BRITISH COUNCIL

Research

Transnational Education in Pakistan:

Current Challenges and Future Prospects

May 2026



www.britishcouncil.pk

This report was commissioned by the British Council and prepared by Times Higher Education (THE). The views expressed are those of the researchers and do not necessarily reflect the views of the British Council.

Citation:

Cader, I., Hassan, S., Silva, A., and Tan, S. (2026). Transnational education in Pakistan: current challenges and future prospects. British Council. https://doi.org/10.57884/6J9D-XB29

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

The British Council is the United Kingdom's international organisation for cultural relations and education opportunities.

Authors

Ishan Cader
Shiraz Hassan
Angela Silva
Stefanie Tan

British Council team

Sandeepa Sahay
Hamza Salim
Amna Nadeem
Geena Whiteman
Sajeewa Meepage

Table of contents

Executive Summary **1**

1. Introduction **4**

1.1. Background 4

1.2. Transnational Education 5

1.3. Methodology 6

2. Higher Education in Pakistan **8**

2.1. System and structure 8

2.2. Sectoral challenges and strategic priorities 11

3. TNE in Pakistan **13**

3.1 TNE system and structure 13

3.2 Understanding the HEC TNE Policy 2024 14

3.3 Geographical analysis of TNE providers 16

3.4 Gender distribution amongst TNE students 17

3.5 English language proficiency requirements for TNE students 17

3.6 UK TNE in Pakistan 18

3.7 Non-UK TNE in Pakistan 25

4. Governance, strategy and policy **28**

4.1 Foreign collaboration policy 28

4.2 Quality assurance and impact 30

4.3 International engagements 32

5. Challenges and opportunities **33**

5.1 Challenges 33

5.2 Opportunities 34

6. Case Studies 36

Case Study 1 - University of London (UoL) 36

Case Study 2 - University of Kent with BIC 40

Case Study 3 - University of Hertfordshire with TMUC 44

Case Study 4 - Arden University with Roots IVY 48

7. Conclusion 51

7.1 Policy and delivery considerations 51

7.2 Policy and delivery considerations for Pakistani Institutes 52

7.3 Policy and delivery considerations for UK stakeholders 53

Appendix 56

Annex A: UK TNE Mapping in Pakistan 57

List of Tables and Figures

List of Tables

Table 1:	Research Methodology Phases	7
Table 2:	Mapping of 2024 HEC Policy TNE Types in Pakistan (based on and common models of TNE)	16
Table 3:	Top 10 UK universities TNE enrolment in Pakistan (2024/25)	21
Table 4:	HESA-TNE partnership mapping	22

List of Figures

Figure 1	UK TNE in South Asia	18
Figure 2	UK TNE enrolments in Pakistan across 10-year period (2014/15 - 2024/25)	20
Figure 3	UK TNE enrolments in Pakistan by level of study (2019/20 - 2024/25)	20
Figure 4	UK TNE enrolments in Pakistan by type of provision (2019/20 - 2024/25)	23
Figure 5	UK TNE enrolments in Pakistan by delivery model and level of study, 2024/25	23
Figure 6	Pakistan enrolment trends at UoL	36
Figure 7	Pakistan enrolments at the UoL TNE programmes by gender	39

List of abbreviations

AI	Artificial Intelligence
BIC	Beaconhouse International College
LLB	Bachelor of Laws
CPL	Collaborative Partnership Lead
DBT	Department for Business and Trade
GER	Gross Tertiary Enrolment Ratio
HEC	Higher Education Commission
HESA	Higher Education Statistics Agency
HEDR	Higher Education Data Repository Division
HEI	Higher Education Institutions
IBC	International Branch Campus
IBCC	Inter Board Coordination Commission
KBS	Kent Business School
MDI	Management Development Institute Pakistan
MBA	Master of Business Administration
NAHE	National Academy of Higher Education
NQF	National Qualifications Framework
PBC	Pakistan Bar Council
PEC	Pakistan Engineering Council
PTE	Pearson Test of English
PG	Postgraduate
QAA	Quality Assurance Agency
RTC	Recognised Teaching Centres
SDL	Supported Distance Learning
SDG	Sustainable Development Goals
TMUC	The Millennium Universal College
THE	Times Higher Education
TNE	Transnational Education
UG	Undergraduate
HEP	Higher Education Provider
OfS	Office for Students
UH	University of Hertfordshire
UoL	University of London
UCI	Universal College Islamabad



Executive Summary

Pakistan's higher education sector is growing, with enrolments more than doubling in the last decade. The Higher Education Commission (HEC) oversees a strong regulatory system, and leading institutions are increasing its visibility. At the same time, many students continue to go abroad, driven by a desire for global exposure, diverse learning environments, and international career opportunities.

In 2024/25, UK transnational education (TNE) enrolments in Pakistan reached a record of 15,085 students, mostly through distance learning models. UK TNE enrolments have more than doubled compared to five years earlier, with 68 institutions reporting students in Pakistan studying for their qualifications.[1]

The majority of the TNE provision in Pakistan is delivered through private colleges networks, with local universities still largely uninvolved. Undergraduate students make up a large majority of the total and are also growing at a somewhat faster rate, with 5-year compound annual growth rate (CAGR) of 18% compared to 14% for postgraduates. However, while UK TNE in Pakistan is expanding, it is not keeping pace with the rate of growth in Sri Lanka and Nepal.

This report aims to support UK universities, policymakers, and the Pakistani government in expanding higher education by harnessing the potential of TNE partnerships. It provides a comprehensive overview of the operational and quality assurance landscape of TNE in Pakistan, helping stakeholders make informed decisions for sustainable growth. This report also offers a detailed analysis of the HEC TNE policy 2024 and its potential to enhance and streamline the Transnational Education (TNE) in Pakistan.[2]

Despite Pakistan's significance as a UK TNE partner, there remains scope for further research on partnership development, quality assurance, and operations. This report offers insights to guide stakeholders in strengthening and expanding UK-Pakistan TNE partnerships/collaborations in Pakistan. The key findings of the research are:

1. The University of London is the leading provider of UK TNE enrolments in Pakistan

The University of London (UoL) is by far the largest provider of UK TNE in Pakistan, accounting for 8,575 out of 15,085 enrolments in 2024/25 — about 57% of the total. The UoL's delivery model differs from most other UK institutions, offering a flexible distance learning model which allows students to study without relocating, supported by a network of 31 active Recognised Teaching Centres offering local academic support. The UoL also benefits from its well-established legacy in Pakistan, dating back decades, while its focus on popular undergraduate programmes in law, business, and economics meets high local demand.

1. As HESA's data is rounded to the nearest 5 students, this figure does not include universities with two or fewer Pakistan-based students
2. Higher Education Commission, "TNE Policy 2024", https://www.hec.gov.pk/english/services/universities/Documents/HEC-Foreign-Collaboratin-Policy.pdf (2024).

2. Joint and double degree (a distinct pathway) model is under development

The HEC is also actively exploring the development of a dedicated policy for joint and double degree programmes. This model offers deeper academic integration and co-branding opportunities and is particularly appealing to Pakistani mainstream universities[3] seeking to maintain their academic identity while engaging in high-quality global partnerships. The academic community welcomes HEC's forward-looking approach in this area and looks forward to the formalisation of this pathway, which is expected to further enrich Pakistan's higher education landscape.

3. Expanding access to global education through articulation models

Articulation programmes are structured arrangements, where students commence their studies in Pakistan and complete their degrees at a partner international institution. They offer increased flexibility and affordability. HEIs see strong potential in such models to expand access to international education, support student mobility, and foster institutional partnerships. There is optimism within the academic community about initiation and continued progress in this area under HEC's leadership.

4. Evolving understanding of TNE types among stakeholders

According to the new TNE policy, there are three recognised types of TNE models. Type-I is the most common, where foreign institutions provide the curriculum while local institutions handle delivery. Type-II, involving franchised campuses operated by private investors or education providers, is rare—University of Greater Manchester Islamabad being a notable example. Type-III, where a foreign university sets up a fully owned campus in Pakistan, is yet to be implemented. Despite the presence of three distinct partnership types—Type-I (Teaching Centre Model), Type-II (Franchise campus), and Type-III (International Branch Campus)— some students and parents are still developing an understanding of these differences.

Policy and Delivery Considerations:

The study highlighted key areas for further policy considerations to support TNE stakeholders—such as Pakistani policymakers, local TNE providers, and UK universities—make informed decisions in anticipation of TNE growth.

3. Mainstream universities refer to fully established, degree-awarding institutions such as LUMS, Bahria, and NUST — universities with a comprehensive academic structure and governance in place

1. **Strengthen quality control and collaboration in TNE partnerships**

Pakistani universities should take a proactive role in managing TNE partnerships and coordination with UK universities and local regulatory bodies. This approach will ensure that TNE programmes meet international academic standards and align with local market demands. Active involvement in the quality assurance process will also guarantee that academic rigor is maintained and that the TNE programmes remain relevant and successful.

2. **Advance double degree/joint degree opportunities through policy development**

There is growing interest among Pakistani universities regarding double degree programmes, particularly related to co-branding and credit transfer benefits. The Higher Education Commission (HEC) is already in the process of developing a double degree/joint degree policy to address these issues and facilitate Pakistani institutions in offering co-awarded degrees in partnership with international universities. Implementing double degree programmes will significantly deepen university-to-university collaborations, fostering stronger academic and research linkages. To build on this momentum and institutional interest, timely publication of this policy by HEC will be beneficial.



3. **Introduce articulated programmes to increase access to TNE**

Articulated programmes may be introduced to facilitate smoother transitions for students. These programmes will allow students to begin their studies at a local institution and transfer seamlessly to a UK partner institution to complete their degree. This model will enhance access to international education by reducing the barriers of entry, offering local students the opportunity to benefit from both local and international educational standards.

4. **Foster exclusive partnerships with local institutions**

UK universities should consider adopting a model of exclusive partnerships with reputable local institutions, where only one partner is engaged within a given region. This approach supports consistency in academic delivery, maintains quality standards, and reinforces brand identity in TNE programmes. Limiting partnerships to one institution per region helps reduce internal competition, which can otherwise lead to disparities in quality and student experience. Exclusive collaborations enable stronger academic alignment, more coherent student support, and deeper institutional engagement. They also promote shared investment in staff development and long-term planning, enhancing the credibility and sustainability of UK qualifications in the region.

5. **Enhance student experience and academic integration**

UK universities may actively engage with students, faculty, and local industries in Pakistan. Joint faculty teaching models, faculty visits, mentorship programmes, and student mobility schemes will deepen academic integration and improve the overall student experience, ensuring that TNE programmes are both academically rigorous and aligned with industry needs.

1. Introduction

1.1. Background

The higher education sector in Pakistan can be described as rapidly growing, with more than a twofold increase in enrolments in the last decade,[4] and a comprehensive regulatory system monitoring the progress of higher education institutions by the HEC. Over the past five years, the participation of public and private universities from Pakistan in international rankings has steadily increased, enhancing the visibility of the country's higher education system. The number of Pakistani institutions ranked in the THE World University Rankings have increased from 39 in 2023 to 47 in 2024.[5] Moreover, in the THE Impact Rankings 2024, the number of ranked Pakistani institutions also increased from 72 in 2023, to 89 in 2024.[6]

Amidst these developments, however, is still an increasing number of outbound students from Pakistan to other higher education systems worldwide. This trend is attributed to several factors, including the pursuit of enhanced career prospects and a desire for perceived higher-quality education abroad.[7] Pakistan is among the top sending countries for inbound recruitment to UK universities, consistently reaching third place worldwide in terms of international student enrolments in 2024/25.[8]

UK TNE in Pakistan is also growing, reaching 15,085 enrolments in 2024/25.[9] However, despite being the region's second-largest partner in terms of students physically studying in the UK, Pakistan is behind countries like Sri Lanka and Nepal in terms of TNE enrolments – although the country overtook India to become the UK's third-largest TNE host in the South Asia region in 2024/25.

At present, most UK TNE students are enrolled in distance learning programmes with UK universities. To date, there are no International Branch Campuses (IBCs) of foreign universities in the country. IBCs – especially those of well-established foreign universities – have often been perceived to bring in enhanced research capacity, an internationalised education curriculum and market-relevant skills into host countries. This significance is recognised by the HEC, which has worked closely with the British Council for the development of a TNE policy titled the

4. Higher Education Commission, "Annual Report 2021/22", https://www.hec.gov.pk/english/news/AnnualReports/Annual%20Report%202021-22.pdf, 90.
5. World University Rankings 2024 edition was released in 2023, whilst the 2025 edition was released in 2024.
6. Impact Rankings 2024 edition was released in 2024, whilst the 2023 edition was released in 2023.
7. British Council, "Mapping international student mobility from Pakistan at the province/territory and city level", https://opportunities-insight.britishcouncil.org/download/data/48049/20269 (2024), 20.
8. HESA Student Record 2024/25
9. HESA Aggregate Offshore Record 2024/25

"Foreign Collaboration Policy". The policy aims to inform and regulate foreign higher education activity in Pakistan, offering guidelines for Pakistani universities providing degree programmes in collaboration with foreign universities, on the establishment of IBCs, and on quality assurance.

The new TNE Policy 2024[10] (building on the foundation of the Foreign Collaboration Policy 2018) came at a timely moment, given the rise of foreign branch campuses in newer IBC host countries such as Uzbekistan and Kazakhstan, alongside mature host countries such as United Arab Emirates, Malaysia and Singapore.[11] Whilst Pakistan has no IBC, there have been talks to promote knowledge sharing, expand foreign-local degree programme offerings, faculty exchange and joint research internationally.[12]

Given this context, a comprehensive understanding of the current TNE ecosystem, is integral to the future development of TNE in Pakistan. This main aim of this report is to i) document all TNE activity in Pakistan, ii) scope out the current measures regulating and informing such activity, iii) provide analysis of stakeholder insight from the UK and Pakistan to evaluate potential for further developments between foreign higher education institutions and Pakistan. An understanding of the above will allow relevant stakeholders to make more informed decisions and overall improve TNE cooperation. Hence, this report will benefit UK universities and policymakers, as well as support the Pakistani government in sustainably expanding higher education opportunities by harnessing strengths of TNE.

1.2. Transnational Education

TNE is generally defined as a country "offering its qualifications in another country, through a local host institution".[13] The UK Quality Assurance Agency (QAA) defines TNE as the "delivery of higher education level awards by recognised UK degree-awarding bodies in a country, or to students, other than where the awarding provider is based".[14]

TNE has contributed significantly to global agendas such as the United Nations' Sustainable Development Goals (SDGs). The British Council's report explains that TNE collaborations enhance local education systems, promoting SDG 4. Research shows TNE's direct contribution to SDG 4 and potential impact on SDGs

10. Higher Education Commission, "TNE Policy 2024", https://www.hec.gov.pk/english/services/universities/Documents/HEC-Foreign-Collaboratin-Policy.pdf (2024).
11. Times Higher Education, "TNE 3.0 Report", https://www.timeshighereducation.com/sites/default/files/tne-3.0-how-transnational-education-can-support-sustainability-and-national-economic-development.pdf (2024).
12. Universities UK, https://www.universitiesuk.ac.uk/sites/default/files/uploads/UUKi%20reports/PakistanHE_iNotes_June17_final.pdf (2017), 10.
13. British Council, "Transnational Education Strategy", https://www.britishcouncil.org/sites/default/files/transnationaleducationstrategy.pdf (2023), 2.
14. Quality Assurance Agency, UK https://www.qaa.ac.uk/international/transnational-education.

3, 5, and 17. By supporting national education reforms through partnerships, they contribute to these global goals.[15] Recent studies conducted by the British Council and THE have demonstrated how the TNE sector has rendered tangible social and economic impact in host countries. Most notably, TNE increases the accessibility of higher education, improves employability and skills development, refines quality assurance processes, expands research and development capacity, and contributes to gender parity.[16] Ideally TNE should align with the national development of host countries. For example, Dubai established an international universities hub to host branches of reputable foreign institutions. While the hub predates the Dubai Economic Agenda 'D33',[17] it now is instrumental in supporting its aims. Similarly, a recent study by British Council-THE highlighted how the Sri Lankan higher education sector had plans to establish more foreign universities in line with the country's aim for international connectivity.[18] Historically, the UK has been recognised as one of the leading providers of TNE. In 2024/25, there were approximately 663,970 students from around the globe receiving UK TNE.[19]

In Pakistan, there have been increased enrolments in UK TNE over the last five years, rising from 6,835 students in 2019/20 to 15,085 in 2024/25.[20] Aligning with the growing demand for UK TNE and Pakistan's goal of expanding higher education access, this report intends to assist UK universities, policymakers, and the Pakistani government in fostering partnerships with more international higher education institutions.

1.3. Methodology

The research adopted a mixed-methods approach, integrating quantitative data analysis, desk research, interviews and literature review to provide a comprehensive understanding of the current TNE landscape in Pakistan. The research was undertaken in three phases:

15. British Council, "Transnational Education Strategy", https://www.britishcouncil.org/sites/default/files/transnationaleducationstrategy.pdf (2023), 28.
16. British Council, "Transnational Education in Sri Lanka", https://www.britishcouncil.lk/sites/default/files/sri_lanka_tne_report_august_2024.pdf (2024).
17. https://diacedu.ae/media/press-releases/dubai-knowledge-park-marks-20-years-of-enriching-regional-knowledge-economy
18. British Council, "Transnational Education in Sri Lanka", https://www.britishcouncil.lk/sites/default/files/sri_lanka_tne_report_august_2024.pdf (2024).
19. HESA Aggregate Offshore Record 2024/25
20. Ibid.

Table 1: Research Methodology Phases

Research Methodology	Description	Output	Source
TNE Data Mapping	Analysing data to identify UK universities with existing TNE partnerships in Pakistan and their enrolment numbers, course type, and delivery models. Supplementary desk research to capture programme details and tuition fees.	A list of TNE providers, partner organisations, TNE models, tuition fees and programme names in Annex A (UK) and Annex B (Non-UK) of this report.	UK TNE: Higher Education Statistics Agency (HESA) 2024-25 data Non-UK TNE: Third-party national datasets, UNESCO Institute of Statistics,
Literature review and desk research	Extensive comb through official documentation	1. Analysis examining evolution and implementation of TNE policies in Pakistan, national education and economic strategies influencing TNE growth. 2. Five case studies highlighting best practices of TNE in Pakistan	• Pakistan HEC reports, government publications and notices • Pakistan government policy documents • Past British Council reports • World Bank reports
Stakeholder interviews and focus groups	Approx. 20 interviews with stakeholders. Two focus group discussions (FGDs)	1. Analysis examining evolution and implementation of TNE policies in Pakistan, student demand, growth and opportunities for UK TNE, key enablers for TNE in Pakistan. 2. Five case studies highlighting best practices of TNE in Pakistan	• UK universities • UK quality assurance agency • Pakistani public universities • Pakistani private universities (HEC recognised) • Pakistani recognised foreign collaboration institutions • British Council Pakistan • Pakistan HEC • Ministry of Higher Education • National Business Education Accreditation • World Bank Higher Education Development Project • UK Department for Business and Trade (DBT) Pakistan • TNE students • Parents of TNE students

2. Higher Education in Pakistan

2.1. System and structure

A reformed higher education system in Pakistan began with the creation of the Higher Education Commission (HEC) in 2002. Its role is to regulate, oversee, and promote the sector in line with the country's goals for social and economic development. Under the HEC, the number of higher education institutions (both private and public) expanded, from 142 in 2010[21] to 267 in 2025.[22] Apart from expanding access to higher education, HEC also focused on improving the quality of higher education and enhancing the credibility and employability of graduates. This led to the creation of a National Qualifications Framework (NQF) in 2009 to delineate a framework to ensure high quality higher education in Pakistan. In 2015, the Framework was thoroughly revised again to maintain accountability and consistency across all higher education courses, as well as alignment with international best practices.

The HEC has also introduced a three-tier classification system for universities as part of its strategic vision to align higher education with national development goals. This system categorises institutions based on their core strengths and intended contributions to the economy: Tier I universities are positioned to lead in research excellence and innovation, serving as hubs for cutting-edge knowledge creation. Tier II universities focus on upskilling and applied education, preparing graduates with practical competencies for the workforce. Tier III universities are dedicated to vocational and technical education, addressing the need for skilled technicians and tradespeople.[23] With nearly two-thirds of its population under 30,[24] Pakistan has one of the world's largest university age populations.[25] Over the past decade, the country's higher education sector has expanded steadily, with rising enrolments and the establishment of new institutions. Enrolment numbers have more than doubled, rising from 948,268 students in 2009/10 to 2,245,998 in 2020/21.[26] The teaching faculty has also grown, increasing from 34,596 members in 2013/14 to 57,180 in 2020/21.[27] Government initiatives, such as increased funding and reforms by the HEC, have played a crucial role.

21. Higher Education Commission Statistics, https://www.hec.gov.pk/english/universities/hes/Pages/HEDR-Statistics.aspx.
22. Higher Education Commission, https://www.hec.gov.pk/english/universities/pages/recognised.aspx.
23. https://www.hec.gov.pk/english/universities/hes/Pages/Universities-Ranking.aspx
24. Press Information Department, https://pid.gov.pk/site/press_detail/25847 (2024).
25. British Council, "Mapping international student mobility from Pakistan at the province/territory and city level", https://opportunities-insight.britishcouncil.org/download/data/48049/20269 (2024), 10.
26. https://www.hec.gov.pk/english/news/AnnualReports/Annual%20Report%202021-22.pdf, 90-91.
27. ibid

Additionally, the private sector's investment in new institutions, improvements in faculty quality and infrastructure, and international collaborations have all contributed to this growth. According to official sources, this enrolment number is expected to rise to 2.41 million in 2022/23.[28] These figures highlight a substantial demand for higher education in Pakistan.

To manage the sustainable expansion of the sector, the HEC's three tiered system of universities is emerging primarily within the public sector.[29]

Apart from these plans to expand the sector, the HEC is also leading internal growth through the creation of the National Academy of Higher Education (NAHE)- a division within the HEC serving to enhance capacity building and professional development of faculty and higher education management, while also scaling the sector's global outreach. The HEC has two other prominent divisions- the Quality Assurance Agency (QAA) and the Higher Education Data Repository division (HEDR). The QAA serves to enhance the quality of higher education by monitoring and evaluating the current portfolio of programmes and developing guidelines and policies for quality enhancement cells- units within both public and private universities recognised by the HEC, for maintenance of standards and regular review of quality progress.[30]

Meanwhile, the HEDR collects data from all HEC-recognised universities and their affiliated colleges. Basic data on student enrolment, number of graduates, faculty, international students, and others are collected annually, for the HEC to understand trends like institutional growth, student enrolment and demand for alternative modes of education delivery, as exemplified through the tracking of distance learning delivery.[31] Overall, these units work cohesively to strengthen the university system in Pakistan, which can be understood in three main ways.

The first way of understanding the higher education system is by type of universities. In Pakistan, there are two main university sectors- the public sector, and the private sector. The public sector is representative of the oldest and most prestigious universities in the nation, having been featured in international rankings such as the THE and QS World University Rankings, as well as domestic rankings helmed by the HEC. Such universities include Quaid-i-Azam University, the National University of Sciences and Technology, and Punjab University. Similarly, the private sector is as competitive as the public sector. At

28. Ministry of Finance, "Pakistan Economic Survey 2023-24", https://finance.gov.pk/survey/chapter_24/10_education.pdf, 165.
29. Universities UK, "Pakistan Higher Education Commission Vision 2025", https://www.universitiesuk.ac.uk/sites/default/files/uploads/UUKi%20reports/PakistanHE_iNotes_June17_final.pdf, 4-5.
30. Higher Education Commission, https://www.hec.gov.pk/english/services/universities/QA/Pages/default.aspx.
31. Higher Education Commission, "Vision 2025", https://www.hec.gov.pk/english/news/Documents/HEC-Vision-2025.pdf, 31.

present, private universities such as the Capital University of Science and Technology, and the Lahore University of Management Sciences are amongst the top 600 universities in the 2025 world rankings, according to THE and QS respectively.[32] These positions outweigh most public universities.

The second way of understanding Pakistan's higher education landscape is by type of accreditation. The first mode of accreditation is known as the "HEC-recognised" status. Currently, the HEC recognises a total of 158 public universities, 109 private universities and 56 foreign collaboration institutions.[33] From these public and private universities, the HEC also recognises 91 campuses belonging to these universities. Next, there are also "affiliated institutions"- which can be either public or private in nature. Such institutions are granted affiliation through public sector universities, which validates the institutions' academic standards and quality of education by monitoring and overseeing its curriculum. This status also means that students at such institutions are awarded degrees by the affiliating university, an education delivery model reminiscent of TNE. Lastly, there are "unregistered or unaccredited institution" institutions, which includes both public and private sector universities, as well as foreign collaboration institutions. While it is not explicit what constitutes an unrecognised university, it can be referenced from the list that these are universities whose curriculum and accreditation have not been approved by the HEC.[34]

Another way of understanding Pakistan's higher education landscape is by mode of education delivery. Both public and private HEIs adopt a range of delivery models. While most institutions follow conventional delivery methods, some also offer foreign collaboration programmes, affiliation arrangements, online learning, or a combination of these. Foreign collaboration programmes are mostly offered by HEIs that exclusively deliver foreign degrees and do not offer local programmes. However, there are also HEIs that design and award their own degrees while also delivering foreign programmes under collaborative arrangements. Regardless of HEC-recognised status, these arrangements still require formal approval from the HEC.

Furthermore, online learning is another significant delivery mode, adopted by both public and private HEIs. Collectively, these multiple delivery modes reflect the diversity of the sector, offering greater access and flexibility for students to pursue higher learning.

32. https://www.topuniversities.com/universities/lahore-university-management-sciences-lums and https://www.timeshighereducation.com/world-university-rankings/capital-university-science-and-technology

33. Higher Education Commission, https://www.hec.gov.pk/english/universities/Pages/recognised.aspx and https://www.hec.gov.pk/english/universities/Pages/Foreign-Collaboration-Institutions.aspx

34. Higher Education Commission, https://www.hec.gov.pk/english/universities/Pages/Unaccredited-Institutions.aspx.

2.2. Sectoral challenges and strategic priorities

Despite growth in the sector, there are prevailing challenges. Higher university enrolment has not reduced unemployment, mainly due to a mismatch between graduate skills and market needs. Limited job creation is also a contributing factor. According to ILO, the country's employment-to-population ratio is estimated at 47.6 per cent in 2023, which is nearly 2 percentage points below the pre covid-crisis ratio in 2019.[35] The World Bank also report similar concerns- the national employment-to-population ratio is estimated at 49.7 percent which is on a downward trajectory since FY16.[36] As per the Pakistan Economic Survey 2023-24, youths aged 15-34 recorded the highest unemployment rates in 2020/21 among all age groups within the total labour force.[37] While multiple factors contribute to unemployment, like limited industrial capacity to absorb the growing number of graduates, some stakeholders raised concerns with the quality of graduates, which they perceived to be sometimes misaligned with the market's demands. Notably, within the IT industry, there is an evident skills gap between graduates and industry. In a report by the Pakistan Software Houses Association (2022), only 10% of IT graduates (out of 25,000) were deemed to have the necessary skills for employment in the industry.[38] The report observed the lack of competencies required to meet the evolving demands of the digital landscape, emphasising the need to ensure curriculum is relevant with industry demands.[39] Hence there is a growing need for more innovative and rigorous programmes, particularly in STEM-related fields.

Next, there is a significant gap between the demand for and supply of higher education in Pakistan. As noted in section 2.1, while there are multiple learning pathways through HEC-recognised institutions, access remains limited. Public universities, despite offering more affordable education, have high merit thresholds, making them inaccessible to many students. On the other hand, private universities, which have grown in number, are often costly. This financial imbalance in higher education provision limits opportunities for education mobility. For instance, only 8.2% of employed individuals were holding a degree-level qualification in 2020/21.[40] This is concerning given Pakistan's predominantly university-aged population, highlighting the need for more accessible and diverse higher education pathways. From HEC's perspective, ensuring greater equity and inclusivity in higher education is crucial, given that public and private universities currently serve only a small number of university-age students. They recognise the need for TNE to play a more significant role in expanding access for the remaining students.[41]

35. Pakistan labour market update 2023
36. Pakistan-Development-Update-Report-April-2025-FINAL.pdf
37. Ministry of Finance, "Pakistan Economic Survey 2023-24 (Chapter 12)", https://finance.gov.pk/survey/chapter_24/12_population.pdf, 205.
38. Pakistan Software Houses Association, "The Industry-Academia Skills Gap Report 2022", https://www.pasha.org.pk/wp-content/uploads/The-Great-Divide-Industry-Academia-Skills-Gap-Analysis-Report-2022.pdf (2022), 20.
39. Ibid, 56.
40. Pakistan Bureau of Statistics, "Labour Force Survey 2020-2021", https://www.pbs.gov.pk/sites/default/files/labour_force/publications/lfs2020_21/LFS_2020-21_Report.pdf, 27.
41. Higher Education Commission, "Vision 2025", https://www.hec.gov.pk/english/news/Documents/HEC-Vision-2025.pdf, 18.

Finally compared to regional peers, investment in higher education remains low. In the past six years, there has been a decrease in the expenditure on education as a percentage of total government expenditure- from 12.2% in 2018 to 8.3% in 2023.[42] Just recently, the HEC Chairman revealed that while the HEC's funding requirement was Rs. 125 billion, the actual allocation was only Rs. 65 billion, underscoring a significant shortfall in resources needed to sustain and grow higher education sector.[43] Low investment may have resulted in challenges at the university level such as limited infrastructure, gradual digital transformation, weak research and innovation and quality of education.[44]

These challenges have not gone unnoticed by the wider government. On December 31st 2024, the Ministry of Planning, Development and Special Initiatives launched the ***"Uraan Pakistan"***, a strategic roadmap outlining the government's commitment to sustainable economic growth for the nation by 2035.[45] With it comes an emphasis on shifting Pakistan's economy into a knowledge-based economy through increased investment in research and development and enhancing the quality and quantity of higher education. This emphasis is longstanding, with previous national strategies having already highlighted the importance of increasing the latter.[46] Similarly, in Vision 2025, the HEC also outlined the importance of increasing the number of public, private and distance education institutions to accommodate the rising need for skilled human capital.[47] As such, the current priorities for the higher education sector can be said to enhance the quality and quantity of higher education.



42. World Bank, https://data.worldbank.org/indicator/SE.XPD.TOTL.GB.ZS?locations=PKandstart=2018.
43. https://www.hec.gov.pk/english/news/news/Pages/Chairman-HEC-Stresses-Measures-for-Continuous,-Sustainable-Development-of-Higher-Education-Sector----.aspx
44. https://www.thenews.com.pk/print/1269041-pakistan-s-higher-education-a-regional-perspective
45. https://pc.gov.pk/web/press/get_press/1424#:~:text=Federal%20Minister%20for%20Planning%2C%20Development%2C%20and%20

    Special%20Initiatives%2C%20Ahsan,launched%20on%20December%2031%2C%202024.
46. Planning Commission, "Pakistan Vision 2025", https://www.pc.gov.pk/uploads/vision2025/Pakistan-Vision-2025.pdf (101).
47. Higher Education Commission, "Vision 2025", https://www.hec.gov.pk/english/news/Documents/HEC-Vision-2025.pdf (21).

3. TNE in Pakistan

3.1. TNE system and structure

The scale of TNE in Pakistan is growing. The number of enrolments in TNE programmes have increased over time. However, this increase is only observed in UK TNE programmes. Transnational education (TNE) provision from non-UK countries such as the United States and Australia has shown a stagnant enrolment trend in recent years.[48] At present, the TNE system in Pakistan has five main stakeholder groups- foreign HEIs, the HEC, local HEI partners, the QAA, and third parties such as the British Council. The HEC and QAA take on a supervisory and regulatory role in this engagement, ensuring that foreign TNE aligns with local accreditation standards, while third parties such as the British Council provide support and guidance to facilitate international partnerships and quality assurance efforts. Through the PAK-UK Education Gateway,[49] launched in 2018 in partnership with HEC the British Council has played a central role in strengthening the UK's academic reputation in Pakistan. It has supported the development of a more robust regulatory environment by aligning Pakistan's transnational education policies with UK quality assurance standards. The British Council has facilitated over 160 institutional partnerships and engaged more than 1,000 researchers, promoting collaborative research and academic excellence. It has also provided technical guidance, including the co-development of a TNE Handbook.[50]

In 2024, through consultation with stakeholders and with technical assistance from the British Council under the PAK-UK Education Gateway, the HEC developed a revised TNE policy[51] to outline guidelines for local HEIs collaborating with foreign institutions and for the future establishment of international branch campuses (IBCs).[52]

The HEC TNE Policy 2024 details legal requirements, quality assurance measures and the compliance with Pakistani law and conditions stated by the HEC for approval. This builds upon the previous TNE guidebook co-developed by the British Council and HEC emphasising more on the quality assurance arm of the TNE landscape.

48. Data obtained from Higher Education Statistics Department, Australia.
49. Pak-UK Education Gateway | British Council.
50. https://www.britishcouncil.pk/sites/default/files/transnational_education_handbook_pakistan.pdf.
51. Higher Education Commission, "TNE Policy 2024", https://www.hec.gov.pk/english/services/universities/Documents/HEC-Foreign-Collaboratin-Policy.pdf (2024).
52. Pakistan launches a revised TNE policy | British Council

3.2. Understanding the HEC TNE Policy 2024

The Transnational Education Policy 2024,[53] notified[54] on 9th Sep 2024, by the Higher Education Commission of Pakistan, marks a significant update in the regulatory framework governing foreign collaborations in higher education. This policy aims to enhance quality assurance, streamline institutional eligibility, and ensure alignment with national development goals.

3.2.1. Key Changes in the 2024 Policy

HEC TNE policy 2024 represents a comprehensive update to the regulatory framework, with several important provisions for institutions operating in Pakistan:

- It supersedes all previous TNE policies and notifications issued by HEC.
- All previously accredited institutions, whether their accreditation is indefinite or expired, are required to obtain fresh accreditation within a six-month compliance window.
- Failure to meet these requirements will result in cancellation of accreditation and suspension of student enrolment.

3.2.2. Eligibility Criteria for Foreign Institutions

HEC TNE Policy 2024 outlines the requirements for foreign Higher Education Institutions (HEIs) to collaborate with Pakistani institutions, while allowing flexibility for strategic exceptions:

- Be ranked in the top 700 globally, according to QS or THE rankings.
- HEC retains discretionary authority to approve institutions outside these rankings based on merit and strategic relevance.

3.2.3. Core Components of the Policy

HEC TNE Policy 2024 also emphasises accreditation, regulatory oversight, and alignment with national priorities, setting clear expectations for all TNE institutions:

- All TNE institutions must undergo HEC's accreditation process. Institutions failing to renew accreditation will face operational restrictions.
- HEC will monitor quality, governance, and academic standards of all TNE collaborations.
- Institutions must maintain clear documentation of partnerships, curricula, faculty qualifications, and student outcomes.
- TNE initiatives must align with Pakistan's higher education priorities, including access, equity, and international competitiveness.

3.2.4. Different types of TNE Models

HEC TNE Policy 2024 outlines three types of transnational education (TNE) models in Pakistan: Type-I, II, and III. Type-I, the "Tuition Centre Model," is the most common, with institutions such as Roots IVY International Colleges, TMUC, and Beaconhouse International College delivering foreign curricula locally through trained tutors, while the final degree is awarded by the foreign

53. Higher Education Commission, "TNE Policy 2024", https://www.hec.gov.pk/english/services/universities/Documents/HEC-Foreign-Collaboratin-Policy.pdf (2024).

54. HEC Notification Transnational Education (TNE) Policy 2024.pdf

university. Type-II partnerships involve private investors establishing franchise campuses of foreign universities, currently exemplified only by the University of Greater Manchester Islamabad. Type-III refers to fully owned international branch campuses (IBCs) by foreign universities, which do not yet exist in Pakistan.

These models correspond to internationally recognised TNE agreements:

- **Franchised Programmes[55]:** Foreign courses delivered locally, with degrees awarded by the foreign university.
- **Validated Programmes:** Local institutions design courses approved by the foreign university, giving greater academic ownership to the partner.
- **Articulation Agreements:** Students enter a degree with advanced standing, often called "twinning" or "pathway" programmes; none are formally established yet in Pakistan.
- **Double/Joint Degrees:** Collaborative programmes designed by two universities, awarding either separate or joint degrees; HEC is currently considering a formal policy for double degrees.

Table 2 attempts to map Types I, II, and III from the Pakistan 2024 TNE policy against commonly used international TNE arrangements. However, it should be noted that definitions of internationally recognised agreements vary across contexts, and exact equivalence may not always apply. More information on the structure of Pakistan TNE can be found through an understanding of the HEC's TNE Policy under Section 4.1.

55. Franchised agreements, as referred to here, involve local partners delivering the courses of a foreign university under a collaborative arrangement. This should not be confused with Type 2 as defined in the TNE Policy 2024, which refers specifically to franchise campuses—a distinct model where the foreign institution operates a more direct, campus-style presence abroad.

Table 2: Mapping of 2024 HEC Policy TNE Types in Pakistan (based on and common models of TNE)

Arrangement Type	2024 HEC TNE Policy Type	Core Features (2024 Policy)	Examples	Status in Pakistan
Franchise / Validated	Type I	Local delivery by private colleges with foreign curriculum and QA by both partners	Roots IVY, TMUC, BIC	Widely implemented
Dual / Double Degree	Currently not mentioned but can be offered under Type I	Two institutions jointly award a degree	N/A	A separate policy is under consideration
Franchise	Type II	Investor-funded foreign university franchise campus	University of Greater Manchester (ISB)	Very rare – only one known example
Fully Owned by Foreign HEI	Type III	International Branch Campus (IBC) directly owned and operated by foreign university	N/A	Not yet implemented
Pathway model / Twinning/ Articulat-ed	Currently not mentioned but can be offered under Type I, Type II and Type III	Students start in Pakistan, transfer abroad with advanced standing (pathway model)	Via credit transfer in Bahria University, Islamabad	Not explicitly covered in TNE 2024 policy

3.3. Geographical analysis of TNE providers

Transnational Education providers are predominantly concentrated in major metropolitan areas, including Islamabad, Lahore, Karachi, Faisalabad, Peshawar, Gujrat, Rawalpindi, and Multan. The distribution of TNE providers is influenced by both demand and supply factors. On the demand side, enrolment numbers in smaller cities tend to be low where TNE institutions exist.

From the supply perspective, low student enrolments in smaller cities does not present a viable business case for foreign institutions to establish partnerships in these locations.

Additionally, foreign university partners generally prefer to collaborate with institutions in larger cities due to ease of travel and better opportunities for oversight. Smaller cities also face significant constraints related to human resources and technological infrastructure, which hinder the establishment and sustainability of TNE programmes.

Despite these challenges, some prospective TNE students from smaller cities are willing to relocate to metropolitan areas to access opportunities. Approximately 15-20% of TNE students enrolled in institutions located in major cities come from

outside the city. These students often reside in university hostels during the academic term and return to their hometowns on weekends. However, if TNE programmes were made available in suburban or rural areas—particularly with government support or subsidies—representation from these regions could be significantly higher, reducing the burden of relocation and promoting more equitable access.

3.4. Gender distribution amongst TNE students

The overall gender distribution among Transnational Education (TNE) students is approximately 65% male and 35% female. However, this aggregate figure masks significant variations across academic disciplines. Fields such as fashion, arts, and psychology tend to attract predominantly female students, with female enrolment often reaching 80–90% in these programmes. These disciplines are generally perceived to be more aligned with creative, communicative, or people-focused career paths, which may influence female student preferences and societal expectations.

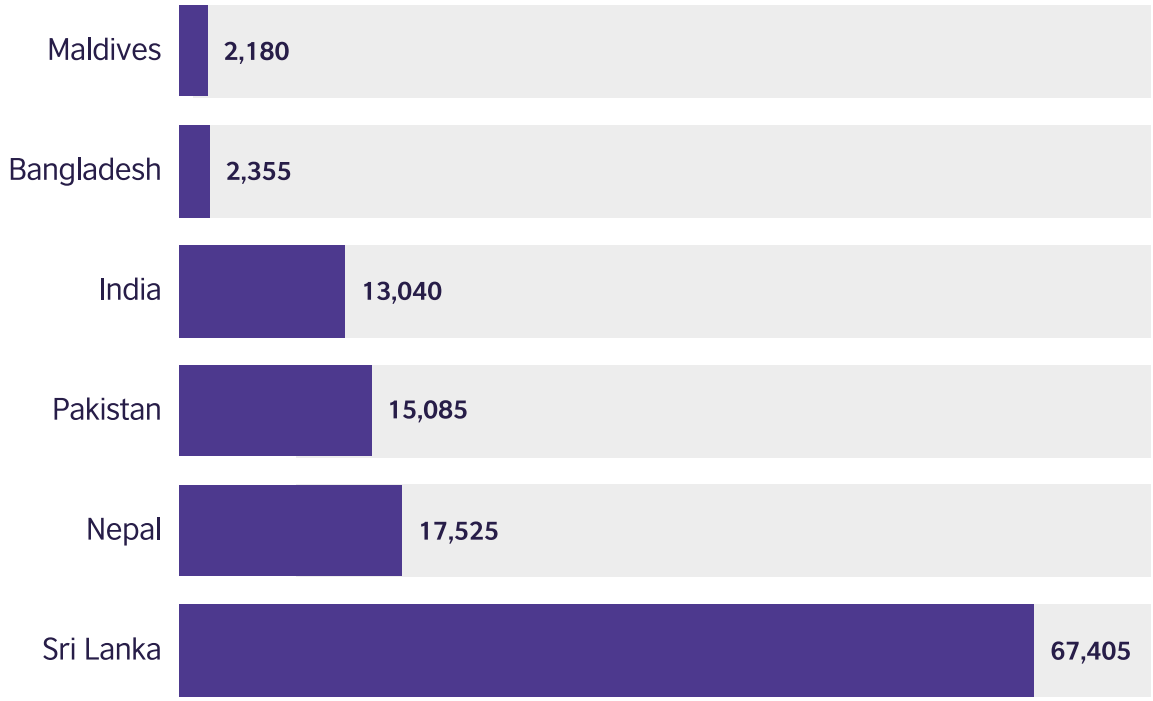
In contrast, traditionally male-dominated disciplines such as engineering and law continue to show higher male enrolment, although some gradual shifts toward gender diversity are emerging. Business programmes, on the other hand, tend to show a more balanced gender ratio, with many institutions reporting an almost equal distribution of male and female students. This suggests that certain fields, especially those with broader career applications like business, are becoming more inclusive and accessible to both genders, while others still reflect entrenched gender norms and career pathways.

3.5. English language proficiency requirements for TNE students

English proficiency is generally not a barrier for students pursuing TNE programmes. Most TNE students come from A-Level backgrounds, so their English comprehension is strong, and institutions do not require additional English proficiency tests. Some institutions accept English proficiency certificates from previous schools, waiving the need for further testing. For students from Higher Secondary School Certificate (HSSC) and Faculty of Science (FSc) backgrounds, some institutions require tests such as Pearson Test of English (PTE); however, the required thresholds are usually low, and students typically meet the scores. Additionally, students who face challenges during their studies are provided with extra English support classes as needed to help them succeed. Overall, English language proficiency rarely hinders students from enrolling in TNE programmes.

3.6. UK TNE in Pakistan

Figure 1: UK TNE in South Asia



Source: HESA Aggregate Offshore Record 2024/25

Pakistan was the UK's third largest TNE host country in the South Asia region in 2024/25, slightly behind Nepal but with less than a quarter as many TNE students as Sri Lanka (Figure 1).

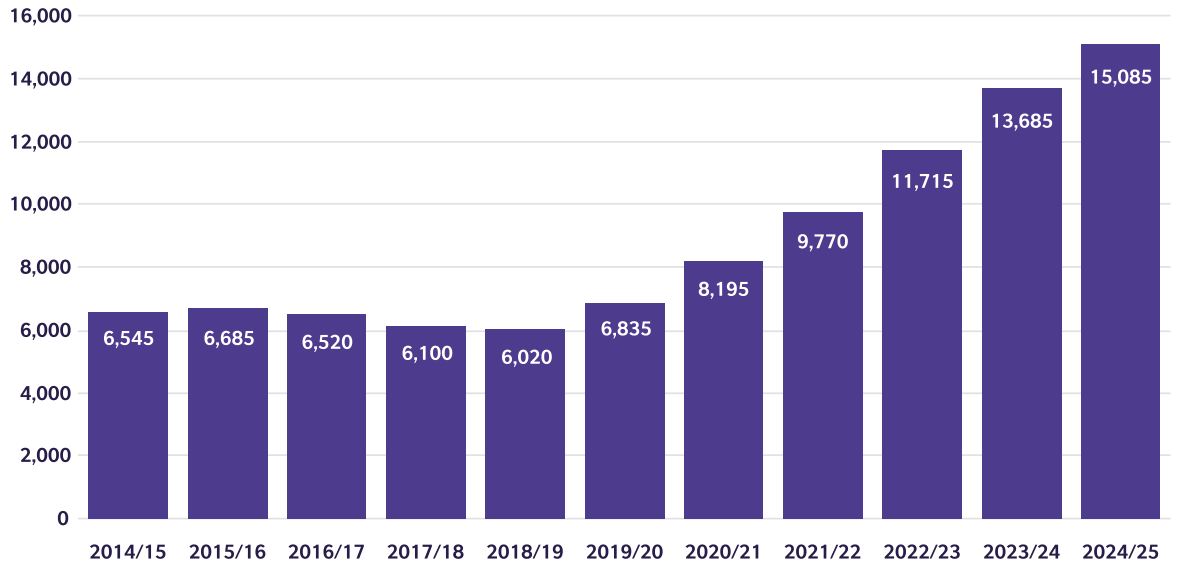
UK TNE enrolments in Pakistan have more than doubled over the last five years, with a compound annual growth rate of 17% over this period, compared to average growth of less than 1% in the previous five-year period from 2014/15 to 2019/20 (Figure 2). 2024/25 saw record enrolments, with 15,085 students studying for qualifications from at least 68 different UK universities.[56] Undergraduate students make up a large majority, representing more than 90% of the total; this group has also grown at a somewhat faster rate, with a 5-year compound annual growth rate (CAGR) of 18% compared to 14% for postgraduates (Figure 3).

This growth can be attributed to the increasing demand for quality higher education, success of the University of London's (UoL) initial courses and the establishment of UoL's Recognised Teaching Centres (RTCs), resulting in strategic partnerships between other UK universities and local institutions. Additionally, the supportive regulatory environment provided by Pakistan's HEC has played a crucial role.

56. As HESA's data is rounded to the nearest 5 students, this figure does not include universities with two or fewer Pakistan-based students

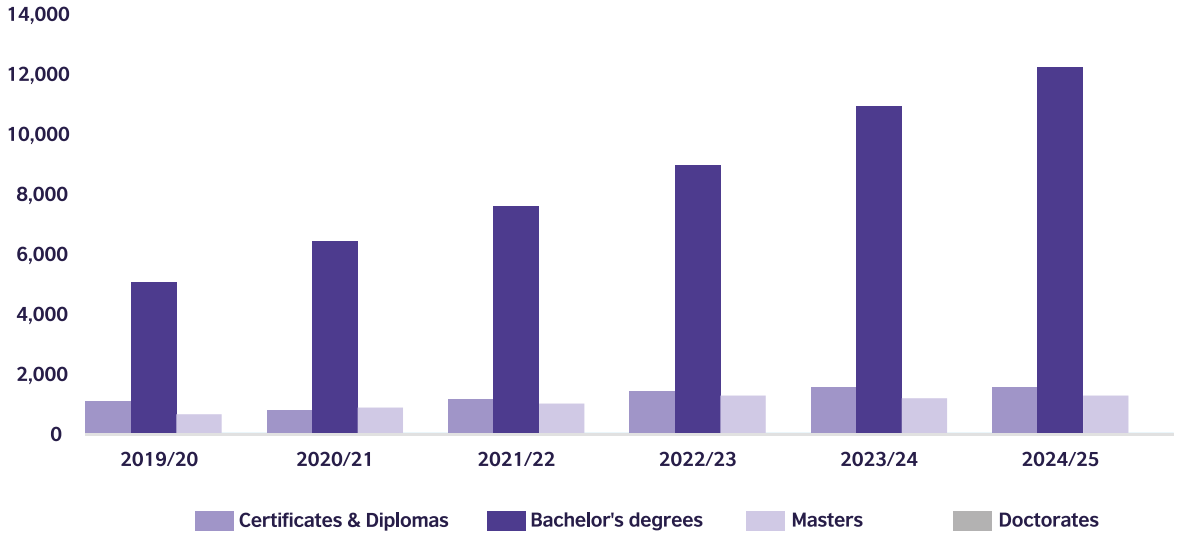


Figure 2: UK TNE enrolments in Pakistan across 10-year period (2014/15 - 2024/25)



Source: HESA Aggregate Offshore Record, 2014/15 to 2024/25

Figure 3: UK TNE enrolments in Pakistan by level of study (2019/20 - 2024/25)



Source: HESA Aggregate Offshore Record (2019 - 2025)

Table 3: Top 10 UK universities TNE enrolment in Pakistan (2024/25)

Host Institution	Total TNE Enrolments (2024/25)
University of London (Institutes and activities)	8,575
University of Hertfordshire	1,485
Oxford Brookes University	1,420
Arden University	870
University of Bedfordshire	545
Liverpool John Moores University	540
The University of Greenwich	310
University for the Creative Arts	300
The University of Essex	120
The University of Bolton	110

Source: HESA Aggregate Offshore Record, 2024/25

Table 3 shows that the University of London is the dominant TNE provider in Pakistan by a large margin, making up more than half of all UK enrolments in the country. Two other institutions – the University of Bedfordshire and the University of Hertfordshire – each had over a thousand students studying for their qualifications in Pakistan that year.

3.6.1. Mapping Pakistan's TNE landscape against UK HESA delivery models

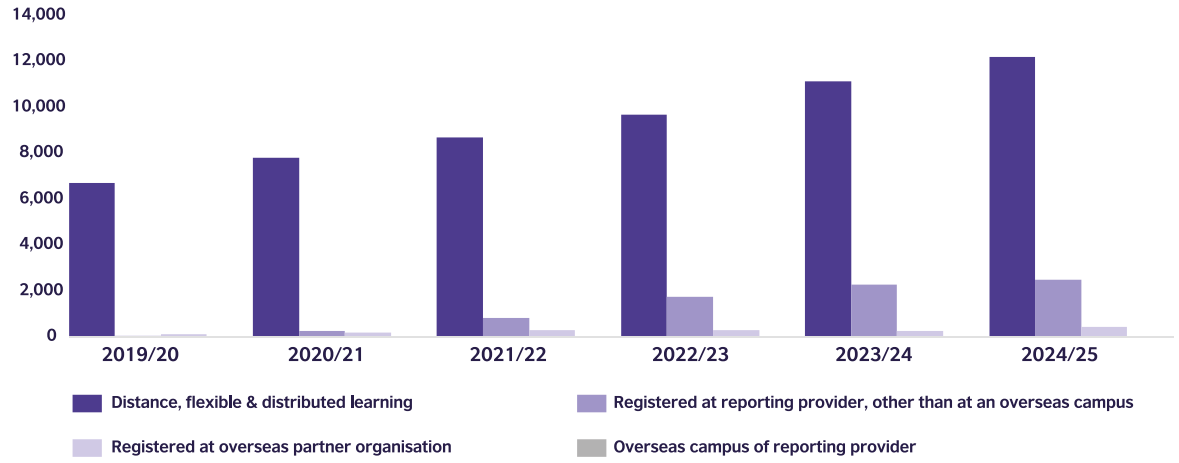
Higher Education Statistics Agency (HESA) in the UK disaggregates Transnational Education (TNE) partnership types based on the way of delivery and the nature of the agreement between the UK university and its partner. The categorisation considers how students are registered and the mode of study, such as distance learning, collaborative provision, or studying at an international branch campus (table 4). However, as these classifications are shaped by the contractual nature of each partnership, the definitions can often be nuanced and open to interpretation, which may lead to varying understandings across contexts.

Table 4: HESA-TNE partnership mapping

Sr. No	HESA Category for Recording TNE Enrolments	Model of TNE	Explanation	Mode of Study
1	Registered at reporting provider - distance, flexible and distributed learning for UK HEP award where the location of the student is known to be overseas	Distance learning, including online learning	Students are registered at the UK university and study remotely, often online, from overseas locations. The degree is awarded by the UK university.	Remote or online learning from overseas
2	Registered at reporting provider - studying overseas for UK HEP award other than at an overseas campus of reporting provider	Collaborative Provision	Students are registered at the UK university but study overseas through collaborative arrangements such as joint or dual degrees, franchise, or validation models. The degree is awarded by the UK university.	Physical presence at an overseas partner institution
3	Registered at overseas partner organisation - studying overseas for an award of the reporting provider	Collaborative Provision	Similar to the above, but students are registered at the overseas partner institution. The degree is still awarded by the UK university.	Physical presence at an overseas partner institution
4	Registered at reporting provider - studying overseas for UK HEP award at overseas campus of reporting provider	International branch campus	Students are registered at the UK university and study at its overseas campus. The degree is awarded by the UK university.	Physical presence at the overseas campus of the UK university

Source: HESA Aggregate Offshore Record

Figure 4: UK TNE enrolments in Pakistan by type of provision (2019/20 - 2024/25)

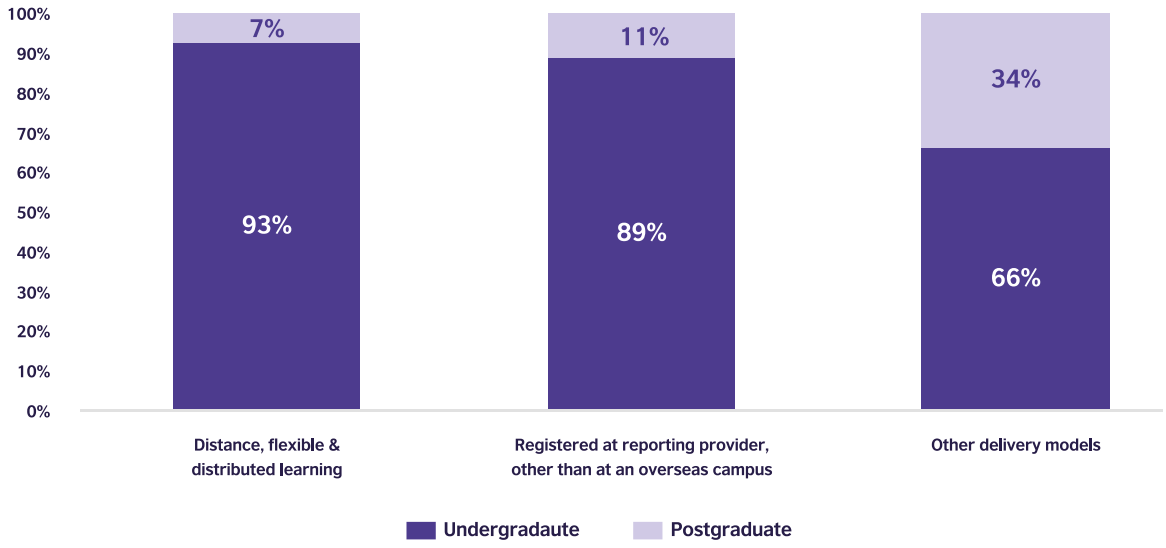


Source: HESA Aggregate Offshore Record

A large majority of UK TNE provision in Pakistan is delivered through the distance learning models, making up around 81% of all TNE enrolments in 2024/25 (Figure 4). Of the 68 UK HEIs delivering TNE courses in Pakistan, 55 operate exclusively through distance learning (including the University of London, the largest provider in the country); 12 rely on in-person delivery, and one institution reported both distance learning and face-to-face students. The largest institutions in the "registered at reporting provider" category are Arden University and the University of Bedfordshire, while the University for the Creative Arts is responsible for the majority of enrolments in the "registered at overseas partner" category.

Looking at students' level of study, a very large majority of distance learning students are studying on undergraduate programmes – making up 93% in 2024/25 – while other formats are still mainly undergraduate but have a relatively higher proportion of postgraduate students.

Figure 5: UK TNE Enrolments in Pakistan by delivery model and level of study, 2024/25



Source: HESA Aggregate Offshore Record, 2024/25

3.6.2. UK TNE in Pakistan: private provision, student perspectives, and programme trends

Private institutions play a significant role in TNE partnerships with both UK and non-UK universities. Notably, many private institutions have primarily operated under Type-I partnerships, where they deliver foreign university courses without their name appearing on the degree. Recent trends indicate a growing inclination among postgraduate students towards international mobility, with the UK emerging as a preferred destination for advanced studies and potential settlement. While most offerings are at the undergraduate level, some institutions have strategically expanded into postgraduate programmes to meet evolving student preferences.

The programmes offered cover a broad range of disciplines at both Bachelor's and Master's levels, including Business, Computer Science, Psychology, Law, Accounting, Economics, International Relations, Digital Innovation, Project Management, Data Science, Human Resource Management, and Master of Laws (LLM). Key partnerships, such as with the University of London, offer flexible programmes in Business, Law, and IT fields, with strong offerings in STEM disciplines like Engineering and IT Security, alongside specialised business programmes and creative industry courses in digital marketing, filmmaking, and fashion design. More details on the partnerships between UK universities and local partners can be found in Annex A.

Students and parents that were engaged for this research related that UK TNE offers access to high-quality education, global exposure, and career-enhancing opportunities that may not be readily available through local institutions. Many students see TNE as a valuable alternative, especially for those who may not have secured admission to government or top private universities, allowing them to prove their potential and pursue a globally recognised qualification.[57]

Parents often perceive TNE colleges as more dynamic and responsive to individual needs compared to government and private universities. They appreciate the structured academic environment, industry-relevant curriculum, and the potential pathway to studying abroad. Students also favour TNE programmes due to their prestige and broader academic offerings; fields like Artificial Intelligence (AI) and the Internet of Things (IoT), which are not yet widely offered by local universities.[58] According to UK universities engaged in TNE partnerships with local institutions, business, management and Master of Business Administration (MBA) programmes are also popular subject areas amongst local students.

While students value the exposure and innovative curriculum that TNE provides, some have raised concerns about accessibility. Even with limited scholarships, the cost of TNE programmes remains approximately 2.5 times higher than local degrees, making affordability a key consideration. Expanding financial aid options and scholarship opportunities could make TNE more inclusive, ensuring that a wider range of students can benefit from its offerings.

57. In-country face to face FGDs with students in Pakistan

58. In-country face to face FGDs with students in Pakistan

3.7. Non-UK TNE in Pakistan

In a 2024 study conducted by the British Council on mapping international student mobility from Pakistan, the top three study destinations in demand were the UK, North America and Australia. Across the three markets, the UK has continued to be the most popular choice amongst Pakistani students. However, Australia has also emerged as a promising competitor, as a destination attractive to students largely due to the appeal of its two-year post-study work visa. Students were aware of the opportunities for work both during and after their studies in Australia, making it increasingly competitive with the UK.[59]

Despite Australian universities' high level of recruitment activity, their participation in TNE appears to be very limited. Data requested from Australia's Higher Education Statistics Department showed only 59 students attending Australian TNE in Pakistan from 2019 to 2023. About 80% of these students were enrolled in postgraduate courses, while the remaining were enrolled in undergraduate programmes.

The fields of education that students were engaged in from 2019 to 2023 was limited to two fields- Management and Commerce, and Society and Culture. This mirrors student demand for UK TNE, which cited Business and Management as popular subjects as well.

From 2019 to 2023, there were two providers of Australian higher education in Pakistan. They are the College of Law, and the University of Southern Queensland. These programmes have been accredited by the HEC since 2012.[60] Until December 2022, the University of Southern Queensland had been delivering two-degree programmes (Bachelor of Business and Commerce, and MBA) in collaboration with the Management Development Institute (MDi) Pakistan. However, this partnership concluded at the end of 2022.

Before 2019, there was another Australian university with HEC-recognised TNE activity in Pakistan. Prior to 2005, Curtin University (then Curtin University of Technology, Australia) had been in collaboration with Beaconhouse Informatics to deliver degree programmes in IT.[61]

---

59. In-country face to face FGDs with students in Pakistan
60. British Council, "Mapping international student mobility from Pakistan at the province / territory and city level", https://www.britishcouncil.pk/sites/default/files/mapping_international_student_mobility_from_pakistan_research_report.pdf (2024), 21.
61. Higher Education Commission, https://www.hec.gov.pk/english/universities/Pages/Foreign-Collaboration-Institutions.aspx



From 2005 to 2023, it can be inferred that the landscape of subjects offered through Australian TNE has shifted- possibly in line with the development of Pakistan's economy, which has prioritised the growth of its STEM and business education.[62]

It is unclear if there are ongoing plans for further Australian TNE in Pakistan.

However, it should be noted that there is considerable mobility of Pakistani students to Australia for higher education opportunities, and Pakistan is a priority partner country within Australia's international education engagement list,[63] hence TNE partnerships with Australia may expand.

62. Ibid.

63. Planning Commission, "Pakistan Vision 2025", https://www.pc.gov.pk/uploads/vision2025/Pakistan-Vision-2025.pdf.

4. Governance, strategy and policy

4.1. Foreign collaboration policy

Foreign collaboration policy, initially established in 2018, was updated in 2022 to provide enhanced guidelines for international higher education providers. This update aimed to help providers better understand and comply with local laws and requirements through the PAK-UK Education Gateway programme/ project. Additionally, the British Council supported the creation of a comprehensive handbook for international higher education providers, which was not included in the 2018 policy. The 2022 update also initiated the development of a revised TNE Policy, which had been in consideration following a successful visit by UK higher education leaders to Pakistan in April 2024.[64] In September 2024, after thorough consultation with stakeholders (including the British Council), the HEC implemented a TNE policy to outline the guidelines for local HEIs looking to collaborate with foreign HEIs in delivering programmes, and for the future establishment of IBCs. This builds upon the previous TNE guidebook released by the British Council and emphasises more on the quality assurance arm of the TNE landscape. The policy also outlines the levels of qualifications that can be offered through TNE, with restrictions based on the type of campus. Additionally, the policy mandates that local institutions offering college-level programmes in collaboration with foreign partners must meet all HEC requirements for these programmes.

The document details legal requirements, quality assurance measures and the compliance with Pakistani law and conditions stated by the HEC for approval. This revised policy aims to ensure that TNE in Pakistan is conducted with high standards of quality and regulatory compliance. This new policy provides a comprehensive framework for TNE in Pakistan and includes three main components. Firstly, it enhances the guidelines for Pakistani Higher Education Institutions offering degree programmes in collaboration with foreign HEIs, providing more clarity on requirements and operational models. Secondly, it introduces guidelines for the establishment of offshore campuses of Pakistani HEIs- a new addition to the policy. Thirdly, it sets out quality assurance and regulatory arrangements for TNE providers, based on the updated standards by the UK's Quality Assurance Agency (QAA) through the PAK UK Education Gateway project in 2023.

The new TNE Policy 2024 introduces several key changes, including tightened eligibility criteria for foreign HEIs. Only institutions ranked among the top 700 in the QS or THE World University Rankings are now eligible for TNE partnerships

64. British Council, "Transnational Education Handbook Pakistan", https://www.britishcouncil.pk/sites/default/files/transnational_education_handbook_pakistan.pdf.

with Pakistani institutions. The policy also grants the HEC the authority to approve or reject TNE operations based on merit or policy compliance, even for universities outside the top 700. Striking a balance between maintaining high academic standards and offering greater flexibility in partnerships may further enhance the policy's effectiveness and impact.

The 2024 TNE policy does not currently mention articulated programmes, which have the potential to expand TNE opportunities for Pakistani students. These programmes, allowing students to study part of their degree in Pakistan and complete the remainder abroad, offer greater flexibility and affordability. It may be beneficial for HEC to consider incorporating articulated programmes in future policy updates to enhance access to international education and support student mobility.

The categories of institutions in the policy includes Local Teaching Centres (Type-I), Franchise Campuses (Type-II), and Offshore Campuses (Type-III). Type-I, commonly referred to as the "Teaching Centre Model," is the most prevalent model for TNE delivery following distance learning. Under this model, institutions such as Roots IVY International College, The Millennium Universal College (TMUC), and Beaconhouse International College (BIC), which have developed purpose-built campuses, offer TNE programmes where the curriculum and coursework are provided by foreign institutions, while delivery is managed locally with quality assurance mechanisms implemented by both partners through local tutors and assignment evaluations. While this model has been widely adopted by reputed network of colleges, mainstream universities remain cautious about initiating TNE partnerships under this





framework due to concerns that they may primarily be perceived as centres for foreign degrees, potentially affecting their own brand identity and degree offerings. Alternatively, mainstream universities cited more interest in offering TNE when double degree/joint degree policy is in place- a framework that is still under HEC consideration. Type-II partnerships are those in which private investors purchase franchise of foreign campus according to the definition of HEC TNE Policy. These partnerships are very rare, with only one example, University of Greater Manchester Islamabad. Currently, there are no examples for Type-III partnerships. These refer to partnerships in which a foreign university establishes, by itself, a campus in Pakistan with full ownership. Internationally, these are referred to as IBCs.

Given these variations in TNE models, it is crucial to provide training and awareness sessions so that colleges, students, and parents are well-informed. Prospective students may have a clear understanding of whether they are enrolling in a teaching centre of a foreign institution (e.g., University of London), a franchised campus, or an IBC, ensuring they can make informed decisions about their education.

In- country students interviews indicated a strong demand for more flexible and affordable pathways within TNE, as financial constraints prevent many students from enrolling. HEC and relevant stakeholders may wish to examine these concerns and explore ways to make TNE provision more flexible and inclusive—while maintaining quality standards. This could include encouraging institutions to offer more scholarships and financial aid, helping to ensure broader and more equitable access to international education opportunities.

4.2. Quality assurance and impact

The HEC endeavours for an extensive quality assurance coverage, having first developed a Qualifications Framework for Higher Education in 2009, and updated it once more in 2015. The National Qualifications Framework (NQF) is a classification system based on learning outcomes, skills and competencies expected at each higher education qualification level. Primarily, its aims are to support students in making well-informed decisions regarding qualifications, empower employers to evaluate candidate qualifications, and establish national qualification standards for policymakers to understand and assess the quality of higher education in Pakistan.

There are three main features of the NQF. Firstly, there is the classification of qualifications based on learning outcomes. Every accredited qualification in Pakistan is assigned a level from Entry (Level 1) to Level 8, in increasing difficulty. The NQF for Higher Education corresponds to academic qualifications from Level 5 to Level 8, with Level 5 referring to undergraduate degrees, and level 6 referring to postgraduate degrees. Secondly, the NQF adopts an outcomes-focused approach, where each level is mapped to a series of learning outcomes, which covers knowledge, skills and competencies. This shows what a graduate is expected to know and do and highlights the gaps in skills between each level. Thirdly, the NQF consists of a Register, which provides all information on the accredited higher education qualification titles and institutions recognised by the HEC.

The efforts taken to manage quality assurance in Pakistan has also manifested in a digital repository of HEC-recognised institutions. This is

particularly useful for students wanting to study in private universities but are unsure if the institution meets the local accreditation standards. There is also a list of unaccredited private institutions, cautioning students from improper accreditation.[65]

In line with its priority to enhance the quality of higher education, the HEC has also recently rolled out targeted policies aimed at improving academic standards and institutional performance. For instance, the Graduate Education Policy (2023) was designed to ensure quality in Level 7 and 8 programmes (Postgraduate and PhD level), with an emphasis on doctoral research. There are three parts to the policy. Firstly, the policy delineates the minimum requirement for launching graduate programmes in universities. This part of the policy stresses on the necessary resources, faculty and infrastructure for graduate education. Secondly, the policy stipulates a framework for governing the doctoral research system. This manifests in the form of guidelines for upholding research ethics, stated roles and responsibilities of supervisors/supervisees, and the supervisory process of doctoral dissertations. Finally, the policy talks about quality assurance, and mandates universities to provide evidence of compliance with the standards and guidelines of graduate degrees to obtain approval from HEC. This part of the policy also contains a list of actions to be taken by the HEC should the regulations in this policy be violated. Such action includes termination of PhD candidature, banning supervisors and other disciplinary actions.

With regards to TNE partners, insights from stakeholders revealed rigorous quality assurance processes are implemented at the various institutions. In brief, these quality assurance mechanisms include processes mirroring that of the parent institution, aligning quality assurance practices with international standards, regular student feedback on experience and outcomes, and regular review of frameworks. More specific details on the different mechanisms implemented can be found within the case studies section in Section 7.

Specific to UK higher education, UK TNE delivery must comply with the UK's Office for Students (OfS) requirements for outcomes such as a high-quality academic experience and proper student support. Whilst these outcomes are mandated, OfS does not issue a

65. https://www.hec.gov.pk/english/universities/Pages/Unaccredited-Institutions.aspx

separate guideline for TNE providers. Instead, TNE providers are expected to follow similar guidelines as UK universities, with the flexibility to determine how best to achieve them within their specific delivery contexts.[66] UK TNE are also expected to meet the UK's Quality Assurance Agency's Quality Code. This code defines the principles of UK higher education to secure a standard quality of education throughout the sector and should serve as a reference point for all UK higher education institutions, as well as their external stakeholders and international partners.

Finally, regulatory stakeholders also highlighted the importance of quality assurance in risk management, noting that ensuring clear processes would lead to proper implementation, which mitigates risk in TNE partnerships between both parties.

4.3. International engagements

Pakistan's TNE landscape has emerged through prominent international collaboration. Interviews with the University of London (UoL) shed light on the inception of UoL programmes in Pakistan. These programmes were formed under the guidance of advisers from both UoL and Pakistani government officials and have resulted in 31 active Recognised Teaching Centres (RTCs) in Pakistan. RTCs are institutions that support students enrolled in UoL's distance learning programmes. These centres provide local teaching, academic guidance, and resources to help students complete their degrees. As of 2023/24, there are 7,862 students studying at RTCs in Pakistan, with the largest provider hosting 903 students.[67] Compared to other partnerships that are more concentrated in metropolitan areas, RTCs are widely spread across Pakistan, extending into mid-sized cities and regional hubs.

The HEC has also collaborated with international organisations such as the World Bank, for higher education development in Pakistan. In brief, the project aims to promote research excellence in strategic economic sectors, improve teaching and learning quality, and strengthen governance within higher education institutions. One key area that this project addresses is aligning Pakistan's quality assurance model with international benchmarks. However, it should be noted that the World Bank is deprioritising higher education in funding, for foundational education, leaving a gap in support for higher education from this stakeholder.[68]

The HEC has established other collaborations with foreign partners- particularly the British Council, through the PAK-UK Education Gateway project. This project aims to strengthen partnerships between both higher education sectors, and promote collaboration in areas such as research, TNE and quality assurance. At present, there have already been talks to strengthen accreditation from both sides and develop a stronger degree validation process for both countries.

66. Interview with OfS conducted.

67. Data provided for by the University of London.

68. Country Partnership Framework: World Bank Document

5. Challenges and opportunities

5.1. Challenges

Transnational Education (TNE) in Pakistan presents persistent challenges that influence its overall trajectory. Based on research and stakeholder consultations, several barriers have been identified that impact the growth, accessibility, and long-term viability of TNE provision in the country. These challenges relate to regulatory frameworks, institutional engagement, financial accessibility, and overall awareness and understanding of TNE models among key stakeholders. The following key issues outline the major obstacles currently facing the sector:

Key Challenges:

1. **Limited non-UK TNE growth:** The decline of US and Australian TNE programmes restricts student choices and reduces diversity.
2. **Regulatory constraints and policy gaps:** The lack of provisions for joint/double degrees and articulation programmes limit collaboration opportunities.
3. **Clarity and confidence in TNE Pathways:** There is a general lack of awareness and clarity around TNE models and their recognition, which sometimes leads to confusion among students and parents. This can make it difficult for families to make fully informed decisions about available TNE options.
4. **Lack of IBCs:** Lack of incentives as well as legal, security and financial barriers have prevented foreign universities from establishing campuses in Pakistan.
5. **Financial constraints and accessibility:** High tuition costs and limited scholarships make TNE programmes unaffordable for many students.
6. **Approval procedures for Law and Engineering courses:** For institutions offering law and engineering programmes,

compliance requires coordinating approvals from multiple regulatory bodies—first the HEC, followed by the Pakistan Bar Council for law courses and the Pakistan Engineering Council (PEC) for engineering courses. While this ensures rigorous standards, it can be a complex process that may extend the timeline for programme approval.

7. **Equivalency and documentation requirements:** Students with UK qualifications have to obtain equivalency certificates from the HEC and have their documents attested. Those with school-level qualifications also need certificates from the Inter Board Coordination Commission (IBCC). These additional steps can make admissions more complex and time-consuming, which may discourage some prospective students.

5.2. Opportunities

Transnational Education in Pakistan presents substantial opportunities for growth, innovation, and expanded access to high-quality international education. Based on research and stakeholder consultations, several key opportunities have been identified that can help shape and strengthen the TNE landscape in Pakistan. Ongoing policy reforms, evolving regulatory frameworks, and the government's commitment to building a knowledge-based economy further enhance its potential. Additionally, strategic collaboration and investment in quality assurance mechanisms can further strengthen the sector. The country's growing youth population, increasing demand for globally recognised qualifications, and rising digital capacity position it as a promising destination for TNE expansion. The following key areas highlight the major opportunities currently available to advance and strengthen the sector:

Key Opportunities:

1. **Clearer regulatory framework:** The 2024 TNE policy provides structured guidelines for collaborations, ensuring transparency for foreign and local HEIs. Offshore campus guidelines also lay the groundwork for potential IBCs.
2. **Growing demand for international education:** The increasing desire for globally recognised degrees creates expansion opportunities for foreign universities through TNE partnerships.
3. **Potential for joint degrees and articulated programs:** With policy work on joint and double degrees already underway at HEC, there is strong potential for broader participation in TNE. This may encourage more mainstream universities to engage without concerns about brand dilution. Additionally, interest in articulation programmes continues to grow, further enhancing the scope for collaborative provision.



4. **Diversification:** Pakistan 2025 Vision[69] and most specifically 2025–26 Annual Plan[70] goal is to equip the youth with global skills and build a future-ready workforce for a knowledge-based, innovation-driven economy. Hence, Pakistan welcomes non-UK providers from countries like the US, Canada, and Australia to diversify and expand transnational education, especially in STEM, business, and healthcare.

69. Pakistan-Vision-2025.pdf

70. Annual_Plan_2025_26.pdf



6. Case Studies

6.1. Case Study 1 - University of London (UoL)

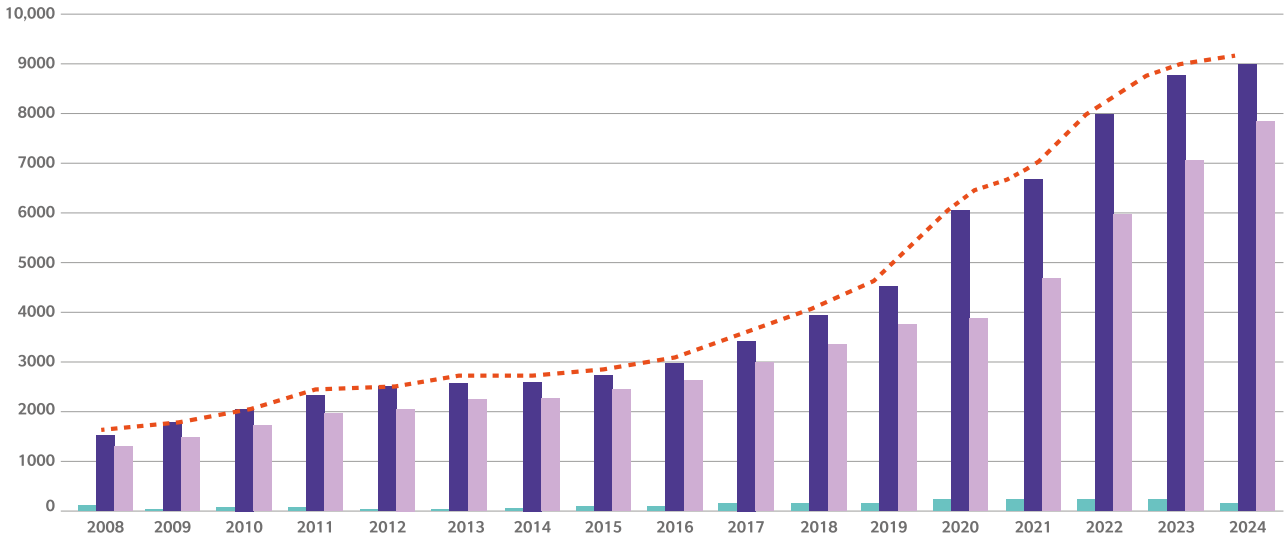
1. Distinctive features

The University of London has a long-standing tradition of delivering education at a distance. As a Federal University comprising 17 self-governing Federation Members, all students from these institutions are also UoL students, making them part of a vibrant London-based community of over 200,000 learners. Additionally, approximately 40,000 students across 190 countries pursue UoL degrees through online, distance, and blended learning. Since 1992, UoL has actively collaborated with institutions in Pakistan, experiencing a steady rise in student enrolments since 2008. Today, UoL stands as the largest provider of UK transnational education in Pakistan.

2. History of the UoL's partnership in Pakistan

The UoL has established a strong and growing presence in Pakistan, driven by demand for quality higher education and recognised qualifications. Collaboration with third parties, predominantly private, has been fundamental to UoL's rapid growth and scalability. Since tuition support first became available for Pakistani students in 1992, the number of partnerships has expanded rapidly across the major cities of Lahore, Karachi and Islamabad, with new centres regularly established by former teaching staff and alumni. Today, 35 Recognised Teaching Centres (RTCs) offer UoL programmes across the country, reflecting the expansion and sustained demand for its transnational education.

Figure 6: Pakistan enrolment trends at UoL



Source: University of London

3. Impact and perceived benefits

Partner Institution: UoL provides the ability to offer support for a world class qualification that is subject to rigorous quality assurance mechanisms as institutions develop, leaving them free to enhance their programme of teaching, to set their own fees, and to benefit from the investments that the University has made in developing high quality support and pedagogy. In Pakistan's case, this includes LSE, UCL, SOAS, King's, Birkbeck, Royal Holloway, Queen Mary and Goldsmiths.

Host University: Alongside its online teaching methodology, the UoL operates a blended learning approach by working with RTCs across Pakistan. This underlines the flexibility of the University's offering by giving opportunities to students to study independently online, or as a blended learning option, at a pace that suits their learning requirements. RTCs have played a valuable role in delivering local skills training, career guidance, and remedial English courses, and providing essential opportunities for personal and professional development. This approach provides students with flexibility by blending local or regional face-to-face instruction with teachers who are familiar with the cohort and the cultural nuances of teaching and learning, effectively bridging technological, cultural, and language barriers.

4. Main challenges and lessons learned

For several years, academic staff at UoL were severely constrained in travelling to support RTCs due to government turnover, political instability, military interventions, and civic unrest. This was the standout challenge, which no longer applies, but it notably assisted in developing ways to monitor and support RTCs remotely. It also provided the incentive to employ a local representative, who has been pivotal in effective engagement on the ground and in refining the University's dealings with government, RTCs, and regulators.

The University uses a 'devolved' model for face-to-face teaching through independent RTCs, which provide local in-person support alongside UoL's online provision. Around 60–70% of undergraduates use RTCs, while access



students must attend one. Challenges include ensuring quality assurance, avoiding unsuitable teaching methods, and preventing duplication or contradiction of University materials. The University invests significant resources to support RTCs and share best practices globally. Academics from the UoL UG Laws team regularly visit Pakistan to observe teaching, support tutors, and deliver workshops on feedback and assessment. These visits inform ongoing updates to partnership policies.

Despite regulatory complexities, UoL's experience in Pakistan has been largely positive. While some regulations have faced delays, the overall framework for TNE has matured quickly. The HEC's proactive engagement and resource allocation have enabled flexibility and supported quality assurance across TNE provision. Given its long-standing presence, UoL has built strong relationships with the government and regulatory bodies, including HEC. The University has contributed to the development of the TNE 2024 policy and is now preparing Joint Letters of Commitment with its RTCs. However, uncertainties remain—such as the plan for joint inspections and the approach to postgraduate TNE. Recognition of online and distance education also continues to vary among professional regulators.

5. Quality assurance

Although the early concept of providing self-study materials along with the examination has long since given way to new, cutting-edge programmes on sophisticated virtual learning platforms, rigour of quality and standards has remained core to the UoL's TNE provision.

There are six pillars underpinning quality at UoL:

1. A quality assurance framework and processes that are the same around the world as they are on campus in London.
2. Effective learning design that optimises student experience and outcomes.
3. Harnessing technology to enhance student experience and wellbeing.
4. Careers and employability are fully embedded within our provision.
5. We have extensive systems to leverage the student voice for continuous enhancement.
6. We collaborate internationally to share best practice in distance education and teaching.

RTCs are assessed by the UoL as part of the criteria for inclusion in the framework, which is itself subject to rigorous review and monitoring under the auspices of the University's Teaching Centres Committee. Some examples of the criteria for inclusion, Recognised Teaching Centres are required to:

1. Have student feedback mechanisms that are systematically used.
2. Take steps to use the outcomes of UoL monitoring activities for enhancement purposes and report progress.
3. Undertake systematic analysis of students' examination results and progression.
4. Keep under review and enhance where necessary, its approach to the delivery of academic support/ teaching.

5. Engage with the University's quality assurance mechanisms and processes.

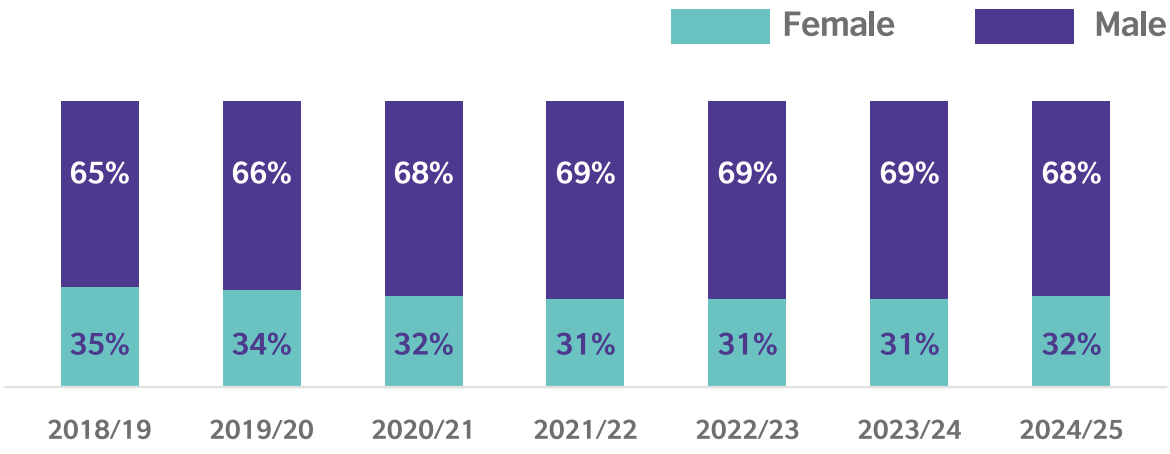
6. Gender and diversity

The UoL was the first UK university to admit students irrespective of race, gender, creed, or affordability. Access and inclusion have always been central to its mission and to maintaining local governmental and regulatory goodwill. While contemporary TNE provider interest may often focus on qualifications that generate surplus or enhance reputation, perceptions of the UoL derive from older roots and a model historically associated with large-scale online distance learning in response to defined capacity needs. This model balances access with more niche offerings that promote modernisation, social and cultural development, capacity building, and contribution to the UN's SDGs.

The published admissions policy maintains the tradition of offering opportunity to students while remaining rigorous in its assessment standards. All students, regardless of study mode, are assessed to an equivalent standard. Student support is taken very seriously, with the University focused on enhancing the learning environment rather than compromising assessment integrity or restricting access.

Figure 7 shows that the student body in Pakistan is majority male (68% in 2024/25, down from 69%), whereas in markets such as Sri Lanka and parts of MENA, the majority is female. In Pakistan and more broadly across South Asia, we have consistently highlighted stories of female students and alumnae and their career outcomes. Up to 73% of students are aged 20 and under, while only 4% are 30 and over.

Figure 7: Pakistan enrolments at the UoL TNE programmes by gender



Source: University of London



6.2. Case Study 2 - University of Kent with BIC

1. Distinctive features

The partnership between Beaconhouse International College (BIC) and the University of Kent marks Kent Business School's (KBS) first Transnational Education initiative, globally. This programme allows students in Pakistan to earn a UK degree without relocating, making it both academically and financially viable.

BIC delivers the teaching locally, while the University of Kent provides course content, specifications, and learning outcomes. Students who complete a Level 5 diploma, such as a qualification from Pearson, can progress to Level 6 and earn a Bachelor's in Business. They are considered University of Kent students, with full access to its facilities and resources, alongside BIC's support.

Unlike traditional franchise models where UK universities handle both assessments and moderation, BIC conducts assessments, and the University oversees moderation. Kent also prioritises faculty training to maintain academic standards.

After completing assessments, students gain access to internships and training from companies like Microsoft and Google, enhancing their employability and providing practical business experience.

2. History of the institution in Pakistan

BIC is a prominent educational institution in Pakistan, operating campuses in Islamabad, Lahore, and Faisalabad. As part of the Beaconhouse Group, which has been serving educational needs for nearly 50 years and currently educates over 315,000 students across eight countries, BIC offers globally recognised qualifications in partnership with esteemed UK universities.

In September 2024, BIC established a transnational education partnership with the University of Kent. This collaboration enables Higher National Diploma Business students in Pakistan to enrol in a one-year top-up programme, culminating in a Bachelor of Arts (BA) (Hons) in Business from the University of Kent. The programme is delivered in English across BIC's campuses in Islamabad, Faisalabad, and Lahore, with students registered as University of Kent students and granted full access to the university's remote services. The University of Kent is renowned for its diverse academic offerings and holds prestigious accreditations, including EQUIS, AMBA, and AACSB,[71] placing it among the top business schools globally.

Beyond its collaboration with the University of Kent, BIC has partnered with other leading UK institutions, such as the University of Essex, to offer a

71. This refers to a business school's triple accreditation by three international organisations: the Association to Advance Collegiate Schools of Business (AACSB) in the US, the Association of MBAs (AMBA) in the UK and the EFMD Quality Improvement System in Belgium (EQUIS).

variety of undergraduate and postgraduate programmes in fields like business, law, and technology. These partnerships provide Pakistani students with access to high-quality international education within their home country, often at a fraction of the cost of studying abroad. Through these strategic collaborations, BIC continues to enhance educational opportunities in Pakistan, aligning with global standards and catering to the evolving needs of its student community.

3. Impact and perceived benefits

Partner Institution: For BIC staff, this collaboration provides valuable experience in delivering a UK-accredited programme. Training from Kent's academics enhances their teaching methodologies, assessment techniques, and research skills, ensuring alignment with Kent's academic standards. This not only strengthens their expertise but also increases competitiveness in the higher education sector. Additionally, faculty benefit from joint research opportunities and potential exchange programmes with Kent.

Students in Pakistan gain access to a globally recognised UK degree without the financial burden of relocating. The TNE programme enhances employability through a curriculum aligned with international industry standards, supported by Kent's prestigious triple accreditation (EQUIS, AACSB, and AMBA). Students also benefit from international guest lectures, workshops, and networking events with industry professionals and faculty. Furthermore, the programme provides opportunities for postgraduate study at Kent with advanced standing. Beyond academics, students develop essential digital and business skills while receiving career support through Kent's Careers and Employability services. The programme also incorporates exposure to SDGs, equipping students with a well-rounded, future-ready education.

Host University: The University of Kent values its TNE partnership with BIC as it expands global reach, strengthens brand recognition, and supports financial sustainability. TNE plays a key role in Kent's internationalisation strategy and aligns with its commitment to the triple accreditation system (EQUIS, AACSB, and AMBA). By offering TNE in Pakistan, the University meets local education demands while diversifying revenue streams.

As part of the evolving KBS and BIC top-up TNE partnership, work is underway to strengthen student support and wellbeing at BIC. The aim is to ensure that student wellbeing is considered an integral part of the overall learning experience. This includes developing clear steps for accessing support, establishing regular meetings between BIC and KBS staff to review support practices, and exploring additional mechanisms to address student needs. These efforts are ongoing and reflect a shared commitment to creating a supportive academic environment that responds to the experiences of students studying locally.

4. Main challenges and lessons learned

Ensuring that Kent's academic standards align with Pakistan's educational landscape presents certain challenges. BIC faculty must adapt to UK assessment methods, which emphasise critical thinking and independent research—skills that are traditionally less emphasised in Pakistan's education system. This requires a shift in teaching approaches to encourage discussion, challenge ideas, and develop analytical skills. Assessments must also reflect these principles to cultivate critical thinking among students. To bridge the gap, continuous professional development opportunities are provided for faculty, enabling them to align with UK pedagogy. BIC's teaching staff are highly committed to this transition and work closely with the University of Kent to implement these methodologies effectively.

Many students aspire to transfer to the UK for further studies, but visa processing and financial constraints remain significant barriers. While the University prioritises student experience, logistical challenges can affect TNE students' sense of integration into Kent's academic community. Process-related issues such as managing time zone differences can create difficulties in scheduling meetings with UK-based teams, which are often limited to morning hours. Collaboration with students in the USA presents additional challenges due to time zone disparities. The University is committed to fostering inclusion but must carefully navigate these complexities.

Encouraging equal participation in discussions among male and female students has required dedicated effort. Creating an inclusive learning environment where all students feel comfortable expressing their viewpoints and engaging in group discussions is essential. This cultural shift is crucial for successfully implementing a British curriculum.

Economic instability and fluctuating exchange rates also impact students' ability to afford tuition fees, making long-term financial planning difficult. Additionally, competition from other TNE providers and local universities offering similar programmes at lower costs presents further challenges. Despite these hurdles, the University of Kent and BIC remain committed to delivering high-quality education and expanding opportunities for students in Pakistan.

5. Quality assurance

The Top-Up programme is designed to align seamlessly with Kent's existing degree structure, ensuring compliance with the University of Kent's Quality Assurance framework. This is overseen by the Quality Assurance and Compliance Office (QACO) in the UK, maintaining rigorous academic standards.

To support BIC faculty in meeting UK higher education standards, Kent provides specialised workshops led by the KBS Director of Studies. These sessions focus on enhancing teaching methods, assessment practices, and student engagement. Regular student feedback surveys are conducted at the end of each term to evaluate teaching quality, learning resources, and overall student satisfaction.

Continuous improvement is a key priority, with end-of-term review meetings between Kent and BIC across all three campuses. Academic integrity is strictly enforced through Turnitin plagiarism checks, with any cases of misconduct handled by the KBS Academic Misconduct Committee. The University also provides clear grading criteria and assessment guidelines aligned with UK higher education standards, ensuring transparency and consistency in academic evaluation.

6. Gender and diversity

The partnership adheres to an equal opportunities policy, ensuring that student admissions are free from gender-based or socioeconomic discrimination. The current TNE student body at BIC is becoming increasingly diverse, with a growing number of female students, although male students still constitute the majority. A large portion of the students come from middle-class and upper-middle-class backgrounds, reflecting the strong demand for international degrees in Pakistan. The student population is also ethnically diverse, representing various regions across the country.

TNE provides valuable opportunities for women in Pakistan who face social barriers to studying abroad. This programme allows them to pursue a UK-accredited education locally, offering them access to higher-level learning while reassuring their families about their safety and well-being.

Studying in the UK can be financially prohibitive, with many associated costs. In response, the University of Kent and BIC focused on creating a programme that is both affordable and accessible, while maintaining financial sustainability for both institutions involved.

7. Future plans

The University of Kent is broadening its TNE partnerships in countries like China, Thailand, India, and Dubai. By formalising its partnership in Pakistan, the University is establishing a strong foundation for further expansion into other regions. TNE is a key component of Kent's internationalisation strategy, which focuses on enhancing teaching capabilities, delivery systems, and global engagement beyond the UK.

Through the introduction of a one-year top-up programme, the University of Kent is taking a strategic first step into the TNE market. This allows Kent to evaluate and refine the programme's effectiveness before launching a full three-year offering in the future.

6.3. Case Study 3 - University of Hertfordshire with TMUC

1. Distinctive features

The University of Hertfordshire (UH) has an innovative TNE offering. Operating several different modes of delivery in Pakistan, UH has been a leading University for TNE, with its oldest partnership spanning 30 years. Currently, approximately 7000 students worldwide are enrolled in TNE programmes from the University. UH operates a number of different TNE models, including Supported Distance Learning (SDL), Franchise, Dual Degree and Validated.

The Millennium Universal College (TMUC), UH's partner in Pakistan is recognised for the state-of-the-art infrastructure, and among the most advanced physical facilities and infrastructure across Pakistan. Recognised by the Higher Education Commission of Pakistan, TMUC is operating eight purpose-built and vibrant campuses across major urban cities — Islamabad, Rawalpindi, Lahore, Karachi, Faisalabad, Gujranwala, Abbottabad and Peshawar. TMUC has grown into one of Pakistan's leading TNE providers, offering undergraduate and postgraduate qualifications. The TMUC–University of Hertfordshire partnership is a significant milestone as one of the first private TNE collaborations in Pakistan, offering UK qualifications through a globally recognised institution. There is also an emphasis on contextualising learning experiences to align with local industry needs and employment opportunities. The collaboration promotes faculty engagement in joint research projects, fostering academic enrichment and facilitating knowledge exchange between UH and TMUC.

2. History of the partnership in Pakistan

The collaboration between TMUC and the University of Hertfordshire commenced in 2016. Recognising the growing demand for quality higher education in Pakistan, both institutions embarked on this partnership to offer internationally recognised degrees locally. Over the years, this alliance has flourished, expanding its academic offerings and solidifying its reputation for excellence in TNE. At the undergraduate level, the courses include a BA (Hons) Business Administration, BSc (Hons) Computer Science, Bachelor of Laws (LLB), and a BSc (Hons) Psychology, with the portfolio growing to include courses such as a PgCert, PgDip and MA Education and a Master of Business Administration (MBA) at the postgraduate level.

3. Impact and perceived benefits

Partner Institution: The partnership with the University of Hertfordshire significantly enhances TMUC's academic portfolio by aligning its curriculum with international standards and broadening its programme offerings. This collaboration also drives faculty development through continuous professional training, enabling TMUC's staff to adopt global best practices and enhance their pedagogical skills. Affiliation with a prestigious UK university further elevates TMUC's reputation, attracting prospective

students and strengthening its position in the educational sector. The partnership also offers students access to globally recognised degrees without the financial and logistical challenges of studying abroad, making quality international education more accessible. Through SDL with UH, TMUC provides students with a flexible learning experience, allowing them to balance their studies with personal and professional commitments. Students also benefit from UH's international faculty network, gaining exposure to global expertise and best practices.

Host University: The University of Hertfordshire's partnership with TMUC has brought several strategic benefits. By collaborating with a reputable local institution, UH has been able to diversify its delivery models, ensuring they meet both local and international standards. Through close coordination with the HEC, UH has successfully aligned its programmes with local regulations, enhancing the credibility and acceptance of its qualifications in Pakistan. Initially focused on business programmes, the partnership has expanded over time to include Law, Computing, and more recently Psychology, broadening UH's academic footprint in the region. The collaboration has provided UH with direct access to the HEC, which has been supportive of TNE operations from the outset. This access not only strengthens UH's presence in Pakistan's higher education landscape but also offers opportunities for deeper engagement with policymakers, enabling the university to contribute to and influence the evolving TNE framework. Through this partnership, UH gains greater visibility, attracts a diverse student base, and extends its global reach, further enhancing its reputation and impact.

4. Main challenges and lessons learned

The University of Hertfordshire (UH) follows a phased approach in global partnerships, including with TMUC in Pakistan, by starting with lower-risk models like progression agreements and gradually expanding to more embedded models such as supported distance learning or franchise arrangements. As advanced models involve higher operational costs, this gradual transition allows for better risk management as relationships strengthen and trust develops.

The new TNE policy by HEC Pakistan emphasises partnerships with high-ranking international universities. With UH's strong global reputation, including the King's Award for Enterprise in International Trade, a 2025 QS 5 Star rating, and a 601 THE ranking, it meets local regulatory expectations. UH's longstanding relationship with HEC, a progressive and flexible regulator, further supports future growth and expansion of the partnership.

Student engagement and adaptation remain key, requiring attention to diverse learning styles, expectations, and potential resistance to foreign models. Technological and logistical challenges such as digital infrastructure, learning platforms, and remote support also add complexity. Effective communication and partnership management are vital for maintaining alignment and collaboration.

Key lessons from TNE include early engagement with local regulators, curriculum adaptability to local contexts, and strong quality assurance through regular monitoring, faculty training, and audits. Sustainable financial models and investment in faculty development are also essential for long-term success.

UH typically limits itself to one partner per country due to the intensive management required for successful TNE delivery. Multiple partnerships in the same market may lead to internal competition and diluted engagement. In larger countries like India, regional partnerships are feasible, but in markets like Pakistan, where a single partner operates across campuses, maintaining one partnership is more practical.

5. Quality assurance

The HEC in Pakistan has been consistently open and accessible, facilitating multiple discussions and meetings with the University of Hertfordshire during visits. Since UH first approached the HEC in 2016, the regulators have been open-minded and receptive to the proposed arrangements, compared to other markets where regulators may view new models as risky and request lengthy and expensive processes to undertake any new models of delivery and operation.

In the case of UH's TNE operation with TMUC, the University retains significant control, overseeing all aspects of teaching, owning the intellectual property, and developing the curriculum. The University also creates the teaching and assessment materials, provides academic support for programme delivery, and manages quality assurance, enhancement processes, and the issuance of award certificates and transcripts. TMUC is responsible for providing additional support, including workshops, extra classes, and tutoring. TMUC also mirrors QAA UK and HEC's best practice in quality assurance to ensure that teaching is aligned with the University's standards. Despite TMUC's role in teaching, the UH remains the awarding body and continues to oversee quality assurance and exam boards.

In terms of curriculum and assessment oversight, the University of Hertfordshire ensures that the curriculum delivered at TMUC aligns with its UK standards, preserving academic integrity. The UH's Module leaders and TMUC local tutors work together to deliver the teaching material. Control over assessment rests with the UH, where all grading and marking are handled by the university's module leaders and moderated by the External Exam Board. Both institutions conduct regular audits to review programme delivery, faculty performance, and student outcomes. These audits focus on the quality of the learning experience, considering student feedback and their perspectives. Compliance with both local and international accreditation requirements is meticulously maintained, ensuring that the qualifications awarded are globally recognised.

6. Gender and diversity

TMUC upholds a policy of inclusivity and equal opportunity. The current student demographic comprises approximately 35% female and 65% male students, reflecting a diverse mix of ethnic and socioeconomic backgrounds. Students from Pakistan, particularly from TMUC, are among the highest calibre the university has seen. However, many of them struggle with the financial burden of pursuing an overseas education. With UK tuition fees averaging £15,000 to £20,000, plus living costs, visa applications, and other expenses, students could be looking at £30,000 to £40,000 to study in the UK. By studying

locally, students can cut those costs in half while earning the same qualifications and receiving the same teaching materials as they would in the UK. The only difference is the infrastructure and location.

TMUC students benefit from access to some of the best facilities. TMUC's campuses are purpose-built, and some of the universities are modelled after the University of Hertfordshire in the UK, with a similar look and feel and adherence to the brand guidelines. Another advantage of this arrangement is the quality of education. Some of the programmes offered by the University of Hertfordshire are highly ranked, ensuring students receive top-tier education. In some instances, there are parents who decide not to send their child abroad based on affordability. Instead, parents may prefer to keep their children at home while still offering them the opportunity to earn a foreign university qualification.

7. Future plans

The University of Hertfordshire approaches its partnerships with a long-term commitment. Its oldest partnership, which began over 30 years ago, is with Malaysia. When the university met with TMUC in 2016, it was made clear that the university was not interested in a five or ten-year relationship, but rather in a long-term partnership, similar to the one with Malaysia. After meeting with several potential partners, the university received feedback from TMUC indicating that they also shared the same long-term vision. The next natural step is to establish a branch campus in Pakistan within the next five years. This long-term commitment and reassurance are essential for the success and growth of the TNE partnership.

6.4. Case Study 4 - Arden University with Roots IVY

1. Distinctive Features

Roots IVY International College in Pakistan established a significant partnership with Arden University to offer British higher education programmes locally. IVY was the first TNE partner of Arden University. The partnership has celebrated multiple graduation ceremonies in Islamabad, Lahore, and Faisalabad, highlighting the achievements of students who completed their Arden degrees through Roots IVY. The collaboration has been recognised internationally, being shortlisted for the Best Business School Partnership Award at the AMBA and BGA Excellence Awards 2024.

IVY has been a pioneer in offering TNE qualifications in Pakistan since 2003—well before the HEC introduced its formal TNE policy. The institution's first international collaboration began in 2001 with the University of London, providing franchised undergraduate programmes in diverse disciplines including Economics, Management, Finance, Social Sciences, Law, and Computing. IVY is also an approved learning partner of the Association of Chartered Certified Accountants (ACCA) UK, offering the full suite of ACCA qualifications—from the Foundation Diploma to all ACCA examination papers. The institution maintained its prestigious Gold Status as an ACCA learning partner until 2023.

In addition, IVY partnered with Pearson UK to deliver Higher Nationals and, later, Business and Technology Education Council's Level 3 qualifications in various fields such as Business, Computing, and Fashion. This collaboration significantly transformed the scope and delivery of these vocational programmes. A recent highlight of this partnership is the development of a unique Self-Regulated Framework in Higher National Law—currently offered exclusively by IVY on a global scale. This innovative qualification is accredited by the University of Bedfordshire, which also offers a franchised top-up year for graduates of IVY's HND Law programme, facilitating seamless academic progression.

In 2020, IVY entered into an exclusive partnership with the University of Bedfordshire, UK. This collaboration includes the delivery of franchised programmes in computing, business, accounting, law, and fashion. IVY provides the teaching and learning facilities and maintains quality assurance benchmarks for these programmes. IVY's most recent partnership is with Arden University. Through this collaboration, a large portfolio of programmes has been franchised across levels 4 to 7, covering the fields of social sciences, business, accountancy, computing, and psychology.

Arden and IVY formed a collaboration that encompasses a comprehensive and diverse portfolio of programmes. The partnership includes shared access to various resources, such as Arden's extensive library, which houses one of the largest collections of academic titles. Additionally, students benefit from the opportunity to schedule one-on-one workshops with Academic Skills Tutors, further enhancing their academic support.

The success of the partnership is driven by its competitive pricing and flexible admission criteria, making higher education more accessible to a wider range of students.

2. History of the partnership in Pakistan

Student recruitment began in September 2021 and has since enrolled nearly 1,200 students into the programme. The establishment of the partnership involved significant effort and extensive negotiations. It took five years to build momentum in student recruitment within the TNE sector and to successfully carve out a distinct niche in the market. Programmes were originally set for renewal in August 2025 for another five-year term. However, due to the HEC Transnational Education (TNE) Policy 2024, the partnership will be taught out, as Arden does not fall within the top 700 universities in global rankings.

The partnership offered a wide-ranging portfolio of undergraduate and postgraduate programmes across various disciplines at levels 4 to 7. These included business-related degrees such as BA Business (including Top-Up), BA Business Marketing Top-Up, BA HRM and Psychology, and an MBA. It also featured specialised programmes like BSc Accounting and Finance, BSc Computing (and Top-Up), BSc Project Management, and BSc Psychology (Applied). In addition, students could pursue professional qualifications such as the LLB, as well as advanced postgraduate degrees including MSc Project Management, MSc Data Analytics, MSc Engineering Management, MSc Strategic Digital Marketing, and MA Human Resource Management. New programmes had been approved and were ready for launch alongside the renewal of the five-year contract. However, the partnership will no longer recruit students beyond the February 2025 intake period.

3. Impact and perceived benefits

Partner Institution: The partnership with Arden University brought several benefits to IVY. Academic delivery was strongly supported by dedicated staff, with continuous liaison and training provided by Arden. Initial marking was carried out by IVY tutors as part of their training and professional development. Final marking and full moderation were conducted entirely by Arden to ensure academic standards and quality assurance.

Arden provided a robust academic learning experience and extended its comprehensive digital learning resources to students, including access to its full database across all faculties, positioning itself as a high-quality, student-centred institution in the region. The Postgraduate Certificate in Digital Pedagogies and Practice was made available at no cost to all IVY staff involved in teaching Arden University programmes, further contributing to capacity building and professional development.

Host University: Arden University's partnership with IVY proved to be strategically important and delivered three key benefits to the host institution. Firstly, Arden's academic team conducted biannual visits to IVY campuses to provide student support, carry out peer reviews, and deliver training sessions. These visits enhanced academic delivery and ensured alignment with Arden's academic standards. Secondly, the partnership significantly strengthened Arden's brand visibility and reputation in a key international market. Senior management from Arden actively participated in major IVY events,



including graduation ceremonies held in Pakistan, reflecting the university's engagement and commitment. Thirdly, the collaboration led to a major regulatory milestone: Arden's LLB programme, initially not approved by the Pakistan Bar Council (PBC), ultimately received approval due to IVY's efforts. This means Pakistani students who complete the LLB at Arden's UK study centres are now eligible to practise law in Pakistan—an opportunity that did not exist prior to the partnership.

4. Main challenges and lessons learned

As a relatively young and non-research-intensive institution, Arden University does not currently appear in major global university rankings. This became a critical issue when the new TNE policy in Pakistan required participating institutions to be ranked within the top 700 globally. As Arden did not meet this criterion, the partnership had to be discontinued. This highlights the importance for emerging universities like Arden to anticipate such policy shifts and build mechanisms for continuous student support, especially in international collaborations where eligibility criteria may evolve over time.

5. Quality assurance

At the end of each academic year, IVY and Arden collaboratively prepare and submit an Annual Monitoring Review, which highlights best practices and addresses any areas of concern. This process ensures continuous improvement and helps prevent future issues. Additionally, the partnership has been audited locally, exclusively through the HEC, ensuring compliance with local standards and regulations.

6. Gender and diversity

Equal access has consistently been advocated by the institutions, without imposing any restrictions on the number of participants. The student demographic is predominantly male, likely due to the nature of the programmes offered and their societal appeal, which tends to be more gender specific. Psychology is the only programme at Arden that has a higher proportion of female students. TNE has had a significant impact on enabling females to acquire international degrees, as parents are typically reluctant to send their daughters abroad independently from Pakistan.

7. Future plans

IVY has sought to establish a partnership with another university ranked within the 700 band, as specified by the HEC, to replace Arden's portfolio and maintain the recruitment of students for programmes where they have already developed a market presence.

7. Conclusion

7.1 Policy and delivery considerations

To enhance the accessibility, quality, and diversity of TNE in Pakistan, a series of comprehensive policy reforms are necessary. These reforms should focus on improving regulatory frameworks, expanding partnerships, and ensuring greater affordability and transparency. A critical aspect of these reforms is fostering collaboration between local institutions, industry partners, international universities and regulatory bodies including HEC. Strengthening trust and collaboration with local institutions is crucial to ensure that their contributions to quality education are acknowledged and supported. In addition, bringing international partners into the policy-making process and involving them in quality assurance practices will be essential. This partnership would provide valuable insights into international best practices and help align Pakistan's TNE policies with global standards, ensuring that both local and international institutions work together toward a more robust and inclusive TNE ecosystem in Pakistan.

Key policy and delivery considerations:

1. **Implementation of joint and double degree policy:** The Higher Education Commission (HEC) is currently developing a policy framework for joint and double degree programmes. This important step could significantly enhance the quality and credibility of TNE in Pakistan by encouraging greater participation from mainstream universities, thereby expanding access and strengthening academic partnerships. To support successful implementation, it may be helpful for HEC to further engage in broad-based consultations with local colleges, international universities, and delivery partners. Such engagement could help ensure wider buy-in and result in a framework that is both practical and aligned with international best practices. Piloting programmes in high-demand fields such as STEM, business, and AI may also serve as a useful way to build early momentum and foster collaboration.

2. **Broaden access to TNE partnership opportunities:** In addition to the top 700 ranking criteria, introduce a tiered partnership model allowing universities ranked beyond the top 700 to qualify if they meet specific standards. Furthermore, HEC may consider expanding partnerships to include universities accredited by recognised bodies such as AACSB and ABET.

3. **Introduce articulated programmes to advance TNE pathways:** HEC may initiate articulated programmes, enabling students to study part of their degree in Pakistan and part abroad, supported by clear credit transfer guidelines to ensure academic consistency and smooth transitions.

4. **Improve public awareness and transparency:** HEC may establish a national TNE portal with verified information on accredited programmes, and recognition, complemented by public workshops to educate students and parents about TNE pathways and career prospects.

5. **Automated one-window approval portal:** To enhance efficiency and reduce administrative burden, a one-window online portal may be established for institutions to apply for and track all necessary NOCs and approvals. This system could include clear timelines, scheduling for inspection visits, and streamlined coordination between HEC and relevant bodies like PEC and PBC to ensure a transparent and organised process.

6. **Streamlined degree verification and student services:** In parallel, the process for student degree verification and related services could also be streamlined through improved coordination with HEC and affiliated entities. A unified digital platform with clear timelines, real-time tracking, and standardised procedures would significantly reduce delays, improve transparency, and enhance the overall student experience.

7.2 Policy and delivery considerations for Pakistani Institutes

To enhance the success and impact of TNE partnerships with UK institutions, local Pakistani universities should take a more active role in managing these collaborations. Rather than merely acting as intermediaries, they can play a central coordinating role by facilitating dialogue and collaboration among key stakeholders, including regulatory bodies, UK universities, and industry partners. This approach will foster stronger academic integration, improve student experiences, and create more effective pathways for employability and long-term success. By leading these partnerships, Pakistani institutions can ensure that TNE programmes are academically rigorous and aligned with the demands of the local job market. Additionally, they should play a crucial role in quality control, ensuring that both UK universities and local regulatory bodies, such as the HEC, are satisfied with the standards and outcomes of these programmes. The following policy considerations focus on fostering ownership, increasing visibility, and encouraging academic collaboration:

Key policy and delivery considerations for Pakistani Institutes

1. **Enhancing university engagement in TNE partnerships:** Pakistani institutions should deepen ties with UK partners by co-teaching courses both online and in person, and by increasing faculty and leadership exchanges. Co-branded programmes and joint initiatives can help raise the profile of TNE and provide richer learning experiences for students.

2. **Strengthening industry collaboration:** Establishing local industry advisory boards will ensure curricula remain aligned with evolving job-market needs. By expanding internships and employer engagement programmes, universities can provide students with practical experience, enhance employability, and foster stronger ties between academia and industry.

3. **Promoting inclusivity and access:** Targeted scholarships and outreach for female students, coupled with increased female faculty representation, will improve gender balance. Conducting market research to design in-demand courses and offering flexible payment options or financial aid will make TNE programmes more accessible to students from diverse socio-economic backgrounds.

4. **Optimising student progression and support:** Clear progression pathways, such as guaranteed transfer options to UK campuses, and enhanced career services with strong employer networks will guide students from enrolment to employment. Showcasing graduate outcomes and facilitating direct entry routes will reinforce the value proposition of TNE.

5. **Elevating quality assurance and faculty development:** Regular training on UK-aligned teaching methods, grading standards, and assessment practices will keep faculty current. Joint quality-assurance committees with UK universities, alongside robust internal controls, will safeguard academic rigour and ensure all TNE programmes meet both HEC and partner-university requirements.

6. **Raise awareness about TNE pathways:** Run awareness campaigns in schools and colleges, highlighting TNE benefits and launch targeted outreach through schools, colleges, and media—featuring success stories, alumni testimonials, and industry insights—to raise awareness of TNE benefits and career pathways.

7.3 Policy and delivery considerations for UK stakeholders

To enhance the success and impact of UK universities in Pakistan's TNE landscape, UK institutions must transition from a largely regulatory role to one of active involvement and partnership. Beyond mere monitoring visits, there is a pressing need for deeper engagement with students, faculty, and local industries. This will not only strengthen academic integration and improve student experiences but also create more robust pathways for employability and long-term success. Key stakeholders, including UK universities, local institutions, industry partners, UK Department of Business and Trade, QAA and local regulatory authorities should collaborate to ensure the TNE programmes are both academically rigorous and aligned with the demands of the local job market. The following policy considerations focus on ownership, visibility, and academic collaboration:

Key policy and delivery considerations for UK stakeholders

1. **Increase UK University presence and engagement in Pakistan:** Establish a comprehensive faculty exchange and mentorship programme, combining annual UK–Pakistan faculty and leadership visits, UK-based faculty mentorship for students, and semester-long teaching fellowships for Pakistani academics in the UK.

2. **Promote gender inclusion in TNE pathways:** Implement targeted scholarships and flexible learning models to boost female participation, offer mentorship with UK female faculty and tailored support

services, and integrate gender sensitive content and diverse case studies into TNE programmes.

3. **Strengthen regulatory collaboration with HEC and QAA and UK Universities:** Develop a joint UK-Pakistan accreditation framework in collaboration with HEC and QAA.

4. **Enhanced DBT engagement in the Higher Education sector:** The UK Department for Business and Trade (DBT) can play a more active role in strengthening transnational education by coordinating trade missions and supporting bilateral educational agreements. Targeted funding schemes, incentives for UK institutions, and support for establishing overseas campuses can further encourage UK providers to expand in Pakistan. Additionally, promoting UK education standards and qualifications can help boost local demand for high-quality TNE programmes.









Appendix

Annex A: UK TNE Mapping in Pakistan

UK University	Partner organisation	Partnership Type (UK Definition)	Average Tuition Fees in GBP (per academia year unless otherwise specified*	Level of study
Arden University	Roots IVY International College (RIIC)/ICMS	Franchise	£3,500-4,000	UG, PG
University of Bedfordshire	IVY College of Management Sciences (ICMS)	Franchise	N/A	UG, PG
Liverpool John Moores University	Beaconhouse International College (BIC)	Franchise	£2,500	UG, PG
University for the Creative Arts	The Millennium Universal College (TMUC)	Franchise	£2,500-3,000	UG, PG
University of London	Registered Teaching Centres (RTCs)	Online with a hybrid option with RTCs	£3,333	
University of Hertfordshire	The Millennium Universal College (TMUC)	Distance learning Franchise (from 2024)	£2,000-£2,500	UG, PG

Study Type	Duration	Programme
N/A	3	BA (Hons) Business Management BA (Hons) Business Management Top-Up BA (Hons) Business Management (Marketing) Top-Up BSc (Hons) Computing BSc (Hons) Accounting and Finance BSc (Hons) Psychology BA Human Resource Management and Psychology
	1	MSc Strategic Human Resource Management MSc Data Science MSc Project Management MA Human Resource Management MSc Data Analytics and IT Security Management Master of Business Administration (MBA)
	N/A	BSc (Hons) Business Management BA (Hons) Fashion Design LLB MBA BA Fashion Design Top-Up BSc Business Management Top-Up LLM International Business Law (IBL) LLM International Dispute Resolution (IDR)LLB (Hons) Law
N/A	N/A	BEng (Hons) Electrical and Electronic Engineering BEng (Hons) Mechanical Engineering BSc (Hons) Software Engineering BA (Hons) International Relations and Politics Bachelor of Law Honours MA International Relations and Politics
FT	3-5	BA (Hons) Fashion Textiles BA (Hons) Film and Digital Art BA (Hons) Hospitality Management BA Hons Media and Communication International Master of Business Administration
FT	3-5	BA (Hons) Business Administration BSc (Hons) Computer Science LLB Bachelor of Laws (LLB) BSc (Hons) Psychology (Prospective offering) PgCert, PgDip and MA Education Master of Business Administration (MBA)

UK University	Partner organisation	Partnership Type (UK Definition)	Average Tuition Fees in GBP (per academia year unless otherwise specified*	Level of study
The University of Bolton	University of Bolton Islamabad (UOBI)	Franchise	N/A	UG, PG
The University of Law	Business and Law School (BLS)	Franchise	£12,400	PG
	Institute of Cost and Management Accountants of Pakistan (ICMA Pakistan)	Franchise	N/A	PG
	Shaheed Zulfiqar Ali Bhutto University of Law (SZABUL)			
University of Kent	Beaconhouse International College (BIC)	Franchise	£2,500	UG
University of Essex	Beaconhouse International College (BIC)	Franchise	£2,500	UG
University of London	Registered Teaching Centres (RTCs)	Online with a hybrid option with RTCs		

Study Type	Duration	Programme
N/A	3	LLB (Hons) Law BA (Hons) Fashion BSc (Hons) Games Programming BSc (Hons) Computing BSc (Hons) Computing (Cyber Security) BSc (Hons) Business Management BA (Hons) Accountancy MBA Business Administration
FT, PT	1/2	LLM Master of Laws (General) Online
N/A	N/A	Master's Degrees Global Accounting and Financial Management
		Law
FT	1	BA (Hons) Business ((Kent Business School, Top-up programme once obtained level 5 to gain a level 6)
N/A	3	BBA Business Administration BSc Accounting and Finance BSc Artificial Intelligence

University of London Registered Teaching Centres (RTCs)		
RTC locations	**RTCs**	**Programmes**
Islamabad	Beaconhouse International College	BSc in Computer Science
Faisalabad	Beaconhouse International College	BSc in Business Administration; CertHE Business Administration; BSc Computer Science; LLB; CertHE Common Law; BSc Psychology
Lahore	Beaconhouse International College	BSc in Computer Science BSc Business Administration
Lahore	Blackstone School of Law	CertHE Common Law; LLB; LLM; BSc Business Adminstration
Karachi	Cedar College Degree Programme	BSc in Business Administration BSc Psychology
Peshawar	Centre for Learning Law and Business (CLLB)	LLB; LLM
Clifton, Karachi	Denning, Clifton Campus	Bachelor of Laws (LLB)
Creek, Karachi	Denning, Creek Campus	Bachelor of Laws (LLB)
PECHS, Karachi	Denning, PECHS Campus	BSc in Business Administration; BSc Computer Science; BSc Psychology; CertHE Business Administration; International Foundation Programme; BSc Econs; BSc Politics and IR; BSc Acc/Fin; CertHE Common Law; LLM
Seaview, Karachi	Denning, Seaview Campus	Bachelor of Laws (LLB)
Lahore	International College for Legal Studies	Bachelor of Laws (LLB)
Islamabad	Islamabad School of Law	CertHE Common Law, Bachelor of Laws (LLB), LLM, Grad Diploma in Commercial Law
Faisalabad	Kallipolis College for Advanced Studies	BSc Psychology; LLB
Lahore	LGS International Degree Programme	International Foundation Programme, CertHE Social Sciences, BSc Finance, BSc Accounting and Finance, BSc Banking and Finance; BSc Business and Management; BSc Development and Econs; BSc Econs; BSc Econs and Finance; BSc Econs and Politics; BSc Econs and Mgt; BSc International Development; BSc IR; BSc Management and Digital Innovation; BSc Maths and Econs; BSc Politics and IR; BSc Business Admin; CertHE Business Admin; CertHE Common Law; LLB; BSc Computer Science; BSc Psychology; BSc Data Science and Business Analytics

University of London Registered Teaching Centres (RTCs)		
RTC locations	**RTCs**	**Programmes**
Gujrat	LGS International Degree Programme - Gujrat	Cert HE in Common Law; LLB; BSc Business Administration
Islamabad	LGS International Degree Programme - Islamabad	BSc in Business Administration; BSc Acc/Fin; BSc Bus/Mgt; Bsc Econs; BSc Maths/Econs; BSc IR; BSc Pol/IR; CertHE Common Law; CertHE Social Sciences; LLB
Karachi	LGS International Degree Programme - Karachi	Bachelor of Laws (LLB)
Islamabad	Lord's College International	LLB
Islamabad	Metropolitan International United College	Bachelor of Laws (LLB); CertHE Common Law
Lahore	Pakistan College of Law	Graduate Diploma in Commercial Law; CertHE Common Law; LLB; LLM
Islamabad	Roots IVY International College (RIIC)	Cert HE in Common Law; LLB; Grad Dip; Commercial Law; BSc Acc/Fin; BSc Bus/Mgt; BSc Econs; BSc Econs/Fin; BSc Econs/Mgt; BSc IR; BSC Mgt/Digital Innovation; BSc Pol/IR
Lahore	Roots IVY International College (RIIC) - Lahore	Bachelor of Laws (LLB), BSc Business Admin; CertHE Common Law
Islamabad	School of International Law (SIL)	Cert HE in Common Law, LLB, LLM
Karachi	Shaheed Zulfikar Ali Bhutto Institute of Science and Technology University (SZABIST University)	Bachelor of Laws (LLB), CertHE Common Law
Lahore	SKANS School of Accountancy	MSc in Professional Accountancy 2022
Islamabad	The Institute of Legal Studies (TILS)	Bachelor of Laws (LLB), CertHE Common Law, LLM
Lahore	The Institute of Legal Studies (TILS)	Bachelor of Laws (LLB), CertHE Common Law, LLM
Peshawar	The Institute of Legal Studies (TILS)	CertHE Business Administration, CertHE Common Law, LLB, BSc Business Administration
Karachi	The Millennium Universal College, TMUC	BSc Acc/Fin; Mgt/Dig Innovation; BSc Bus Admin; LLB; CertHE Business Admin
Lahore	The Millennium Universal College, TMUC	BSc Acc/Fin; Bus/Mgt; Mgt/Digital innovation; BSc Bus Admin; CertHE Bus Admin; LLB
Rawalpindi	The Millennium Universal College, TMUC	Bachelor of Laws (LLB); BSc Acc/Fin; Bus/Mgt; Mgt/Digital innovation

University of London Registered Teaching Centres (RTCs)		
RTC locations	**RTCs**	**Programmes**
Islamabad	The Millennium Universal College, TMUC	BSc Fin; Acc/Fin; Bank/Fin; Bus/Mgt; Dev/ Econ; Econ/Fin; Econ/Mgt; Econ/Pol; Intl Dev; Mgt/Dig Innovation; Maths/Econs; Pol/IR; IR; CertHE Social Sciences; BSc Bus Admin; CertHE Common Law; LLB; LLM; CertHE Business Admin;
Multan	TILS Law School	CertHE Common Law; LLB
Multan	UCL Business School	CertHE and BSc Business Admin
Lahore	Universal College Lahore (SITS code: PKUCL0)	IFP; CertHE Common Law; Grad Dip Commercial Law; LLB; CertHE Social Sciences; BSc Acc/Fin; Bus/Mgt; Econs; Econ/Mgt; Mgt/Digital innovation; IR; Pol/ IR; CertHE and BSc Business Admin

www.britishcouncil.pk

BRITISH COUNCIL