of International Campuses for major exporting countries (2020)



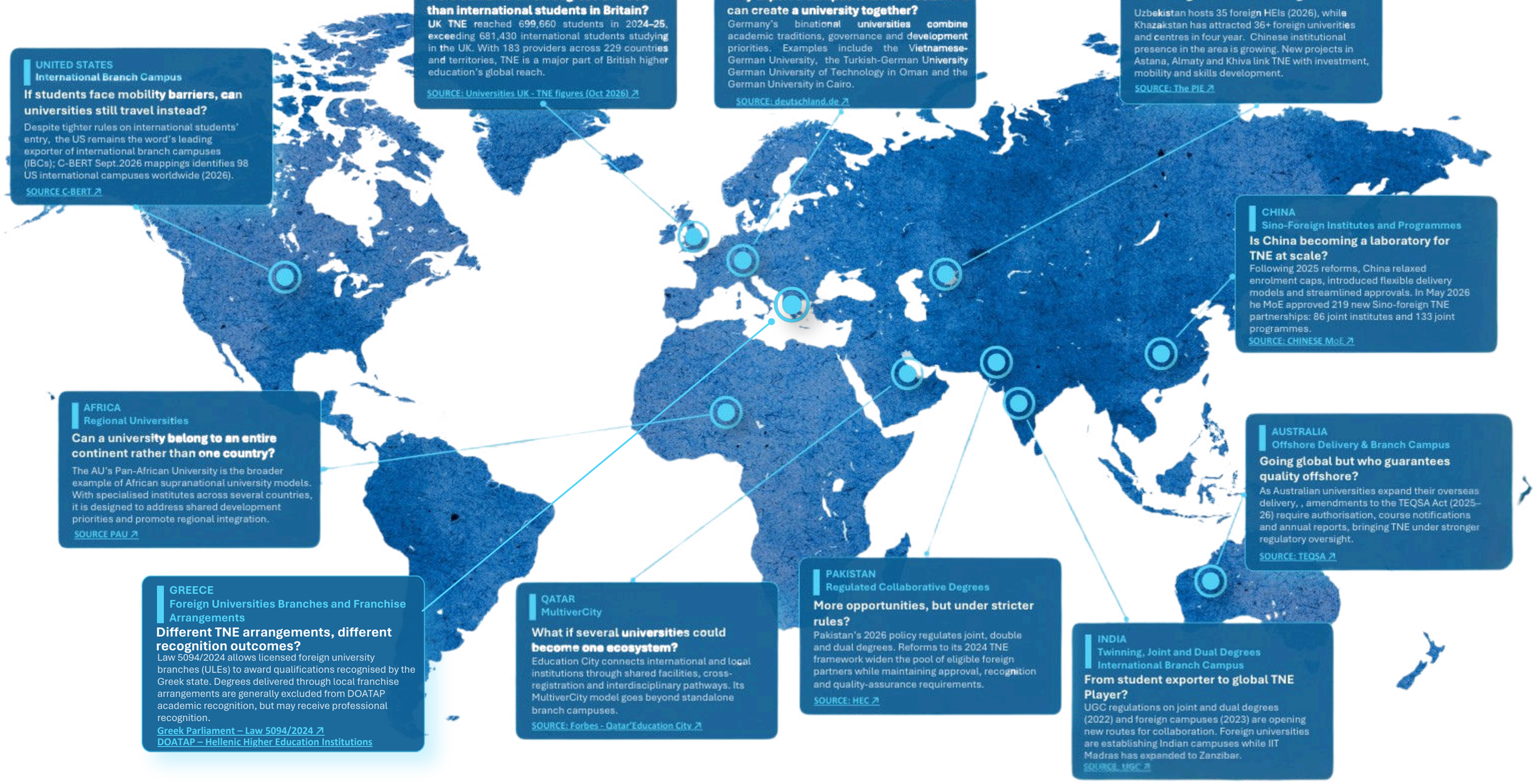
Origins of International Campuses for major Importing countries (2020)



Source: : Kleibert, Jana M.; Bobée, Alice; Rottleb, Tim; Schulze, Marc (2020) : Global Geographies of Offshore Campuses, Leibniz-Institut für Raumbezogene Sozialforschung (IRS), Erkner

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UNITED KINGDOM
Partnerships and Branch Campus

More students on UK degrees overseas than international students in Britain?

UK TNE reached 699,660 students in 2024–25, exceeding 681,430 international students studying in the UK. With 183 providers across 229 countries and territories, TNE is a major part of British higher education's global reach.

SOURCE: Universities UK - TNE figures (Oct 2026) ↗

GERMANY
Binational Universities

Why export a campus when two countries can create a university together?

Germany's binational universities combine academic traditions, governance and development priorities. Examples include the Vietnamese-German University, the Turkish-German University German University of Technology in Oman and the German University in Cairo.

SOURCE: deutschland.de ↗

CENTRAL ASIA
International and Embedded Campuses

The next global hub for foreign HEIs?

Uzbekistan hosts 35 foreign HEIs (2026), while Khazakstan has attracted 36+ foreign univerities and centres in four year. Chinese institutional presence in the area is growing. New projects in Astana, Almaty and Khiva link TNE with investment, mobility and skills development.

SOURCE: The PIE ↗

UNITED STATES
International Branch Campus

If students face mobility barriers, can universities still travel instead?

Despite tighter rules on international students' entry, the US remains the word's leading exporter of international branch campuses (IBCs); C-BERT Sept.2026 mappings identifies 98 US international campuses worldwide (2026).

SOURCE C-BERT ↗

CHINA
Sino-Foreign Institutes and Programmes

Is China becoming a laboratory for TNE at scale?

Following 2025 reforms, China relaxed enrolment caps, introduced flexible delivery models and streamlined approvals. In May 2026 he MoE approved 219 new Sino-foreign TNE partnerships: 86 joint institutes and 133 joint programmes.

SOURCE: CHINESE MoE ↗

AFRICA
Regional Universities

Can a university belong to an entire continent rather than one country?

The AU's Pan-African University is the broader example of African supranational university models. With specialised institutes across several countries, it is designed to address shared development priorities and promote regional integration.

SOURCE PAU ↗

AUSTRALIA
Offshore Delivery & Branch Campus

Going global but who guarantees quality offshore?

As Australian universities expand their overseas delivery, , amendments to the TEQSA Act (2025–26) require authorisation, course notifications and annual reports, bringing TNE under stronger regulatory oversight.

SOURCE: TEQSA ↗

GREECE
Foreign Universities Branches and Franchise Arrangements

Different TNE arrangements, different recognition outcomes?

Law 5094/2024 allows licensed foreign university branches (ULEs) to award qualifications recognised by the Greek state. Degrees delivered through local franchise arrangements are generally excluded from DOATAP academic recognition, but may receive professional recognition.

Greek Parliament – Law 5094/2024 ↗
DOATAP – Hellenic Higher Education Institutions

QATAR
MultiverCity

What if several universities could become one ecosystem?

Education City connects international and local institutions through shared facilities, cross-registration and interdisciplinary pathways. Its MultiverCity model goes beyond standalone branch campuses.

SOURCE: Forbes - Qatar'Education City ↗

PAKISTAN
Regulated Collaborative Degrees

More opportunities, but under stricter rules?

Pakistan's 2026 policy regulates joint, double and dual degrees. Reforms to its 2024 TNE framework widen the pool of eligible foreign partners while maintaining approval, recognition and quality-assurance requirements.

SOURCE: HEC ↗

INDIA
Twinning, Joint and Dual Degrees
International Branch Campus

From student exporter to global TNE Player?

UGC regulations on joint and dual degrees (2022) and foreign campuses (2023) are opening new routes for collaboration. Foreign universities are establishing Indian campuses while IIT Madras has expanded to Zanzibar.

SOURCE: UGC ↗

SO WHAT EXACTLY IS TNE TODAY?

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WHAT IS TNE

DEFINING FEATURES - what makes it TNE

1. Movement between jurisdictions

Borrowing or transfer of elements of higher education systems from one jurisdiction to another.

2.Educational provision involving elements of different higher education systems

The movement is embedded in the provision of study programmes, sets of courses or educational services that incorporate elements originating from another higher education system (or a non-country-specific system).

VARIABLE FEATURES - what can change it TNE models

What moves?

Students, faculty, providers, programmes, curricula or knowledge.

Where and how?

On-site, online, blended. In one country or across several countries

Who is responsible?

One institution or several, with distinct or shared academic roles.

What is the outcome?

Single, joint, double or dual degrees; different systems of reference.

Transnational Education

*A **subset of cross-border education** where study programmes, or sets of courses, or educational services **borrow or transfer elements of one country's higher education system (or non-country specific education systems) from or to another country**.*

*It may involve the **movement of faculty, learners, knowledge, programmes, providers and curricula across jurisdictional borders**. It may encompass a **wide range of mode of delivery** (including distance and blended learning) and may or may not require learners mobility.*

*The programme(s) and qualification(s) awarded **may belong to the domestic education system of reference of the providing institution, to the education system of a State different from the State in which the providing institution operates, or may be independent of any national education system.***

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HOW IS TNE ORGANISED?

Transnational arrangements define how education is delivered, governed and academically managed across borders.

INDEPENDENT ARRANGEMENTS

No academic partnership with local institution(s)

A foreign institution provides education across borders while retaining academic responsibility. Licensing or government agreements may still be required.

Examples

International branch campuses, offshore institutions, self-study distance education, non country-specific (international) institutions

COLLABORATIVE ARRANGEMENTS

Responsibilities shared with local institution(s)

Foreign and local institutions collaborate in curriculum design, teaching, quality assurance and/or awarding, to varying degrees.

Examples

Franchise and validation agreements, twinning programmes, joint programmes, joint universities, country-branded universities.

The key variable: degree of academic collaboration

No local academic collaboration



Highly integrated collaboration

What actually changes across arrangements?

Curriculum Design
Who designs and approves it?

Quality Assurance
Who oversees external quality?

Delivery
Who teaches and provides the studies?

Awarding
Who awards the qualification?

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TNE: KEY TAKEAWAYS AND OPEN QUESTIONS

A GROWING AND EVOLVING PHENOMENON

TNE is a growing and dynamic phenomenon, calling for better understanding, research, data collection and monitoring.

How can we better study, understand and monitor the evolving TNE landscape?

OPPORTUNITIES AND RISKS



TNE can widen access and strengthen international cooperation, but also raises concerns about quality, commodification, local relevance and fraud.

How can we maximise TNE's opportunities while mitigating its risks?

MULTILEVEL GOVERNANCE

Effective oversight requires coordination among various national authorities, HEIs, quality assurance and recognition bodies.

How can responsibilities be clearly defined and coordinated across institutions and jurisdictions?

RECOGNITION CHALLENGES



Diverse arrangements and outcomes challenge traditional approaches to what we mean by national education systems and qualifications.

How can recognition practices adapt to increasingly diverse TNE arrangements and qualifications? What challenges?


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Thanks for your attention