Transnational Education in Bangladesh

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The views expressed in this research do not necessarily represent those of the British Council and are the researcher's own.

Contents

Acronyms

BdREN	Bangladesh Research and Education Network
BNQF	Bangladesh National Qualifications Framework
BTEC	Business and Technology Education Council
CBHE	Cross Border Higher Education
CPD	Continuing Professional Development
DBT	Department for Business and Trade
ECTS	European Credit Transfer and Accumulation System
GDP	Gross Domestic Product
HE	Higher Education
HEI	Higher Education Institution
HESA	UK Higher Education Statistics Agency
IES	International Education Strategy
MoE	Ministry of Education
OfS	Office for Students
QAA	Quality Assurance Agency for Higher Education
STEM	Science, Technology, Engineering, and Mathematics
TNE	Transnational Education
UGC	University Grants Commission

Overview of Transnational Education (TNE)

Over the past two decades, parallel to processes of internationalisation and globalisation, the international higher education landscape has seen not only a growth in internationally mobile students, but also in education providers offering their programmes overseas, either through online learning, international branch campus, or international academic partnerships. These types of international education activities are often referred to as transnational education (TNE), intended as 'education in which the learners are located in a country different from the one where the awarding institution is based.'

TNE can take a number of different forms, the main types include:

- Branch campuses: involving the establishment of teaching facilities overseas, sometimes in partnership with local education or service providers

- Franchise partnerships: where TNE degree-awarding bodies franchise their programmes of study to local delivery partners

- Validation partnerships: where TNE degree-awarding bodies validate programmes of study developed and delivered by local partners

- Joint or dual degrees: where two degree-awarding bodies partner together in the development and delivery of a programme of study, leading to either a single joint or double certificate

- Distance/online learning: either fully delivered online or through the support of local tuition centres

There are numerous reasons for education providers to engage in TNE, such as growing international student recruitment, developing broader international partnerships, facilitating transfer of knowledge, as well as raising their international profile. TNE can play an important role not only in diversifying revenue streams for education providers, but also in widening access to international education to students who might be unable or unwilling to travel long distance. It can further help address unmet demand for higher education in receiving countries, reducing 'brain-drain', as well as helping to internationalise and develop local national systems.

Executive Summary

Context and scope

This research project was conducted in the context of an increasing demand for international education in Bangladesh and the growing strategic importance of transnational education (TNE) for UK higher education (HE). There has been a significant increase in Bangladeshi students coming to the UK in recent years, whilst UK TNE in Bangladesh has not shown signs of growth despite increasing demand for TNE in nearby countries such as Sri Lanka and India. At the same time Bangladesh is aiming to internationalise its education sector and widen access to higher education in the country.

In this context, the British Council in Bangladesh has commissioned Ecctis to undertake study on current developments in the TNE landscape in Bangladesh, with a view to identifying challenges and opportunities for TNE growth in the country and closer cooperation between the UK and Bangladesh HE sectors.

> ... Bangladesh is aiming to internationalise its education sector and widen access to higher education in the country.

The principal research objective of this study has been to present a comprehensive review of the TNE landscape in Bangladesh, exploring international education partnerships between Bangladesh and the UK, while considering the differing education policy and strategic priorities of both countries.

The primary and secondary data, from literature and interviews/focus groups, informing this study have been categorised into five overarching thematic areas which constitute the broad structure of the report:

- Educational Context
- Regulatory Landscape in Bangladesh
- Appetite for TNE in Bangladesh
- Development and Opportunities for TNE in Bangladesh
- Gender Equality and Social Inclusion.

Key findings

Analysis of desk-based research and stakeholder interviews resulted in the following key findings per each thematic area:

Educational Context

Student enrolment in higher education in Bangladesh has significantly increased over the past decade. The gross enrolment in tertiary education in Bangladesh is nonetheless below the global average and whilst currently Bangladesh is not a large receiving country of UK TNE, there is evidence that new TNE operations have been established in recent years.

At present the majority of UK TNE students in Bangladesh study through distance learning and the remaining through collaborative partnerships. Most UK TNE is offered through collaborative partnerships, including franchise and validation arrangements and joint degrees, with just over a quarter of UK TNE delivered through distance learning programmes.

Regulatory Landscape in Bangladesh

Bangladesh has a national framework called The Bangladesh National Qualifications Framework (BNQF), which consists of ten levels and has been operational since June 2021. The Bangladesh Accreditation Council administers the BNQF, whereas the Ministry of Education in Bangladesh manages policy-setting for HE institutions within Bangladesh. The University Grants Commission (UGC) oversees funding and compliance protocols for institutions in line with the National Education Policy 2010 and the Strategic Plan for Higher Education 2018-2030. The UGC is undertaking an ongoing review process of the Cross Border Higher Education (CBHE) legislation with the intention of producing a revised set of national guidelines.

The 2014 CBHE legislation is a legal framework governing the establishment of study centres (of international universities) and branch campuses. Key legislation and policy developments include the Private University Act (2010), Strategic Plan for Higher Education (2006-2026 & 2018-2030), Higher Education Quality Enhancement Plan (2009-2018), The Bangladesh Accreditation Council Act (2017), and Guiding Rules for Regulating the Branch Campuses / the Study Centre of Foreign University or Institute (2014).

To facilitate the development of TNE in Bangladesh, it was reported that the UGC recognises overseas qualifications awarded at recognised domestic institutions (institutions located in Bangladesh).

For alternative non-branch-campus TNE models – such as partnership programmes – curriculum development, assessment methodologies, and resource allocation within the regulatory context are key elements of approval processes. However, it was found that there is a lack of comprehensive guidance for non-branch campus TNE models and their governance, with the role of the UGC in regulating these provisions remaining unclear. Stakeholders may need to better understand and navigate the non-CBHE TNE landscape to ensure quality education delivery and regulatory compliance.

Appetite for TNE in Bangladesh

TNE programmes prove to be in high demand in Bangladesh, with law being a particularly popular subject. Demand for TNE placements was thought to likely come from students without the resources to study abroad but who intend to pursue higher education at international higher education institutions (HEIs) with an established reputation. In Bangladesh, entry requirements for some TNE degree programmes are lower than in the UK; one HEI explained this as a means of making the enrolment process for Bangladeshi students more equitable.

> **To facilitate the development of TNE in Bangladesh, it was reported that the UGC recognises overseas qualifications awarded at recognised domestic institutions (institutions located in Bangladesh).**

UK TNE providers in Bangladesh reported an incompatibility between costing TNE programmes for broad accessibility and aligning with internationally competitive quality standards. The estimated cost of a three-year BSc degree course delivered in Bangladesh is approximately £7000. Legislation governing TNE and TNE application procedures, such as indefinite application timelines, were reported to be unclear to some. Furthermore, TNE applicants considered themselves to be dependent on Bangladeshi HEIs for guidance and information during the application process.

In relation to demographic characteristics, the majority of TNE programme enrolments involve students from urban zones. Economic factors are thought to be the principal reason for the higher percentage of urban enrolment; international study and TNE programmes in Bangladesh are both considered to be price prohibitive for the majority of students from rural backgrounds.

Development and Opportunities for TNE

TNE programmes were found to be attractive to employers due to the associated outcomes students develop and achieve as part of their studies, such as interpersonal skills relating to business, computing, hospitality, and law programmes.

Graduate unemployment in Bangladesh is higher than the national average and the national unemployment rate for tertiary qualification holders is almost double

for women than it is for men. Despite this, TNE has the potential to generate opportunities for underrepresented groups such as women and students deriving from rural areas. Barriers to TNE can be reduced by delivering bridging English language programme to help students successfully integrate into their chosen academic programmes.

Gender Equality and Social Inclusion

Over a third of all enrolled undergraduate students in HE in 2022 were female, although the majority of TNE programmes attracted more male students. Furthermore, gender ratios vary across university types, for instance, 40.5% of students are female in public universities. Some stakeholders interviewed for this study thought that TNE could reduce gender disparities by serving as a platform for postgraduate studies in a different country. For instance, there was an observed trend of parents encouraging daughters to undertake TNE programmes in Bangladesh, as opposed to going abroad.

Students deriving from wealthy urban socio-economic strata obtained the primary benefits of TNE. The estimated composition of urban / rural backgrounds on one TNE programme was 80% and 20% respectively. The reason for the higher percentage of urban students was thought to relate primarily to economic factors.

1. Introduction

1.1 Context and scope

The British Council has commissioned Ecctis to undertake a study on current developments in the Transnational Education landscape in the country, with a view to identifying challenges and opportunities for TNE growth and for closer cooperation between the UK and Bangladesh HE sectors.

The Ministry of Education in Bangladesh plays an important role in shaping the nation's educational policies and strategies, with a particular focus on enhancing access to higher education. In particular, Bangladesh is currently aiming to internationalise its education sector and widen access to higher education in the country. There has been an increase in enrolment in tertiary education in recent years and universities have increased the range and number of their offerings as a result. There remains a strong demand for university places, and there is a need to increase capacity to meet this demand. Perceived quality of higher education is still an issue in Bangladesh with only three ranked in the top 1000 Quacuarelli Symonds higher education ranking. At the same time, there is strong demand for international education opportunities from Bangladeshi students, being driven by immigration and employment opportunities overseas.

1.2 Report Structure

This report begins by outlining the research methodology adopted for this study. An analysis section follows the methodology and includes analysis of the desk-based research undertaken for this study as well as analysis of stakeholder interviews and focus groups. The final section outlines the overall key findings emerging from desk-based analysis and stakeholder engagement.

To contextualise, over the past three years the UK has seen about a 370% increase of international students coming from Bangladesh, from about 3,200 students in 2019-20 to 15,000 in 2022-23.[1] This growth has not been matched by a similar increase of UK TNE in Bangladesh, which has seen an increase of only 13% in the same period, despite growing demand for TNE in nearby countries such as Sri Lanka and India, which have registered growth of 80% and 88% respectively since 2019/20.

Despite the growth in Bangladesh TNE provision in recent years, there remains a lack of a reliable evidence base regarding the current TNE delivery landscape, the perception and in particular, the scope of the future opportunities and areas for development. In this context, the British Council has tasked Ecctis with undertaking this comprehensive study into TNE provision in Bangladesh, adopting a mixed methods approach combining a review of literature with stakeholder engagement conducted via interviews and focus groups. Using this methodology, it is intended to evaluate diverse perspectives in order to provide insights into the TNE landscape and ultimately deliver a more comprehensive understanding which could be used to inform future development strategies.

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1.   HESA (2023) Where do *HE students come from* [online] Available from: https://www.hesa.ac.uk/data-and-analysis/students/where-from [accessed 13/03/24]. Adaderana Sri Lanka, State Minister reveals plans to establish three international universities in Sri Lanka (adaderana.lk) (Feb 2024)
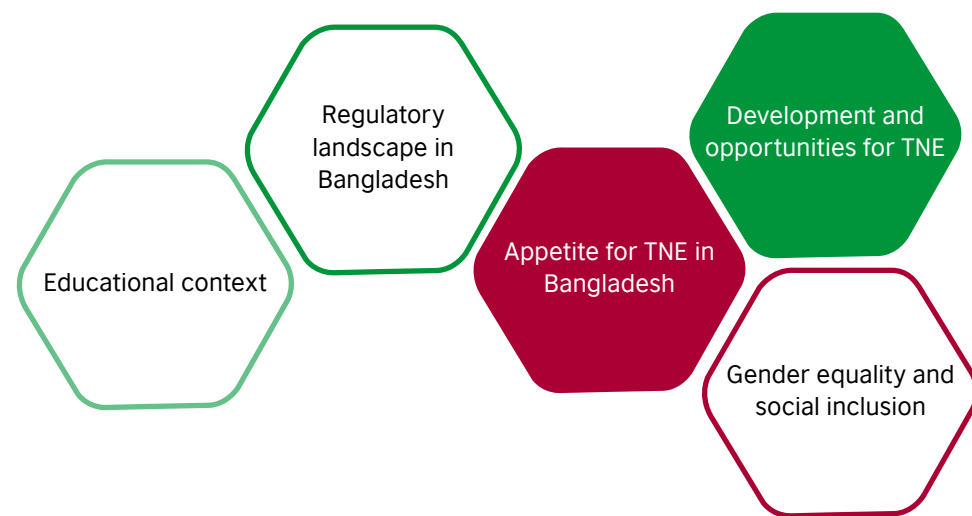
2. Methodology

The principal research objective of this study has been to present a comprehensive review of the TNE landscape in Bangladesh, exploring the potential for international education partnerships between Bangladesh and the UK, while taking into account the differing education policy and strategic priorities of both countries.

Figure 1: Five Overarching Areas

By drawing on primary and secondary sources, encompassing a review of existing policy documents and literature, as well as interviews and focus groups with key stakeholders, this study sheds light on five overarching areas pertaining to TNE in Bangladesh:

Regulatory landscape in Bangladesh

Educational context

Appetite for TNE in Bangladesh

Development and opportunities for TNE

Gender equality and social inclusion

The desk-based analysis of existing literature and documents focused primarily on obtaining a picture of the existing education and TNE landscape in Bangladesh and its regulatory environment, and

informed the questions pursued during interviews by identifying information gaps. Dynamics related to gender and social inclusion were considered throughout.

2.1 Stakeholder Analysis and Engagement Methodology

2.1.1 Stakeholder Identification

A preliminary stakeholders analysis carried out in consultation with the British Council identified the following key groups of stakeholders to engage as part of this study:

- Senior management of UK HEIs with responsibility for TNE in Bangladesh
- Universities that have submitted application to establish branch campus
- Senior management of Bangladeshi institutions partnering with TNE providers
- Department of Business and Trade (DBT) representatives / DBT team from British High Commission (Dhaka)
- Representatives of Bangladeshi authorities with responsibility for higher education and internationalisation
- Students engaged in TNE
- Non-UK TNE providers operating in Bangladesh.

The stakeholder identification process involved an assessment of various criteria to select specific stakeholders in line with the project's objectives. The following criteria guided the selection process:

- Relevance to TNE Landscape: Stakeholders were selected based on their direct involvement or influence in the TNE sector. This criterion ensured that stakeholders possessed firsthand knowledge and experience pertinent to the research focus.
- Strategic Positioning: Stakeholders occupying senior management positions within UK Higher Education Institutions (HEIs) responsible for TNE initiatives in Bangladesh were prioritised. Their strategic positioning enabled them to provide insights into institutional strategies,

challenges, and opportunities in TNE delivery.

- Regulatory Insights: Representatives from Bangladeshi authorities responsible for higher education and internationalisation efforts were included to provide regulatory perspectives.
- Universities that had previously sought to establish branch campuses in Bangladesh and are awaiting outcome from the Bangladeshi Ministry of Education (MoE) were included to understand partnership dynamics and regulatory challenges faced by overseas institutions.
- Trade Relations and Policy Implications: Representatives were selected who were best positioned to offer insights into trade relations and policy implications influencing TNE collaborations between the UK and Bangladesh.
- Student Perspectives: Engagement with students actively participating in TNE programmes was prioritised to capture firsthand experiences and feedback on the efficacy, challenges, and impact of TNE initiatives from a student-centric viewpoint.
- Non-UK TNE Providers: Inclusion of non-UK TNE providers operating in Bangladesh broadened the scope of perspectives, allowing for comparative analysis and understanding of diverse approaches to TNE delivery.
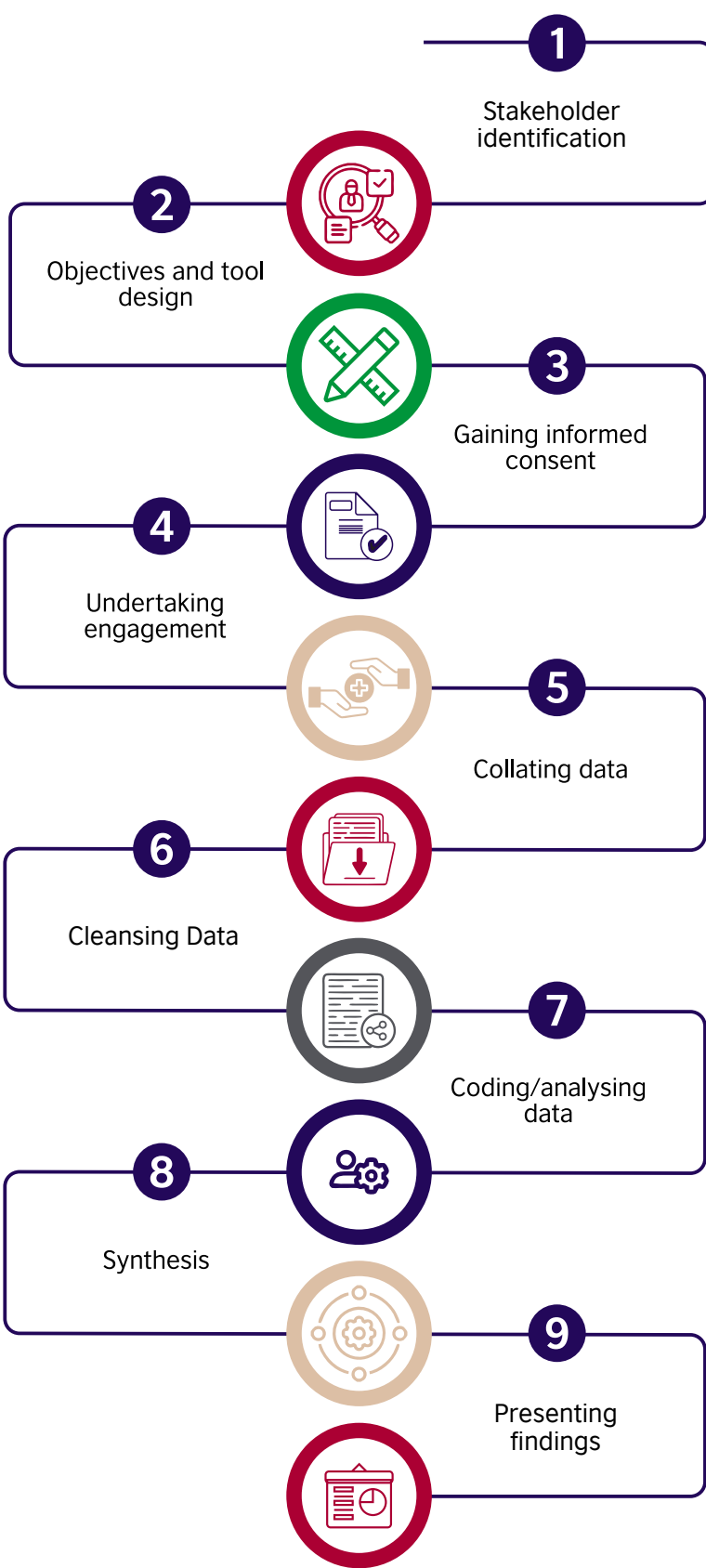
By using these criteria, stakeholders were selected based on their ability to contribute valuable insights and perspectives essential for achieving the research aims. This approach ensured the inclusion of stakeholders representing diverse perspectives within the TNE landscape, thereby facilitating the comprehensiveness and robustness of the study findings.

2.1.2 Approaches to Stakeholder Engagement

The research team undertook to engage with the identified stakeholders through a clear process, illustrated in Figure 2. This approach to stakeholder engagement ensured that the most relevant stakeholders were consulted with and the contact was focused and efficient, having identified the objectives and tools for engagement prior to gaining informed consent and utilising the tools to effectively gather the necessary information.

Stakeholder data has been anonymised in the report; in some instances, an indication of stakeholder type has been given to contextualise findings, although this has only been done where anonymity is able to be maintained.

Figure 2: Ecctis overarching approach to stakeholder engagement

1. Stakeholder identification
2. Objectives and tool design
3. Gaining informed consent
4. Undertaking engagement
5. Collating data
6. Cleansing Data
7. Coding/analysing data
8. Synthesis
9. Presenting findings

2.1.3 Interviews

The interview pathway was run parallel to the literature review, in conjunction with stakeholder insight provided by the British Council.

The interviews targeted various stakeholder types across the Bangladeshi TNE landscape, with consideration given to demographic, social, and economic variables. The perspectives of students as key stakeholders were explored through focus groups with TNE undergraduates, as well as with questions targeted at senior management. A total of 15 interviews and two focus groups were conducted with the target stakeholders.

Table 1: Number of interviews conducted with stakeholders

Stakeholder	Number of interviews
Senior management of UK HEIs with responsibility for the TNE in Bangladesh	3
Universities whose requests to establish branch campuses were denied by the Bangladeshi MoE	3
Senior management of Bangladeshi institutions partnering with TNE providers	3
Department of Business and Trade (DBT) representatives / DBT team from British High Commission (Dhaka)	1
Representatives of Bangladeshi authorities with responsibility for higher education and internationalisation	4
Students engaged in TNE (focus groups)	2
Non-UK TNE providers operating in Bangladesh	1

2.2 Literature review and policy analysis

The literature review targeted key research themes and questions, enabling a picture of the TNE landscape in Bangladesh to be constructed. The analysis proceeding from the literature review was triangulated with the data collected from interviews / focus groups to formulate the key findings. The desk-based research also fed into the questions informing the interview research tools.

3. Analysis and Findings

3.1 Educational Context

3.1.1 The education landscape in Bangladesh

With a population of over 170 million, Bangladesh is the 8th largest nation by population size, just after Brazil and before Russia.[2] The full age–sex breakdown of the population in 2022 was reported by the Bangladesh Bureau of Statistics in the Population & Housing Census 2022[3] as follows:

Figure 3: Age-Sex Pyramid (in millions)[4]
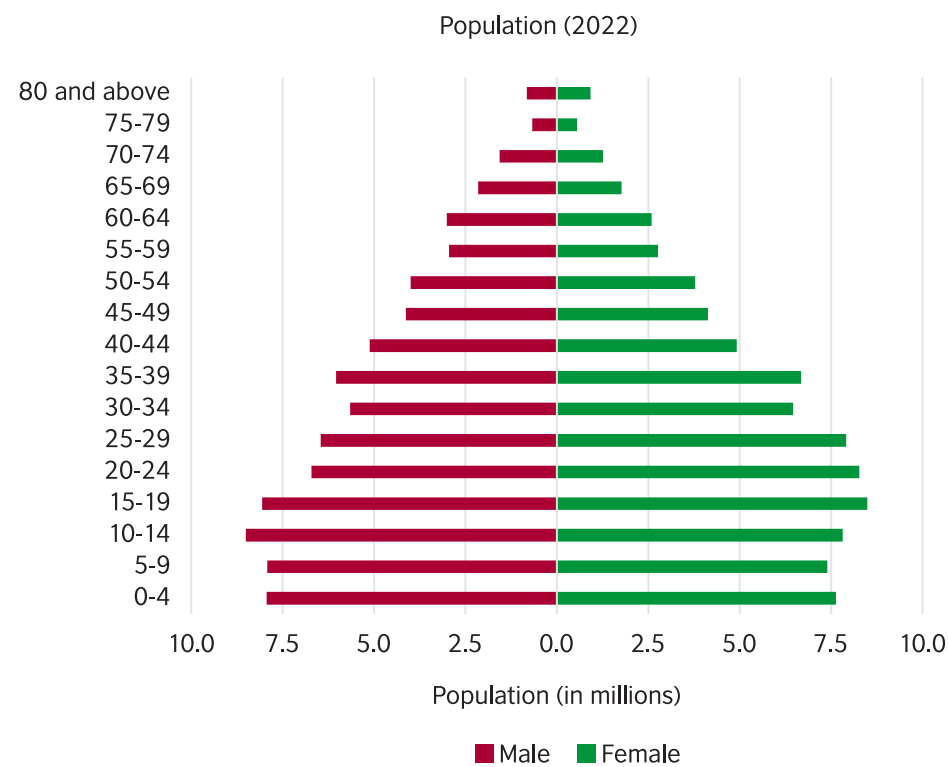
Population (2022)

The school age population (aged 5-19) makes up 29.2% of the population, and those aged 15 – 29 make up 28%. As of 2023 data, estimated unemployment stands at 4.2%.[4] In terms of educational attainment and employment opportunities, there is a gender disparity in outcomes which has been related to a number of different factors including cultural norms, access to resources, societal expectations, and systemic barriers.[5] A report published in 2017 by the Bangladesh Bureau of Statistics on educational outcomes and gender listed factors such as child marriage, high adolescent fertility rates, and violence against women as barriers to female participation.[6]

Gross enrolment in tertiary education in Bangladesh stands at approximately 23%.[7] By comparison, the global average for this measure for lower middle income countries is 42% and for high income countries it stands at 79%. According to data from the Bangladesh Ministry of Education, a total of 164 universities were registered in the national territory in 2022.[8] Private universities constituted 68% (111 institutions) of this figure, which includes three international higher education institutions, whilst the number of public universities stood at 53 (32%).[9] The international universities are listed as: the Islamic University of Technology (founded 1978), the Asian University for Women (established in 2005), and the South Asian University (instituted in 2008).[10]

According to the 2022 Bangladesh Education Statistics data, there were just over 1,000,000 students enrolled in university education. Of these 69.5% were enrolled at public universities, 30% at private universities, and less than 0.5% at the approved international universities. Female participation rate is higher at public universities at 40.5% compared to 30.8% at private universities, whilst international universities have a 46.6% female enrolment rate.

In relation to internationalisation in higher education trends, research literature suggests that international connections have been developing in Bangladesh in three ways:[11]

- The incorporation of curricula produced in universities external to Bangladesh which are subsequently updated and used as a standard

- The enrolment of Bangladeshi students in overseas universities, in the host country

- Collaborative ventures between higher education institutions through joint-degree programmes or international branch campuses.

UNESCO data for the South Asia region taken from the UNESCO website in 2024 situates the total outbound student mobility figure (at the tertiary education level) for Bangladesh at 52,799.[12] The following table details the destination countries hosting the largest number of Bangladeshi university students (list not exhaustive). The percentages were calculated from the total outbound mobility figure stated (52,799).

Table 2: Outbound Student Mobility Figures[13]

Destination Country	Number of Bangladeshi Students	% of Total Outbound Mobility
United States	8,524	16%
United Kingdom	6,586	12%
Canada	5,835	11%
Malaysia	5,714	10%
Germany	5,046	10%
Australia	4,987	9%
Japan	2,802	5%
India	2,606	5%
The Republic of Korea (South Korea)	1,202	2%
Saudi Arabia	1,190	2%

2. The World Bank (2024) Population Total: Bangladesh [online]. Available from: https://data.worldbank.org/indicator/SP.POP.TOTL?locations=BD [accessed 08/04/2024].

3. Bangladesh Bureau of Statistics (2022) Population and Housing Census 2022 [online]. Available from: https://sid.portal.gov.bd/sites/default/files/files/sid.portal.gov.bd/publications/01ad1ffe_cfef_4811_af97_594b6c64d7c3/PHC_Preliminary_Report_(English)_August_2022.pdf [accessed 08/04/2024].

4. The World Bank (2024) Unemployment Total: Percentage of the Total Labour Force [online]. Available from: https://data.worldbank.org/indicator/SL.UEM.TOTL.ZS?locations=BD [accessed 08/04/2024].

5. The International Labour Organisation (2023) Data: Country Profiles [online]. Available from: https://ilostat.ilo.org/data/country-profiles/ [accessed 08/04/2024].

6. Bangladesh Bureau of Statistics (2017) Education Scenario in Bangladesh: Gender Perspective [online]. Available from: https://bbs.portal.gov.bd/sites/default/files/files/bbs.portal.gov.bd/page/4c7eb0f0_e780_4686_b546_b4fa0a8889a5/BDcountry%20project_final%20draft_010317.pdf [accessed 09/05/24]

7. Gross enrolment ratio is the ratio of total enrolment, regardless of age, to the population of the age group that officially corresponds to the level of education shown. Tertiary education, whether or not to an advanced research qualification, normally requires, as a minimum condition of admission, the successful completion of education at the secondary level; The World Bank (2024) School Enrolment: Tertiary – Bangladesh [online]. Available from: https://data.worldbank.org/indicator/SE.TER.ENRR?locations=BD [accessed 08/04/2024].

8. Bangladesh Bureau of Educational Information and Statistics (2023) Bangladesh Education Statistics 2022 [online]. Available from: https://banbeis.portal.gov.bd/sites/default/files/files/banbeis.portal.gov.bd/page/6d10c6e9_d26c_4b9b_9c7f_770f9c68df7c/Bangladesh%20Education%20Statistics%202022%20%281%29_compressed.pdf [accessed 14/02/2024].

9. Bangladesh Bureau of Educational Information and Statistics (2023) Bangladesh Education Statistics 2022 [online]. Available from: https://banbeis.portal.gov.bd/sites/default/files/files/banbeis.portal.gov.bd/page/6d10c6e9_d26c_4b9b_9c7f_770f9c68df7c/Bangladesh%20Education%20Statistics%202022%20%281%29_compressed.pdf [accessed 16/04/2024].

10. University Grants Commission of Bangladesh (2024) List of International Universities [online]. Available from: http://www.ugc-universities.gov.bd/international-universities [accessed 08/03/24].

11. Hossain, A. (2016) Internationalisation of Higher Education: Trends in Bangladesh [online]. Available from: https://www.academia.edu/37258691/2_INTERNATIONALIZATION_OF_HIGHER_EDUCATION_TREND_IN_BANGLADESH_19_09_2016_docx [accessed 15/02/2024].

12. UNESCO (2024) Global Flow of Tertiary-Level Students [online]. Available from: https://uis.unesco.org/en/uis-student-flow [accessed 15/02/2024].

13. UNESCO (2024) Global Flow of Tertiary-Level Students [online]. Available from: https://uis.unesco.org/en/uis-student-flow [accessed 09/04/2024].

Almost 15,000 students from Bangladesh enrolled on HE programmes in the UK in the 2022-23 academic year, according to the latest data from the UK Higher Education Statics Agency (HESA). This figure represents a 370% increase compared to the 2019/20 academic year.

Enrolment data across the last five-year period is presented in the graph below:[14]

Figure 4: Number of Bangladesh-domiciled students enrolled on UK HE programmes[15]
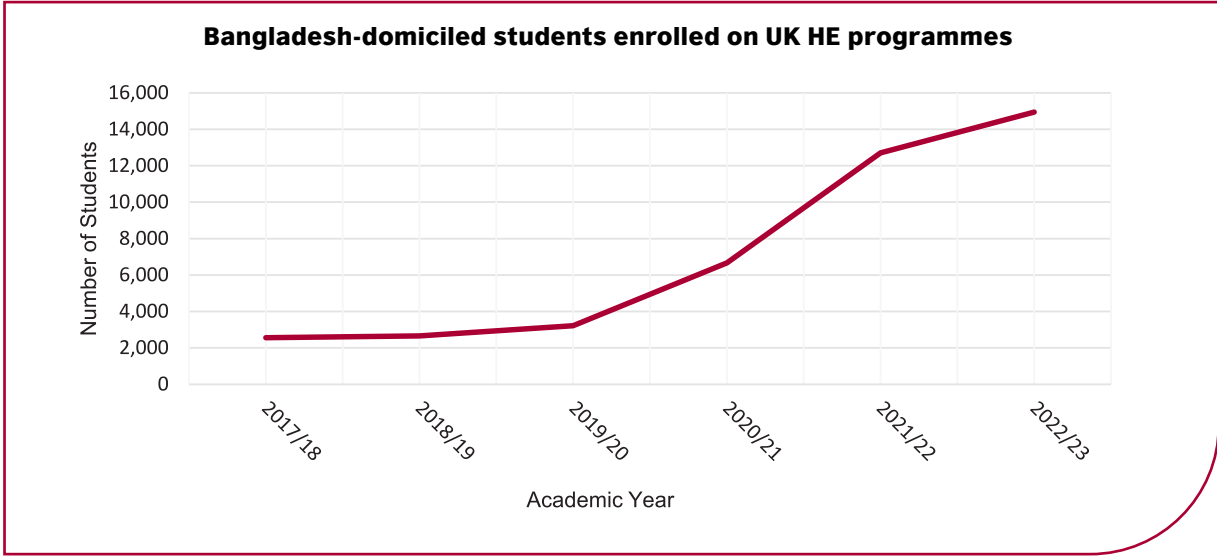
Visa data shows continued strong growth in 2022, however the trend reversed in 2023 with a 39% year-on-year decrease, reducing from 15,234 to 9275.[16] The number may be expected to fall further due to recent changes in UK student visa policy.[17]

With regards to international student mobility, inbound student mobility to Bangladesh remains comparatively low, with UNESCO figures showing 2,281 students entering the country from neighbouring countries such as Nepal and Myanmar.[18] In contrast, a considerably higher number of around 53,000 Bangladeshi students are engaged in outbound mobility.

In terms of the factors influencing development of Bangladesh as a study destination for international students, a study published by the Bangladesh Bureau of Educational Information and Statistics found that political instability and the broader educational environment were factors limiting its expansion.[19] The comparatively low (in an international context) cost of living and tuition fees were outlined as considerations that attracted international students. The study recommended that internationalisation of HE is prioritised as a growth sector due to its potential to attract foreign investment capital and that educational infrastructure is improved.

3.1.2 The TNE landscape in Bangladesh

Bangladesh is not a major host country of UK TNE. In the 2022-23 academic year, about 2,145 students were reported to be studying for UK HE qualifications in Bangladesh, a slight decrease from the previous year. These are relatively low numbers in comparison to other countries in the region like India and Sri Lanka, which account for roughly 15,000 and 54,000 UK TNE students respectively.

There is no central repository of data and information for TNE in Bangladesh. In particular, data on countries providing TNE in Bangladesh is not currently publicly available. It is however possible to get an insight into UK TNE in the country.

The largest UK TNE provider is the University of London, accounting for about 75% of all UK TNE students in Bangladesh. It is important to note that these are classed as 'distance learning' students, although the University of London's TNE model operates differently from other distance learning institutions.

The University of London operates through its established model of distance learning supported, optionally, by recognised local teaching centres. These local centres, all based in Dhaka, include:

- Universal College Bangladesh, which offers four BSc programmes in Finance, Economics, Accounting, and Business and Management
- Four other centres offering a bachelor's degree in Law (the British School of Law, Buyani Academy, London College of Legal Studies, and Newcastle Law Academy).

Other UK TNE providers operating in the country include:

Wrexham Glyndwr University

- **Partner Institution:** London School of Commerce
- **Location:** Dhaka
- **Programmes Offered:**
  - Top-up BA in Business Studies
  - MBA

Leeds Trinity University

- **Partner Institution:** BAC International Study Centre
- **Location:** Dhaka
- **Programmes Offered:**

Figure 5: Number of TNE students studying for UK HE qualifications in Bangladesh[20]

14.   HESA (2023) Where do HE students come from [online]? Available from: https://www.hesa.ac.uk/data-and-analysis/students/where-from [accessed 13/03/24].

15.   HESA (2023) Where do HE students come from [online]? Available from: https://www.hesa.ac.uk/data-and-analysis/students/where-from [accessed 13/03/24].

16.   British Council (2023) UK Student Visas Down 5.5% in 2023 [online] Available from: https://opportunities-insight.britishcouncil.org/blog/uk-student-visa-dip-55-2023-driven-drops-india-and-nigeria [accessed 09/05/2023].

17.   HESA (2023) Where do HE students come from [online]? Available from: https://www.hesa.ac.uk/data-and-analysis/students/where-from [accessed 13/03/24].

18.   UNESCO (2024) Global Flow of Tertiary-Level Students [online] Available at: https://uis.unesco.org/en/uis-student-flow [accessed 09/04/2024].

19.   Bangladesh Bureau of Educational Information and Statistics (2013) Research Study on Cross-border Higher Education in Bangladesh [online]. Available from: https://banbeis.portal.gov.bd/sites/default/files/files/banbeis.portal.gov.bd/page/bf60bc17_7f35_45aa_a082_8aedd460dd8a/2014_Research%20Study%20on%20Cross-border%20Higher%20Education%20in%20Bangladesh.pdf [accessed 21/02/2024].

20.   HESA (2023) Where do HE students come from [online]? Available from: https://www.hesa.ac.uk/data-and-analysis/students/where-from [accessed 13/03/24].

- Undergraduate programmes in Business, Law, and Computer Science
- Postgraduate programmes in Business, Law, and Computer Science

University of Greenwich

- **Partner Institution:** NCC Education
- **Location:** Daffodyl International Academy, Dhaka
- **Programme Offered:**
  - Final year validated top-up BSc in Computing

University of Central Lancashire (UCLan)

- **Partner Institution:** NCC Education
- **Location:** Penston Academy, Uttara
- **Programme Offered:**
  - Online top-up validated BSc degree in Business Computing and Information Systems

Breaking UK TNE enrolments down by mode of study, the latest detailed data from HESA – covering the 2022-23 academic year – shows that distance learning is by far the most dominant form of enrolment, accounting for 87 per cent of all enrolments. The listed course fees ranged from £2,950 to £4,950 although there may be

further variance as not all HEIs publish tuition fee information in the public domain. The TNE programmes of the above universities are delivered by the faculties of their respective TNE partners in Bangladesh.

The majority of these students are enrolled at a single institution: the University of London (UoL). As noted above, while the UoL does not physically teach students in Bangladesh and their programmes are therefore classed as distance learning, students registered on their courses can optionally enrol with recognised local teaching centres to support their studies.

Aside from UoL students, 12 per cent of UK TNE students in Bangladesh are enrolled on distance learning courses with other providers, whilst 13 per cent are studying on in-person programmes either registered directly with the UK provider or via a local partner.

UK TNE in Bangladesh is predominantly undergraduate, with only around 12 per cent of students studying for postgraduate qualifications (primarily taught master's degrees). Levels of study vary by provider and mode of study. Almost all UoL students are studying undergraduate courses, along with around 80 per cent of students on in-person programmes. However, almost 70 per cent of students on distance learning courses offered by institutions other than the University of London are studying for postgraduate degrees.

Figure 6: Modes of study
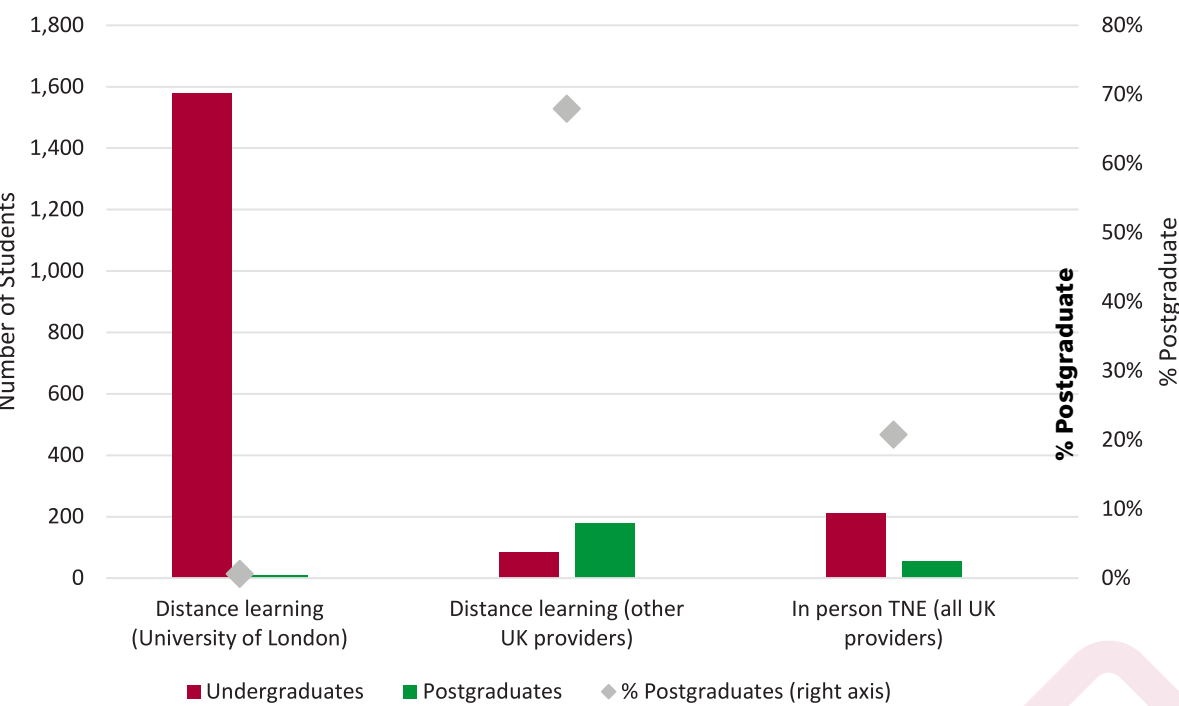
Transnational Education in Bangladesh encompasses a diverse range of offerings from various countries beyond the UK. While the UK has historically been a prominent provider, other nations have also made significant contributions to the TNE landscape in the country. For instance, Australian universities have actively engaged in TNE initiatives in Bangladesh over the past few decades, with institutions like Griffith University and Curtin University establishing partnerships with local institutions to offer a range of undergraduate and postgraduate programmes. Additionally, Malaysian universities have played a significant role in TNE, with institutions such as Multimedia University and Limkokwing University offering programmes in collaboration with Bangladeshi partners. These examples highlight the longstanding involvement of non-UK countries in providing TNE opportunities in Bangladesh, contributing to the country's higher education landscape over the past few decades.

There has been a slight decrease in number of UK TNE students in Bangladesh in recent years. Nonetheless there is evidence of new TNE operations, particularly non-UK TNE operations, having been established in recent years, including:

- The Malaysian UCSI University Branch Campus, established in Dhaka in 2022, which offers a suite of undergraduate and postgraduate degrees in different disciplines
- Monash College in Australia, which in 2021 partnered with the Universal College Bangladesh, also based in Dhaka, to introduce in the country the Monash University Foundation Year and Monash College Diploma programs that lead directly to degrees at Monash University Australia and Monash University Malaysia
- UTS College, also providing similar pathway programmes to the University of Technology Sydney in Australia, in partnership with Premier University Chattogram in Chittagong

In addition, there are the three international universities listed in the UGC register of approved universities, the Islamic University of Technology, the Asian University for Women and South Asia University. The Islamic University of Technology (IUT) specialises in engineering and technology related subjects and is located in Gazipur, Bangladesh. IUT is a subsidiary institution of the Organisation of Islamic Cooperation (OIC). The university receives endowment from OIC member states, including India. The Asian University for Women (AUW) is an independent, international university in Chittagong, Bangladesh. The institution admits women from across Asia, aims to provide a

global outlook in its education and leadership development, while being offered within an Asian context. Moreover, the Asia University (AUB) meanwhile is a private university in Bangladesh, whose governing council comprises representatives from academics from the US, Australia and Malaysia, facilitating an international dimension to teaching, learning and programme design.

A number of UK providers communicated that they have considered establishing TNE operations in Bangladesh, but they considered the regulatory framework to be overly complex. Regulations relating to higher education were thought to be complicated, particularly for license applications, creating uncertainty as to whether regulatory requirements were being adhered to. Concerns about fund scrutiny and the significant deposits required were said to constitute further challenges. Additionally, restrictions such as the limitation of one license per UK awarding body for local tutorial colleges were reported as being limiting, in some cases impacting the foundation of TNE partnerships (further information concerning licensing restrictions does not appear to be publicly available). Stakeholders indicated that these restrictions were not applicable to international branch campuses and study centres that are governed by the 2014 CBHE legislation provided that there is compliance with the latter. These challenges may indicate a need for increased transparency and consistency in Bangladesh's TNE legislation to facilitate further collaborations and promote the growth of international HE partnerships.

3.1.3 The UK TNE landscape

UK TNE in countries neighbouring Bangladesh, such as India, Sri Lanka, and Malaysia, has seen significant expansion in recent years. In India, for example, UK universities primarily engage in joint degree programs and academic partnerships. Furthermore, Sri Lanka hosts a few UK branch campuses offering a variety of undergraduate and postgraduate programmes. Malaysia has established itself as a prominent TNE hub with several UK branch campuses and dual-degree programmes, supported by substantial government initiatives. This growth highlights the UK's strong educational presence and influence in the region, providing diverse opportunities for students.

Having acknowledged the scale and type of UK TNE in neighbouring countries, this section looks at the UK TNE landscape from a global perspective. The UK is a popular destination for students pursuing overseas higher education and a large exporter of TNE. The UK TNE sector has experienced a period of sustained growth over the past few years, from about 433,000 students in 2018/19 to over 576,000 in 2022-23.[21]

21.   Universities UK (2023) The scale of UK HE TNE 2021—22 [online]. Available from: https://www.universitiesuk.ac.uk/universities-uk-international/insights-and-publications/uuki-publications/scale-uk-he-tne-2021-22 [Accessed 16/04/2024].

According to the latest available data from the Higher Education Statistics Agency (HESA), 186 UK HE providers reported having students learning through TNE in in 2022-23, with 57 countries each hosting 1,000 or more students. The majority of students studying on UK TNE programmes are located in Asia (52%), with 299,500 students, followed by Europe (16%), the Middle East (14%) and Africa (11%).

3.2 Regulatory Landscape in Bangladesh

3.2.1 Higher Education Structure in Bangladesh

Higher education in Bangladesh operates under a centralised structure with the Ministry of Education functioning as the principal planning and policy-making institution.[22] In addition to the Ministry of Education, the University Grants Commission was established in 1973 by an Act of Parliament to provide and oversee the disbursement of funding to public higher education institutions in Bangladesh. The UGC is also charged with monitoring compliance with the National Education Policy 2010 and the Strategic Plan for Higher Education 2018–2030 (see below for more details on this legislation).

Whilst the UGC performs a regulatory role in relation to public and (since the Private University Act 2010) private universities, it is not vested with the direct authority to enforce adherence to national legislation; rather, the UGC can report any observed breeches or malpractice to the Ministry of Education.[23] Other functions of the UGC include: the promotion and coordination of tertiary education, assessing the funding needs of universities, and performing a consultatory service to the government on issues relating to universities. The UGC also maintains a national register of all recognised public and private higher education institutions. While these are the general functions of the UGC, there are regulatory activities that relate specifically to TNE provision that will be discussed in later sections.

It is important to note that many non-UGC approved institutions and educational providers continue to operate in Bangladesh and that this provision may not be officially recognised according to national regulations. Furthermore, in regard to TNE provision, the national regulations implemented by UGC only cover branch campuses and study centres and may not apply to joint degree offerings.

Figure 7: Organisational and regulatory structure of higher education in Bangladesh[24]
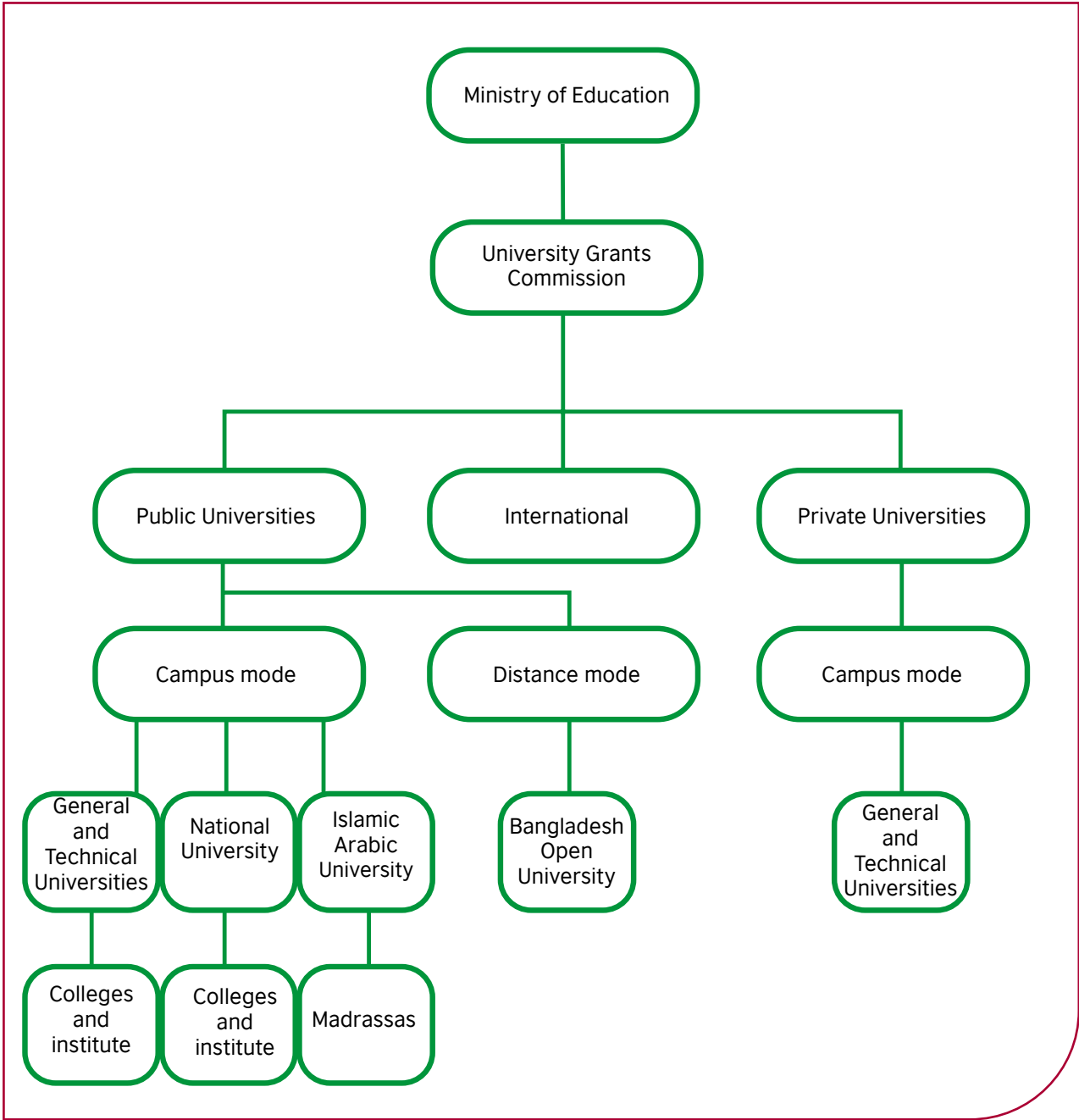
3.2.2 Policy Developments

In relation to policy developments, recent legislation governing the higher education sector has tended to focus on expansion and improving quality standards. The core policy developments and acts since early 1990 are summarised below:[25]

- Private University Act: promulgated in 1992 and amended in 1998, the Private University Act provided a legislative framework for the establishment of private tertiary education providers, intended to meet the growing demand for university placements.[26]

- Strategic Plan for Higher Education 2006-2026: this reform policy was undertaken in collaboration with the World Bank with the aim of increasing institutional capacity and improving quality in public and private universities.

22.   Chowdhury, M.H., Absar, M.M.N, and Quader, S.M. (2020) Challenges and Developments in the Higher Education System of Bangladesh. Handbook of Education Systems in South Asia, pp.1-32. DOI:10.1007/978-981-13-3309-5_57-1

23.   Chowdhury, M.H., Absar, M.M.N, and Quader, S.M. (2020) Challenges and Developments in the Higher Education System of Bangladesh. *Handbook of Education Systems in South Asia*, pp.1-32. DOI:10.1007/978-981-13-3309-5_57-1

24.   Chowdhury, M.H., Absar, M.M.N., and Quader, S.M. (2020) Challenges and Developments in the Higher Education System of Bangladesh. *Handbook of Education Systems in South Asia*, pp.1-32. DOI:10.1007/978-981-13-3309-5_57-1

25.   Chowdhury, R. and Kabir, A.H. (2021) *The Privatisation of Higher Education in Postcolonial Bangladesh: The Politics of Intervention and Control*. London, Routledge.

26.   University Grants Commission of Bangladesh (2016) *University Grants Commission of Bangladesh: A Profile*. p.34.

- Higher Education Quality Enhancement Project (HEQEP) 2009-2018: the HEQEP was implemented in collaboration with the World Bank between 2009 and 2018. Informed by the Strategic Plan 2006-2026, the primary objectives were to increase: quality standards, innovation, accountability, and institutional capacity.[27]

- Private University Act 2010: the Private University Act 2010 replaced all statutes that had previously been enacted and was designed to ensure transparency, quality standards, and adequate governance of the private university sector.[28]

- Guiding Rules for Regulating the Branch Campuses / the Study Centre of Foreign University or Institute 2014: formulated by the Ministry of Education, the Guiding Rules were introduced through an amendment to the Private University Act 2010. The amendment was made in 2010 and approved in 2014. This regulation permits external higher education institutions to open branch campuses and study centres. Prior to this, the Private University Act 2010 had prohibited for-profit transnational branch campuses and study centres.[29] The 2014 act now allows scope for profit based TNE.

- The Bangladesh Accreditation Council Act 2017: the Bangladesh Accreditation Council Act 2017 provided the legislative base to form the Bangladesh Accreditation Council (BAC). The BAC is a statutory body that is charged with the maintenance of standards and the accreditation of higher education programmes.[30]

- Strategic Plan for Higher Education 2018-2030: the second Strategic Plan was formulated to update the original (2006) policy and further adherence to the UN's Sustainable Development Goals (SDGs).

The state was responsible for funding higher education in Bangladesh until 1990; it was the Private University Act 1992 that permitted private universities to operate in the country.[31] The first offshore campuses of foreign universities began to operate shortly after the promulgation of the Private University Act 1992. The amendment of the Private University Act in 1998 recognised foreign universities as private education providers, permitting them to deliver academic programmes provided that they did not operate as profit-seeking enterprises.

3.2.3 The Bangladesh National Qualifications Framework

A national qualifications framework (the Bangladesh National Qualifications Framework or BNQF) has been operative in Bangladesh since June 2021.[32] The BNQF encompasses school level education as well as further education, Technical and Vocational Education and Training (TVET), and Higher Education sectors. It comprises ten levels and is administered by the Bangladesh Accreditation Council, a statutory body established by the Bangladesh Accreditation Council Act 2017.[33] Part B of the BNQF corresponds to higher education.

3.2.4 Legal Framework for Overseas Universities or Institutes

3.2.4.1 Branch Campus Models

The Guiding Rules for Branch Campus or Study Centre of Foreign University or Institute 2014 (henceforth the Guiding Rules 2014) provide a legal framework for foreign universities, joint-ventures, offshore branches, and study centres operating in Bangladesh.[34] This applies to branch campuses and similar models (which comprise a small proportion of the total TNE provision in Bangladesh) which must obtain approval from the UGC and adhere to regulations regarding infrastructure, faculty qualifications, curriculum approval, and financial requirements. The Guiding Rules 2014 allow study centres to award degrees (undergraduate, postgraduate, certificates, and diplomas) in partnership

with Bangladeshi universities. Under this legislation, a temporary permit is required for foreign universities from the UGC.[35] To obtain a temporary permit, a number of prerequisites are stipulated in the Guiding Rules 2014 such as:[36]

Infrastructure and Personnel

- Offshore branch campuses or study centres need to demonstrate that they possess a 25,000 square foot complex and a suitable premises (that can be rented or owned directly) or space that can adequately accommodate all students

- The complex must have a 10,000 square foot floor area with classrooms that provide sufficient space for each student

- The TNE provider is obligated to have registered a specific number of full-time teaching staff for every department, programme, or course; if part-time teachers are appointed, they should not exceed one third of the total faculty

- For branch campuses, each faculty must have a head department with a corresponding office

- A minimum of 1500 square feet must be allocated for a library (housing at least 20,000 texts) and there should be on-campus laboratories

- Individual educational programmes provided by external universities must have been approved by the UGC

- Information concerning tuition fees, admission costs, semester activity charges, and all the other costings must be provided by the international university, sponsoring institution, and local representative

- The UGC will approve a board of trustees comprising three members.

Financial Requirements

- A deposit of 70,335,589 Taka – equivalent to approx. £469,000 for a branch campus and 14,067,330 Taka – equivalent to approx. £93,800 for a study centre is needed in a recognised bank.

In the fields of engineering, medicine, dentistry, nursing, and pharmacy, a consent letter from the regulatory body corresponding to each professional

field is also required. For the delivery of syllabi relating to computing, science, engineering, and technical subjects, there is an infrastructure stipulation that a minimum of one computer is provided for every five students and that all amenities are accessible without a service charge. In addition, the approval process for establishing a cross border higher education institution involves the submission of a standard UGC application form. The application process involves other mandatory documents including:

- Documentation to evidence proprietorship or leasing of the premises intended for academic use

- A written attested copy of the agreement signed between the host institution or sponsor and the international university / study centre

- Documents evidencing the possession of the necessary deposited funds.

In relation to the duration of the application process, the Guiding Rules 2014 state that a survey committee will submit an observation report (concerning the inspection of academic infrastructure and facilities) to the government within a thirty-day period. The legislation specifies a maximum period of six months for the issuing of a temporary permit subsequent to the approval of an application. Once issued, the temporary permit is valid for a period of seven years from the approval date.

3.2.4.2 Other Forms of TNE

In addition to branch campuses, the legal framework in Bangladesh also encompasses other forms of TNE provided by overseas universities or institutes. One such model is joint-venture programmes, which involve partnerships between local Bangladeshi institutions and international universities or institutes to deliver academic programmes. These programmes must adhere to regulations set forth by the UGC and other relevant authorities to ensure quality and consistency in education delivery.

Furthermore, distance learning and online education have gained prominence as alternative forms of TNE in Bangladesh. The legal framework for distance education encompasses regulations related to curriculum development, assessment methods, faculty qualifications, and accreditation standards. Institutions offering distance learning programmes are required to obtain approval from the UGC and comply with guidelines to ensure the quality and integrity of

27. University Grants Commission of Bangladesh (2018) *Strategic Plan for Higher Education in Bangladesh:2018-2030.* p.i.

28. University Grants Commission of Bangladesh (2016) *University Grants Commission of Bangladesh: A Profile.* p.34.

29. Bangladesh Ministry of Education (2014) *Foreign University or its Branches or Study Centres Operating Rules 2014: Bangladesh* [online]. Available from: https://opportunities-insight.britishcouncil.org/sites/siem/files/field/file/news/10870_52279.pdf [accessed 12/02/24]; this is a link to the official MoE publication which to date is only available in Bengali.

30. British Council (2017) B*angladesh Accreditation Council Bill 2017 passed at National Parliament* [online]. Available from: https://opportunities-insight.britishcouncil.org/news/market-news/bangladesh-accreditation-council-bill-2017-passed-national-parliament [accessed 12/02/24]

31. Kabir, A.H. (2020) Higher Education: Trapped in Neoliberal Reform. In: Khan, M.T. and Rahman, M.S. (Eds.) *Neoliberal Development and the Bangladesh State* (pp. 127-152). University Press Limited.

32. Ministry of Education (2021) *Bangladesh National Qualifications Framework (BNQF)* [online]. Available from: https://shed.portal.gov.bd/sites/default/files/files/shed.portal.gov.bd/publications/f1c410ad_3af2_462c_a8ae_df1ffdb27905/daf6821b-666e-44e4-85fe-6a0fe8998a9f.pdf [accessed 14/02/2024]

33. Ministry of Education (2021) *Bangladesh National Qualifications Framework (BNQF) – Part B Higher Educations Levels 7-10* [online]. Available from: https://www.iiuc.ac.bd/home/show-pdf/files4dZfTMdaau8PzjlZ8h9RBNQF-Bangladesh-2021T4ClV47CEU5qOj2ShAtD [accessed 14/02/2024].

34. Kabir, A.H. (2020) Higher Education: Trapped in Neoliberal Reform. In: Khan, M.T. and Rahman, M.S. (Eds.) *Neoliberal Development and the Bangladesh State* (pp. 127-152). University Press Limited.

35. World Education News and Reviews (2014) *Bangladesh: Government Formalises Rules for Foreign Universities* [online]. Available from: https://wenr.wes.org/2014/07/wenr-julyaugust-2014-asia-pacific [accessed 13/02/2024].

36. Bangladesh Ministry of Education (2014) *Guiding Rules for Branch Campus or Study Centre of Foreign University or Institute 2014* [online]. Available from: https://opportunities-insight.britishcouncil.org/news/market-news/foreign-university-or-its-branches-or-study-centres-operating-rules-2014-bangladesh [accessed 13/02/2024].

Figure 8: Current application process

An application is first submitted to the MoE

The application is subsequently forwarded to the UGC

THe UGC examines the application, seeks clarification if required, and visits the facilities at the proposed premiss

Officials from the UGC may also visit the international provider's domestic campus

The MOE refers the UGC recommendations to a cell within the Prime Minister's office for clearance

UGC makes its recommendations to the MOE regarding the approval or dismissal of the submitted application

Approval is subsequently granted or withheld, and the procedure for establishing a branch campus/study centre is concluded

Source: Stakeholder interviews

education delivery. The UGC has published seven overarching policies to facilitate the introduction of blended learning (defined as different delivery media or instructional methods) into universities:[37]

- Universities should be ready to incorporate blended learning
- Appropriate pedagogy should be adopted for blended learning
- Necessary technological infrastructure should be put in place for blended learning
- Universities should ensure effective design of and support for blended learning
- Proper assessment strategies relating to blended learning should be in place for content, courses, programmes, students, and teachers
- Universities should manage developing and maintaining infrastructure to comply with blended learning requirements with appropriate support and resources to create meaningful learning environments
- Ethics, culture, equality, and legal issues should be considered in blended learning.

3.2.4.3 UGC Review of the 2014 Cross Border Higher Education Legislation

In relation to the Cross Border Higher Education (CBHE) legislation enacted in 2014 (Guiding Rules for Regulating the Branch Campuses / the Study Centre of Foreign University or Institute), interviewees mentioned that the UGC is undertaking an ongoing review process with the intention of producing a revised set of national guidelines; no specific time frame was known for the review or the publication of an amended regulatory framework.

> *"Our cross-border higher education regulations passed in 2014. But meanwhile, we have formed a committee and, you know, Ministry of Education and UGC is working relentlessly to update this formulation, policy formulation. And this is now in final stage"*

The review of the 2014 CBHE legislation was thought to focus on guidelines for international universities offering TNE in Bangladesh. Some stakeholders suggested the following as measures that the UGC could implement to improve the quality of TNE in Bangladesh:

- Prioritise HEIs with an international ranking within the top two hundred global universities
- Only the applications of established universities, with a minimum of one hundred years of experience providing educational services, may be approved
- Address eligibility conditions: It is important for HEIs to verify eligibility conditions for domestic institutions to partner in joint ventures or other forms of collaboration with foreign universities, ensuring that capacity and resources can contribute effectively to such ventures

> *"These types of ranking institutions, if they have any sort of certification that their rank is within 200 [Times Higher Education ranking of universities], we'll encourage them. And we'll give them some sort of facilities that they can get land, [...] and other programme facilities"*

The interviewed stakeholders relayed that the current application process for establishing TNE partnerships in Bangladesh (relating specifically to branch campus and study centre models) can take between several months to over a year, comprising the procedures found in figure 6.

Stakeholders also communicated that international providers are permitted to operate more than one TNE partnership in Bangladesh, provided that there is compliance with the legal requirements detailed in the 2014 CBHE legislation governing branch campuses and study centres (currently, there is a limit of one license that can be issued per UK awarding body for local tutorial colleges).

3.2.5 The Impact of the Current TNE Regulatory Scheme for non-Branch Campus TNE on Market Access and Attitudes

Participants in the stakeholder interviews specified that the 2014 CBHE legislation is a legal framework governing the establishment of study centres (of international universities) and branch campuses. Other types of TNE arrangement are not covered in the 2014 CBHE regulations, such as: articulation agreements between domestic and foreign universities for credit transfer, award of dual degrees in collaboration with local universities, and online / distance education.

> *"There are rules called Cross-Border Higher Education Rules 2014. That is only for cross-border higher education; it does not include other types of TNE. For example, it does not include dual degree programme or joint-degree programme or online education. It does not provide provisions for that"*

37.   UGC (2021) *Policy on Blended Learning for Bangladesh* [online]. Available from: https://ugc.gov.bd/sites/default/files/files/ugc.portal.gov.bd/policies/ddeb0952_f123_4d24_8ddf_53b9b24031f8/2022-06-06-06-44-a6a5dea173d2d0ec327b83f57cd55e24.pdf [accessed 13/06/24]

Distance learning or collaborative partnerships may similarly involve approval processes and some degree of regulatory oversight. Approval processes may, according to the 2014 UGC Blended Learning Policy, involve assessments of the proposed educational programmes, infrastructure, and faculty qualifications to ensure alignment with quality standards and compliance with regulations.[38] Aspects such as curriculum development, assessment methodologies, and resource allocation within the regulatory context form part of approval processes.[39] There is nonetheless a lack of comprehensive guidance for non-branch campus TNE models and the way in which they are governed, and the role of the UGC in regulating such provision is unclear. There is a general need for stakeholders to better understand and navigate the landscape of non-CBHE TNE, fostering a conducive environment for quality education delivery and regulatory compliance.

There was an impression amongst certain stakeholders that branch campuses, rather than study centres, were more likely to be approved. Some participants in the dialogues perceived the approval process for opening a Branch campus or study centre as requiring further transparency and independent oversight. In general, there may be challenges for individuals outside these relatively small networks to participate effectively, despite the country's size. In addition, interviewees communicated that they considered there to be a general lack of clarity on the status granted to online qualifications by the UGC under CBHE.

Other stakeholders expressed that they considered the trade licencing system to situate private universities at a disadvantage in comparison to teaching centres. In Bangladesh, higher education institutions are required to obtain trade licenses from local government authorities to operate legally. These licenses ensure compliance with regulations and standards set by the government and are essential for the establishment and operation of educational institutions in the country.

> *"The particular issue you have is around the status of these teaching centres. Now, the problem was around the private universities [...] They [teaching centres] can all continue to operate under their trade licences, whereas private universities can't operate under a trade licence and also they can't have access to research or PHDs [doctoral students] either. I mean, there's a range of reasons why the private universities feel that they aren't recognised. Teaching centres have an unfair advantage in some respects and so this leads to some lobbying behind the scenes"*

It is important to note that the oversight and management of teaching centres can vary throughout the country and the sector. The perceived anti-competitive practices were seen as influencing private universities to lobby against the further expansion of TNE in Bangladesh.

3.2.6 Incentives Offered by the Bangladeshi Government to Establish TNE

Currently, there are a number of incentives offered by the Bangladeshi Government to promote international PhD programmes. For example, the UGC offers grants to academics conducting doctoral research in the country (PhD programmes are only offered in public universities).[40] Participants in the stakeholder engagement interviews also stated that the UGC is aiming to promote and expand TNE in Bangladesh. Whilst reference was not made to specific incentivisation policies, stakeholders communicated that the UGC intends to promote collaboration between international and domestic universities as it considers this a means of improving the quality assurance of local HE providers. Incentivisation programmes may anecdotally include a grant of land, resources, and facilities. To facilitate the development of TNE in Bangladesh, stakeholders reported that the UGC recognises overseas qualifications awarded at recognised institutions (i.e. institutions recognised by the respective governments overseas – those that have degree awarding powers). There is a section of the UGC website entitled CBHE, although a list is not available in English.

3.2.7 Regulatory and Institutional Attitudes in Bangladesh Towards TNE

Interviewed stakeholders relayed that state regulatory bodies were aware of unapproved HEIs operating in Bangladesh; legal proceedings were not known to have been brought against them. This also reflects the 2021 UGC report[41] which states that 'news of students' admission into branch campuses of foreign universities often appears in the media'. There was an expressed concern that graduates from unauthorised TNE providers may be awarded qualifications that are not officially verified.

One UK-based stakeholder reported that the UGC periodically publishes a list of unlicensed international branch campuses operating in Bangladesh, and that these have included local HEIs partnering with universities in the UK. The last list to be published was in July 2022. Featuring on the list may lead to non-recognition of an institutions' qualifications, although it is unclear whether any additional punitive measures are taken.

> *"The universities of Bangladesh, public universities and private universities, they work in a unified manner. I mean they have the guidance of University Grants Commission of Bangladesh, but the transnational education providers, there are very few transnational education providers in Bangladesh [...] there are few renowned names who are providing transnational education in Bangladesh, so we don't have any unity actually, we are not working together. [...] So, if we can work together, if we can be brought under an umbrella which works together, we can work together to create that awareness that will be easier for all these transnational education providers"*

Participants at the stakeholder engagements also reported that private universities based in Bangladesh may be able to exert influence on legislators against the expansion of TNE. Such pressure by syndicated private universities was considered by certain stakeholders to have been capable of blocking applications for TNE partnerships submitted subsequent to the 2014 CBHE legislation. This particular approach to TNE by some private universities, which involves bringing legal pressure against expansion, was also thought to have resulted in several TNE providers in Bangladesh ceasing operations.

> *"The private universities do not want competition, and they have influence with the government. And that is why the law for the cross-border education took so many years to be passed by the government"*

Referring to the approaches of Bangladeshi universities with international affiliations, stakeholders interpreted there to be an observed preference for partnerships with UK TNE providers. UK institutions were regarded as having defined guidelines and experience of delivering TNE partnerships across several geographical regions, as well as the flexibility to adapt to local conditions. UK institutions were also thought to be cognisant of market conditions, taking these into consideration when setting fees.

> *"Countries like Bangladesh, where UK higher education or a connection with the UK is seen as a positive thing, I think that in regions or in countries where there is that positive reputation for UK higher education, that's where we find the most traction in terms of student recruitment"*

A number of stakeholders also communicated that they perceived there to be a lack of coordination in the broader TNE sector, and that a more consolidated administrative structure could facilitate the delivery and expansion of TNE in Bangladesh. The lack of regulatory cohesion in the TNE sector was thought to disadvantage it in comparison to public and private universities which operate under the UGC framework.

> *"I mean, because what is happening is every so often the UGC will publish, I think the last time they did this was 2022 in July, and they will publish a list of illegal branch campuses. And then our teaching centres will usually feature on this list. And this has happened multiple times"*

A suggestion made by the stakeholder was that the British Council could further coordinate TNE providers operating in Bangladesh, acting as an umbrella organisation. The British Council was considered to be an established organisation which would be trusted by HEIs.

> *"I believe the British Council can contribute more in terms of creating the unity among these transnational education providers, and it can be the parent or it can be the umbrella of supporting all these transnational education providers, because British Council is very much renowned in Bangladesh"*

3.2.8 UK Institutional Attitudes Towards Bangladesh as a Target Market

The stakeholders interviewed from UK institutions expressed that they found Bangladeshi CBHE legislation unclear and the application procedures not explicitly documented. Indefinite timelines for the TNE application process were also considered a deterring factor. Participants also communicated that they considered themselves to be dependent on Bangladeshi HEIs for advice and information during the application process. In terms of economic factors, it was mentioned that Bangladesh was considered a price sensitive market, and it can be challenging to attract sufficient numbers of TNE students to recoup initial outlays.

38. University Grants Commission, 2022. *Policy for Blended Learning in Bangladesh.* [pdf] Published by: UGC. Available at: <2022-06-06-06-44-a6a5dea173d2d0ec327b83f57cd55e24.pdf (ugc.gov.bd)>.

39. University Grants Commission, 2022. *Policy for Blended Learning in Bangladesh.* [pdf] Published by: UGC. Available at: <2022-06-06-06-44-a6a5dea173d2d0ec327b83f57cd55e24.pdf (ugc.gov.bd)>.

40. Shayery, A.J., Zayed, N.M., Hossain, M.F., & Islam, K.M.A. (2022) The Impact of Internationalization to Improve and Ensure Quality Education: A Case Study of Daffodil International University (Bangladesh). Natsional'nyi Hirnychyi Universytet. Naukovyi Visnyk (6) 160-169. DOI: https://doi.org/10.33271/nvngu/2022-6/160.

41. University Grants Commission, 2021. Annual Report. [online] Available at: <https://ugc.gov.bd/sites/default/files/files/ugc.portal.gov.bd/annual_reports/104b8c32_dbe2_4c07_8228_76b999beff2a/2024-01-23-05-49-e04bbf524cb5120252822612c3fab6df.pd> [Accessed May 2024].

> *"You need to have a local partner. If you assume that the process will run in the same way that it would run in the West, well, you're going to be dreadfully mistaken. That's not how it works here. And, of course, there are no obvious timescales. The only timescale comes with rejection. So if an application is outright rejected, then there's 30 days in which there's a right of appeal and the UGC have to respond"*

Another UK-based stakeholder reported that law programmes accounted for between 97% and 98% of all their TNE provision in Bangladesh. This stakeholder also reported that approximately 80% of their enrolled students are fulltime learners at teaching centres; there was an observed preference amongst students for presential study delivered via a teaching centre. The demand for law courses was also mentioned by an HEI based in Bangladesh. The interviewee noted that there were significant numbers of TNE providers offering degrees in law, followed by programmes in business studies and IT subjects.

3.3 Appetite for TNE in Bangladesh

3.3.1 Perceptions of current TNE in Bangladesh Market

Participants in the stakeholder interviews stated that the UK and Australian TNE partnerships operating in Bangladesh had been granted approval as study centres whilst the Malaysian TNE arrangements were formalised as Branch Campuses. Interviewed state representatives estimated that there are approximately twenty-five international providers from countries such as: the UK, Australia, Canada, and Malaysia. HEIs from the US were thought to be currently exploring the possibility of further TNE arrangements with Bangladeshi HEIs.

It was also believed that there are currently two TNE applications being processed by the UGC and the Ministry of Education: one for a study centre with a UK-based university and one with a Malaysian University for a Branch Campus. Given that these institutions are currently still only exploring the possibility of TNE arrangements in Bangladesh or still in the application process, no further detailed information was available on the types of institutions, type of TNE provision or proposed programmes at the time of writing.

3.3.2 The Medium of Instruction

Interviewees outlined how the current medium of instruction at different levels of education could be a factor restricting further TNE development. Stakeholders described how the majority of students in Bangladesh are taught in Bengali at secondary school whilst the medium of instruction at the level of tertiary education is in English. This linguistic disjuncture was seen as a factor that could impede the delivery of TNE programmes. One stakeholder suggested that varying the medium of instruction used for delivering TNE programmes, could reduce linguistic barriers to TNE.

> *"Having the language flexibility, the medium of education, can also expand the [TNE] market significantly, it [providing TNE in Bengali] will certainly also give a nationalised feeling of the whole model [TNE programmes will feel more accessible to Bangladeshi students]"*

Instances of UK TNE providers using local languages as the medium of instruction have been documented. For example, UK TNE providers in Greece have been progressively shifting to programme delivery in Greek, reporting higher levels of student recruitment and lower drop-out rates.[42]

According to an estimate by one interviewed TNE provider, the number of students completing secondary schools that teach predominantly in English is around 65,000. Amongst this figure, those who had obtained an international qualification were thought to demonstrate a preference for either enrolling in a HEI abroad or a high-ranking domestic university (publicly or privately administered). In addition, affordability was noted to be a significant factor for students when considering enrolment on a TNE programme.

> *"The total number of students available in any year that already have the necessary levels of English to enter a foundation program is only about 60,000, 65,000 max. Overwhelmingly, those kids come from wealthy backgrounds. So they don't need the local international education. They can afford to go overseas"*

3.3.3 Affordability and Entry Requirements

In relation to tuition fees, a stakeholder from a UK-based HEI estimated the cost of a three-year BSc degree course to be approximately £7000 (based on a 2+1 model). In addition, the interviewee reported that students pay teaching centres a direct fee; the latter were thought to establish their own entry costs which would vary.

One stakeholder commented that there is an inverse relationship between costing for broad accessibility and international competitiveness in terms of quality. The interviewed TNE provider reported that their teaching centres had reported a high demand for more coursework from students, but that this was not incorporated into the means of assessment as it would raise entry costs.

> *"it is very hard to square this circle between broad low cost access mission and world-class education. There's many things we'd love to do, but simply the fact that it will increase the price of our degree means that we just simply can't do it. And one of them […] that the teaching centres are crying out for, […] is often a greater degree of coursework"*

In addition, stakeholders described that demand for TNE placements was likely to come from students without the economic means to study abroad but who would like to pursue higher education from international HEIs with an established reputation. In this way, demand for TNE was interpreted as being elastic in that its provision is required to be lower in price than studying at a foreign university, but of sufficient quality in services that it can compete with HE providers based in Bangladesh.

> *"Many of them [students] don't have the affordability to continue their studies in foreign countries. That is one of the problems, and if they can pursue higher education from foreign universities, renowned foreign universities in Bangladesh, staying in their home country, that can be cost effective for them. This is one of the reasons. To make it more affordable, to make the quality of their education, their academic life, better in an affordable manner"*

A UK-based HEI with a TNE partnership in Bangladesh noted differences in entry requirements between the degree programme offered in Bangladesh and those in the UK. This difference was explained as a measure to increase the equitability of the enrolment process for Bangladeshi students.

Two A Level qualifications (or equivalent) are needed to matriculate in Bangladesh. Without these, students are able to access a one-year programme that is comparable to the first year of the BSc course; if a pass mark is attained at a preestablished threshold, students will be able to transfer to the second year of the BSc.

> *"The degree entry requirements are set much, much lower [in Bangladesh] than the student who would actually apply to [UK HEI] and study here, and that's for various reasons. It's kind of equity across the world. It's to give students who haven't had the same opportunities to study the same qualifications; [they] may be very bright, but just don't have the piece of paper"*

3.4 Development and Opportunities for TNE

In the UK, recent data show that the income generated from transnational education has grown by 112.9% across the 2010-2020 period with an estimated value of £2.3 billion in 2020 globally.[43] During the 2022-23 period, UK higher education TNE programmes were delivered in 228 nations and territories globally. Disaggregating the data by region, 52% of the enrolling TNE students studied in Asia, followed by 16% in Europe, 14% in the Middle East, and 11% in Africa. The dominant type of TNE in Asia (and Africa) was collaborative provision, differing from Australasia, North America, and South America where distance, flexible, and distributed learning were the prevalent modes of delivery.

Breaking the global data down by level and mode of study, Bangladesh ranked 22nd among countries with the largest number of UK TNE students studying via distance, flexible, or distributed learning, and was the eighth largest host country for undergraduate distance learning specifically. However, Bangladesh is ranked

42. The British Council (2021) *Local Impact of Transnational Education: A Pilot Study in Selected European Countries* [online]. Available from: https://www.britishcouncil.org/education/he-science/knowledge-centre/transnational-education/local-impact-TNE-Europe [accessed 17/05/2024].

43. Universities UK (2023) *The Scale of UK HE TNE 2021-22* [online]. Available from: https://www.universitiesuk.ac.uk/universities-uk-international/insights-and-publications/uuki-publications/scale-uk-he-tne-2021-22 [accessed 13/03/24].

only 63rd in terms of students studying by non-distance modes, and 80th in terms of postgraduate TNE enrolments.

3.4.1 Economic Activity Generated by TNE

Given the aforementioned economic activity generated by transnational education, TNE is recognised by the UK Government in its International Education Strategy (IES).[44] The IES aims to increase UK education exports to £35 billion per year by 2030 via a strategy of focusing on long-term partnerships, prioritising five countries in particular: India, Vietnam, Nigeria, Indonesia, and Saudi Arabia. Expansion of TNE in Bangladesh therefore aligns with the UK IES strategy, overall contributing to the UK's IES objectives.

The UK government's Trade and Export Guide states that the high percentage of the Bangladeshi population that are currently students (approximately 20% or 29 million people), as well as the Cross Border Higher Education regulation recognising foreign qualifications, enable UK universities and education providers to offer programmes, open campuses, and set up study centres.[45] The Trade and Export Guide outlines the following as potential growth areas for UK education providers in the fields of HE and vocational qualifications:[46]

- English Language and IT training centres
- Content and curriculum development
- E-learning programmes
- Qualification assessment and quality assurance programmes
- Teaching and leadership training programmes
- Education facility management and consultancy
- Capacity building of the Technical Training Institute
- Introduction of Level 3 and above for vocational curriculum (so that vocational students can progress to higher education)
- International standard laboratory
- Publication house.

According to the 2022-23 HESA data, Bangladesh was the eighth largest country in terms of students studying UK undergraduate distance learning programmes, but only 41st in terms of total UK TNE enrolments. At the postgraduate level, Bangladesh is not among the top 20 countries hosting UK TNE students. Data from the UK's Higher Education Statistics Agency (HESA) offers additional insights into the number of Bangladeshi students enrolling in UK higher education programmes.

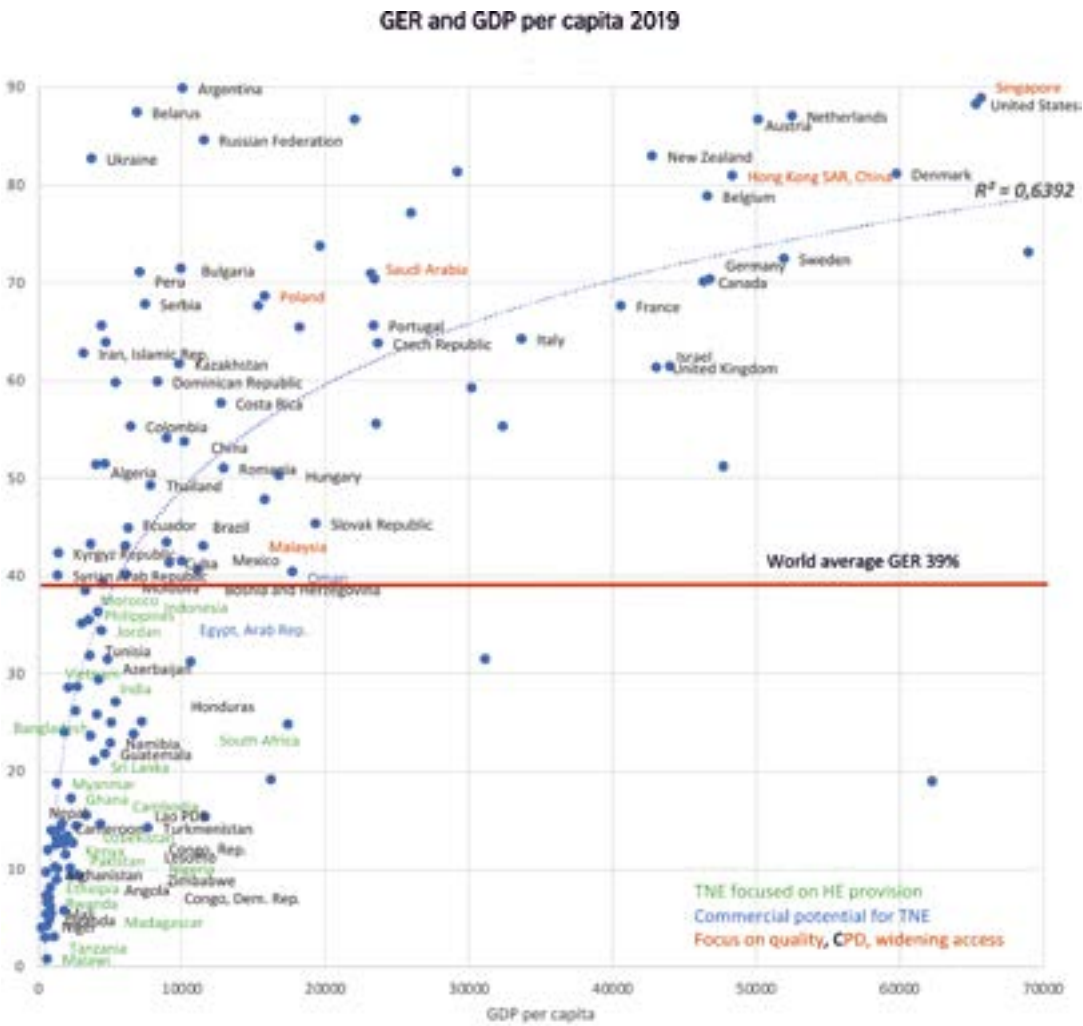### 3.4.2 Strategic Plan for Higher Education

The Strategic Plan for Higher Education in Bangladesh: 2018 – 2030, published by the UGC in 2018, reiterates the national objective of aligning HE to global standards.[47]

This is referred to as both a general aim, such as upgrading "higher education to global standards", and as a benchmark relating to specific areas, including: budget allocation as a percentage of the GDP, educational infrastructure, and updating of curriculum and syllabi "to meet international standards". Additionally, the Strategic Plan for Higher Education envisages TNE as a means of expanding HE provision to meet growing demand, stating that "the government may allow foreign universities to open their branches in Bangladesh. This will help meet the increasing demand for higher education".[48] Progression routes into employment and collaboration between industry and HEIs are also foregrounded in the UGC's Strategic Plan.

Research literature suggests that in the context of Bangladesh, TNE could perform a demand absorption function. For example, some studies indicate a relationship between a country's gross enrolment ratio, its GDP per capita, and the role of TNE.[49] For countries with a low GDP per capita and a gross enrolment ratio below the world average of 39%, TNE is likely to focus on expanding HE provision in relation to increasing demand. TNE in countries with gross enrolment ratios above the global average is more likely to operate as a means of improving the quality of HE provision, improving opportunities for particular demographic groups. Frequently, this can include: addressing particular labour market demands; responding to CPD needs; and widening access to HE for adult learners, those with familial commitments, women, and lower socioeconomic strata. In countries with a high GDP per capita, either above or below the world gross enrolment ratio, TNE is more likely to be run according to commercial imperatives. As a nation with a comparatively low GDP per capita and a gross

Figure 9: Gross enrolment ratio and GDP per capita by country[50]

enrolment ratio below 39% (see Figure 9 above), TNE could function in Bangladesh as a means of addressing demand as per the Strategic Plan for Higher Education.

A UK-based stakeholder stated that there was a recognition of the Bangladeshi Government's national strategy of expanding TNE provision, but that miscommunications and misapprehensions could occur. The stakeholder commented that this was a factor affecting their TNE operations in countries other than Bangladesh, and that there was an aim to communicate intentions more clearly in future collaborations.

"I mean there should be a lot of ways in which we can communicate how we can contribute towards countries achieving their educational vision without stealing the local market"

In relation to aligning higher education in Bangladesh with global standards, research literature suggests several ways that TNE could contribute to this objective. In the 2014 Guiding Rules for Regulating Branch Campuses, the Ministry of Education permits the governing authorities of foreign universities, branch campuses, and study centres to hire academics and professional bodies internationally.[51] This has the potential to facilitate cross-cultural exchanges amongst faculty. A case study on Daffodil International University

44. Universities UK (2023) *The Scale of UK HE TNE 2021-22* [online]. Available from: https://www.universitiesuk.ac.uk/universities-uk-international/insights-and-publications/uuki-publications/scale-uk-he-tne-2021-22 [accessed 13/03/24].

45. Department for International Trade (2015) *Doing Business in Bangladesh: Bangladesh Trade and Export Guide* [online]. Available from: https://www.gov.uk/government/publications/exporting-to-bangladesh/doing-business-in-bangladesh-bangladesh-trade-and-export-guide [accessed 14/03/24].

46. Department for International Trade (2015) *Doing Business in Bangladesh: Bangladesh Trade and Export Guide* [online]. Available from: https://www.gov.uk/government/publications/exporting-to-bangladesh/doing-business-in-bangladesh-bangladesh-trade-and-export-guide [accessed 14/03/24].

47. University Grants Commission of Bangladesh (2018) *Strategic Plan for Higher Education in Bangladesh: 2018 – 2030* [online]. Available from: https://ugc.portal.gov.bd/sites/default/files/files/ugc.portal.gov.bd/publications/c768558c_2126_41c5_83ab_4a17004eb1af/2020-10-20-10-45-e20b0b095947032e58b70c32314be187.pdf [accessed 14/03/24].

48. University Grants Commission of Bangladesh (2018) *Strategic Plan for Higher Education in Bangladesh: 2018 – 2030* [online]. Available from: https://ugc.portal.gov.bd/sites/default/files/files/ugc.portal.gov.bd/publications/c768558c_2126_41c5_83ab_4a17004eb1af/2020-10-20-10-45-e20b0b095947032e58b70c32314be187.pdf [accessed 14/03/24].

49. British Council (2022) *The Value of Transnational Education Partnerships*. British Council. pp.75-76.

50. British Council (2022) The Value of Transnational Education Partnerships. British Council. pp.75-76.

51. Kabir, A.H. (2020) Higher Education: Trapped in Neoliberal Reform. In: Khan, M.T. and Rahman, M.S. (Eds.) Neoliberal Development and the Bangladesh State (pp. 127-152). University Press Limited.

(Dhaka) found that an international exchange programme for students and lecturers had been operational since 2013 with the intention of improving interpersonal skills and extending networks.[52]

The exchange programme is conducted through Memoranda of Understanding (MoU) with external HEIs and scholarship systems such as the Erasmus+ (funded by the European Commission), the Mevlana Scholarship Programme (financed by the Turkish and Korean states).

3.4.3 Opportunity for Underrepresented Demographics

A further case study provides some localised evidence that TNE can advance educational opportunities for underrepresented demographics.[53] The case study centres on Glasgow Caledonian University which instituted a nursing college in Bangladesh as a social enterprise. The partnership was established to provide training for women from rural zones and accorded with the University's ethos of promoting female education. A flying-faculty model was adopted; the aim of the venture was for female graduates to return to their respective communities and deliver primary health care. The college became financially sustainable and was amalgamated into the University of Dhaka.

3.4.4 Employment of TNE Graduates: Stakeholder Perceptions

Labour participation statistics gathered by the Bangladesh Bureau of Statistics show that graduate unemployment is higher than the national average.[54] For individuals possessing tertiary-level qualifications, the unemployment rate increased to 12.0% in 2022, up from 11.2% across the 2016-17 period. When disaggregated according to sex, the national unemployment rate for tertiary qualification holders is almost double for females, standing at a figure of 18.88% for women and 9.49% for men. In relation to joblessness and region, the unemployment rate at the tertiary-education level is higher for males in rural areas (12.89% rural and 6.08% urban) whilst for females, the unemployment rate is higher in urban zones (18.66% rural and 19.17% urban). The aforementioned case study on Daffodil International University provides some evidence at the institutional level that progression routes and employability are taken into consideration by TNE providers. The student exchange programme includes the aim of participating in extra- and co-curricular activities to improve employability.

Regarding TNE partnerships and graduate employment,

during interviews some stakeholders raised the topic of unauthorised TNE providers operating in Bangladesh. Unapproved TNE institutions were thought to operate with low volumes of students and not to market themselves overtly; the attraction of such TNE suppliers to students was understood as reflecting the perception (amongst students) that TNE graduates possess more favourable employment outcomes.

Some interviewed stakeholders believed that employers were interested in graduates of TNE programmes due to the knowledge and interpersonal skills offered on courses in subject areas such as: business, computing, hospitality, and law.

> *"It [international degree programme] had 50% business courses and 50% computing courses. So that was because computing people go into the real world, which is a business world, and if they know nothing about business terms, etc, it makes it very difficult for them to communicate with the real world. So this they tackled very neatly"*

The students that participated in the focus group also commented that the flexibility of TNE course delivery was seen favourably as it permitted studies to be balanced with familial and work obligations. Students also reported that TNE programmes offered the opportunity to obtain an internationally recognised qualification whilst costing less than studying for a degree award in a different country.

> *"Not only does it [TNE] allow us to continue living at home while earning a degree from abroad, but it also lowers the astronomical cost of doing so"*

3.4.5 Digital Infrastructure

The surveyed research literature indicates that there are a number of factors that may need to be considered in relation to TNE operations in Bangladesh and their expansion. A requirement for extending digital infrastructure and providing IT training for staff has been outlined in research literature as a potential factor limiting internationalisation of the HE sector.[55] The UGC correspondingly initiated the Bangladesh Research and Education Network (BdREN) in 2009 with the intention of: promoting collaborative research, distance learning, international partnerships, and providing "connectivity

among higher education and research institutions in both public and private sectors".[56] However, network coverage is currently partial and may need to be extended; at present, BdREN has 107 registered partner institutions, 65.24% of the total number of HEIs situated in Bangladesh.[57]

In relation to the types of TNE provision that stakeholders considered applicable in the Bangladeshi national context, online education and flexibly delivered programmes were conceived as forms of TNE that could operate. s. Franchise programmes and collaborative partnerships were also suggested by stakeholders as suitable TNE arrangements due to their potential recognisability to the UGC.

> *"The political volatility doesn't always help. There's always this backdrop [...] or it's the bloggers and the academics living in fear there, there's always some sort of challenge. And that's before you get to the fact that it's almost impossible to get any-where in the traffic. So I mean, that alone would say that there's a great future for online education and the flexibility of delivery.*
>
> *But [...] we know that so many of these students are actually getting across town somehow to attend these teaching centres. So it would sug-gest to me that the most sustainable models for working in Bangladesh would be more around the franchise collaborative Partnership road. I think it would be more recognisable to the likes of the UGC"*

3.4.6 TNE Student Perspectives

The student focus group consisted of 22 male and female undergraduates in their first, second, and third years of study. In relation to expectations of TNE programmes, and their perceived advantages, students reported that they sought TNE qualifications offered at internationally recognised HEIs. Accreditation and the quality of TNE programmes were communicated as important factors when considering courses and educational institutions.

In addition, blended and distance learning modes of course delivery were found to be positively regarded; the interviewed TNE students communicated that blended and distance learning options made organising

studies around employment, family obligations, and commuting more convenient. For example, one student mentioned that:

> *"We had to do odd-jobs / part-time jobs for taking care of our education and living costs which are totally taken care of in Bangladesh as most of us stays with families. This comprehensive approach [of TNE programmes] gives students a sense of empowerment and preparation".*

Another aspect of TNE programmes that many students viewed as beneficial was their intercultural and global orientation.

The TNE students participating in the focus group communicated an expectation for support services to be offered, such as careers advice, language, academic, and general pastoral guidance. Resource limitations were conveyed as factor restricting the provision of such assistance:

> *"There are always questions we have regarding job opportunities, credit transfer, module selec-tion, and exam procedures. Given the growing enrolment and staff, several institutions host education expos and seminars for TNE students, but these events are likewise insufficient".*

A further reported difficulty associated with TNE programmes concerned credit transfer and qualification recognition; students discussed how employers and educational institutions based in Bangladesh may not recognise qualifications awarded at HEIs operating outside of the country. An observed concern amongst students was that this could lead to further personal resources needing to be expended to obtain qualification approval.

In terms of progression routes following graduation, a prevalent long-term intention amongst students was to emigrate for reasons of economic security and employment opportunities. In relation to this ambition, TNE programmes tended to be seen as a transitional stage of education:

52. Shayery, A.J., Zayed, N.M., Hossain, M.F., & Islam, K.M.A. (2022) *The Impact of Internationalization to Improve and Ensure Quality Education: A Case Study of Daffodil International University* (Bangladesh). Natsional'nyi Hirnychyi Universytet. Naukovyi Visnyk (6) 160-169. DOI: https://doi.org/10.33271/nvngu/2022-6/160.
53. British Council (2022) *The Value of Transnational Education Partnerships.* British Council. p.27.
54. Bangladesh Bureau of Statistics (2023) *Labour Force Survey 2022.* Bangladesh, Bangladesh Bureau of Statistics Press. p.75. Available at: https://bbs.portal.gov.bd/sites/default/files/files/bbs.portal.gov.bd/page/b343a8b4_956b_45ca_872f_4cf9b2f1a6e0/2023-10-25-07-38-4304abd7a3f3d8799fbcb59ff91007b1.pdf [accessed 10/05/2024].
55. Shayery, A.J., Zayed, N.M., Hossain, M.F., & Islam, K.M.A. (2022) *The Impact of Internationalization to Improve and Ensure Quality Education: A Case Study of Daffodil International University* (Bangladesh). Natsional'nyi Hirnychyi Universytet. Naukovyi Visnyk (6) 160-169. DOI: https://doi.org/10.33271/nvngu/2022-6/160.
56. BdREN (2020) *Background* [online]. Available from: https://www.bdren.net.bd/about/company [accessed 14/03/24]; Chowdhury, M.H., Absar, M.M.N. and Quader, S.M. (2020) Challenges and Developments in the Higher Education System of Bangladesh. Handbook of Education Systems in South Asia, pp.1-32. DOI:10.1007/978-981-13-3309-5_57-1.
57. BdREN (2020) *BdREN Trust – List of Members* [online]. Available from: https://www.bdren.net.bd/about/partners [accessed 15/03/24].

> *"I have to take care of my family after finishing my studies in Bangladesh. For me to feel completely settled, I need to stay in my home country for a few more years, after which I intend to move abroad. TNE programme is making my career path easier"*

3.4.7 Postgraduate Study and Graduate Outcomes

Some interviewees mentioned that several of their students had completed their undergraduate TNE programmes in Bangladesh and subsequently progressed to study postgraduate qualifications in universities abroad. In this way, TNE partnerships were thought to potentially act as intermediate institutions between universities based in Bangladesh and HEIs located externally. In addition, the majority of students participating in the focus group stated that they planned to relocate permanently to a different country for economic and security considerations. In relation to

this intention, TNE was perceived as a transitional stage between obtaining qualifications in Bangladesh and emigrating abroad.

In addition, credit transfer and recognition processes have been identified as an area requiring further development to facilitate international mobility.[58] For example, at the institutional level, additional complexities have been reported when using the European Credit Transfer and Accumulation System (ECTS) for the recognition and conversion of credits. The expansion of HEIs' quality assurance mechanisms to ensure validation of programmes, credits, and degrees offered by partnering institutions has been proposed as a solution.[59] Quality assurance in relation to TNE and international campuses has also been observed to be a more generalised issue in recent decades.[60] A UGC report published in 2012 noted that there had been an increase in the incidence of foreign campuses whose provision did not correspond to national requirements. The UGC document included cases of external providers operating without formal approval and allegations of degree-selling schemes.

3.5 Gender Equality and Social Inclusion

The number of students enrolled in HE was recorded as 1,034,320; just over a third of these (37.6%) were female. Amongst public universities, 40.5% of all students were female whilst this figure decreased to 30.8% for private universities. In the international universities, 15.4% of the teaching staff and 46.7% of the students were female.[61] These statistics are broadly consistent with the findings of a World Bank report from 2019 which observed that access to tertiary education was not equitable across gender and socio-economic groups.[62] The female share of enrolments was listed as 38%, comparably lower than India (46%) and Sri Lanka (60%), whilst the two highest income quintiles constituted 75% of the total enrolment figure.

3.5.1 Contribution of TNE to Access, Gender, and Inclusion

During the stakeholder engagements, it was explained that economic accessibility varied by HEI. Three approved TNE providers were considered to target wealthier socio-economic strata. In contrast, the

University of London External and NCC Education (offering the Pearson Business and Technology Education Council or BTEC award) were thought to be examples of HEIs that take affordability into consideration in relation to TNE programmes.

One stakeholder suggested that TNE could contribute to gender equality as there is a perceived cultural practice of parents encouraging their daughters to study at tertiary level in Bangladesh prior to enrolment on postgraduate courses abroad. It was conjectured that undergraduate TNE education could therefore act as a vector for students studying externally to Bangladesh, potentially attracting female students.

> *"And also there is other group, it's female students. In many cases, parents feel that we are kind of, I should not be saying conservative country, but parents feel that in many cases, particularly at the undergraduate level, if they send their young boys as well as girls or boys abroad, then they may not be mature enough to take care of their wellbeing.*
>
> *So it is better to have their undergraduate in Bangladesh. But in the long run, they have the motivation to send their children abroad. So I think for those groups as well, parents who don't want their [sons and daughters], particularly girls, to go abroad at that young age and also in some cases boys as well.*
>
> *But if they can achieve their undergraduate under some international universities in Bangladesh, then that will subsequently help them to go abroad for master's programme"*

In contrast, other stakeholders commented that TNE undergraduate programmes and qualifications could be used to limit exposure to different cultural settings. Nevertheless, it could be interpreted that TNE programmes particularly those delivered in Bangladesh offer an advantage, allowing students the ability to access a Western-style education while remaining in Bangladesh.

> *"For example, a foreign university campus, we received a proposal from some people. And one of their justifications was that, especially parents, they want to have a campus here of a particular, of a reputed foreign university because they don't want to send their female child abroad, because of cultural issues"*

3.5.2 Female Student Underrepresentation across Subjects

Interviewed stakeholders were not aware of any sources where statistics were gathered in relation to gender ratios by discipline on TNE programmes. It was thought that the majority of TNE programmes attracted more male students although gender ratios were observed by stakeholders to vary across subject area. The composition of students was considered to be almost entirely female on the Pearson BTEC in Fashion,

Art, and Design when it was initiated. Business and computing student cohorts were estimated to be around 30-40% female, whilst aeronautical engineering and other engineering programmes had close to no female enrolment. The latter may also be linked to a broader trend of female underrepresentation in STEM subjects.[63]

> *"Most of our students are from the urban areas, urban areas because the rural students don't have the affordability to continue foreign education, even staying in Bangladesh. These urban area students, they have that affordability, so they get enrolled in our programmes and they pursue higher education, staying in Bangladesh. So, in terms of the geographic variation and diversity, the ratio would be approximately 80:20: 80% of students from urban and 20% from rural areas"*

One interviewee from a UK based HEI with a TNE partnership in Bangladesh observed there to be more females than males enrolled on the programme by a small margin. This was thought to result from the aforementioned cultural preference for daughters to study on TNE courses rather than pursuing educational opportunities abroad.

> *"But we actually find globally slightly more female students tend to do this programme.*
>
> *Which is kind of unconfirmed, but our assumption is that it's because females are more closely protected by the family perhaps, and that kind of an international degree studied locally is more appealing rather than sending a daughter off abroad"*

3.5.3 Regional Variations in TNE Enrolment

The stakeholder engagements produced limited data in relation to regional variations in female TNE enrolment. One stakeholder stated that urban and wealthier socio-economic strata in particular benefitted from TNE, but that dual degree and joint degree programmes could expand access to middle-income groups.

58. Shayery, A.J., Zayed, N.M., Hossain, M.F., & Islam, K.M.A. (2022) *The Impact of Internationalization to Improve and Ensure Quality Education: A Case Study of Daffodil International University* (Bangladesh). Natsional'nyi Hirnychyi Universytet. Naukovyi Visnyk (6) 160-169. DOI: https://doi.org/10.33271/nvngu/2022-6/160.

59. Shayery, A.J., Zayed, N.M., Hossain, M.F., & Islam, K.M.A. (2022) The Impact of Internationalization to Improve and Ensure Quality Education: A Case Study of Daffodil International University (Bangladesh). Natsional'nyi Hirnychyi Universytet. Naukovyi Visnyk (6) 160-169. DOI: https://doi.org/10.33271/nvngu/2022-6/160.

60. Kabir, A.H. (2020) Higher Education: Trapped in Neoliberal Reform. In: Khan, M.T. and Rahman, M.S. (Eds.) Neoliberal Development and the Bangladesh State (pp. 127-152). University Press Limited.

61. Bangladesh Bureau of Educational Information and Statistics (2023) Bangladesh Education Statistics 2022 [online]. Available from: https://banbeis.portal.gov.bd/sites/default/files/files/banbeis.portal.gov.bd/page/6d10c6e9_d26c_4b9b_9c7f_770f9c68df7c/Bangladesh%20Education%20Statistics%202022%20%281%29_compressed.pdf [accessed 14/02/2023].

62. The World Bank (2019) Bangladesh: Tertiary Education Sector Review [online]. Available from: https://documents1.worldbank.org/curated/en/303961553747212653/pdf/Bangladesh-Tertiary-Education-Sector-Review-Skills-and-Innovation-for-Growth.pdf [14/02/2024].

63. Avolio, B., Chavez, J. and Vilchez-Roman, C. (2020) *Factors that Contribute to the Underrepresentation of Women in Science Careers Worldwide: a Literature Review.* Social Psychology of Education (23) 773–794. DOI: https://doi.org/10.1007/s11218-020-09558-y

"I think urban students who are from well-off families or wealthy families, they take the benefit of TNE most. But when it is offered, if it is offered as dual degree programmes or joint degree pro-grammes, then other students also. Students from other families, like middleclass or lower middle-class families, they also get benefited"

Another stakeholder based in Bangladesh reported that the majority of students enrolling on TNE programmes were from urban areas; the estimated composition of urban / rural backgrounds was 80% and 20%, respectively. The reason for the higher percentage of urban enrolment was thought to stem from economic factors; studying abroad and enrolment on TNE programmes in Bangladesh both were considered to be price prohibitive for the majority of students from rural backgrounds.

4 Conclusion

This report has examined the current state of Transnational Education in Bangladesh, exploring its prospects, challenges, and opportunities for expansion. The findings highlight both the potential of TNE in addressing educational disparities in the country and the challenges that need to be addressed to fully capitalise on this potential.

Despite a relatively low gross enrolment rate of 23% in tertiary education, Bangladesh is home to a growing demand for higher education, particularly from students seeking access to internationally recognised qualifications. Whilst internationalisation of higher education has been developing in Bangladesh in different ways such as adoption of international curricula, student mobility and collaborative ventures between higher education institutions, the scale of TNE is limited due to regulatory complexities, affordability, language entry requirements and accessibility. However, there has been some progress in forming new TNE partnerships.

The UK remains a key player in the TNE landscape, with the potential for further expansion in Bangladesh, particularly as international collaborations and online education options become more prevalent. The regulatory framework governing TNE, though structured, remains challenging to better facilitate the growth of international partnerships and ensure adherence to national education standards. The TNE policy can be the driver in striking a balance between robust regulatory oversight and fostering growth in access and opportunity.

Although TNE is currently concentrated in urban areas and enrolment is higher among male students, it has the potential to create significant international educational opportunities for underrepresented groups, including women and rural populations. The demand for higher education, especially in fields such as law, business, and engineering, presents an opportunity for TNE providers to expand their offerings and contribute to gender equity in education and greater social inclusion. Targeted actions in this area would have the strongest impact.

However, challenges such as linguistic barriers, digital infrastructure, and cultural attitudes towards foreign education – sometimes including a negative perception of quality of TNE programmes – need to be addressed to ensure that TNE can effectively meet the needs of Bangladesh's diverse student population.

In summary, TNE represents a valuable pathway to support efforts in Bangladesh to overcome its educational challenges, particularly in increasing access to international qualifications and improving employability outcomes for students. To unlock the full potential of TNE, it is essential to streamline regulatory processes, enhance collaboration between international and domestic institutions with adherence to quality assurance requirements, and address the financial and logistical barriers that students and providers face. This would enable create a more inclusive, accessible, and globally connected higher education system that better serves the needs of its student population.

Recommendations

In relation to the above findings, the following recommendations have been formulated:

- **Streamline regulatory processes and provide clear guidelines for TNE providers**

  To facilitate the growth of TNE in Bangladesh, it is essential to streamline the regulatory processes and provide clear, accessible guidelines and standard operating procedures for foreign education providers. This will help reduce procedural delays, ensure consistent compliance, and create a more predictable environment for both international institutions and students. Simplifying these procedures will encourage more international partnerships and ensure that TNE offerings can expand effectively.

- **Foster effective collaboration between international and domestic institutions**

  Building strong, mutually beneficial collaborations between international and domestic institutions is crucial for the success of TNE in Bangladesh. By encouraging partnerships that leverage the strengths of both local and global expertise, these collaborations can enhance the quality of education, expand access, and create pathways for students to benefit from diverse educational opportunities while meeting local needs.

- **Develop strategies to balance programme costs for accessibility while maintaining quality**

  TNE providers should develop strategies that balance the affordability of programmes with the maintenance of high educational standards. Offering flexible pricing, scholarships, or financial aid can help ensure that TNE remains accessible to a broader range of students, particularly those from lower-income or rural backgrounds, without compromising the quality and reputation of the education offered.

- **Address linguistic barriers through bridging language programmes**

  Considering majority of secondary school students' study in Bengali medium schools, incorporating language programme would help focus on equipping students with the necessary language skills to successfully integrate into their chosen academic environment. This will not only improve their access to higher education opportunities but also enhance their overall learning experience and academic performance, particularly for non-native speakers.

- **Enhance digital infrastructure to support remote and online learning**

  Improving Bangladesh's digital infrastructure is essential to supporting the growing demand for remote and online learning in TNE programmes. This includes expanding internet access, enhancing connectivity, and providing digital tools and platforms that facilitate interactive and effective learning. A stronger digital infrastructure will help ensure that students across the country can access and engage with TNE opportunities, regardless of their geographical location.

- **Improve transparency and alignment in quality assurance processes**

  For TNE to thrive, it is vital to improve the transparency and alignment of quality assurance processes between international and domestic institutions. Clearer standards and regular audits can ensure that TNE programmes meet both national and international quality benchmarks, fostering trust and confidence among students, employers, and academic institutions alike.

- **Develop targeted initiatives to increase female participation in diverse subject areas**

  To address gender disparities in higher education, particularly in male-dominated fields like engineering, business, and computing, targeted initiatives should be developed to encourage more female students to pursue these subjects. These initiatives could include scholarships, mentorship programme, and outreach campaigns that promote the benefits of diverse academic fields and help create a more inclusive educational environment for all students.

- **Facilitating dual degree programmes can provide valuable opportunities for middle-income students**

  These programmes, which allow students to earn degrees from both domestic and international institutions, can help bridge the gap between local and global education standards while reducing financial barriers. By offering a more cost-effective path to high-quality education, dual degree programmes can make higher education more accessible to a wider range of students, particularly those from middle-income backgrounds.

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