

EDUCATION
INTELLIGENCE

Gearing up for growth: Transnational education in Pakistan

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Executive summary

Statement of purpose

Pakistan is one of the world's most populous and fastest growing nations, but due to its complex political and security situation its potential in terms of foreign education investment is not readily apparent. The purpose of this report is to examine the current and potential market for transnational education (TNE) partnerships in Pakistan for policymakers as well as education practitioners and professionals; further, this paper identifies trends, opportunities, and challenges associated with operating transnational programmes in Pakistan.

Methodology

In order to form a holistic and accurate understanding of the Pakistani TNE environment, the British Council research team utilised a multi-pronged approach. Global and national information sources were used to paint a picture of the Pakistani market as well as for overall demographic, economic, and education trend analysis and forecasting. Primary research was collected in two ways to better understand the subtle nuances of the sector; quantitative data was aggregated through the British Council's Student Insight survey, which has gathered firsthand information on student preferences from 9,335 Pakistani students since 2007, and qualitative information was gathered through in-person interviews with government officials, administrators, faculty, parents, and students in Islamabad, Lahore, and London.

Findings

The main findings of this research are as follows:

- Government funding and public supply of education are low and therefore private provision must help raise capacity at all levels.
- Pakistan is home to a growing tertiary aged population and an increasingly affluent middle class that is comprised of discerning consumers of higher education.
- Enrolments in tertiary education in Pakistan are low, at roughly five to six percent, but have massive potential to rise with the right incentives and provision.
- Fewer students are travelling abroad to the US and UK for higher education, though interest in American and British degrees remains high.
- The Pakistani Higher Education Commission (HEC) is in favour of transnational programmes.

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- The government has declared student priority subjects in terms of employability as well as key research areas that will help Pakistan's socioeconomic development. Student demand for programmes and university demand for partnerships are largely in line with these government objectives.
 - There are numerous examples of successfully functioning partnerships in Pakistan that fall under these key subject and research areas.
 - Due to lower costs and accessibility, there is rising Pakistani student demand for degree-bearing TNE programmes, both at the undergraduate and postgraduate level.
 - Pakistani government officials and education professionals see Pakistan's future as a regional hub for education.

Conclusions

Transnational education in Pakistan should not be limited to degree-bearing foreign programmes administered in-country. Instead, the wider definition of TNE that introduces universities as drivers of skills and research progress, partnering to stimulate socioeconomic and business growth, is more applicable to this market. The Pakistani government, institutions, and students welcome collaborations for both award-bearing programmes and research exchanges.

Joint degree-bearing partnerships that involve government and student priority subjects at both the postgraduate and undergraduate level are in high demand. Foreign institutions should enter the Pakistan market in a measured manner and with a trusted partner. This partnership may come about in a number of ways but the most successful collaborations have been through personal connections, through a Higher Education Commission (HEC) introduction, or under the direction of a local visionary. International provision of vocational programmes and digital learning are also on the horizon for Pakistan.

Research partnerships, especially those with government sponsorship and funding, have been largely productive and have moved knowledge and relationships forward. Foreign institutions are encouraged to follow this path of entry into the Pakistan market, as this type of collaboration could flourish in time. As of now, however, investors in the education market must employ a slow and steady entrance and long-term milestones in order to form mutually beneficial partnerships in Pakistan.

Introduction

This report presents the findings of research into the current and future trends for transnational education (TNE) in Pakistan. With a young population that is expanding rapidly, Pakistan presents significant opportunities for higher education providers worldwide. However, the slow-growing economy and volatile political situation makes the country a complex, challenging market to invest and thrive in.

In this study, a multi-pronged approach was implemented to gain an understanding of TNE in Pakistan. Information collected at the national and international level was used to provide an overview of the political and socio-economic factors that shape the country, as well as identify trends and generate forecasts. Quantitative data was extracted from 9,335 Pakistani students' responses to the British Council's Student Insight survey, which has been used to collect information on student preferences since 2007. This information was supported by qualitative data gathered through face-to-face interviews with government officials, administrators, faculty members, parents and students in Islamabad, Lahore and London.

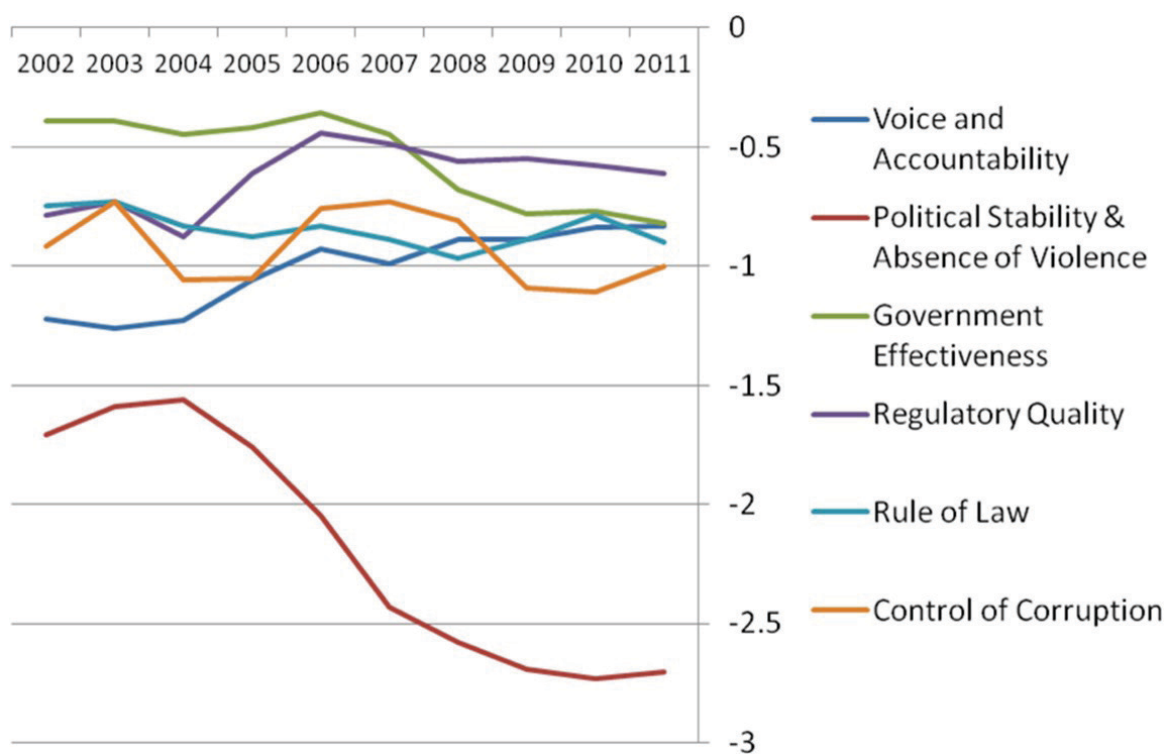
The findings of this study confirm the strong desire of Pakistani people for further education opportunities and the high value placed on education in spite of the country's volatility. TNE should be tailored precisely to meet the needs of students and the long-term improvement of development indicators should be educators' main goal. Educational collaboration in Pakistan is likely to succeed so long as institutions and governments ensure that the modes of entry and delivery used are appropriate for the market.

Background

Politics

The complex political situation and the perceived and actual threats to security in Pakistan mean that many label the country as unstable without considering the underlying factors. The Pakistani people are largely aware of and concerned about the problems their country faces and want to see a change that will bring lasting stability.

Figure 1: Governance Indicators in Pakistan, 2011 (+2.5 = strong, -2.5 = weak)



Source: World Governance Indicators 2011, World Bank

As shown in Figure 1, Pakistan underperforms in all six of the World Bank's governance indicators; political stability in Pakistan is particularly weak and is ranked in the lowest percentile worldwide. This political instability can be traced to weak governments that change frequently, as well as numerous incidents to destabilise the government and the presence of militant groups.

Historically, Pakistan has been led by a series of civilian governments and military dictatorships and has struggled to achieve a balance between its secular and Islamic natures. Power is currently divided between civilian leaders, the judiciary and the generally trusted military, which has led four coups in the nation's history, the most recent being in 1999. The military dictator General Pervez Musharraf was forced from office in 2007 and was succeeded by Asif Ali Zardari. President Zardari is the co-chairman of the Pakistan People's Party (PPP), the party led by his late wife, Benazir Bhutto, who was assassinated in 2007.

Zardari has been a weak and unpopular president and is accused of corruption and taking extra-legal measures to control the country's supreme court. Nonetheless, he has led a civilian government that is set to be the first to survive its five-year term in leadership. The Supreme Court of Pakistan, led by Chief Justice Iftikhar Muhammad Chaudhry, has become a political force and Chaudhry is one of Zardari's key opponents. The pair has engaged in a proxy battle through the courts, which resulted in the resignation of Prime Minister Yousaf Raza Gilani, who was ousted in 2012 for failing to comply with orders from the Supreme Court to reopen investigations into Zardari's alleged corruption.

Pakistan's military continues to receive strong public support, with 77% of Pakistanis asserting that the institution has a positive influence on the country. This means that General Ashfaq Kayani, the Pakistani Chief of Army Staff, is potentially the most powerful man in the country and senior generals continue to exert their influence behind the scenes. The military effectively has control over foreign policy and does not have a high regard for the Zardari government. While Kayani and his officers have taken a backseat in politics, there is speculation that the military will intervene before June. This speculation has been fuelled by the rise of the pro-military cleric Allama Tahir ul Qadri, who has aspirations to overthrow the government, and the recent return to Pakistan of former president Musharraf. One of the opposition leaders, Nawaz Sharif, who was deposed as prime minister in 1999, does not enjoy great popularity but has joined with Zardari to promise democratic reform and a free and fair general election in May 2013.

Figure 2: Favourability of Pakistan's political leaders, 2008–2012

% OF PAKISTANIS GIVING FAVOURABLE RATINGS	2008	2009	2010	2011	2012
Khan	-	-	52	68	70
Sharif	76	79	71	63	62
Kavani	-	-	61	52	54
Chaudhry	-	61	61	51	51
Musharraf	44	-	-	-	39
Gilani	-	67	59	37	36
Zardari	64	32	20	11	14

Source: Pew Global Attitudes Project 2012, Pew Research Centre

Pakistanis are losing faith in their leadership candidates as the political environment has become more fractured and complex. As shown in Figure 2, Kayani and Chaudhry remain more popular in the polls than Zardari. Public opinion of national hero and activist Imran Khan has also increased and since 2012 Khan has had a higher favourability rating than any of the country's other leadership candidates. Khan has a strong pro-education agenda and his popularity highlights the public's priorities and exhaustion with the current instability. It remains uncertain, however, how Khan's popularity will translate into votes for his Pakistan Tehreek-e-Insaf (PTI) party in the upcoming elections.

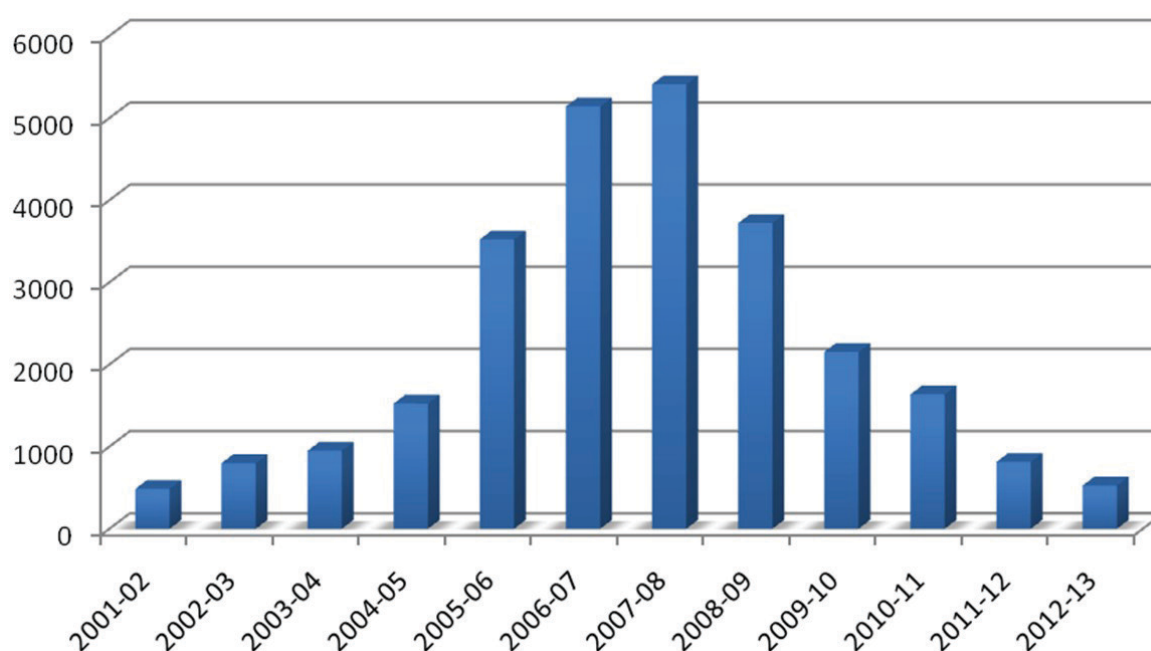
Economy

The Pakistani economy is characterised by slow growth and low investment, which have contributed to the lack of faith in the government and its policies. The slow rate of growth can be attributed to political instability but also to the devastating floods of 2010 and 2011, which led to a decline in the nation's cotton exports; the share of national GDP held by agriculture has remained fairly constant since 2003. The country is now experiencing high levels of debt and inflation and a tax reform is necessary: less than 2% of Pakistanis, including the nation's wealthiest citizens, pay their taxes. This highlights the lack of formal mechanisms in place within Pakistan.

Pakistan's GDP per capita (PPP) was US\$2,900 in 2012 and is recovering slowly from the effects of the global financial crisis, which affected Pakistan more than its neighbours. Growth averaged less than 3% over 2008–2011 and is projected to strengthen much more slowly than the GDP of neighbouring countries over the next five years: India and China are set to continue their strong growth trajectories, as are Bangladesh and Sri Lanka, despite having GDP a half and a quarter of the size of Pakistan's, respectively.

In order to boost productivity, become more competitive and attract foreign direct investment (FDI) Pakistan needs to increase public spending on infrastructure, education and industry. However, the declining rate of FDI, as shown in Figure 3, limits the amount the government is able to spend.

Figure 3: Foreign direct investment in Pakistan, 2001/02–2012/13 (millions of US\$)

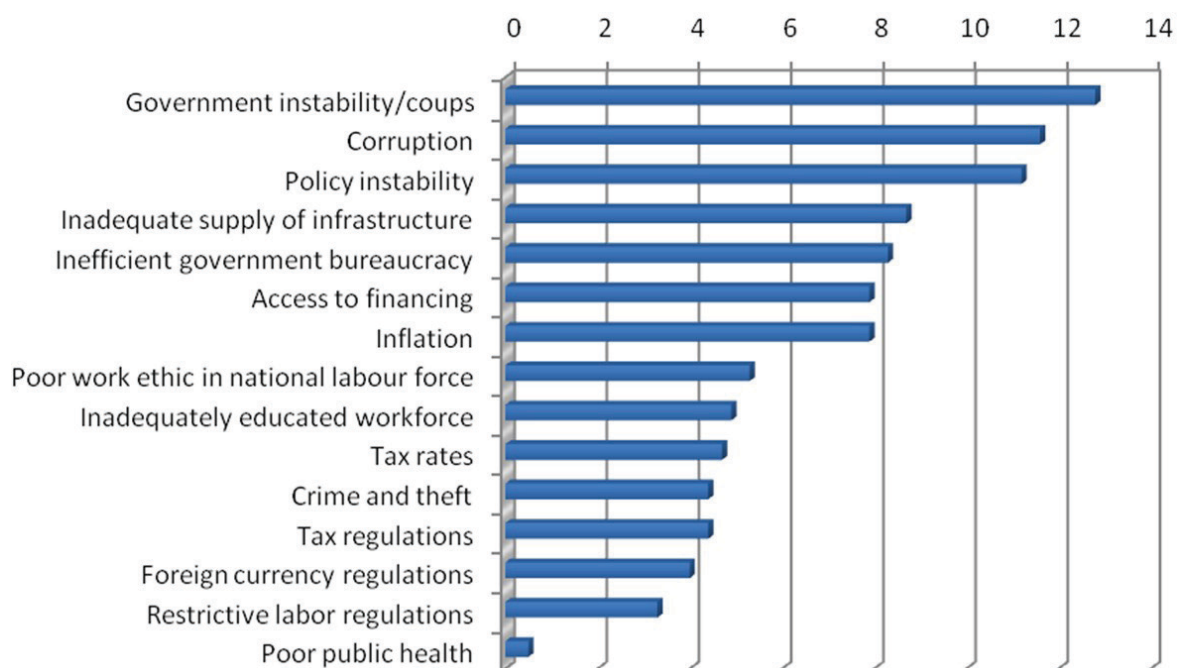


Source: Pakistan Board of Investment

Note: Figures for 2012/13 are for the first half of the year

The decline in investment in Pakistan, by both the government and international investors, needs to be addressed in order to develop capacity and realise human potential. FDI in Pakistan has fallen by almost 85% since its peak in 2007/08 before the onset of the global financial crisis, which has meant that the country remains dependent on foreign aid and key national-level programmes, including education, have suffered.

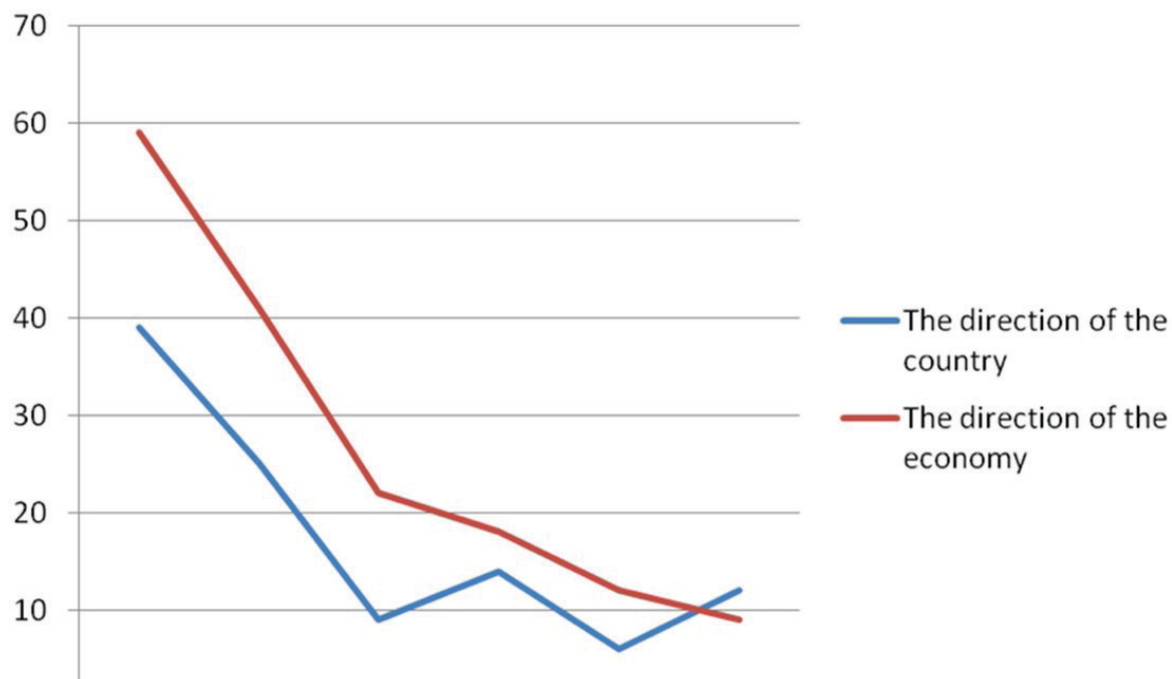
Figure 4: Obstacles to doing business in Pakistan (% of responses, respondents asked to select five obstacles)



Source: Global Competitiveness Index 2012, World Economic Forum

As shown in Figure 4, corruption and political and policy instability are the most commonly cited obstacles to doing business in Pakistan. These complaints are echoed by the Pakistani public.

Figure 5: Satisfaction with the direction of the country and economy, Pakistan, 2007–2012



Source: Pew Global Attitudes Project 2012, Pew Research Centre

Figure 5 shows the decline since 2007 in public satisfaction with the direction in which Pakistan is heading. In 2012, 95% of Pakistanis named the government as either the primary or secondary cause of the country's economic problems, including the energy crisis and the resulting power outages, which have caused setbacks in industry, business and everyday life. Widespread poverty, underemployment and unemployment are also chief complaints, along with the increasing national wage gap and the effects of brain drain.

Demographics

Pakistan contains a mix of ethnic groups and has a large refugee population. With a population of 193 million, it is the sixth most populous country in the world and growth is continuing at a rate of 1.84%. The country's large population means that it has a comparatively low GDP per capita (PPP), as shown in Figure 6.

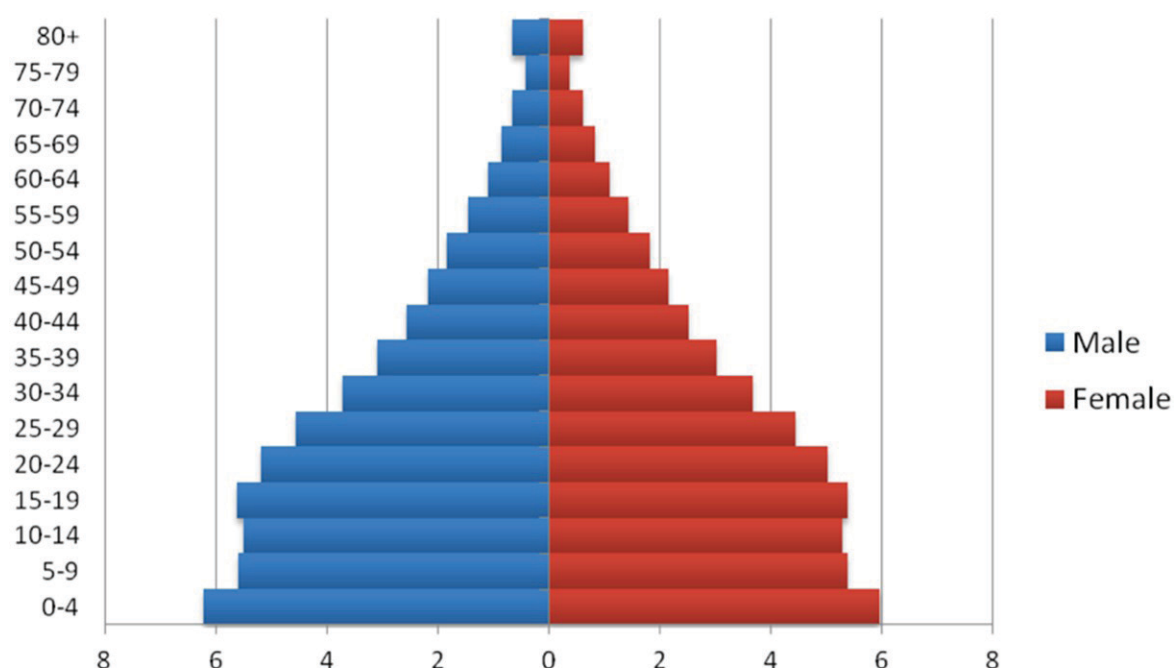
Figure 6: Comparing demographic and economic indicators, Pakistan

KEY METRIC	FIGURE	WORLD RANK
Population (2013)	184 million	6
Population growth rate	1.84%	62
GDP (nominal)	230 million USD	44
GDP per capita (PPP)	2,900 USD	138

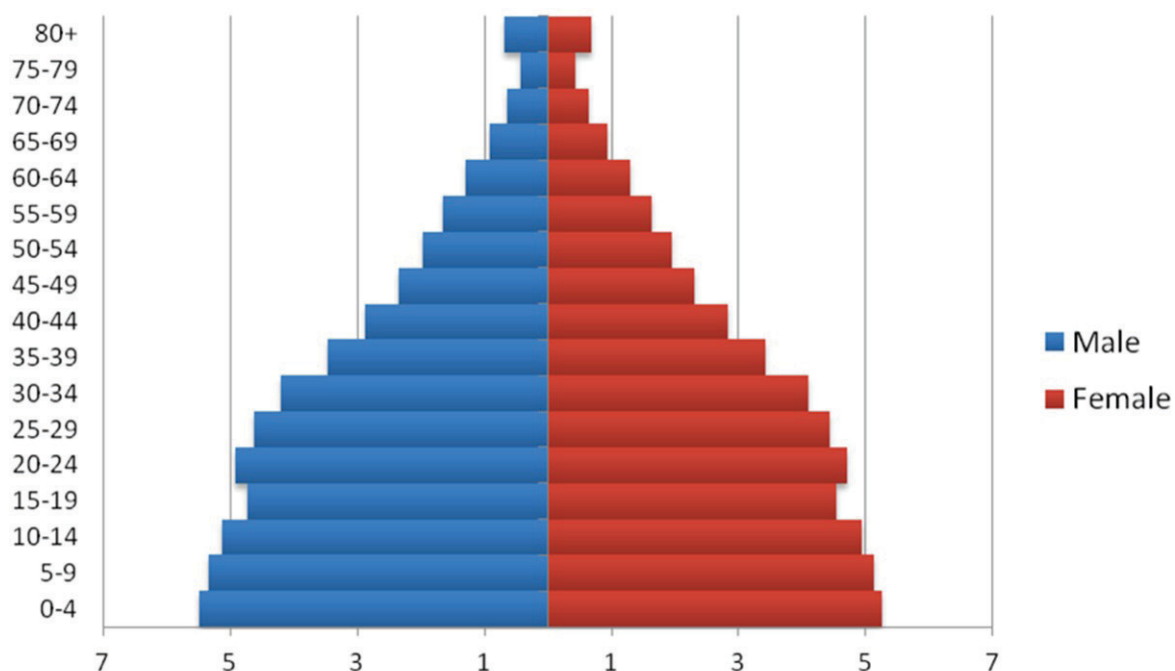
Source: Global Competitiveness Index 2012, World Economic Forum

The population is projected to grow to around 207 million by 2020 and could exceed 300 million by 2050. This continued growth will place further pressure on the government to increase education provision and employment. As fertility rates decline, the government will also have to address its expanding elderly population, while continuing to promote economic growth.

Figure 7: Pakistan, 2013 population



Source: UN Department of Economic and Social Affairs

Figure 8: Pakistan, 2020 population

Source: UN Department of Economic and Social Affairs

Figures 7 and 8 highlight the relative youth of Pakistan's population, with 64% of the population under the age of 30 and 45% under the age of 18 in 2013. By 2020, the proportion of the population under the age of 30 will have fallen to 60%. This means that the government has a limited amount of time to address the education and employment needs of its expanding working-age population before it must turn its attention to its growing elderly segment. Similarly, as urbanisation is increasing and the number of city-dwellers is set to overtake the rural population in 2030, more will have to be done to provide infrastructure and services and enable job creation for the urban population.

Education provision and attainment

Basic education, enrolment and literacy

Basic education in Pakistan is provided through the formal, informal and religious education systems. The education sector is large, comprising 150,000 public schools attended by 21 million students and a large private sector educating another 12 million.

The formal education system is based on the British education system, highlighting Pakistan's colonial past, while religious schools or madrasas operate parallel to the formal system. There are separate madrasas for girls and boys and investment in religious schools has increased in response to growing demand and a lack of adequate public provision. Informal education has also emerged to fill the significant gaps in state provision, which is particularly poor in rural areas. The informal education sector lacks a clear structure or curriculum and may be funded in part by the government.

Education in Pakistan is free and compulsory for students aged five to 16, although the lack of provision means that education is not accessible to all. The Pakistani credit and qualifications framework falls in line with the European Framework; the formal education system is divided into primary school (ages five to nine), middle school (ages 10–12), and high school (ages 13–16, equivalent to British O-levels), as shown in Figure 9. Intermediate school or higher-secondary school (ages 16–18, equivalent to British A-levels) is a non-compulsory level offered prior to college or university.

Figure 9: Structure of basic education in Pakistan

	Years	Levels	Award Type	Award Example	
Intermediate Level	12	4	Higher Secondary School Certificate (HSSC)	F.A, F.Sc, ICS, I.Com, DBA, D.Com etc	
	11				
Matriculation Level	10	3	Secondary School Certificate (SSC)	Matric	
	9				
		2	Middle (3 Years)		
		1	Primary (1-5 Years) Pre-Primary (1-2 Years)		

Source: Higher Education Commission

In spite of the large size of the education sector in Pakistan, literacy and enrolment are low owing to the poor quality of teachers and infrastructure, a lack of education provision in rural areas and cultural and security factors that may prevent enrolment. Poor and damaged infrastructure makes access to the limited state provision difficult for many, while the large number of refugees and people displaced by the flooding of 2010 and 2011 has also increased the strain on the education system.

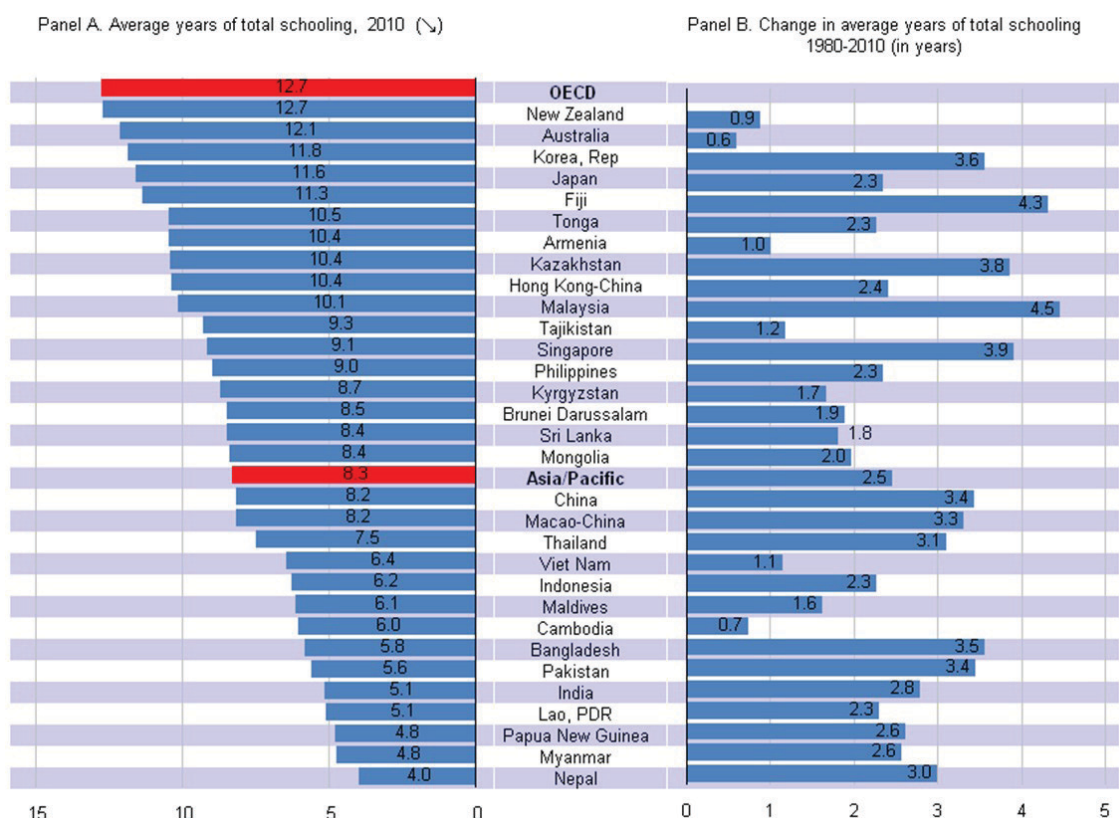
In terms of enrolment, Pakistan ranks among the lowest in the world, as illustrated in Figure 10.

Figure 10: Enrolment in education in Pakistan, 2012

FACTOR	FIGURE	GLOBAL RANK (OUT OF 144)
Primary education enrolment, net %	74.1	131
Secondary education enrolment, gross %	34.2	131

Source: Global Competitiveness Index 2012, World Economic Forum

While nearly three quarters of children enrol in primary education only a third of secondary-age Pakistanis attend secondary school. According to a report by the non-partisan Pakistan Education Task Force (PETF), one in 10 of the world's out-of-school children in 2011 was Pakistani. Primary school enrolments in 2007/08 numbered 22.7 million; this number drops to just 2.9 million at secondary level, suggesting that a maximum of five years of primary education is the extent of the education received by most Pakistanis. The enrolment figures shown above mask a significant gender imbalance: only 22% of girls complete primary education, compared to 47% of boys; by secondary school, although just 35% of boys attend school regularly, this figure dips to 29% for girls.

Figure 11: Average number of years of schooling and % change 1980–2010, Asia

Source: Organisation for Economic Cooperation and Development

The number of years of schooling received in Pakistan is low compared to OECD countries and the Asia/Pacific average. However, this figure grew at a faster rate over 1980–2010 than in many other nations in the region. This suggests that progress has been made and that demand for education is increasing.

Pakistan's literacy rate also remains low compared to that of neighbouring countries. According to a 2009 census, 69% of males and 45% of females were literate and some suspect that these numbers are overstated. Literacy and education levels also vary significantly by region; for example, in tribal areas in the northwest of the country female literacy is estimated to be just 8%. Religious schools or madrasas have attracted media attention for their purported links with Islamic extremism. However, these schools educate approximately 6% of Pakistani children, filling some of the gaps in government provision and facilitating enrolment and literacy for children who may otherwise have received no education. It is important to note the influence of madrasas on fundamentalism may be overstated and the major reason behind regional militancy is more likely to be the poor provision of education as a whole, which permits illiteracy, ignorance and gender inequality.

Higher education

The tertiary education sector in Pakistan is respected and progressive but limited capacity and funding have resulted in low enrolments, in spite of high demand. The poor provision of basic education system severely limits the number of students capable of or interested in enrolling in higher education and enrolment figures are also affected by the cost of higher education and the difficulty in securing a place at a local institution.

Higher education is offered up to doctorate level in Pakistan, as shown in Figure 12. Students prepare for higher education at non-compulsory intermediate schools from the age of 16 to 18.

Figure 12: Structure of higher education in Pakistan

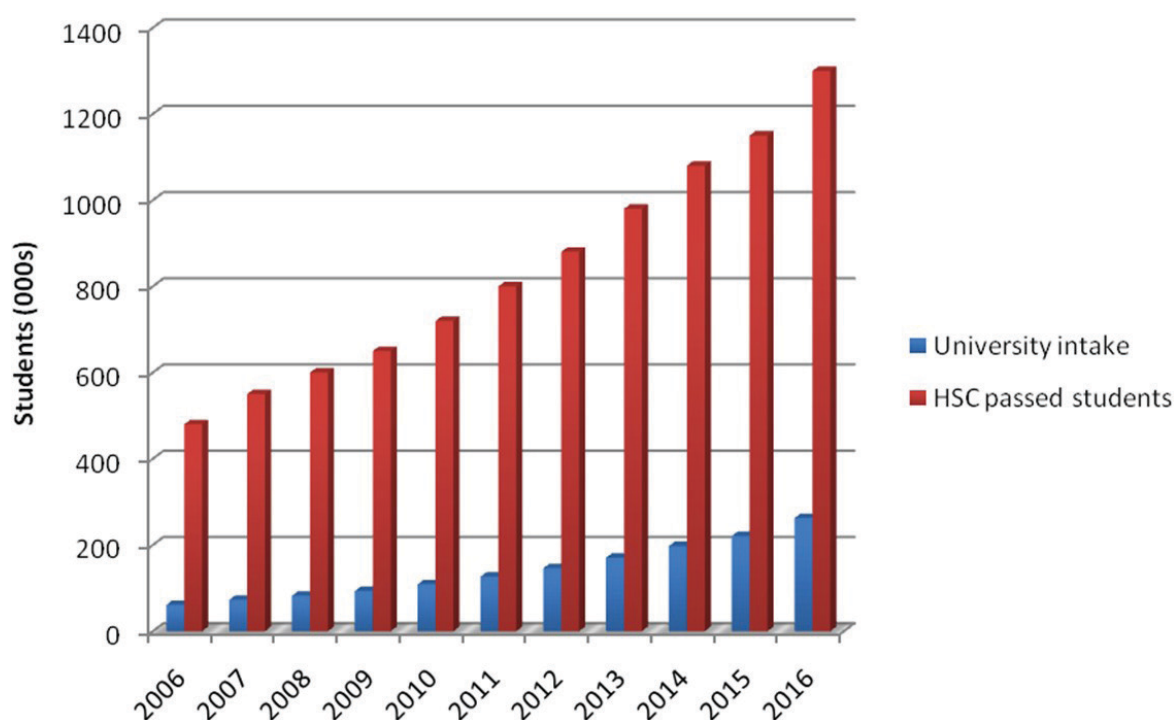
	Years	Levels	Award Type	Award Example
Higher Education Levels	21	8	Doctoral	PhD
	20			
	19			
	18	7	Masters	M.Phil./MS/MBA, M.Sc. (Eng.), M.E, MArch etc
	17			
	16	6	Bachelor	BS, B.E, B.Arch., BSc (Eng.), BSc (Agri), MA/MSc (16 year), LLB, B.Com (Hons), MBBA, DVM, PharmD, etc
	15			
	14	5	Associate Ordinary Bachelor	BA/BSc (Pass), ADE, Associate Degrees etc
	13			
Intermediate Level	12	4	Higher Secondary School Certificate (HSSC)	F.A, F.Sc, ICS, I.Com, DBA, D.Com etc
	11			

Source: Higher Education Commission

Pakistani universities are under state control, while schools are administered by provincial governments. This means that there is a degree of separation between the higher education and basic and intermediate education systems. Higher education is provided at autonomous public and private institutions and includes universities and vocational colleges. Of the 135 universities recognised by the Higher Education Commission of Pakistan, 74 are public and 61 are private. Higher education in Pakistan enjoys a good reputation, in spite of its high cost, and is seen as the best route to a high-status, high-earning career, as well as the best pathway to living and working abroad.

The gross tertiary enrolment ratio in Pakistan is low, averaging around 5 to 6%, with the rate for males being slightly higher than for females, making tertiary enrolment in Pakistan among the lowest in the world. In 2007, it was reported that 6.3% of Pakistan's population were university graduates. The government announced in 2011 that it aims to increase the tertiary education participation ratio to 15% by 2020; these plans are addressed in the HEC's Medium Term Development Framework 2011-15.

Figure 13: University intake and higher secondary school certificate (HSC) holders, 2006–2016



Source: Higher Education Commission, Pakistan

There is strong demand for higher education in Pakistan and the number of students graduating from higher secondary school has increased in recent years, although at a faster rate than the number of students attending university. Both trends are expected to strengthen in the future, as illustrated in Figure 13.

Figure 14: Proportion of HSC holders progressing to higher education, 2006–2016

2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016
12.7%	13.2%	13.7%	14.3%	15.1%	15.8%	16.6%	17.4%	18.3%	19.2%	20.2%

Source: Higher Education Commission, Pakistan

In 2012, 16.6% of students who passed the Higher Secondary School Certificate (HSC) went on to attend Pakistani higher education institutions. As shown in Figure 14, this proportion is set to increase in the coming years to over 20% in 2016. Although some HSC graduates will naturally leave the education system at this level, it is safe to assume that the increasing availability of higher education places would result in a greater proportion of students progressing to tertiary education; undoubtedly, provision of higher education must be expanded.

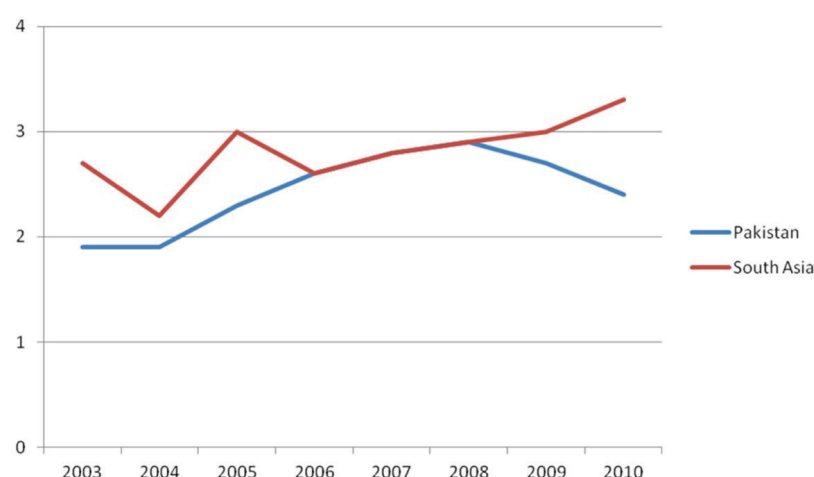
Education policy and expenditure

National policy and public spending on education

While Pakistan has structures in place for education at all levels, the provision does not allow universal access and refugees, girls and rural children remain marginalised. Pakistan has pledged to meet the Millennium Development Goal for education of providing all children with primary education and ensuring equal access to education for boys and girls. Analysts note, however, that Pakistan is not on track to meet its Millennium Development Goals for education expenditure or universal access. In 2015, male enrolment is expected to continue to exceed female enrolment at all education levels. The World Bank has invested in Pakistani education reforms in a bid to enable Pakistan to reach its goals and limited structural reforms have taken place.

The need to invest in human capital is recognised by Pakistan's leaders, who are aware that the country requires skilled graduates to staff its high-value industries, including finance, insurance, communications and information technology. As such, up-skilling the population and matching education provision to the needs of the country's industry is a priority. The limited progress made so far, however, highlights the comparative ineffectuality of the government in this area, with corruption and misplaced priorities being blamed for the lack of progress.

Figure 15: Public education spending as a % of GDP, Pakistan and South Asia, 2003–2010



Source: World Bank

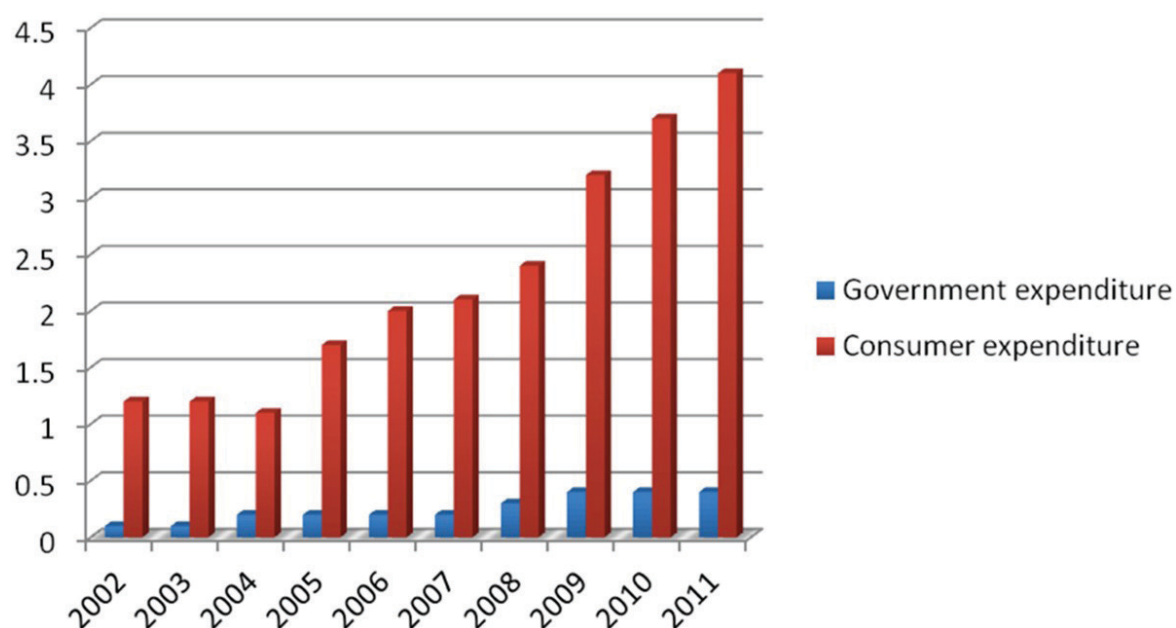
Pakistan's education budget is handled centrally, while provincial governments are responsible for planning and policymaking in basic education and the Higher Education Commission oversees higher education. Public education spending in Pakistan averaged around 2.4% over 2000–2010, as illustrated in Figure 15. Although this figure was progressing in line with the average in South Asia, Pakistan has fallen behind since 2009. Public expenditure on higher education was approximately 0.2 percent of GDP (MP current) in 2012.

Public funding has been strained in recent years by natural disasters and the war in Afghanistan. These events have resulted in reconstruction costs and large numbers of refugees, which have added further strain to the education system. Similarly, tighter monetary policy was implemented over the review period in a bid to receive IMF emergency funding. While there have been competing demands on the Pakistani budget, defence expenditure has remained high, at around 13% of GDP.

Consumer spending on education

Private provision and consumer expenditure on education have grown to fill the gaps in government provision at all education levels. The low quality of public provision means that private education is now seen as a necessity for anyone seeking tertiary education or a professional career. Consumer expenditure on education is significantly higher than public expenditure and the margin between the two widened over the review period, as shown in Figure 16. This highlights the underfunding of education by the government and the readiness of consumers to spend to meet their education demands.

Figure 16: Public and consumer spending on education as a % of GDP, 2002–2011



Source: Euromonitor International

Note: The Euromonitor definition of 'government expenditure on education' was modified in 2011 to include state and local government spending in addition to central government spending. Until, 2010 only central government spending was reported.

The increase in consumer expenditure can be attributed to population growth and the expansion of the urban middle class, which has growing disposable income, lacks confidence in the state provision and has high aspirations. According to a 2010 report by the International Growth Centre (IGC), there were more than 50,000 private schools in Pakistan in 2005, which accounted for more than a third of primary enrolments. Demand for private education can be expected to increase as the student-age population grows, although high tuition fees and rising inflation and taxation will mean that the majority of Pakistanis will still be unable to access private education. Consumer expenditure on education is expected to grow by 28.3% over 2012–2015.

Internationalisation of higher education

Pakistan as a study destination

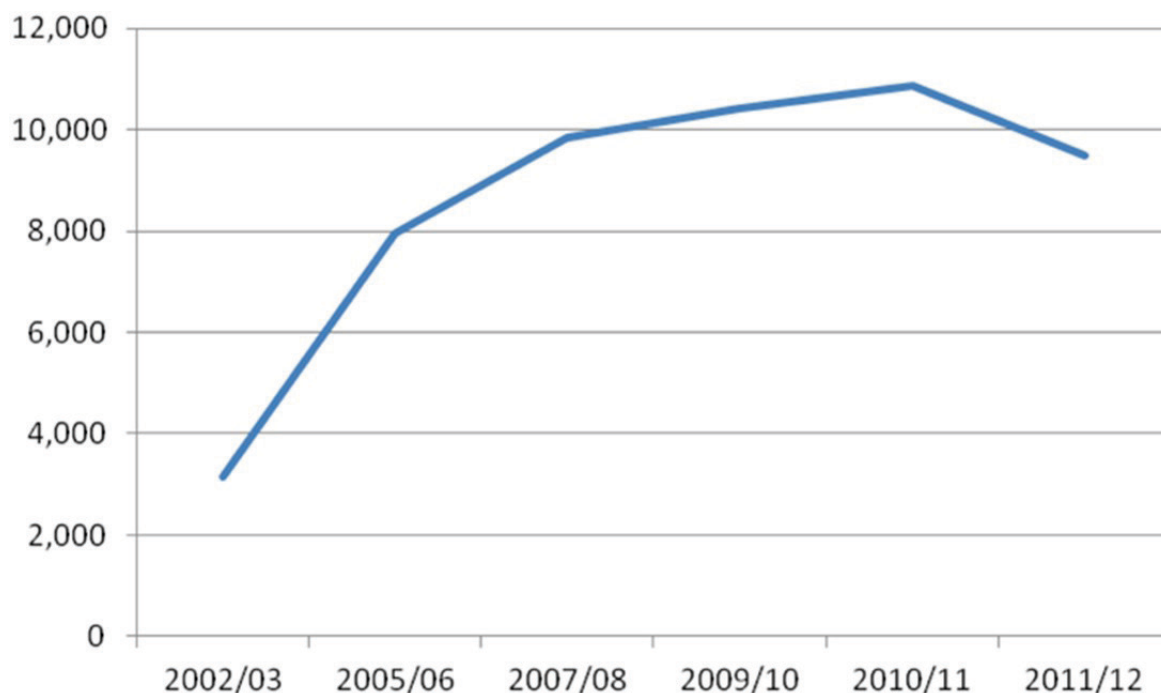
Although Pakistan's higher education provision is small, a number of its institutions are world-class: the QS Asian University Rankings 2012 places six Pakistani universities in the top 300 in Asia, including the National University of Science and Technology (NUST) Islamabad, the University of Karachi, Aga Khan University and Lahore University of Management Science (LUMS). NUST and University of Engineering and Technology (UET) Lahore also feature in the top 300 technology universities worldwide. Despite offering a number of high-quality programmes, Pakistan has limited appeal as a higher education destination. Visa requirements, security concerns and a lack of recognition for qualifications present obstacles for potential international students. Nonetheless, the government is keen to attract international students and faculty members and already hosts students and academics from countries within the region, such as Iraq and Afghanistan.

Pakistani students overseas

International study is promoted for Pakistani students and demand for overseas study is high, with nearly three quarters of students abroad being self-funded. The HEC and Pakistani universities funded the overseas study and teacher development of 4,200 students in 2010. These students headed to a range of locations, including the US, the UK and China. That said, scholarship students have faced difficulties as Pakistani government funding has been retracted and reinstated several times in recent years, interrupting study and causing students to incur high costs or abandon programmes. Similarly, international institutions may have become wary about recruiting Pakistani students, fearing defaults on tuition fees or unfilled places. Other barriers to international study include cultural factors and prohibitive admissions criteria.

Pakistan has historical connections with the UK and there are similarities between the educational structures of the two countries. As such, many Pakistani students opt to head to the UK and numbers increased significantly over the last decade, as illustrated in Figure 17.

Figure 17: Pakistani students enrolled in UK higher education institutions, 2002/03–2011/12



Source: Higher Education Statistics Agency (HESA)

In 2011/12, however, the number of Pakistani students in the UK dropped sharply to 9,485, the lowest figure since 2006/07. This may be attributable to the global economic downturn, political instability and natural disasters in Pakistan and a reduction in the scholarships offered by UK institutions.

'I got into a UK Russell Group school as well as a top Hong Kong institution, but ended up choosing a great university in the US, as it gave me a sizable scholarship.'

Pakistani secondary school graduate

Despite generous scholarships, the number of Pakistani students heading to the US has also declined, potentially as a result of the high cost of tuition fees and the appreciation of the US dollar, while the number travelling to Australia, which offers scholarships and flexible work and visa options has increased. This suggests that Pakistani students make their decisions based on practical considerations, such as finances and direct employability, and means that affordable TNE programmes could be an attractive option for Pakistani students.

Research visibility

Research is becoming increasingly important in Pakistani higher education and many students opt for subjects related to science and technology at the tertiary level. In 2012, only a quarter of academics in Pakistan held a PhD, although this figure is higher at certain universities such as Punjab University, where the rate reaches 40%. Pakistan is looking to produce larger numbers of doctoral graduates in order to remain competitive academically and increase its research output; for example, Pakistan currently produces an estimated 6,000 to 7,000 research publications each year, compared to more than 12,000 in Iran. Pakistan's Higher Education Commission (HEC) has estimated that the country requires an additional 20,000 PhD graduates and began to offer funding for PhD study overseas several years ago, with the requirement that graduates return to Pakistan and teach upon completion. There has also been a recent push to raise the level of domestic doctoral programmes and research. To circumvent the shortage in the short term, private higher education institutions tend to recruit visiting professors on short-term contracts.

Transnational education overview

Defining transnational education

Individuals, institutions and governments have come to accept transnational education as a driving force in global higher education and something that will transform the sector in the years to come. Although various definitions exist, TNE is generally accepted to mean the provision of an award-bearing programme to learners that are, either for a part or the entirety of the course, located in a different country to the one where the awarding institution is based. The Global Alliance for Transnational Education defines the concept slightly differently, stating that 'TNE is an export product that can be used to stimulate economic development and business growth, with universities as the key drivers of skills and technological progress'. This definition highlights the idea that international cooperation between higher education institutions can help a society to develop and that TNE is flexible and can be applied to complex environments, where the investment of human capital and knowledge exchange may be just as or more beneficial than a traditional degree-bearing programme.

Types of TNE programmes

There are numerous approaches to distance education; these range from face-to-face classes at branch campuses to asynchronous online lessons and materials and lectures that can be accessed online at students' convenience. Some of the most common modes include:

- International branch campuses (IBCs) – An awarding institution sets up a campus on another site, usually in a country in a different region of the world.
- Twinning programmes – An awarding institution provides a local institution with curricula and course standards and the local institution delivers the content. Often students transfer to the awarding institution to complete the course after a year or two, moving to the host location.
- Online courses (with or without local support) – Online programmes of online classes, whether synchronous or asynchronous, delivered over the Internet to students around the world. In some cases, local institutions offer support for the course.
- Articulation programmes – An awarding institution recognises and accepts specific credits or degrees from a host institution, giving a student advanced standing when they transfer to the awarding institution.
- Dual/joint degrees – Partnerships in which awarding institutions and a host partner provide programmes leading to separate awards from both institutions (dual award) or to a single award issued by both institutions (joint award).

Transnational education in Pakistan

Overview of TNE in Pakistan

TNE is still in its infancy in Pakistan and international providers face numerous obstacles: security concerns, political instability, poor infrastructure, and a lack of experience may deter providers interested in running programmes from a distance. Despite political and economic stability, though, Pakistan's expanding student-age population and aspirational middle class is showing increasing demand for higher education. The lack of public funding or provision means that significant opportunities exist for TNE providers, evidenced by the rapid expansion of the domestic private education sector.

Many partnerships stem from personal relationships and site visits; however, insurance issues mean that many universities will not send representatives to Pakistan to identify and develop opportunities, which presents an obstacle to collaboration. Pakistani officials and administrators stressed the need for overseas professionals to visit Pakistan in order to get a realistic picture of the higher education sector. Moreover, as TNE provision is limited in Pakistan, there is no established precedent or research in terms of modes of delivery and locations for TNE degree-bearing programmes.

'On one hand, Pakistan is a good place for experimentation. On the other, nobody's quite gotten it right yet.'

TNE administrator

Although it may appear to be a high-risk market, if approached the right way, Pakistan could present the ideal setting for TNE. Studying TNE provision and market trends as well as student demand allows us to identify how institutions can best enter and operate in the Pakistani higher education market.

Government support for TNE

TNE and foreign investment in the Pakistani higher education sector are welcomed and encouraged by the country's Higher Education Commission (HEC). The HEC is responsible for accrediting all degree, diploma and certificate-awarding institutions in Pakistan. It also oversees the quality of higher education programmes and partnerships and as such oversees Quality Enhancement Cells and accreditation councils, the recognition of international bodies and university rankings.

The HEC's key concerns are enrolments, equal access, quality and research. It also aims to increase the number of researchers and skilled workers, which is a key driver of its interest in TNE. Further, it is looking long term to attract students from neighbouring countries who would be interested in studying in Islamic nation. TNE programmes are seen as a way to increase enrolments, broaden knowledge and stimulate competition. Salary increases for faculty members, increasing the appeal and quality of research and teaching, are priorities and

plans are in place to encourage Pakistani PhD holders overseas to return, with 5,000 already being processed. The HEC is inviting regional scholars to conduct research in Pakistan and is beginning to attract students from neighbouring countries, including Iraq and Afghanistan.

The HEC wants to play a pivotal role in setting up collaborations and providing information for foreign institutions interested in investment, including an overview of the university landscape and possible partners. Most existing partnerships stem from faculty-level connections or high-profile donors and the HEC is looking to enable partnerships with institutions that lack these networks.

All foreign collaborators that want to partner with Pakistan should have HEC approval for their programmes, though the process of approval for foreign providers is not always straightforward. The organisation has streamlined the approval and registration process and all information and documentation is available on their website. The HEC is trying to raise the domestic higher education provision in Pakistan to international standards; the organisation has refused approval for institutions that do not meet certain standards in the past. HEC officials stress the importance of universities matching their provision to the needs of Pakistan's economy and key subject areas that have been identified.

Some institutions operating in Pakistan are not up to standard or are unaccredited and the HEC is attempting to combat this by publishing a list of accredited universities in the media and on their website, and professional councils are doing likewise. As students and parents check these lists routinely, TNE providers would be advised to adhere to official procedures when establishing themselves in Pakistan. The HEC has also begun to rank programmes in Pakistan by subject area.

Existing TNE programmes in Pakistan

A number of TNE programmes exist or have existed in Pakistan. These programmes have had varying degrees of success, although the number of students involved in such programmes has increased exponentially in the last four years, as shown in Figure 18.

Figure 18: Pakistani students enrolled in TNE programmes by programme Type, 2007/08–2011/12

	2011/12	2010/11	2009/10	2008/0	2007/08
Registered at reporting institution – studying overseas for UK HEI award at overseas campus of the reporting institution	0	0	0	0	0
Registered at reporting institution – studying overseas for UK HEI award other than at an overseas campus of the reporting institution	35	220	60	240	215
Registered at reporting institution – distance, flexible and distributed learning for UK HEI award where the location of the student is known to be overseas	2,895	2,705	2,430	2,105	1,740
Registered at overseas partner organisation – studying overseas for an award from a reporting institution	36,150	31,975	21,080	20,800	10
Other students studying overseas for an award from a reporting institution	0	0	0	0	0
Total	39,080	34,905	23,570	23,145	1,965

There are no international branch campuses in Pakistan and although the UK's Middlesex University signed an MoU to develop Pakistan's first branch campus, this has not yet been established. The US is also looking to build universities in Pakistan and, despite their strained history, Pakistan and India have begun academic dialogues in line with the MoU on joint

education signed in 2006. In the meantime, many students study distance-learning degrees or are registered at a reporting institution in dual, articulation and twinned degrees.

'I like the excellence of the UK curriculum with the excellence of our Pakistani teachers mixed in my programme.'

TNE student

The numbers indicate that joint delivery programmes are currently the most successful type of TNE degree-bearing programme in Pakistan, with over 36,000 Pakistani students enrolled in such programmes in 2011/12.

Figure 19: Pakistani students enrolled in TNE programmes by study level, 2007/08–2011/12

Research doctorates	10
Taught doctorates	0
Research master's degrees	5
Taught master's degree	310
Bachelor's degrees with honours	37,910
Ordinary bachelor's degrees	85
Higher education (HE) diplomas	5
Higher education (HE) certificates	750
	39,080

Figure 19 shows that of the 39,080 students enrolled in TNE programmes in 2011/12, the vast majority were studying bachelor's with honours degrees in Pakistan, highlighting the level of interest in these programmes. Much smaller proportions pursued HE certificates and taught master's degrees. There is currently little provision in Pakistan for master's degrees in spite of demand. Student Insight data reveals that postgraduate study overseas is equally or more appealing to students than TNE programmes.

The UK and Pakistan have a history of educational partnerships and a number of collaborations, both degree bearing and research focused, exist between the two countries. These include around 70 MoUs, 90 UK university partnerships with 118 Pakistani institutions, 27 INSPIRE partnerships with over 900 researchers, a number of degree programmes and a Pakistan Quality Assurance Agency collaboration with the UK, as well as a number of international conferences and the Development Partnerships in Higher Education programme, which provides funding for partnerships. The British Council also provides grants to select, award-bearing TNE programmes in Pakistan. Figure 20 outlines the number of students enrolled in TNE programmes in Pakistan by UK partner institution.

Figure 20: Pakistani students enrolled in TNE programmes by UK partner institution, 2007/08–2011/12

	2011/12	2010/11	2009/10	2008/09	2007/08
The University of Aberdeen	5	5	0	0	0
The Queen's University of Belfast	0	0	0	0	0
Birkbeck College	0	0	0	0	0
Birmingham City University	0	0	0	0	0
The University of Bradford	355	255	145	80	10
Brunel University	0	0	0	0	0
The University of Derby	15	30	10	0	0
The University of Dundee	30	20	15	20	0
University of Durham	5	0	5	0	0
The University of East London	5	5	0	0	0
Edinburgh Napier University	5	0	0	0	0
The University of Edinburgh	5	5	0	0	0
The University of Exeter	0	0	0	0	0
The University of Glasgow	0	0	0	0	0
Heriot-Watt University	30	25	15	80	55
The University of Hertfordshire	0	0	0	0	0
The University of Huddersfield	0	0	0	0	0
Imperial College of Science, Technology and Medicine	0	0	0	0	0
King's College London	5	0	5	0	0
The University of Lancaster	830	220	0	0	0
The University of Leicester	30	40	35	35	25
The University of Liverpool	10	10	25	0	0
The University of London (Institutes and activities)	2,625	2,460	2,180	1,895	1,620
London Metropolitan University	0	0	0	5	10
The Manchester Metropolitan University	5	0	0	0	5
The University of Manchester	10	10	10	5	5
The University of Northumbria at Newcastle	10	25	35	0	0
The University of Nottingham	0	0	0	0	0
The Open University	0	0	5	0	5
Oxford Brookes University	34,975	31,575	20,630	20,720	0
The University of Oxford	10	5	10	5	0
University College Plymouth St Mark and St John	0	160	360	170	100
The University of Portsmouth	5	5	10	5	5
Queen Mary and Westfield College	5	5	5	5	0
The University of Reading	0	0	0	0	0
Robert Gordon University	15	20	20	10	0
Roehampton University	0	0	0	0	0
The University of Salford	0	0	0	0	5
Sheffield Hallam University	5	5	5	0	0
Staffordshire University	5	5	0	65	100
The University of Strathclyde	5	5	5	0	0
The University of Sunderland	5	0	5	0	0
The University of Surrey	0	0	0	0	0
Teesside University	5	0	5	0	0
The University of Ulster	0	0	0	0	0
The University of the West of Scotland	5	0	0	0	0
The University of Wolverhampton	0	0	0	0	0
The University of York	5	5	5	5	5

Source: Higher Education Statistics Agency (HESA)

Note: HESA regulations mean that '0' may indicate zero, one or two students. All other enrolments are rounded to the nearest multiple of five.

The courses with the highest enrolments are from Oxford Brookes University, which offers a BSc (Hons) in Applied Accounting for Pakistani students in partnership with the Pakistani Association of Chartered Certified Accountants; one reason for its popularity is that the programme is recognised by the HEC and thus increases students' employability. Other

popular programmes include the University of London International Programmes and the University of Lancaster's dual-degree programme with COMSATS in Pakistan. In addition, the University College Plymouth St Mark and St John operated a partnership with the esteemed Beaconhouse school system in Pakistan to provide teacher training, although this partnership was dissolved in 2010.

The most popular subjects, in line with national priority subjects, at these top three schools are Accounting, Law, Telecommunications and IT. These subjects mirror the areas listed as national priorities, as well as domestic student demand.

Case studies in TNE

Case study: Northern Consortium UK–Pakistan (NCUK)

Q: When was the programme established?

A: NCUK was established in 1987 and provides university pathway programmes at the undergraduate and postgraduate level. It moved into the Pakistan market in 2010/11 and has set up feeder colleges that offer Pakistani students 2+2-type opportunities.

Q: Who are the partners in this programme?

A: NCUK has established two relationships (offering 1+3 and 2+2 programmes) in Karachi and in Lahore and one university partnership in Islamabad/Rawalpindi.

Q: How many students does the programme serve?

A: The programme enrolled 45 students in its first year, followed by 65 in its second year and 45 in year three.

Q: In what subjects does the programme award degrees or certificates?

A: NCUK students in their first year report being undecided on the course they will enrol in upon transfer to the UK.

Q: What is the mode of delivery?

A: The exact setup of the programme is between the universities but NCUK is trying to set up a variety of programmes ranging from 2+2 study patterns to 1+3 and full-degree programmes. The goal is to allow students flexibility in terms of cost and in case their personal circumstances change. Quality assurance and curricula come from NCUK and teachers are approved by NCUK Manchester.

Additional points

NCUK is a forward-thinking organisation that has a number of personal investors within Pakistan that hope these partnerships will further cooperation in other areas of research and teacher training. Prior to entering the Pakistan market, NCUK engaged closely with the Pakistan Engineering Council (PEC) and HEC and appointed a project manager that was familiar with Pakistan. NCUK administers its own English proficiency test for students where necessary.

Case study: University of London programmes in Pakistan

Q: When was the programme established?

A: University of London International Programmes was established in 1858.

Q: Who are the partners in this programme?

A: There are 10 Pakistani institutional partners in Islamabad, Karachi, Lahore, Multan and Rawalpindi. A further partnership is currently being set up with another location.

Q: How many students does the programme serve?

A: The programme has grown from 148 students in 2001 to 2,625 in 2012. Pakistan is the sixth largest market for University of London programmes.

Q: In what subjects does the programme award degrees or certificates?

A: The programme offers degrees in a variety of subjects but the most popular courses in Pakistan are Law-related, due to the similar legal system and qualifications, as well as Economics, Management, Finance and Social Sciences.

Q: What is the mode of delivery?

A: All course curricula and materials are developed by the College of the University of London and administered by faculty at the Pakistani partner institution. Exams, worth 100% of the grade, are administered at the end of the academic year and are graded in London at the same standard that UK-based students are graded. Local faculty members are welcome to set exams and homework but these do not count towards students' grades.

Additional points

Despite the programme's success, staff from the University of London do not visit Pakistan and haven't done for some time. Furthermore, the gap between entrance standards and exam standards has resulting in a number of students being unable to complete the programme. University of London students report high satisfaction with their programmes.

Case study: COMSATS

Q: When was the programme established?

A: COMSATS, a high-ranking science and technology university, was established in 2000 and has locations in seven cities in Pakistan.

Q: Who are the partners in this programme?

A: A dual-degree programme with the University of Lancaster began in 2010 and has just welcomed its third cohort of students. Lancaster was looking for a partner in Pakistan and found COMSATS.

Q: How many students does the programme serve?

A: The programme started with around 90 students and with the incoming cohort, currently enrolls 1,700 students.

Q: In what subjects does the programme award degrees or certificates?

A: The top three subjects in the programme are Telecommunications, Computer Science and Business Administration. English language proficiency is tested prior to admission and language support is provided alongside the programmes.

Q: What is the mode of delivery?

A: This is the only dual-degree programme in Pakistan. The universities agree on courses and local faculty members prepare examinations, which are also agreed upon. From the third year of the four-year programme, exams are sent to Lancaster for grading. Lancaster only counts the final two years towards its degree. Courses are taught at COMSATS, though students may be able to interact with Lancaster faculty members online. Students graduate with both a Lancaster and a COMSATS degree.

Additional points

The programme took approximately four years to set up and necessitated a number of visits, videoconferences and concept papers, including a 600-page programme document. COMSATS is also looking to recruit internationally for its programmes.

Research partnerships

Demand for research partnerships

Universities are looking for international research partnerships that will allow them to build their research capacity, human potential and international resources. The government has mandated a number of key areas for research, including but not limited to health sciences, renewable and alternative energy, education and innovation, and agriculture; however, universities in Pakistan have limited resources to tap for such research. As a result, the demand for knowledge-exchange type collaborations, especially those with public funding, is high in Pakistan.

Research partnerships are vital for Pakistan as universities have limited equipment and infrastructure and lack certain chemicals, which are banned by the government. Pakistani universities are looking to cultivate relationships within Pakistan and the wider region, as well as internationally. There have been calls for domestic information forums, such as conferences, networking opportunities and skills exchanges, and for external organisations to create forums for researchers to interact, establish institutional links and allocate funding.

Existing research partnerships in Pakistan

Knowledge-exchange collaborations in Pakistan, which may involve research, capacity building or entrepreneurship, are increasing in number and are the route many universities are taking to enter Pakistan. Such partnerships develop valuable relationships between faculty members, researchers and administrators and the HEC, in tandem with other organisations, has established and funded a number of joint-knowledge partnerships with some success.

MoUs, such as that between the UK's Leicester University and Abdul Wali Khan University, Mardan (AWKU), have led to teacher and student exchanges. The US is also interested in partnerships, having recently provided funding, matched by the Pakistani government, for 73 university research projects. In addition, there have been youth exchanges between Pakistan and China and a university in Pakistan is offering Chinese lessons for its students. Turkish and Pakistani academics have also discussed the establishment of technology parks in Pakistan.

Although various countries are collaborating with Pakistan in knowledge-sharing partnerships, the UK remains at the forefront in this area. The HEC and the British Council have worked together to facilitate various initiatives to improve research relevance, access to funding, reputations and rankings, networks, career prospects and skills. These initiatives have taken many forms, including but not limited to:

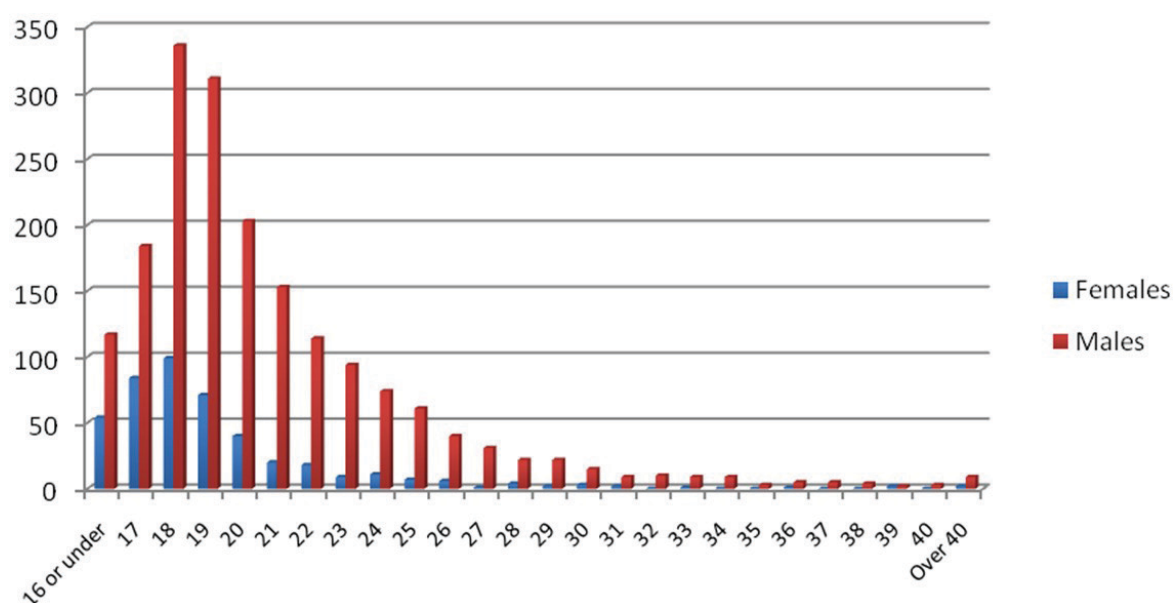
- INSPIRE programme: Sponsored and funded jointly by the British Council and the HEC, UK and Pakistani institutions partner in order to build capacity and knowledge in priority areas.
- DELPHE programme: In partnership with the British Council, the UK government's Department for International Development (DFID) provides funding for collaborations that work towards international education goals, including the Millennium Development Goals.
- UK Prime Minister's Initiative: Building strategic partnerships in key countries, PMI2 provides grants for further education colleges to collaborate with colleges in priority areas, including Pakistan.

The activities are a mix of research cooperation, faculty exchange and curriculum and collaborative programmes development. The British Council, and the HEC, seeks non-academic partners to collaborate with Pakistani universities on human and economic development issues.

Pakistani student demand for TNE

Population growth, rising disposable incomes and a lack of domestic provision are driving students to consider international options. Although incomes are rising, international study remains expensive and Pakistani students may look increasingly for award-bearing courses and universities with knowledge-exchange programmes in their home country. The opinions of Pakistani students on overseas provision can be gathered from responses to the British Council's Student Insight survey, a longitudinal survey that has examined student decision-making since 2007.

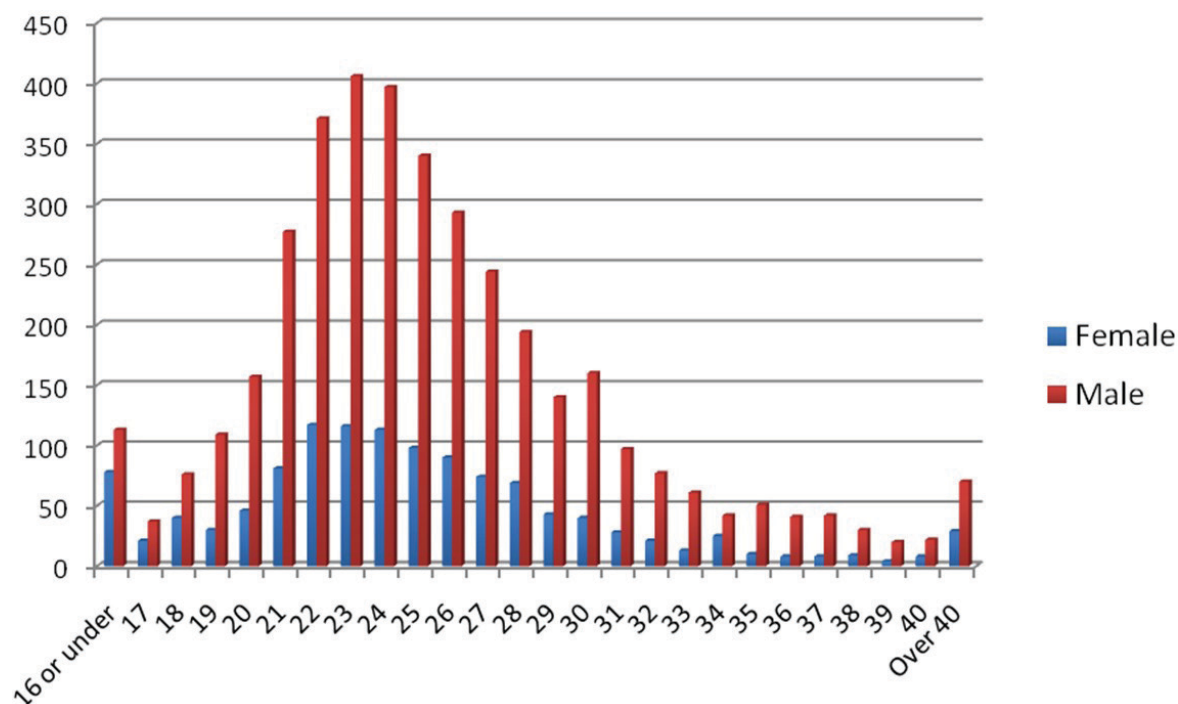
Figure 21: Pakistani students interested in undergraduate study overseas by age and gender, 2007–2012



Source: British Council Student Insight

As shown in Figure 21, the overwhelming majority of Student Insight survey respondents from Pakistan were male, outnumbering female respondents by almost four to one and representing 81% of those interested in undergraduate study overseas. This gender difference is reflected in the data of those interested in overseas postgraduate study, as shown in Figure 22, with males making up 76% of potential postgraduate students. More than twice as many respondents were interested in postgraduate study (N=4,987) as in undergraduate study (N=2,227), indicating that Pakistani students are more interested in overseas postgraduate qualifications.

Figure 22: Pakistani students interested in postgraduate study overseas by age and gender, 2007–2012



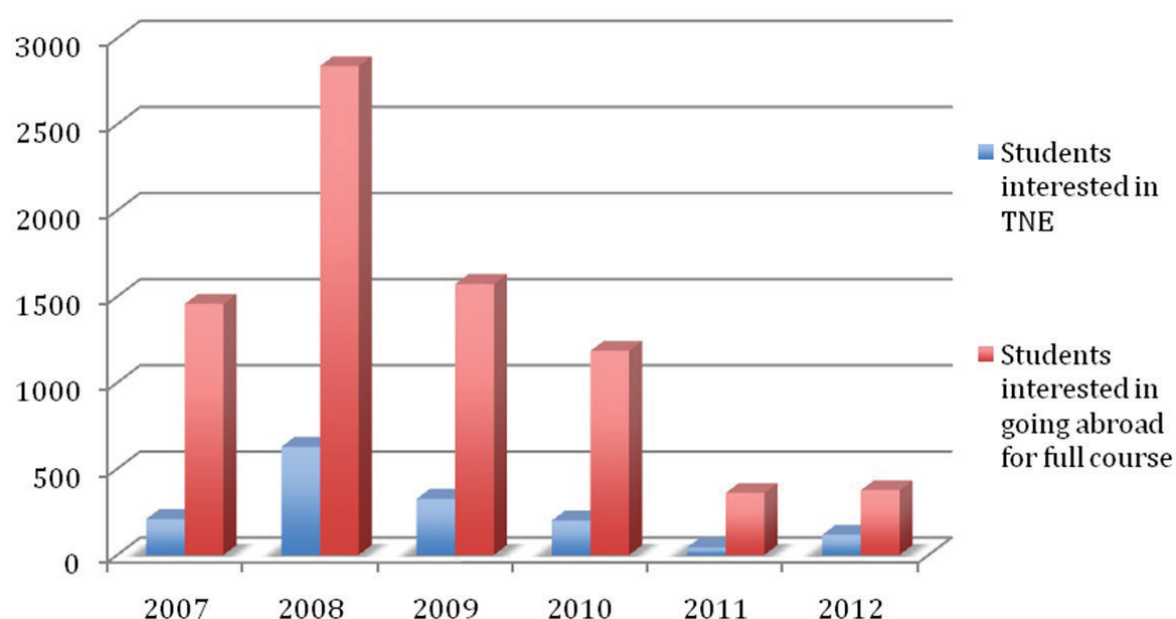
Source: British Council Student Insight

Those interested in undergraduate study from an overseas institution tended to be in the 18–22 age group, while postgraduate respondents were slightly older, showing a wide range of ages from 21 to 29. Foreign study appealed most to respondents in their twenties. This is most likely due to greater mobility in terms of family and employment commitments. The protective culture could also play a role in students not wanting to leave home as early as some of their global counterparts.

'I want to study abroad, but not now. I am 18 and feel I need to mature some more before going overseas and living on my own.'

TNE student

Figure 23: Pakistani students interested in TNE vs. ‘traditional’ education, 2007–2012

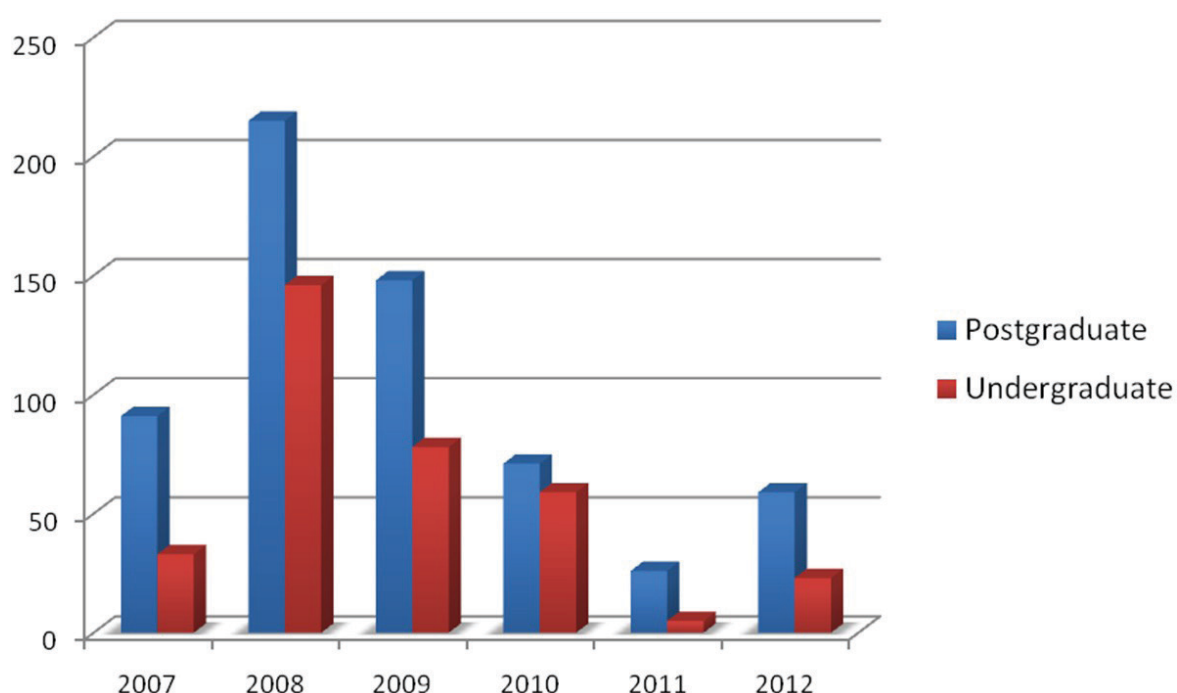


Source: British Council Student Insight

The ratio of those interested in TNE to those interested only in traditional, on-campus, overseas education varied over the study period. In 2012, the ratio was approximately 1:3, which is higher than in any other survey year, suggesting that interest in TNE is increasing. Between 2007 and 2012, approximately 1,500 students indicated that they were interested in TNE, either entirely in Pakistan (26%) or in Pakistan and the awarding country (74%). This student sub-sample came predominantly from the urban centres of Lahore (34%), Karachi (27%), Islamabad (7%) and Rawalpindi (7%).

Figure 24 highlights that the majority of students considering overseas study are potential postgraduates (64%), interested in various master's and doctoral programmes. This finding reflects the gap between provision and demand at the postgraduate level in Pakistan.

Figure 24: Pakistani students interested in overseas undergraduate vs. postgraduate studies, 2007–2012



Source: British Council Student Insight

Interest in undergraduate programmes overseas varied over the survey period; in 2012, there were more than double the number of students interested in postgraduate degrees than in undergraduate degrees, while the previous year saw nominal interest in undergraduate degrees and interest was fairly equal in 2010. This lack of consistency indicates that interest in TNE programmes may be almost as high for undergraduates as it is for postgraduates and that the education market in Pakistan is constantly changing.

Students in Pakistan that are interested in TNE programmes are generally studying full time (35%), have a full-time job (26%) or work part time (25%). This suggests that those interested in postgraduate education may already be in the workforce and are looking to develop their skills through a second degree. The entrance requirements for white-collar jobs in Pakistan is reported to be a master's degree, meaning that undergraduate students may feel compelled to continue their studies, albeit after completing a period of work experience.

Pakistani students indicated that they were interested in TNE for a wide range of reasons, as shown in Figure 25, although the largest proportion reported that they wanted to study overseas in the future.

Figure 25: Motivations behind Pakistani students' interest in TNE

Source: British Council Student Insight

Extended family living and the protective culture in Pakistan are just some of the reasons that Pakistani students and their families feel that they need more time before heading overseas for education. This may also explain students' interest in postgraduate degrees over undergraduate degrees, with students planning to study undergraduate programmes at home and postgraduate courses abroad. Another reason students gave for considering TNE was the cost; while the middle class in Pakistan is growing quickly, along with the population, students in Pakistan remain cost conscious. Also important for students were issues relating to quality, teaching methods and internationally recognised qualifications.

'Pakistani students are very practical when it comes to decision-making: they simply ask, "What is the highest-quality, most cost-effective programme?" It's all about getting a job.'

University agent

The ratio of males to females in higher education in Pakistan is roughly equal; this is a departure from basic education, in which boys outnumber girls by a wide margin. Pakistani girls who are interested in overseas higher education do see transnational education, both in

Pakistan as well as in other Islamic nations, as a viable and welcome alternative to studying abroad. Anecdotal, females who can afford to generally end up studying overseas however there is a large segment of the female population who prefer to stay within their protective culture for their undergraduate education; many of these women then go abroad for postgraduate awards.

'One year in the UK is equivalent to four in Pakistan, cost-wise.'

Potential TNE student

Potential TNE students in Pakistan expressed interest in a range of subjects and the top five are presented in Figure 26.

Figure 26: Top five subjects chosen by potential TNE students from Pakistan

	All potential TNE students	Potential undergraduate TNE students	Potential postgraduate TNE students
1	Business and Administrative Studies	Business and Administrative Studies	Business and Administrative Studies
2	Computer Science	Engineering and Technology	Computer Science
3	Engineering and Technology	Computer Science	Engineering and Technology
4	English Language	Media, Publishing and Journalism	Social Sciences, e.g., Economics and Politics
5	Media, Publishing and Journalism	English Language	English Language

Source: British Council Student Insight

The top five subjects chosen were similar at both levels, with the notable difference being that undergraduates were interested in Media, Publishing and Journalism while postgraduates were interested in Social Sciences. Many of these subject choices mirror the national priorities of finance, insurance, communications and information technology and highlight students' awareness of the country's skills gaps.

'I want to study Aviation [...] but I am studying Electrical Engineering, like my father, instead.'

TNE student

Although English language teaching in Pakistan is widespread, research into the English language market has found that Pakistani students want to develop their English further in order to become more successful in the global marketplace. The demand for Business English is also booming. As Pakistani students are becoming increasingly tech-savvy this could open up possibilities in the online English learning market.

Both survey respondents and students interviewed emphasised the important role that their families and friends played in decision-making. While students conduct their own research, often on the Internet, the experiences of family members that have been through the same system are more important. The greatest influences on students making decisions about overseas education providers are employers, parents, the media, agents, personal preference and peers. Exhibitions and non-digital forms of marketing to Pakistani students are not particularly popular, however this is difficult to assess accurately as the number of representatives visiting Pakistan is low.

'Universities could influence student decisions if they simply sent representatives to Pakistan to speak with students. Nobody is coming to talk to the students, so the students have to rely on themselves, their families and each other for information.'

University agent

Of the students interested in a TNE programme, a small proportion favoured enrolling in programmes in 'safe' or culturally similar settings of Malaysia, the UAE and Singapore. However, the majority of students opted for 'Other', assumed to be Pakistan, from a wide range of TNE study destinations. In some cases, students enrol in TNE programmes in Pakistan after a difficult semester or year in an awarding country.

'I'm actually from Saudi Arabia but I came to Pakistan to study this degree because I found it was a better fit for me than going to Canada or to Malaysia to study a TNE degree.'

TNE student

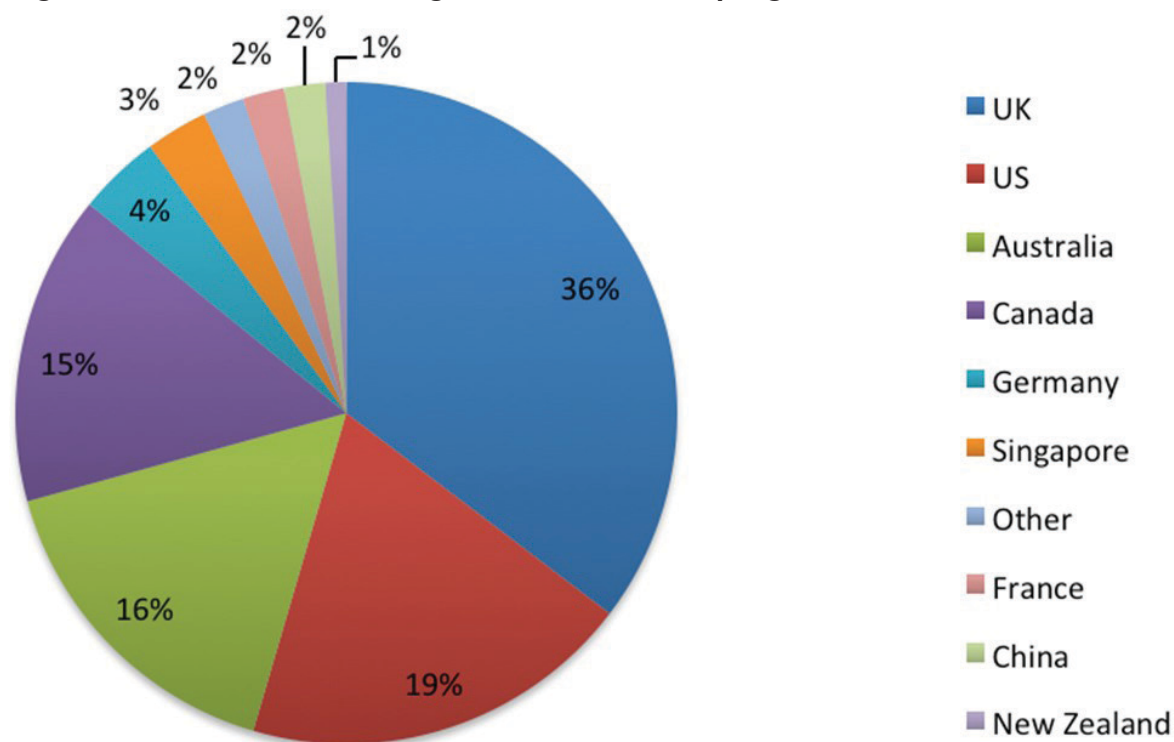
Pakistani students are interested in TNE degrees from similar countries to those chosen by other prospective TNE students worldwide. Students tend to select the awarding country first and then examine the courses on offer; the overseas and local institutions involved in the partnerships are secondary to the choice of awarding country and subject. That said, there have yet to be any elite brand-name courses offered within Pakistan.

'If a brand-name university comes to Pakistan, students will enrol; no question.'

TNE administrator

The awarding countries preferred by Pakistani students are shown in Figure 27.

Figure 27: Preferred awarding countries for TNE programmes



Source: British Council Student Insight

The awarding countries chosen favour traditional higher education and emerging regional education markets, with China being the youngest international higher education provider identified. There are a number of partnerships, educational and otherwise, between China and Pakistan and the emerging provider is just beginning to offer its degrees outside its borders. Pakistan may be a good destination for TNE programmes, such as those from China, that are still flexible in terms of delivery and implementation.

'A UK degree is a natural fit because our school systems match. Also, if I end up going there, it is closer and I have family and family friends who live there.'

TNE student

Overall, Pakistani students interested in overseas study tend to be slightly older and are interested in postgraduate programmes, although interest at undergraduate level is increasing. Cost and quality are key factors for these students and they are interested in more traditionally popular subjects valuable for the domestic economy, as well as emerging 'niche' subjects, for which there may be little local provision. Students conduct most of their research themselves, through their peers or families. While the UK remains the top choice of awarding country, students are open to a number of different degrees awarded in different ways. Most importantly, interest in TNE programmes compared to traditional, campus-based programmes overseas appears to have increased over the last five years, while numbers heading overseas to mainstream destinations like the US and the UK have fallen, confirming that opportunities for TNE providers exist in Pakistan.

Looking forward

Although risk is inherent in operating in Pakistan in the current climate, the opportunities for degree-bearing courses and research partnerships in key subjects areas and to meet domestic demand are great. Legislation favours high-quality TNE providers and long-term growth may be possible if the correct approach is taken. The current lack of provision and high demand means that a broad range of TNE programmes, including high and low-intensity options, could find a niche in the Pakistani market. However, existing and new programmes must remain sensitive to the local conditions, aware of the responsibility that TNE brings and innovative when it comes to introducing students to new ways of learning.

Institutions looking to enter the Pakistani TNE market with an award-bearing programme should consider the subject focus areas identified by the Pakistani government. Education and knowledge in these areas are in high demand and this demand is likely to increase as students become more aware of their employability and the precise needs of their country's industry. The strength of this approach is evidenced by the high popularity of Oxford Brookes' Accounting degree programme in Pakistan. Programmes that are able to offer similarities between systems, such as Law and Education in the UK, are also likely to be popular, as seen with the University of London's international Law programmes.

Vocational programmes have largely been neglected in Pakistan and there is great potential for TNE to train and up-skill workers in agriculture and production. Under its 2008 National Skill Strategy the government is looking to make policy more efficient, cultivate centres of research excellence, allow the private sector to participate in policy making and standard setting and improve vocational systems. These programmes will also target disadvantaged groups such as women and migrant workers, meaning that TNE in this field could play a significant role in improving development indicators.

Digital programmes, including MOOCs and other forms of open courseware, are changing the TNE landscape and Pakistan is a potential target market for these programmes. In a 2010 survey of 1,130 potential and actual digital English learners in Pakistan, DJS research found that the majority of students had access to the internet at home or at work. These students were online at least a few times a week, with the majority connecting daily. These students used the Web predominately for emailing, research and education, meaning that they could well be open to digital programmes.

Although Pakistani students prefer teacher-led education, digital programmes may suit those who are resourceful, disciplined and driven. In the same survey, almost all respondents used their mobile phone to access the Internet, meaning that digital programmes would benefit from being compatible with mobile devices. This is particularly relevant in the Pakistani setting, where students currently work around daily power outages. Students expressed interest in educational video and audio content, short learning modules and English discussion forums. They also reported that they were interested in courses that led to qualifications, courses for personal development and courses in Business English.

The political and economic situation means that large-scale branch campuses and on-the-

ground developments remain risky and entry into the Pakistani education market has been most successful so far through research partnerships and knowledge collaborations. The establishment and administration of such programmes is also more straightforward and the comparative low profile of such programmes may be received better by the market, which is sensitive to change. With greater political and economic stability, these partnerships may develop into award-bearing partnerships and exchanges.

International cooperation to date has benefitted from the endorsement and support of key Pakistanis, such as the University of Bradford and Namal University, whose partnership was facilitated by Imran Khan. Private Pakistani investors are also showing an interest in TNE programmes, funding 30% of the Pakistani share in NCUK TNE programmes. With the difficulty in sending and maintaining representatives in Pakistan, key local individuals could increase the likelihood that partnerships will be successful, as well as ensure a smooth transition into operation. Choosing the right partner is therefore vital for TNE partnerships.

‘There are no quick returns to investing in TNE, but it’s a great opportunity.’

TNE investor

Educators in Pakistan are aiming high and institutions with strong global reputations are likely to thrive in this new market. Although experience and precedents in this area are limited, there are clear cases of success and failure. Undergraduate programmes with students registered at a local partner organisation have attracted the greatest numbers of students. Programmes have tended to see grading done by the overseas institution, though this may create a disconnect with local faculty members. Full integration of local teaching staff could result in the development of students and teachers, as well as limit drop-out rates, particularly for students with lower English language proficiency.

With its unquestionable need and demand for education, Pakistan presents numerous opportunities for investors. However, providers will have to be prepared to integrate sensitively with the Pakistani market, remaining conscious of ongoing development factors and offering a high standard that will contribute to and enhance the existing high quality of higher education provision.

Conclusion

Transnational education, in the form of degree-bearing courses and research collaborations, is necessary and desirable to raise higher education output in Pakistan. Political and economic insecurity has resulted in education, among other sectors, being sidelined. Although national priorities to become a knowledge economy and up-skill the workforce are clear, a lack of funding means that the education sector is unlikely to see real growth without external input. With its growing middle class and student-age population, Pakistan offers local and international private providers the opportunity to invest in the country's youth and education system and further its key development goals. In terms of research, the government and its universities are looking to utilise shared resources to expand knowledge in key areas, including food, water and women's rights.

Pakistani students have become less mobile as a result of cultural and financial pressures and a shift towards education at home or within the wider region has been observed. However, many remain interested in overseas degrees and TNE options are appealing to those who would not have otherwise considered overseas study. With high demand for a limited number of domestic places, students are looking to study at a higher level and in subjects that will benefit the country's strategic key industries.

The Higher Education Commission in Pakistan is encouraging qualified providers to invest in the country. The diverse range of programmes already in operation highlights that there are no constraining limitations to the investment options. It further indicates that success can come from responding to student, university and government needs. As these needs develop, new markets, such as digital learning and vocational education and training, can be expected to emerge.

Key factors have underpinned successful international partnerships in Pakistan and new providers can benefit by:

1. Forming a knowledge exchange: Knowledge exchanges in the form of research partnerships, teacher exchanges and curriculum development are ideal given the challenging situation on the ground. These programmes will have room to develop as Pakistan stabilises in the future.
2. Finding the right partner: A number of TNE programmes have been established or driven by local investors and education champions. Creating strong relations on the ground may facilitate entry into the market.
3. Identifying a key subject area: Subjects and vocational training areas that are tied closely to the nation's skills gap experience high demand and have low or insufficient domestic provision. TNE programmes that provide excellence in these subjects should be positively received.

As with any investment, there are risks in investing in the Pakistani higher education market. Identifying a long-term academic partnership is a challenge and due diligence should be completed on both sides. Quality should be guaranteed through monitoring and evaluation and overseas institutions should provide continued support for local faculty to engage teachers and learners. Collaborations must also be marketed carefully to maximise their success. However, for as long as the gap between education demand and provision in Pakistan remains high, input from the international education community will be necessary if development in higher education, and the country as a whole, is to continue.

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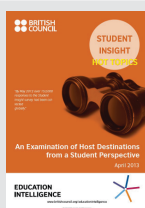
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