Nepal's transnational education landscape

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Acronyms

AI	artificial intelligence
CDC	Curriculum Development Center
CU	Coventry University
EQAAC	Education Quality Assurance and Accreditation Council
HE	higher education
HEI	higher education institution
HESA	Higher Education Statistics Agency
ING	Innovate Nepal Group
IPPM	international programme and provider mobility
IT	information technology
London Met	London Metropolitan University
MOEST	Ministry of Education, Science and Technology
NEC	Nepal Engineering Council
NFF	Nepal Food Forum
NOC	No Objection Certificate
QAA	quality assurance and accreditation
QAAD	Quality Assurance and Accreditation Division
TNE	transnational education
UGC	University Grants Commission
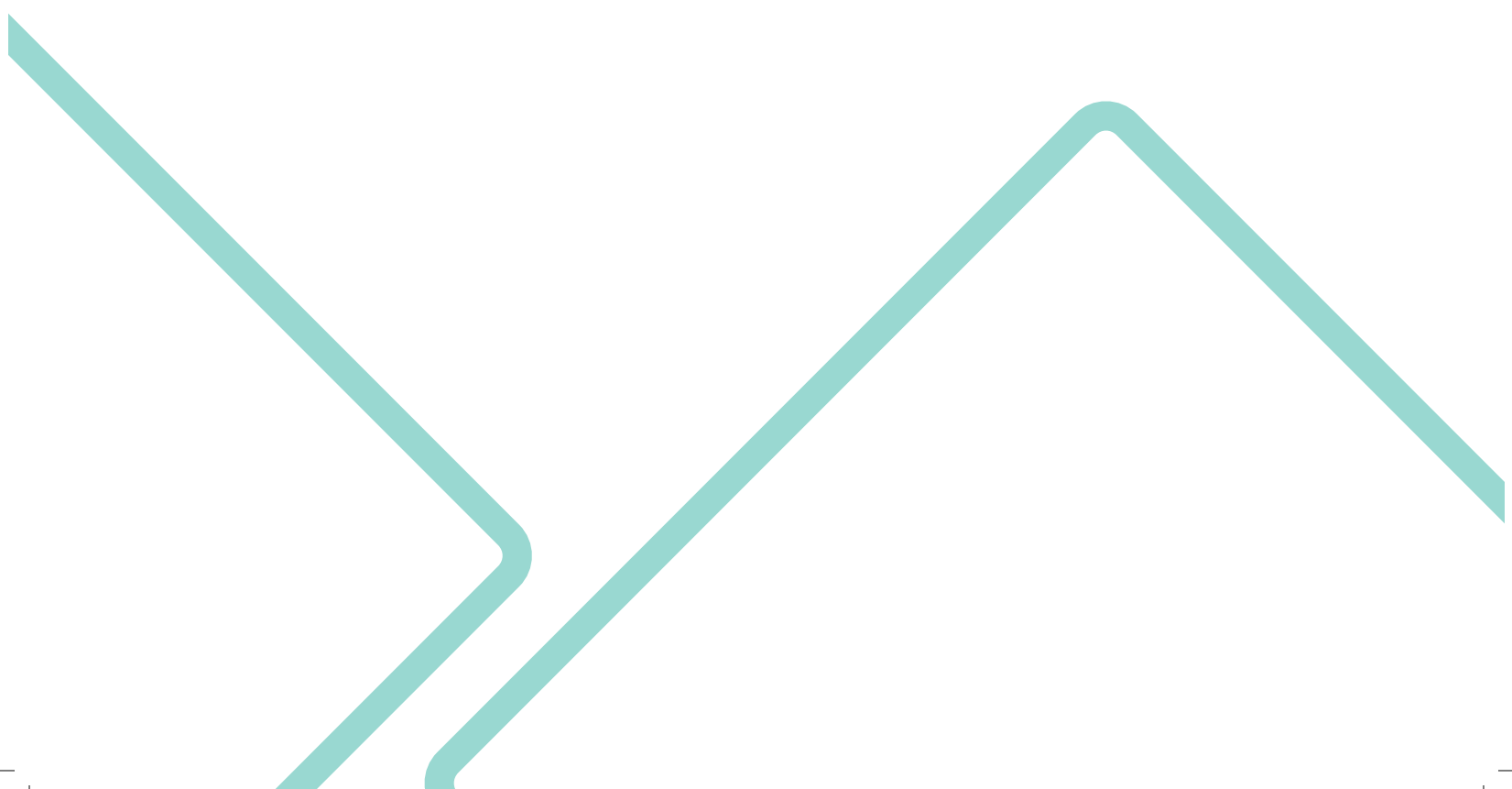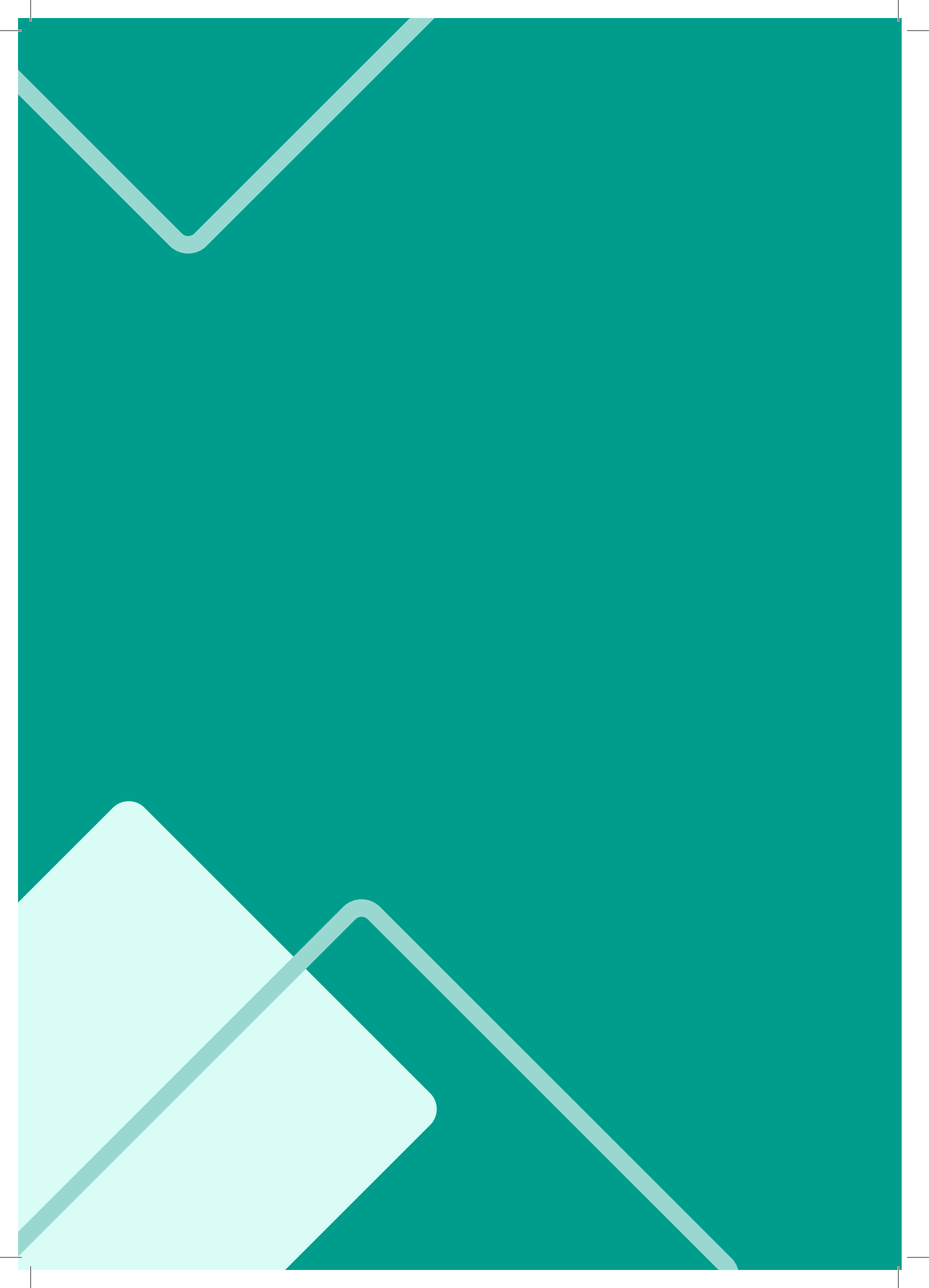
Executive summary

The British Council commissioned this study to analyse the transnational education (TNE) landscape in Nepal and explore opportunities for UK–Nepal educational collaborations aligned with national policies. The research examines TNE activity levels, policies, challenges and the role of UK quality assurance bodies in ensuring high standards. It categorises TNE into distance learning, international branch campuses and collaborative partnerships. The study includes a desk-based review, data analysis and comparative studies with similar higher educational environments to identify growth opportunities.

The report highlights the potential for TNE and the environmental constraints impacting the growth potential of Nepal's TNE sector. The interviews in particular reveal both opportunities and challenges in this globally growing sector. There is an apparent demand for foreign education in Nepal, with 59 private higher education institutions (HEIs) that offer programmes at the bachelor's level and above in affiliation with universities and institutions abroad,

including 22 approved partnerships with 15 different UK partners. Nepal's higher education (HE) environment is expanding, driven by a perception of foreign degrees' prestige and the successful adaptation of local diverse fee structures. However, the process faces some challenges, including regulatory hurdles, limited transparency and, occasionally, inconsistencies in quality assurance. The ongoing governmental reforms, including a proposed 'Higher Education Act', aim to streamline governance, but uncertainty concerning policy remains a barrier to new entrants.

Opportunities for TNE growth are significant, with rising enrolments and a demand for postgraduate research. Education hubs and virtual operating models could also support sustainability agendas. The environment shows potential for diversification, particularly in business, IT, engineering, hospitality and languages. There are existing challenges, such as accreditation delays, regulatory restrictions (for example, a limit of two new degree programmes a year for a given TNE partnership), meeting the requirements of the

This report aims to provide an in-depth review of TNE in Nepal. The report contains both an overview and an analysis of the current climate of TNE activity; the underpinning framework and policies; student motivation and study patterns; delivery modes, both current and areas for future development; and the impact of TNE to Nepal. The report discusses challenges and opportunities and identifies the areas for ongoing discussion and development.

engineering council and insufficient capacity. Additionally, TNE has contributed to reducing economic inequalities and gender disparities, but struggles with rural outreach and the needs of differently abled students. Despite these obstacles, it is suggested that TNE is poised to slow the brain drain, strengthen domestic education and contribute to Nepal's economic development.

Although Nepal plays a significant role as a UK TNE partner, research on its partnership models, quality assurance mechanisms, operational structures and administrative processes currently remains limited. Gaining deeper insights into this landscape will help TNE stakeholders make well-informed decisions when establishing, refining and sustaining TNE initiatives in Nepal, especially as the sector continues to expand. This report aims to support the ongoing growth and development of UK TNE in the country. The key findings of the research can be summarised as follows.

1. Nepal's HE sector has seen substantial growth – although this also presents challenges

Nepal's HE sector has seen significant growth, driven by a young and expanding college-aged population with a median age of 25.3, and a rising demand for tertiary education. However, nearly one-fifth of Nepalese students seek education abroad in countries such as Australia, the UK and the USA, which has led to concerns over domestic enrolments. The country has 24 universities and medical academies and over 1,400 affiliated colleges, with Tribhuvan University alone educating 78 per cent of students. The private sector plays a substantial role, contributing to the proliferation of institutions and international partnerships, though not all collaborations have been successful.

Nevertheless, Nepal's HE sector faces multiple challenges. Perceptions of education quality can still be poor, due to concerns such as oversaturation of institutions, outdated teaching methods and curriculum mismatches with labour market demands. Governance issues, such as administrative delays, further hinder institutional growth, while limited research funding and infrastructure can also hinder academic output. Other challenges include infrastructure, faculty development and student financial support.

2. Significant enhancements have been made to quality assurance and accreditation across Nepal's HE sector, but issues still remain

Quality assurance is a fundamental requirement for all HEIs in Nepal and is managed by the Quality Assurance and Accreditation Division (QAAD), a division of the University Grants Commission (UGC). A recent decision made in October 2024 by the Ministry of Education, Science and Technology (MOEST) stipulates that HEIs operating foreign-affiliated programmes in Nepal must acquire institutional-level QAA from the UGC. Despite significant growth in higher education in Nepal, some concerns remain, related to quality assurance, class instruction standards, examination failure rates and certification processes. The sector also suffers from some challenges around governance, research outputs and obtaining approval for new HE programmes in Nepal, which can be a complex and time-consuming process.

Stakeholder interviews also indicated similar challenges in establishing a new university programme, in part due to the current regulatory complexities. Additionally, all foreign university partnerships require approval from the ministry, which introduces further challenges and delays.

Interviewees also noted that there does not appear to be a clearly defined strategy for diversifying the types of HEIs in Nepal. In response, the private sector has played a role in helping to meet the country's growing demand for higher education.

3. Rising outbound student mobility has raised concerns about brain drain and is impacting domestic HE enrolment

Nepal's outbound student mobility is notably high, with a ratio of 19 per cent in 2021, significantly exceeding that of China and India. Remittances from Nepali migrant workers, which contribute up to 26.6 per cent of the nation's GDP, often fund these studies abroad.

The number of Nepali students studying overseas has grown steadily, from 44,255 in 2017 to 95,268 in 2022. Key destinations include Japan, Canada, the UK and the USA. However, this trend has led to a decrease in domestic HE enrolment, causing concern within the

education sector. To curb this brain drain, the government has introduced measures, including trying to limit the issuance of No Objection Certificates (NOCs), a mandatory document granted by the Government of Nepal for the Nepalese student to send tuition fees and other related payments overseas for study abroad, for certain courses, and increasing taxes on the transfer of tuition fees to the institutions abroad. Nevertheless, outbound mobility remains a significant phenomenon.

4. TNE providers are making a significant contribution to the HE sector and local economy

During the past 29 years, Nepal's private sector has been instrumental in developing higher education through partnerships with international providers. Currently, 59 private HEIs in Nepal registered with MOEST offer bachelor's-level and higher programmes in collaboration with 34 overseas institutions, with significant partnerships from the UK and Malaysia; the majority of these TNE partnerships are concentrated in Kathmandu. Data from the Higher Education Statistics Agency (HESA) indicates a rising trend in UK TNE enrolments in Nepal, with student numbers increasing fivefold from 2017/18 to 2022/23.

TNE partnerships can be seen to have impacted education in Nepal in economic terms, resource building and educational infrastructure. Stakeholder interviews highlight that TNE is a viable alternative to studying abroad, potentially mitigating brain drain while ensuring students receive an internationally recognised education within Nepal. However, while TNE has had a positive impact on Nepal's education sector, it has yet to mature sufficiently to address broader socio-economic disparities – differences in educational access between urban and rural areas, and persistent gender-based inequalities that still remain.

5. Comparative analysis can provide insights into potential TNE growth trajectories

A comparative analysis of Nepal's TNE landscape with Sri Lanka and Malaysia provides insights into potential growth trajectories. Sri Lanka has developed an extensive TNE framework with multiple partnership models, including dual awards and joint programmes, while Malaysia has positioned itself as a regional HE hub with numerous branch campuses. Although Nepal's TNE sector is still emerging, it can draw lessons from these nations to refine its policies and partnerships. Malaysia's experience in particular highlights the importance of regulatory frameworks and long-term strategic planning. While Nepal is unlikely to replicate Malaysia's model immediately, understanding its evolution provides valuable guidance for strengthening Nepal's TNE ecosystem and enhancing its role in global higher education.

6. Regulations and policies are evolving but are still constraining expansion of the TNE sector

Following recent high-level government TNE study committee reports, Nepal is in the process of updating its regulatory framework for TNE institutions, introducing stricter accreditation and ranking requirements for foreign-affiliated universities. As of 2024, 59 MOEST-approved HEIs operate in Nepal with foreign affiliations, subject to new guidelines emphasising global rankings, quality assurance and government approval. Key policy changes include accreditation from recognised bodies, compliance with Nepalese tax laws and a sustainability plan requirement.

Despite these updates, interviewees expressed concerns over the length of the approval process, with new programme approvals taking up to two years, while new provider applications have been suspended for several years. A lack of clarity for future approvals has further discouraged potential entrants. Additionally, Nepal's ongoing consultation on TNE policies signals uncertainty regarding their future impact.

These findings underscore the need for clearer policies, streamlined approval processes and enhanced international collaboration to strengthen Nepal's TNE landscape.

7. TNE providers also face a variety of operational difficulties

Beyond government policies, TNE providers face a number of challenges. These include misalignment between Nepal's academic calendar and international institutions; the necessity of offering four-year degrees (typically through integrating a foundation year); declining demand for in-country master's programmes; and concerns over UK degree recognition, particularly in regulated fields like engineering. Financial and visa-related constraints also hinder mobility for students considering articulating to the UK.

8. Students' choice of TNE is driven by a range of factors, including education quality and better career prospects

Survey results show that Nepali students consider a range of factors when deciding to study a TNE course, with the highest-rated factors being improved job prospects, recognition from the Ministry of Education and increasing their knowledge in a particular field. Important factors for choosing a particular course include the details of the programme, the international affiliation and the quality/reputation of the host institution. Survey results also show that a large majority of TNE students – as well as more than half of respondents on local degree programmes – say they would have preferred to study abroad; aside from the cost, some reported that they had enrolled in a TNE programme after failing to obtain a visa to study abroad.

Focus group discussions reinforced these findings, showing that TNE students valued flexibility and global recognition in order to support their career goals, feeling that overseas degree programmes offered a higher-quality education than local alternatives.

However, they faced challenges such as limited direct interaction with international partner institutions and scheduling conflicts with class times. Parents played a crucial role in selecting institutions, prioritising quality assurance, employability and international recognition. They acknowledged the value TNE brings to local communities but expressed a need for better communication and transparency from partner institutions. The study highlights opportunities for institutions to enhance TNE offerings by improving affordability, flexibility, and engagement with students and their families.

Summary

Nepal's TNE sector has experienced significant growth, with UK-affiliated programmes gaining popularity among students seeking international exposure and employability skills. Despite this progress, diversification of institutional providers remains limited, highlighting the need for policy enhancements and regulatory streamlining to unlock further potential. Comparative analysis with Sri Lanka and Malaysia provides valuable insights into different stages of TNE development, offering lessons in policy frameworks, partnership models and student mobility patterns. Key areas for growth in Nepal include postgraduate programmes in IT and computing, blended learning and industry collaborations. Strategic adaptation of best practices from other nations' TNE strategies can support sustainable expansion tailored to Nepal's educational landscape and capacity, ensuring approaches are aligned with local needs and context.

Recommendations

Recommendation 1: Streamline regulatory procedures

Accelerate the TNE provider approval process and, where possible, streamline regulatory requirements. Simplify approval timelines and establish clear guidelines on the process and the equivalence of foreign qualifications. These measures will support new partnerships, enhance Nepal's education capacity and encourage a broader network of collaborations.

Recommendation 2: Improve data transparency

Establish more accurate reporting and data-collection mechanisms to align government statistics with on-the-ground realities. Enhance transparency and data reporting through implementing standardised data-reporting systems on TNE providers and programme performance, to enable stakeholders to make informed decisions, aid strategic planning and policymaking and drive quality improvements across the sector.

Recommendation 3: Strengthen quality assurance

Enhance the annual review processes by the MOEST Higher Education Division to ensure consistent quality across TNE providers for both new and existing institutions. Provide guidance and training on the process and publish outcomes.

Recommendation 4: Support institutional diversification and promote international collaboration

Encourage the entry of a wider range of TNE providers to foster competition and innovation. Consider introducing incentives for institutions offering unique programmes that are not available through Nepali HEIs. Consideration will have to be taken of the existing processes for programme equivalency and approval. Meanwhile, expand research partnerships, joint PhD programmes and student exchange opportunities with international universities, establishing stable collaboration frameworks to strengthen international ties.

Recommendation 5: Curriculum and skills alignment

Prioritise partnerships that emphasise skills over qualifications, ensuring that graduates are better equipped for the local and international job markets. Promote postgraduate and PhD programmes, particularly in fields like information technology (IT), artificial intelligence (AI) and data science. This alignment could improve employability and the relevance of TNE programmes to local employers.

Recommendation 6: Incentivise lower-cost TNE options

Support the expansion of affordable TNE programmes that will help enhance access to international higher education to a broader demographic. These may also provide more attractive options to students who would otherwise pursue international study, helping to reduce brain drain. This can be achieved by fostering partnerships with a variety of institutions, from prestigious to cost-effective options, and public and private education partnerships that align with local HE environment needs.

Recommendation 7: Address social and economic inequalities

Continue leveraging TNE to target gender disparities and support underprivileged students. Explore funding models that enable scholarships for rural and marginalised communities, ensuring broader access to quality education. Consider expanding TNE options outside Kathmandu and other main cities to address financial and geographic access disparities. This would help address social inequalities and expand TNE community impact.

Recommendation 8: Identify sustainable TNE models

Consider TNE models and educational hubs that reduce the need for partnership travel, therefore meeting global sustainability goals.

By addressing these areas, TNE in Nepal could become a more effective tool for educational and economic development, ultimately fostering stronger ties with the UK while meeting the local demand for higher education.

Introduction

The British Council commissioned this study to gain a deep understanding, evidence and insights into the TNE ecosystem in Nepal.

1.1.   Objectives

The primary objective of this research was to gain in-depth knowledge of the levels of TNE activity and the TNE regulatory environment, and to investigate the opportunities and challenges for international educational collaborations between Nepal and the UK, aligned with the educational policies and strategic priorities of both countries.

In addition, the study seeks to explore the role of UK quality assurance bodies, specifically in supporting the quality of TNE provision in Nepal, including recommendations for potential interventions.

The UK's Quality Assurance Agency for Higher Education defines TNE as the 'delivery of higher education level awards by recognised UK degree-awarding bodies in a country, or to students, other than where the awarding provider is based'.[1] Typically, TNE can be divided into three main forms of activity:

- distance learning
- international branch campus
- collaborative partnership (franchise/validation, joint degree, dual degree).

A more detailed definition and framework is provided in Appendix A.

1.2.   Aims

This document outlines the approaches undertaken, the tools used for data collection, the key findings and outcomes of the study, and a comprehensive desk-based review, drawing upon existing data, reports and literature, to outline current TNE activity and numbers in Nepal, in order to provide initial levels of analysis and agenda setting for the research project. As part of this review, a comparative analysis with similar TNE environments has been conducted, as well as the key international TNE partners in Nepal, in order to provide greater context to the current TNE landscape in Nepal and to offer an understanding of areas for possible development and growth.

The key findings and outcomes are discussed at the end of the report.

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1.   https://www.qaa.ac.uk/international/transnational-education

Methodology

2.1. Document analysis

The selected approach included an extensive and detailed desk-based review and analysis of relevant documents to inform on the current trends and educational landscape within Nepal (see Appendix D). This approach focused on key elements of the educational system, including government oversight and governance of TNE, TNE regulations and policies. Furthermore, it included student mobility and numbers and involved sources from government, international organisations, research papers and educational news. Additionally, a list of key stakeholders in both Nepal and the UK was compiled, providing valuable insights into existing partnerships and informing future activities.

Further evaluation of HESA data on UK TNE enrolments in Nepal for the period from 2017/18 to 2022/23 was conducted. This data provided a summary of TNE students by institution and type of provision, by institution and level of study, as well as by type of provision and level of study.

A second stage of desk-based research focused on the current HE landscape in Nepal and explored potential partnership opportunities. This analysis incorporated the previously compiled list of stakeholders, along with those provided by the British Council.

2.2. Interviews

The third stage involved qualitative primary research with relevant stakeholders in the UK and Nepal, and included policymakers, UK HEIs, TNE colleges in Nepal and international recruitment agents covering this country. The interviews of policymakers in particular were informed by the desk research and findings from the TNE review committee. In total, nine interviews were conducted with HEIs in Nepal and in the UK, and ten bespoke interviews in total were held with key stakeholders in the UK and Nepal. Please see Appendix B for the list of stakeholders.

2.3. Surveys

A fourth stage involved a quantitative survey with a representative sample of prospective and current Nepali HE students. Through existing networks of contacts, local agents, counsellors and Facebook groups, 157 current and prospective Nepalese students were reached. These students were across a range of levels and disciplines, from students either preparing for study or already studying at a TNE provider in Nepal. However, to avoid bias, the initial question around 'Where are you most likely to study?' was purposefully left open. When they were asked which institutions in Nepal they were most likely to choose, responses were filtered based on their choice of institution, i.e. a university in Nepal or a Nepal TNE provider. The results were then used to measure what students value most in order to study at HE level, what support they require, any issues they are facing and what perceptions they have about UK HE institutions.

The survey instrument was designed following the initial desk-based research exercise and took into account key findings of that initial stage. While the survey was designed to eliminate bias, it incorporated relevant contextual findings that had a clear bearing on the current TNE educational landscape in Nepal, student choices and aspirations.

Prior to distribution, a pilot survey was conducted with colleagues and a small group of current TNE students to assess the clarity and sequencing of questions, as well as to determine the estimated completion time. Only minor adjustments were made based on the feedback received.

2.4. Focus groups

A final stage included the use of focus groups to gain both TNE students' and parents' views on TNE providers and clarify any anomalous findings from the student survey. Two focus groups were held, one comprising seven students, with each student from a different TNE provider, and one comprising six parents of TNE students.

Summary

The methodological approach for this project was mixed-methods and involved a series of research tools such as desk research, surveys, interviews and focus groups. The project incorporates case studies in order to provide in-depth analysis of key elements.

Student data, in addition to that obtained from key stakeholders, supports the desk research in providing analysis of the TNE landscape in Nepal in context and with comparable TNE markets.

Nepal's higher education landscape

3.1. Background

Nepal's most recent census reported a population of 29.2 million as of 2021,[2] while the UN Population Division estimated a population of 29.7 million and a median age of 24.7 in 2024[3] – meaning that more than half of the population is below the age of 25. The country represents 'one of the fastest-growing college-aged populations in the world'.[4]

A little under 24 per cent of Nepal's population is urban, with Kathmandu being the largest city (1.4 million inhabitants).[5] The most common language is Nepali, spoken by 78 per cent of the population, followed by Maithili.[6]

Nepal has a relatively low level of enrolment in higher education, with the gross tertiary enrolment rate standing at only 18 per cent, compared to around 90 per cent at the secondary level.[7] The modern Nepali HE system dates back to 1918 with the establishment of Trichandra College, followed by the founding of Tribhuvan University in 1959.[8] Tribhuvan University currently educates around 78 per cent of the HE student population though its central departments, constituent campuses and affiliated colleges. Currently, the Nepal government is developing an umbrella act ('Higher Education Act') to govern and regulate higher education in Nepal, as well as a separate legislation on TVET (technical and vocational education and training).

According to the most recent statistics, Nepal's broader HE system includes a total of 1,432 colleges affiliated to 24 universities and medical academies.[9] Slightly over half of these colleges are private affiliated campuses,

defined as 'campuses whose academic programmes are affiliated to a university, but managed and administered including financing by private individual/ organisation',[10] indicating the significant role of the private sector in Nepalese higher education. Overall Nepal's HE sector enrolled 633,053 students in the 2023/24 academic year, with private campuses accounting for around 30 per cent of this total; this figure does not include 28,073 students enrolled in foreign university affiliated campuses.

Nepal's HE sector grew extremely rapidly in the early part of the 21st century, with the number of colleges almost doubling between 2005 and 2010 alone.[11] More recently, the number of colleges has increased by around a third between 2010 and 2021/22, while student numbers have increased by 42 per cent over the same period.

Nepal has two universities featured in the 2025 Times Higher Education World University Rankings: Kathmandu University and Tribhuvan University, both ranked in the 1500+ category.[12] Other key universities include Pokhara University, Purbanchal University, Mid-West University and Far-Western University.

Nepal has strong ambitions to develop its HE sector and systems, as evidenced by recent policy and regulatory initiatives to streamline and support the QAA process and timeline;[13] projects to reform and enhance institutional quality and capability;[14, 15] plans to explore the opportunity for the development of an international hub[16] and a proposed 'Higher Education Act that aims to

2.   https://censusnepal.cbs.gov.np/results

3.   https://population.un.org/dataportal/

4.   https://monitor.icef.com/2024/10/market-snapshot-international-student-recruitment-in-nepal/

5.   https://tradingeconomics.com/nepal/urban-population-percent-of-total-wb-data.html#:~:text=Urban%20population%20(%25%20of%20total%20 population)%20in%20Nepal%20was%20reported,compiled%20from%20officially%20recognized%20sources

6.   https://translatorswithoutborders.org/language-data-for-nepal

7.   https://data.worldbank.org/indicator/SE.SEC.ENRR

8.   https://trichandracampus.edu.np/about-us/history/

9.   https://www.ugcnepal.edu.np/uploads/publicationsAndReports/T5mb0F.pdf

10.   https://www.ugcnepal.edu.np/uploads/publicationsAndReports/mPditn.pdf

11.   https://www.adb.org/sites/default/files/publication/178548/innovative-strategies-higher-education-nepal.pdf

12.   https://www.timeshighereducation.com/student/where-to-study/study-in-nepal

13.   https://ugcnepal.edu.np/uploads/web-uploadsfiles/UGC_Strategic%20Plan_2021.pdf

14.   https://ugcnepal.edu.np/uploads/web-uploadsfiles/UGC_Strategic%20Plan_2021.pdf

15.   https://documents.worldbank.org/en/publication/documents-reports/documentdetail/610541468060551481/nepal-higher-education-reforms-project

16.   https://www.worldbank.org/en/news/press-release/2021/10/26/government-of-nepal-and-the-world-bank-launch-60-million-nurturing-excellence-in-higher-education-program

streamline governance. Alongside these initiatives, there is a clear ambition to continue to evolve and support a robust student body and sustainable enrolment model at the tertiary level.

A 2023 research journal article identified the gradual but consistent increase in student enrolment over the past five years.[17] While institutions do not reach their maximum capacity for student numbers, the increase is definitely a trend in action. Tribhuvan University reports a '15% uptick in student enrolment and currently at 87% of its capacity';[18] however, this trend has created challenges in terms of institutional capacity and capability and led to concerns over quality assurance and programme delivery.

3.1.1. Expansion of private sector providers and TNE

During the past 29 years, Nepal's private sector has been instrumental in developing higher education through partnerships with international providers, and TNE provision is expanding, driven by a perception of foreign degrees' prestige and the successful adaptation of local diverse fee structures. Nepal's TNE sector has experienced significant growth, with programmes affiliated to UK or other overseas universities gaining popularity among students seeking international exposure and employability skills. However, not all partnerships are successful, with some colleges having less than a hundred students.

Nepal is in the process of updating its regulatory framework for TNE institutions, introducing stricter accreditation and ranking requirements for foreign-affiliated universities. This is a clear indication of the desire of the Nepalese government to build strong and sustainable TNE partnerships to address the capacity, recruitment, retention and quality improvement agendas.

TNE is discussed in more detail in Section 4 of this report.

3.1.2. International student mobility

Quality challenges in the local HE system are contributing to increasing numbers of Nepalese students seeking to study abroad; nearly one in five Nepali college-age students go abroad for tertiary education, with preferred destinations being Australia, Japan, Canada, the US, the UK and India.[19] This has led to concerns over both domestic enrolments and brain drain.

UNESCO figures show that the total number of students from Nepal studying overseas has increased by 40 per cent over the most recent five-year period, from 64,356 in 2017 to 90,092 in 2022.[20] Meanwhile, statistics from MOEST show that 112,593 students received NOCs to study abroad in the 2023/24 academic year. The NOC is a mandatory document granted by the Government of Nepal that is required for students to send tuition fees and other related payments abroad.[21]

Breaking down the statistics on NOC issuances, Japan is the most popular destination by some margin, accounting for around 31 per cent of the total. Japan is followed by Canada, the UK and the US, each accounting for 12 to 14 per cent of all outbound students; smaller destinations include Cyprus, South Korea and Germany.

The high level of outbound student mobility has led to concerns over domestic enrolments, brain drain and the amount of money sent abroad to fund these studies. From a UK perspective, the increase in international student numbers from Nepal appears to conflict with environmental sustainability agendas aimed at reducing the need for travel.

Although no official statistics are available for inbound mobility, the number of overseas students in Nepal is believed to be very low, as Nepal is not considered a major destination for international study. However, some government figures have discussed aspirations for Nepal to establish itself as an international education hub, leveraging Nepal's geographical location and attractive environment to attract foreign students from neighbouring South Asian countries, as well as contributing to addressing student mobility, brain drain and course offerings.

Nevertheless, scepticism remains regarding Nepal's ability to transition from a source of outbound students to a study destination. Aspirational plans are still in the early stages, with a focus on quality improvements and infrastructure development. Further sources on Nepal's aspirations to become an education hub can be found in Appendix D.

3.1.3. School provision and English-medium instruction

Nepal's basic education system consists of eight years of compulsory education followed by four years of secondary school. The most recent national statistics show that the country has around 36,000 schools (excluding those only offering early childhood education) that enrol a total of around 7.2 million students. Gross enrolment rates are over 100 per cent for basic education and 98 per cent for the first two years of secondary education (grades 9–10), but only

17.   https://www.nepjol.info/index.php/cdj/article/view/68981
18.   https://kathmandupost.com/editorial/2024/01/30/innovate-or-perish
19.   https://monitor.icef.com/2024/10/market-snapshot-international-student-recruitment-in-nepal/
20.   https://databrowser.uis.unesco.org/browser/EDUCATION/UIS-EducationOPRI/int-stud
21.   https://noc.moest.gov.np/

66 per cent for grades 11–12. Public ('community') schools make up around 80 per cent of institutions and enrol around 72 per cent of students, with private education being slightly more common at the basic level (29 per cent), compared with secondary (23 per cent).[22]

In general, the primary language of instruction in public schools is Nepali, while private schools predominantly use English.[23] However, community schools in the country can also choose to use English as a medium of instruction rather than just a subject. Detailed recent statistics on medium of instruction are not available, but a 2018 British Council research report found that there had been an expansion in the number of public schools using English in the preceding 10–15 years, with more than half of community schools in one district providing English-medium education in 2016.[24]

3.1.4. Engineering requirements

The Nepal Engineering Council (NEC), established in 1999, regulates engineering education and professional licensing. A significant reform in 2022 mandated an engineering licensure exam, replacing previous registration processes based on academic certificates. The inaugural examination in 2023 saw a pass rate of 28.5 per cent,[25] with civil engineering having the highest number of candidates. This move aims to standardise professional qualifications and improve workforce quality.

TNE providers, particularly private institutions, face the challenge of meticulously aligning their programmes with Nepal's national standards to ensure their graduates are well prepared for the NEC licensure examinations. This alignment is crucial for maintaining the credibility of their programmes and enhancing the employability of their graduates within Nepal's engineering sector.

3.2. Quality assurance and programme approval

3.2.1. Quality assurance

Quality assurance is a fundamental requirement for all HEIs in Nepal, managed by the Quality Assurance and Accreditation Division (QAAD), a division of the University Grants Commission (UGC). QAAD acts as the secretariat for the Education Quality Assurance and Accreditation Council (EQAAC) – a functionally autonomous agency within the UGC – which mandates participation in the quality assurance and accreditation (QAA) process, requiring HEIs to prepare and submit self-study reports. Regular assessment, monitoring and evaluation of all HEIs is conducted to ensure compliance with quality standards.

The estimated timeline for internal accreditation by the UGC/QAAD is approximately five years and four months to achieve final status. This includes a preparation period of three years and three months for HEIs to complete the necessary documentation. The UGC aims to accredit over three hundred HEIs annually to address the growing demand for higher education quality in Nepal.

Nepali HEIs operate under seven key QAA principles: autonomy, safeguarding societal interest, encouragement and support, thoroughness, flexibility, collaboration, and transparency. Previously voluntary,

participation in the accreditation process became mandatory in 2022 for all eligible HEIs.

According to official UGC reports, the UGC remains the sole accrediting body for higher education in Nepal,[26] with key responsibilities including:

- coordinating between HEIs
- allocating government and other grants to HEIs
- promoting and maintaining HE standards through quality assurance and accreditation.

Governing systems for quality assurance are well defined through a number of government acts, including the UGC Act 2051 BS (1993), which established the UGC; the EQAA Regulations 2074 BS (2017), which set up EQAAC; and the HEQAA Directives 2074 BS (2017), which oversee the accreditation system and QAA guidelines.

The UGC's Strategic Plan for 2021–2030 sets out relevant policies, capabilities, guidelines and requirements.[27] Based on the Strategic Plan, the UGC aims to adopt a formative approach that encourages HEIs and facilitates them to meet and maintain minimum standards. The system is intended to create opportunities to transform Nepal's HEIs towards a more credible and internationally recognised system.

22.   https://old.cehrd.gov.np/file_data/mediacenter_files/media_file-17-1330449615.pdf
23.   https://wenr.wes.org/2018/04/education-in-nepal
24.   https://www.teachingenglish.org.uk/publications/case-studies-insights-and-research/english-language-teaching-nepal-research-reflection (Chapter 4)
25.   myrepublica.nagariknetwork.com
26.   https://www.ugcnepal.edu.np/ugc_header_images/QAA_Guidelines.pdf
27.   https://ugcnepal.edu.np/uploads/web-uploadsfiles/UGC_Strategic%20Plan_2021.pdf

The UGC is also a member of globally recognised QAA networks such as the International Network for Quality Assurance Agencies in Higher Education (INQAAHE) and the Asia-Pacific Quality Network (APQN), and has signed memoranda of understanding with a number of overseas accreditation agencies to facilitate and learn from each other, and brings international experts into the peer review team. Peer review teams also incorporate experts from relevant professional councils, while the chairpersons of these councils are involved as members of EQAAC in order to validate relevant recommendations.

Despite significant growth in higher education, concerns about quality remain. The 2022/23 University Grants Commission Annual Report highlighted challenges related to quality assurance, class instruction standards, examination failure rates and certification processes.[28] The sector also suffers from challenges around governance and research outputs.

HEIs affiliated with foreign universities must also undergo the QAA process as outlined above. Specific requirements for institutions affiliated with foreign universities are described in Section 4.2.

3.2.2. Programme approval

The QAA process in Nepal is based upon the core foundational elements of the EQAAC's Strategic Plan (2021–2030). There is a particular focus on the 'Destination 2030' target, which states:

> *Careful observation of emerging global trends in QAA System and develop strategic goals to match its spirit and ethos of QAA in Nepal so that Nepali HEIs comply with defined quality standards, be able to address the national need of qualified human resources, and approach towards meeting international standard in higher education.*[29]

The EQAAC governs QAA in Nepal and is accountable to the UGC.

Obtaining approval for HE programmes in Nepal is a complex and time-consuming process. Interviews with stakeholders revealed that establishing a new university programme in Nepal can take from 18 months to two years owing to regulatory requirements and internal committee approvals. Additionally, all foreign university partnerships require ministerial approval, adding further complexity and delays. Interviewees further noted that the Nepal government was utilising the private sector to fulfill the domestic need for HE diversification.

Tribhuvan University – Nepal's largest domestic HEI – holds a special role in programme approval. The university's Curriculum Development Center (CDC), established in the 1970s to develop curricula within the university,[30] has expanded its remit over time to issuing equivalence certificates to students who graduate from other universities in Nepal and foreign educational institutions through its Equivalency Determination Committee.[31] This role is authorised by the national government and effectively means that other universities wishing to offer HE courses in Nepal must have their programmes approved by the CDC, creating additional requirements for prospective TNE partnerships as well as other domestic universities seeking programme approval.

3.3. Key challenges in Nepal's HE sector

The rapid expansion of Nepal's HE sector has brought about several critical challenges impacting quality, governance and accessibility. These challenges include inadequate funding, a lack of relevance to the labour market, internal inefficiencies and areas for improvement in management, and research that is overly focused on theoretical as opposed to applied science fields.[32]

3.3.1. High levels of outbound mobility

As discussed in Section 3.1.2, Nepal is currently experiencing a high rate of outbound HE student mobility. According to ICEF Monitor, approximately 20 per cent of Nepali students in this age group are pursuing higher education abroad,[33] far higher than the proportions seen in most other countries.

28. https://ugcnepal.edu.np/uploads/web-uploadsfiles/EQAAC_Report_079-80(1).pdf (page 42)
29. https://www.ugcnepal.edu.np/uploads/publicationsAndReports/ZQ9PgI.pdf
30. https://tucdc.edu.np/about_us
31. https://edusanjal.com/organization/curriculum-development-centre-tu/
32. https://nipore.org/current-state-of-higher-education-in-nepal/
33. https://monitor.icef.com/2024/10/market-snapshot-international-student-recruitment-in-nepal/

Interviewees noted that this trend negatively impacts domestic university enrolments as well as leading to financial and intellectual resource drain from the country. Data from the Nepal Central Bank showed that students spent 95.85 billion Nepali Rupees (£549 million) on their foreign studies in the first nine months of the 2023/24 fiscal year.[34]

Nepal's government requires a NOC before students can transfer funds abroad for their studies, and in early 2023 it implemented measures to restrict the issuance of NOCs for diploma, advanced diploma and language courses, meaning that students can only travel abroad for bachelor's and higher degree programmes.[35] The government cited the need for these restrictions to ensure students travel abroad for higher studies rather than vocational or language training. However, this policy was reversed within a month, following pressure from students and other groups.[36]

The government also charges a tax on bank transfers made by Nepali students to foreign institutions for their tuition fees. This tax was increased to 3 per cent from the 2023/24 fiscal year, after previously being doubled from 1 per cent to 2 per cent two years earlier. The move was presented as a way of increasing the country's revenue base, but was described by some agents as another attempt to prevent students from going abroad.[37]

3.3.2. Public perception of quality assurance

Concerns persist regarding the quality of education provided by Nepalese universities. Key issues include:

- institutional quality control – the significant increase of domestic providers has outpaced standards, causing concerns of provision
- value of the curriculum to employability – a gap exists between provision and market demand
- teaching methods – deficiency in the quality of teaching provision.

Stakeholders have expressed concerns about the relevance and management of the current HE system, emphasising the need for significant reforms to align educational offerings with local needs.

3.3.3. Governance and management

Governance and management issues present major obstacles within Nepal's HE sector. Key challenges include:

- institutional autonomy – administrative delays prevent the independence of educational institutions
- internal policies – a lack of coherence and consistency in internal policies hinders progress.

3.3.4. Limited research output

Nepal's HEIs face significant challenges in fostering a strong research culture. While the country's academic research output has more than doubled in the last five years, it was still ranked only 81st globally in 2023, with only 3,481 total publications across all subjects.[38] Issues such as inadequate funding, lack of research infrastructure and limited collaboration opportunities with international institutions restrict research output and impact.[39, 40] Meanwhile, local think tanks have criticised the country's research output as being overly focused on theoretical areas, with 'very limited research done in applied sciences'.[41]

3.3.5. Government spending

Government spending on education in 2023 was 3.7 per cent of the GDP, up from 3.65 per cent in 2022.[42] These figures are slightly below the global average, which stood at 3.8 per cent in 2022. Specific spending on tertiary education constitutes a value of 0.7 per cent of the total GDP, again slightly below the worldwide average.[43, 44] However, when combined with Nepal's low per-capita GDP, this has resulted in underinvestment in infrastructure, insufficient faculty development and a lack of financial support for students. The economic landscape further complicates access to higher education, as many families take on financial burdens to send their children abroad.

34. https://www.newbusinessage.com/article/nepali-students-spent-over-rs-95-billion-for-education-abroad-this-year
35. https://www.universityworldnews.com/post.php?story=20230420113002568
36. https://www.universityworldnews.com/post.php?story=20230705085725450
37. https://www.universityworldnews.com/post.php?story=20230705085725450
38. https://www.scimagojr.com/countryrank.php?year=2023&order=it&ord=desc
39. https://www.nature.com/nature-index/country-outputs/Nepal
40. https://www.researchgate.net/publication/366788855_Academic_Publishing_in_Nepal
41. https://nipore.org/current-state-of-higher-education-in-nepal/
42. https://data.worldbank.org/indicator/SE.XPD.TOTL.GD.ZS?locations=NP
43. https://documents1.worldbank.org/curated/en/099835012032119520/pdf/P17208601e4d9102009d990f176775b9f18.pdf
44. https://borgenproject.org/higher-education-in-nepal/

Summary

Nepal's HE sector has grown over time, but enrolment is still low by international standards. Challenges include low investment, high levels of outward mobility, quality assurance, curriculum relevance and concerns over governance and management, as well as long timescales for new programme approval. TNE has the potential to support development in these areas, while operating fully within the governance and quality assurance policies and regulations.

Nepal's TNE environment

4.1. Current TNE landscape

Since 1996, the private sector has been involved in running HEIs/colleges in affiliation with international academic institutions delivering foreign degrees. While most private colleges are affiliated with local Nepali universities, MOEST's database lists 59 private HEIs that offer programmes at the bachelor's level and above in affiliation with universities and institutions abroad.[45]

These institutions offer HE qualifications from a total of 34 overseas institutions, with some institutions from both the Nepalese and overseas sides having multiple partners. The list includes a total of 22 approved partnerships with 15 different UK partners, including 14 universities as well as Pearson, which offers higher national diploma (HND) programmes. Eight different Malaysian HEIs also have a total of 22 partnerships, with

just one institution – Lincoln University College – working with ten different Nepalese institutions, higher than any other overseas partner. Other partner countries are much less commonly represented, with Thailand being the third most common, accounting for five partnerships with four different Thai HEIs (Fig. 1).

The majority of registered TNE host institutions in the country – 34 of 59, or 58 per cent – are located in Kathmandu, followed by Lalitpur and Pokhara, with 9 and 5 host institutions respectively (Fig. 2). Partnerships with UK institutions are similarly concentrated in Kathmandu, with 11 of these 22 registered partnerships located in the city.

Figure 1: Recognised HE TNE partnerships by partner country

Source: MOEST

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45.   https://risingnepaldaily.com/news/45222
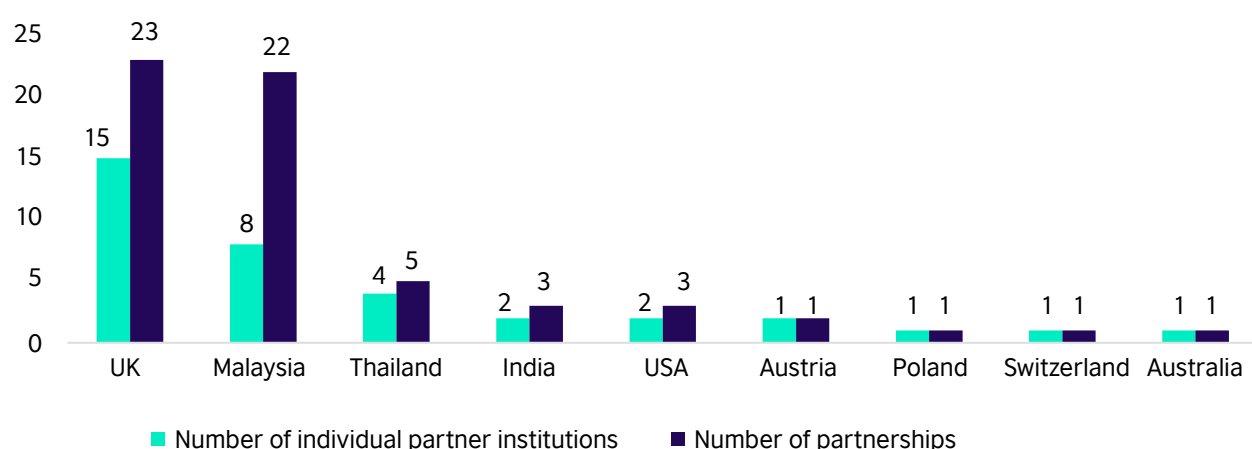
Figure 2: HE TNE host institutions by city
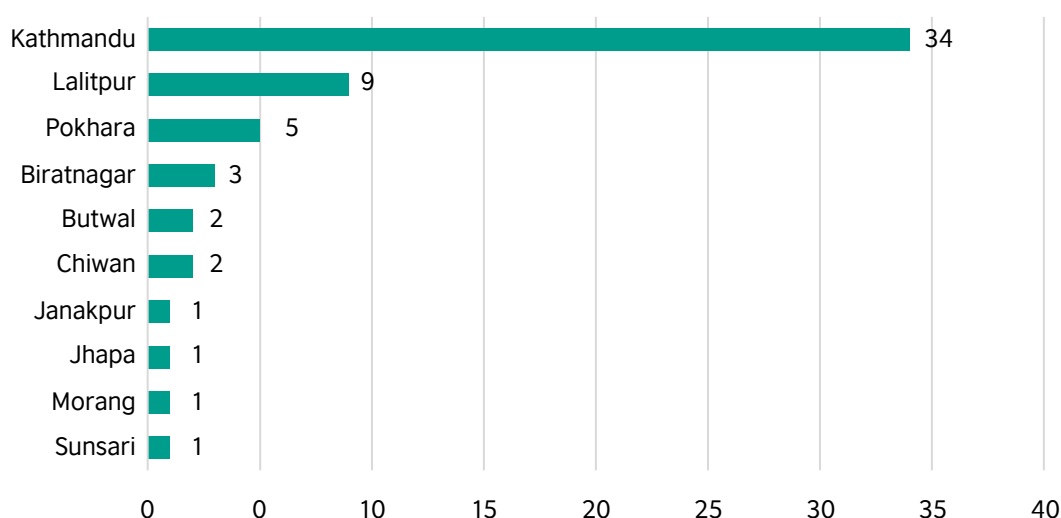
Source: MOEST

4.1.1. UK TNE in Nepal

HESA data shows that a total of 27 UK HEIs reported that students in Nepal were studying for their qualifications in the 2022/23 academic year, of which 12 institutions reported some form of in-person delivery, while the remaining 15 had only distance-learning students.[46] The number of institutions reporting students in Nepal has more than doubled compared to five years earlier (2017/18; see Fig. 3). Meanwhile the total number of registered students grew to 12,815, which is more than five times the figure in 2017/18. Students are mostly concentrated at a few institutions – four universities reported 1,000+ Nepal-based students, with a further seven enrolling 100+ students; all others had 25 students or fewer.
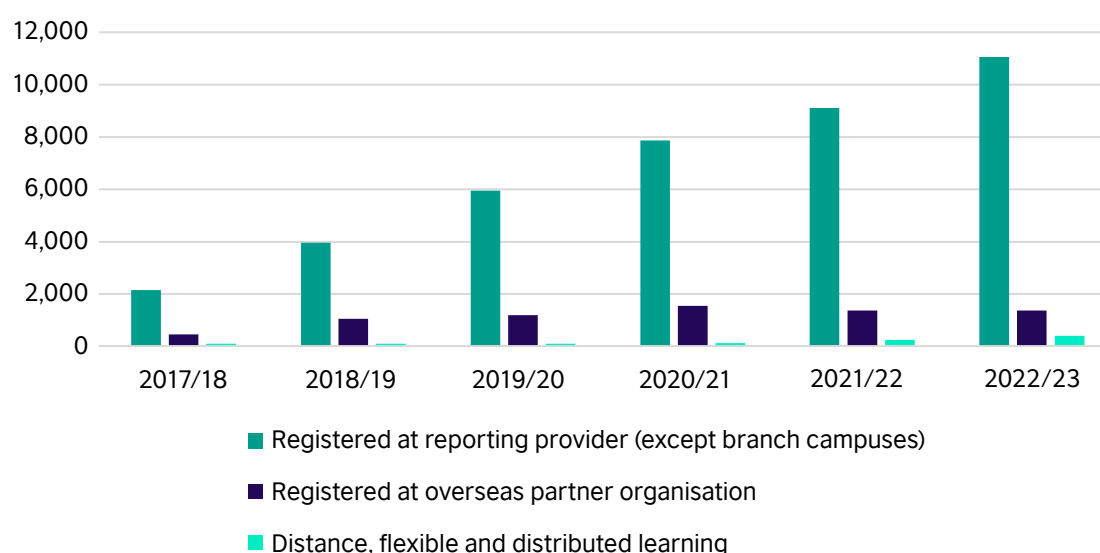
The list of UK HEIs reporting students in Nepal via HESA does not match perfectly with the UK partners in the Ministry's list of registered partners. While ten UK HEIs appear on both lists, four universities appeared on MOEST's list but reported no TNE students in 2022/23 (excluding Pearson, whose data is not included in these statistics), while two institutions reported students via HESA but did not appear on the MOEST list. However, readers should note that the data refers to slightly different periods – the list of registered partnerships was last updated in Nepalese Year 2080 (April 2023 to April 2024), while the HESA data refers to the 2022/23 academic year.

Research for this report – including both interviews and desk research – has identified a total of 16 UK universities partnering with 16 colleges, with a total of 20 branches in Nepal as of 2024 (one institution, ISMT, operates in five different locations), with a further two university partnerships pending approval (See Appendix C). Four of the partnerships listed in the appendix were not included on the MOEST list, including one with a UK partner that also did not report any students in Nepal via HESA – although, as noted above, this may be a result of a difference in the date at which each set of data was collected. Some universities have multiple partner colleges, some colleges have more than one UK university partner and some colleges offer provision in several sites around Nepal. However, the bulk of TNE providers are currently located in Kathmandu.

In-person programmes made up a large majority of students, with only 395 – or around three per cent of the total – studying via distance learning. Most students were registered directly with the UK institution, while around ten per cent were registered with the local partner.

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46.   HESA Aggregate Offshore Record, 2022/23 and previous years

Figure 3: UK TNE enrolments in Nepal by type of provision, 2017/18 to 2022/2023

- Registered at reporting provider (except branch campuses)
- Registered at overseas partner organisation
- Distance, flexible and distributed learning

Source: HESA

As shown in Figure 4, undergraduate students have consistently made up a large majority of UK TNE students in Nepal. Bachelor's degree courses accounted for 88 per cent of all TNE students in 2022/23, with a further two per cent enrolled on a programme at the HE Certificate level. Almost all the remainder are studying for a taught master's degree, with only a handful of PhD candidates – all of whom are recorded as studying via distance learning. Master's degree programmes are also more popular among distance-learning students, making up 41 per cent of this group, compared to only nine per cent of in-person TNE students.

Figure 4: UK TNE enrolments in Nepal by level of study, 2017/18 to 2022/2023

■ HE Certificate ■ Bachelor's degree ■ Masters degree ■ Doctorate
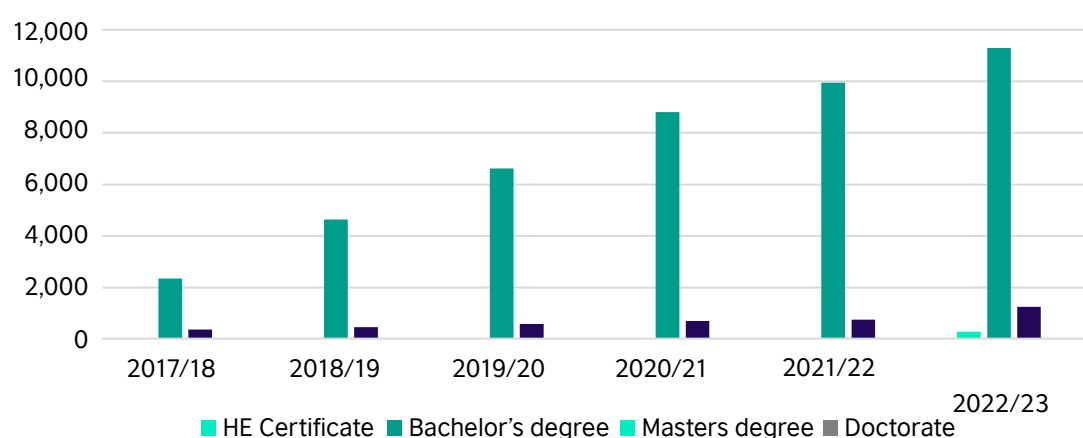
Source: HESA

Many of these partnerships have been very successful. The reasons for success, according to interviewees, include the perception of a prestigious foreign education, good internal management and a credit transfer system. Interviewees also noted that the cost models in these partnerships are effective. Fees at affiliated Malaysian universities are almost half the cost of what some Nepali/UK-affiliated programmes charge, making them a more affordable option.

UK-affiliated institutions operate across different pricing tiers, with some programmes priced 30–35 per cent lower than their competitors, while others are positioned at a higher price point due to factors such as perceived institutional reputation and programme offerings. Stakeholders highlighted that this range of pricing options aligns well with student demand and supports accessibility within Nepal's HE sector.

4.1.2. TNE's contribution to Nepal

Stakeholder interviews show that existing partnerships have led to substantial growth in educational infrastructure in Nepal, including new campuses, a cybersecurity centre and a robust alumni network. Interviews and recent research indicate that the local economy has also benefited, with new businesses and employment opportunities arising around the educational institutions.[47, 48]

TNE has a role to play in supporting the retention of students to study domestically, providing an alternative to studying abroad. TNE can leverage international expertise and reputation to slow down, if not prevent, brain drain. TNE alone does not always prevent talented individuals from leaving Nepal, as interviewees highlighted examples of TNE graduates who had secured jobs in leading international companies and moved abroad. However, interviewees also pointed out

that these individuals continued to contribute to Nepal's GDP through foreign currency earnings.

TNE partnerships have positively impacted local communities, providing education access for low-income students. They have also contributed to addressing gender and social inequalities, although some challenges remain, particularly in retaining female students during economic downturns. To address the challenges for students in rural areas, some TNE providers are operating in those outreach areas or preparing to do so, although it must be noted that TNE is still mainly concentrated in Kathmandu.

Respondents also noted that TNE had not yet matured enough to address issues like gender-based inequalities and other forms of inequality, such as rural and urban disparities, largely due to a lack of resources and expertise as reasons for not being able to accommodate differently abled students.

4.2. Regulations and policies

4.2.1 Specific requirements and approval processes for TNE

Overseas institutions wishing to offer TNE courses in Nepal must first establish a partnership with a local HE provider. Guidelines for the application and approval process have seen developments and updates over the past two decades. In 2003, the Council of Ministers of the Government of Nepal approved a formal set of guidelines. These were then amended in 2015 and again in 2017. In 2024, the process was again reviewed, with additional criteria included. The core elements of the guidelines include the need for permits, the approval process and subsequent evaluation and monitoring.

In 2024 the UGC issued updated eligibility criteria for foreign-affiliated HEIs aiming to participate in the quality assurance and accreditation process.[49]

- Affiliated overseas universities must hold accreditation from relevant national or international accrediting bodies.

- The overseas HEI must secure a position within the top 800 of The Times Higher Education Ranking or the top 1,000 of the QS World Ranking.

- Local partners must meet the benchmarks set by their foreign affiliating universities and provide a letter of recommendation to that effect.

- A letter of approval from the Ministry of

Education, Science and Technology is mandatory for programme initiation or renewal.

- Institutions must submit a sustainability plan, encompassing both academic programmes and financial viability.

- At the time of submitting the letter of intent, the academic programme offered by the HEI must extend for an additional one-year period beyond the affiliation duration. Alternatively, the HEI must have operated continuously for at least five years if the affiliating university provides shorter affiliation periods.

- Compliance with Nepal's tax laws necessitates the submission of a tax clearance certificate.

All HEIs, both public and private, affiliated with foreign universities must undergo the QAA process as prescribed by the National Accreditation Agency, the UGC and described in Section 3.2.1. Government reports issued in the 2023/24 cycle provide the process chart for QAA activity and timeline.[50] As this requirement was introduced relatively recently, the majority of TNE partnerships had not yet undergone this process at the time of writing (March 2025).

Other recent recommendations from two expert committees on this subject include reforming rules for student admissions; establishing a student quota system; establishing a unit under the UGC for quality assurance and monitoring of foreign affiliated institutions; managing student enrolment data at the UGC level; scholarship provision; establishing provisions

47. https://link.springer.com/book/10.1007/978-3-030-50168-6

48. https://scholar.stjohns.edu/jga/vol2/iss2/5/

49. https://edusanjal.com/news/new-criteria-set-for-foreign-affiliated-heis-in-accreditation-process-by-ugc/

50. https://www.ugcnepal.edu.np/uploads/publicationsAndReports/ZQ9PgI.pdf

for physical and human resources; and setting up minimum standards.[51] Interviewees commented that changes to Nepal's TNE policies were still in the initial consultation stages.

Notably, any collaboration with foreign universities requires ministerial consent. However, the Ministry's approval process for new providers has been halted for five to six years, meaning that it is not currently possible to establish a new TNE partnership in the country. Despite the recent developments in TNE policy, interviewees reported that based on their understanding, this policy has not been changed, although they were not aware of any recent attempted applications.

4.2.2. Programme equivalency and approval

In addition to partnership-level approval, individual degree programmes offered by TNE providers must also be approved through the same process as for domestic programmes. As noted in Section 3.2, the process of gaining approval for HE programmes in Nepal, both local and international, is both intricate and lengthy. According to interviews with stakeholders, launching a new university programme can take between 18 months and two years (accounting for internal committee approvals as well as the necessary regulatory procedures), with Tribhuvan University's CDC playing a key role.

One key requirement is that bachelor's degree programmes should be at least four years in length, in contrast to the UK's three-year system – although a programme consisting of a foundation year followed by a three-year degree course is a viable model for UK universities. Certain subject areas can also struggle to gain approval owing to additional regulatory requirements – in particular, criteria set for subject recognition by the NEC can potentially limit the establishment of some engineering programmes.

The Ministry of Education limits these approvals to a maximum of two new degree programmes per year for individual TNE providers.

4.3. Challenges facing TNE partnerships

According to people familiar with Nepal's TNE environment, partnerships face a number of key challenges. One of these is maintaining quality – interviewees stated that some local colleges affiliated with universities abroad were not actually maintaining the quality that was required to hold up to the accreditation that they had originally obtained.

Barriers to entry also represented a major challenge. As noted in Section 4.2.1, local HEIs are not able to enter into TNE partnerships with foreign universities without ministerial approval, but interviewees commented that no new foreign university affiliations have been allowed for several years. They commented that local private organisations that already have access to these accreditations wanted to ensure that there was a limit on new TNE entrants, making it difficult to convince the government to reopen this route. They went on to explain that the current practice was for colleges with existing affiliations that had not been used to allow these to be switched to other existing providers and enable them to expand their course offer; however, it is still difficult for new universities and colleges to enter the Nepali HE environment.

Even for existing partnerships, respondents further found the process of application and approval for new programmes to be lengthy. They discussed the lead time for establishing a university programme in Nepal, estimating it to be around 18 months to two years. A large part of this is due to regulatory requirements, although the internal approvals process also takes time.

The need to deliver a four-year degree programme in contrast to the three-year courses typical in the UK was initially seen as a barrier to entry. However, this challenge has typically been overcome by adding an initial foundation year. Given this issue, it is interesting to note that some local academics have proposed reducing Nepal's current four-year bachelor's programme to three years, citing countries like the UK and India as arguments for such a proposal and arguing that this would reduce burdens on Nepali students and their parents and contribute to producing more graduates for the country.[52]

Nepal's academic calendar was also cited as an operational challenge, as it is not aligned to that of the UK. Meanwhile, matching the timing of academic delivery and the content required to cover a programme of study requires careful adjustments.

Several of the respondents commented that they would like to offer more mobility and flexibility to transfer between programmes in Nepal and in the UK or other countries, with visa issues on the UK side being cited as inhibitors in this area. At the same time, the amount of travel involved in studying overseas – as well as, to a lesser extent, travel to visit TNE partners – conflicts with UK universities' environmental sustainability agendas, suggesting a greater need for more diverse models and the use of virtual as opposed to physical hubs.

51.   https://opportunities-insight.britishcouncil.org/short-articles/news/nepal-tighten-rules-overseas-university-affiliations

52.   https://myrepublica.nagariknetwork.com/news/four-year-bachelor-s-program-has-added-burden-on-graduate-students/

Fee transfer from Nepal to the UK was also considered challenging. However, organising a regular payment plan of smaller sums appeared to be a practical and acceptable solution. Finally, interviewees noted a decline in the popularity of master's degree programmes in Nepal, attributing this to students' preference for international qualifications abroad.

4.4. Student and parent attitudes towards TNE

### 4.4.1. Student questionnaire

A questionnaire designed to capture the key reasons that influence Nepali students' choices on where to study at HE level was completed by 157 prospective and current HE Nepali students based in Nepal and overseas.[53] Among this group:

- 48 students were studying on TNE programmes in Nepal; more than half of this group were studying at Westminster College (28 students), followed by Lord Buddha Education Foundation, which offers degrees from Asia Pacific University in Malaysia (4 students)

- 42 students were studying abroad, across a variety of different countries: Australia and the UK were the most popular (8 students each), followed by Canada (6), Japan (5) and Germany (4)

- 35 students were studying on local degree programmes, primarily at Tribhuvan University (17) and Pokhara University (7)

- 32 respondents were prospective students, of whom 15 said they planned to study abroad, 14 planned to study in Nepal and three were undecided. Students planning to stay in Nepal generally tended to prefer local institutions such as Tribhuvan and Pokhara; only two named TNE institutions as their preferred choice.

Students were asked about their main reason for choosing their current institution, without any further prompting. The most common reasons given by TNE students can be broadly categorised into the details of the course, the overseas affiliations and the host institution's reputation or quality (Fig. 5).

Figure 5: TNE students' main reasons for choosing their institution
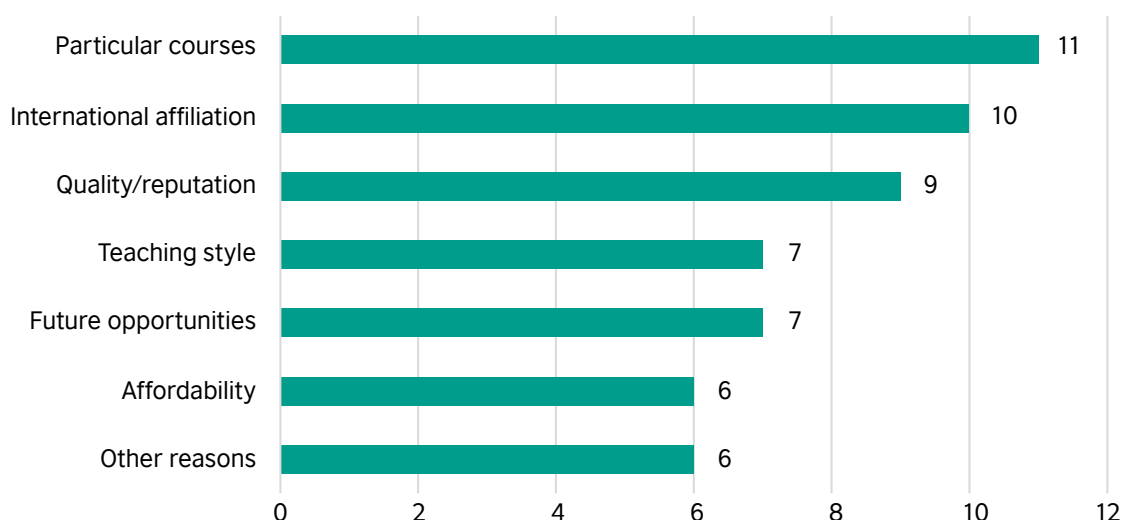
Source: Student survey. Some students gave more than one reason.

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53. A significantly higher number of responses had been anticipated; however, the timing of distribution and completion presented challenges. Many students were unavailable owing to the Dashain festival holidays, and during the study period Kathmandu experienced severe flooding, further impacting participation.

The 'Other reasons' category included suggestions from family and friends, a preference to stay in Nepal (sometimes in response to failed visa applications) and flexible course options.

In comparison, students who studied at local universities were more likely to mention quality, affordability and family influence, while being less likely to discuss international affiliation, future career opportunities and affordability. Meanwhile, students studying abroad were relatively more likely to discuss affordability, quality and the academic or living environment, while being less likely to talk about specific courses or the institution's international affiliation.

One surprising finding was that overseas students were the most likely to cite affordability as a reason for their choice of institution, while those at local HEIs were the least likely to do so. This may be because students are comparing to other institutions of the same type rather than between institution types. However, the small sample size means that the differences were not statistically significant and may be simply due to randomness.

Students were then asked a more structured question about each of a list of factors, with TNE students giving the highest ratings (on a 1–5 scale) to job prospects, Ministry of Education approval or recognition, and increasing their knowledge in a particular field (Fig. 6).

Figure 6: TNE students' ratings of specific reasons for choosing their institution, on a scale of 1-5

Source: Student survey

As with the 'most important factor' question, there were differences between TNE students' responses and those of other groups. Comparing TNE students to those at local universities, TNE students were more likely to be motivated by increasing their knowledge, preferring the curriculum, opportunities for credit transfer and the likelihood of receiving a good general education, while those at local universities were more likely to say that

their institution was based on their parents' choice.[54] Comparing TNE students to those that went abroad, the TNE group place more value on Ministry of Education recognition, receiving a good general education and increasing their knowledge. There were no options for which TNE students gave a statistically significant lower score than overseas students.

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54. These comparisons are all statistically significant at the 5 per cent level after correcting for multiple comparisons by the Holm-Bonferroni method

Other findings from the questionnaire include the following.

- Some Nepali students that end up studying abroad are very much attracted by the fact that the programmes on offer allow them to study part of the degree in another country aside from the one the institution of their choice is located in.

- Foreign institutions with partnerships with Nepali HEIs should offer more flexible options in terms of TNE to better serve Nepali students.

- TNE partnerships should prioritise affordability, quality and flexibility.

- For students interested in staying in Nepal, flexible distance-learning options that enhance career prospects are appealing. For those who would prefer studying abroad but are unable to, blended programmes with short-term overseas modules or international curriculum elements offer an attractive alternative.

- Flexible payment plans, local relevance and global standards will also help international partnerships meet Nepali students' needs effectively.

- In general, a large proportion of Nepali students staying in the country would have preferred to study abroad: 68 per cent of TNE students agreed with this statement,[55] while only 11 per cent disagreed. Even among students at local universities, more than half said they would have preferred to study abroad if possible.

- Certain profiles of Nepali students who choose to study in their own country are not overly attracted to spending part of their degree overseas. What they really value are features such as affordability, quality education and flexibility. However, they could be attracted to distance learning options if these were perceived as increasing their knowledge of their subject of study and also their employment prospects.

- Other profiles of Nepali students who choose their own country to study at HE level actually would have preferred to study abroad, but they could not do it and/or are very much attracted to Nepali institutions with international partners. These students are attracted to experiences of overseas study either as part of their degree abroad or distance learning. Still, everything should be flexible, as that is one of the most commented features that matters in their choices. Similarly, having a foreign curriculum and an international partner are also highly valued by this segment.

4.4.2. Focus group findings

The team met seven Nepal-based students online via Zoom, each of them studying with a different TNE provider. The students were very open about their experiences. They shared views on why they had chosen to study with their respective TNE provider, potential challenges and the value they placed on the experience. Six Nepali parents were also engaged via an online Zoom meeting, where they shared insights into their role in the provider selection process, their understanding of the TNE partnership, and the broader value of higher education in supporting the local community.

The students were first asked why they chose to study with a TNE provider. Factors included flexibility in managing work and academics, global standards and recognition, alignment with personal interests, and the desire to study international courses without physically going abroad. They further mentioned that the technical knowledge they received was aligned with their career goals and that the quality of their education was high. This contrasted with the local universities, which the students suggested had a lack of modern industry standards and an outdated curriculum.

The students were generally very positive about their TNE providers; however, it was noted that they had limited direct communication with the UK university, whose involvement was limited to providing resources and materials. Although some guest lectures had taken place, these were few. The scheduling of classes was seen as a further challenge as, at times, it was in conflict with work schedules.

The students shared many examples of their positive experiences at the respective TNE colleges. For example, they appreciated the depth of content and project-based learning, the balance between theoretical and practical learning, internships, as well as the supportive campus environment. They also praised the international recognition, quality assurance, curriculum structure, faculty excellence, strong industry ties, guest industry speakers, networking

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55.   The relatively small sample size means that the Wilson confidence interval was 52–80 per cent.

opportunities and extracurricular activities. The value of a scholarship scheme based on the students' Academics, Attitude and Attendance was further mentioned.

Although students themselves played the main role when choosing TNE providers, they are influenced by friends and family, with parents playing a significant role in the selection. The parents' prime considerations were quality and, secondly, location, while other factors included employability rates and rankings. Information on the providers is gathered from various sources, including university websites, educational fairs and recommendations from friends and family. Online reviews and alumni testimonials also provided valuable insights.

While some participants had considered courses at local universities, the majority believed that although these courses were less expensive, they lacked flexibility and practical content and had an outdated curriculum. One parent suggested that:

while there are some excellent programmes [at local universities], there is often a gap in terms of international exposure and advanced facilities. Collaborations with international universities could enhance the educational experience here.

From parents' perspective, the most valued contribution of TNE providers was the skills that the students acquire, which they believed would enhance their children's employability prospects. Local employability overall was viewed as more important than study or work overseas. One parent commented that:

We are hopeful and confident that [my child's] education will open many doors for her, both locally and internationally. We appreciate the efforts of institutions that strive to provide quality education and look forward to seeing more collaborations that enhance learning opportunities for Nepali students.

More broadly, parents of TNE students tended to see local employability as more important than study or work overseas, implying that TNE can play an important role in addressing brain drain.

4.5. Comparison to other major TNE hosts in Asia

Nepal is an emerging nation in the field of TNE, with only a relatively small number of providers active in the field. It is useful to gain a greater understanding of how it aligns with similar nations in terms of numbers and provision. There are, of course, many ways to undertake a comparative analysis of this nature (including geographical and by population), and therefore a combination of the most relevant comparative factors is appropriate.

TNE development can be benchmarked against other nations, but there must always exist an element of caution and clear contextual understanding. The fallacy of TNE is that the process of country A can be immediately replicated in country B. While there is much that can be gained from a review and analysis of other examples – and indeed of good practice – a clear understanding of domestic capacity, coupled with a strategic perspective of relevant activity, is needed in order to best determine the course to chart.

TNE is not an absolute, nor is it a quick solution to the domestic challenges of a HE system. There are many motivations for engaging in TNE, but they must also be supported by the realisation that there is no quick fix. TNE is an umbrella term, and within it are a myriad of opportunities that can best be tailored to fit both need and capacity.

HESA data (Fig. 7) indicates that Sri Lanka and Malaysia are both major TNE host countries in the Asia region, being the second and third largest hosts of UK TNE students respectively behind China. Sri Lanka has experienced huge growth in TNE enrolments, with student numbers more than doubling over the past five years to reach 53,190; meanwhile Malaysia, which was formerly the UK's top TNE host, has seen student numbers drop from a peak of 59,100 TNE students in 2014/15 to 41,940 as of 2022/23.[56]

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56.   HESA Aggregate Offshore Record. Statistics exclude students registered with Oxford Brookes University (OBU) through partners; this category included a large number of students who were automatically registered with OBU as a result of a partnership with the ACCA professional accountancy qualification, but these students have been excluded from HESA's TNE data since the 2019/20 academic year.

Figure 7: UK TNE enrolments in Sri Lanka, Malaysia and Nepal, 2017/18 to 2022/2023

UK TNE enrolments

■ Sri Lanka ■ Malaysia ■ Nepal
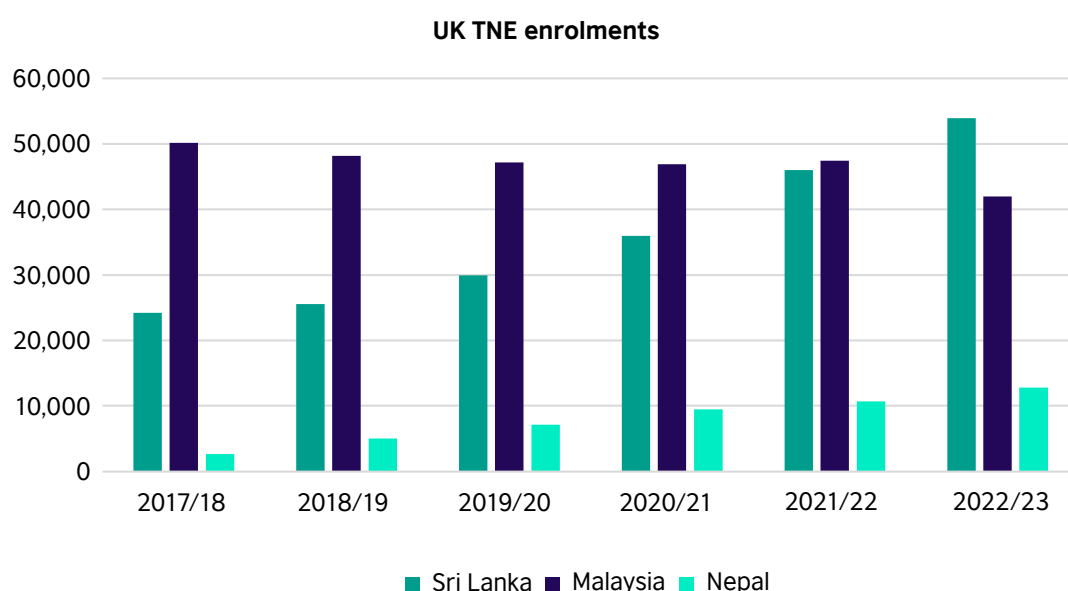
Source: HESA

4.5.1 Sri Lanka

As seen above, Sri Lanka has seen considerable levels of TNE development in recent years and provides a useful point for comparative analysis. Sri Lanka can be considered a developed example of TNE, as it currently has six delivery types in place: franchise, validated programmes, articulation agreements, joint awards, dual awards and branch campuses. Based on data from 2022/23,[57] UK HEIs reported a little over four times as many students in Sri Lanka as Nepal. As the two countries are roughly similar in terms of the size of their HE sectors, this also means that TNE is much more common in Sri Lanka as a share of total HE students.

While undergraduates make up a majority of TNE students in both countries, postgraduates make up almost a third of UK TNE enrolments in Sri Lanka, compared to only around 10% in Nepal (Fig.8).

Figure 8: UK TNE enrolments in Sri Lanka by level of study, 2017/18 to 2022/23

UK TNE enrolments

■ Undergraduate ■ Postgraduate

Source: HESA

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57.   https://www.hesa.ac.uk/news/23-05-2024/students-transnational-education-2022-23
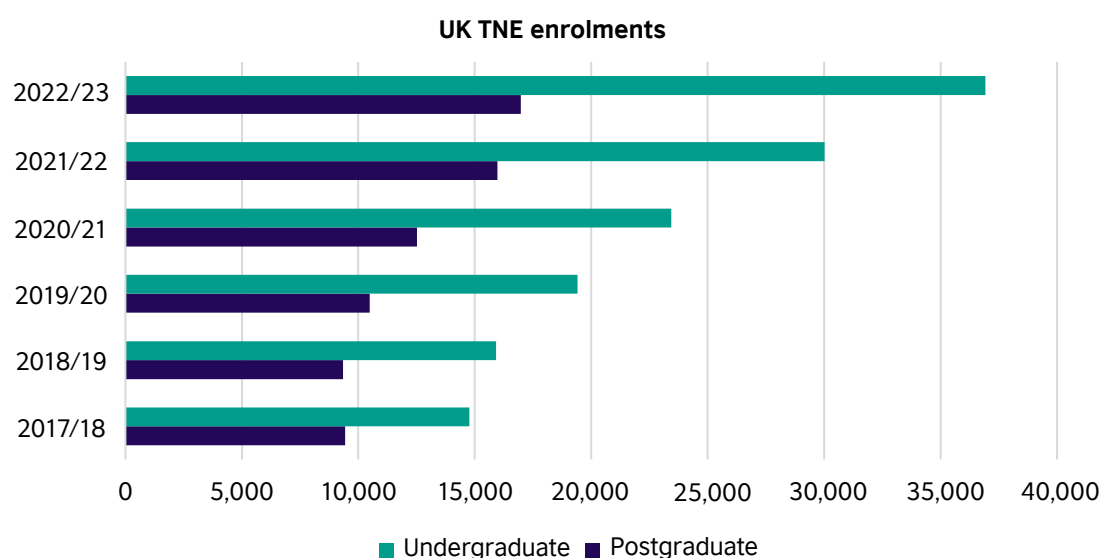
When considering the types of provision in Sri Lanka, there is an almost complete dominance of the collaborative provision model (Fig. 9), similar to the situation in Nepal. This type of provision is central to the early and middle stages of TNE development and is a key factor of growth. Partnership selection is critical, as is an understanding of success measurement and long-term agenda setting.

Figure 9: UK TNE enrolments in Sri Lanka by type of provision, 2022/23

- Distance, flexible and distributed learning
- Collaborative provision
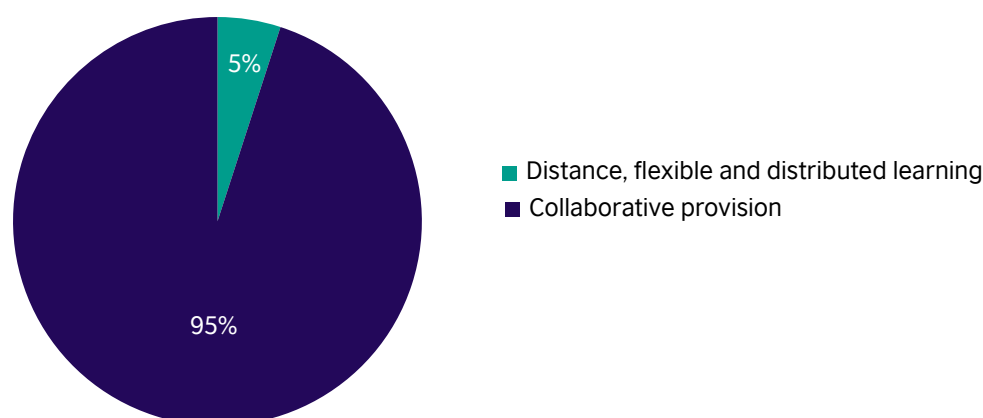
Source: HESA

4.5.2 Malaysia

With a comparable population to Nepal, Malaysia represents a useful comparator. When its long history of TNE development is considered, there is scope for increased understanding of opportunities, regulatory issues, potential and challenges. With almost 42,000 TNE students in 2022/23, Malaysia is still one of the UK's top TNE host countries.[58] The relationship, both at national and institutional level, between Malaysia and the UK has been in place for over two decades, and Malaysia is home to the largest number of UK branch campuses, compared to any other country.
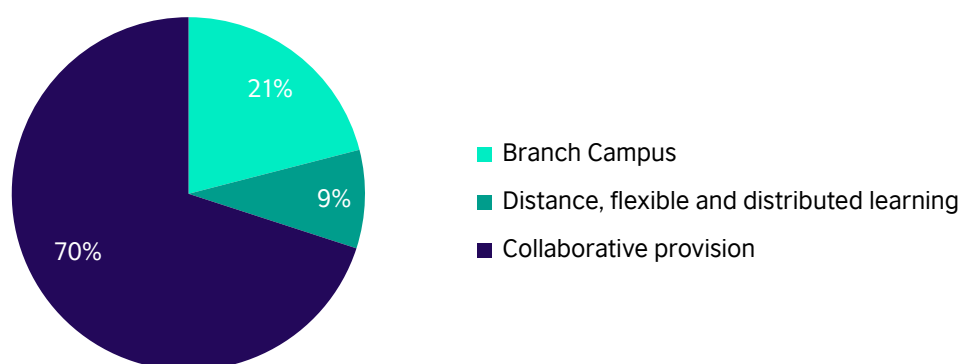
Malaysia is further along the TNE journey than both Nepal and Sri Lanka and, therefore, represents an aspirational target, rather than a realistic immediate goal. What is relevant about Malaysia is an understanding of the internal regulatory and policy reviews that have been developed and refined over the past 20 years, as these have supported (and sometimes hindered) the growth of TNE.

TNE in Malaysia, as in many other countries, initially played an important role in expanding access to higher education, as well as in increasing the level of HE quality domestically by offering internationally recognised and accredited degree programmes. Over time, TNE partner institutions in Malaysia have developed expertise in delivering HE courses and gained their own degree-awarding powers, which has eventually led to TNE student volumes peaking and then declining owing to the greater availability of high-quality local options.

In comparison with Nepal and Sri Lanka, branch campuses play a major role in UK TNE in Malaysia. However, collaborative provision such as franchised and twinning programmes still accounts for the majority of students (Fig. 10).

Figure 10: UK TNE enrolments in Malaysia by type of provision, 2022/23

- Branch Campus
- Distance, flexible and distributed learning
- Collaborative provision

Source: HESA

58.   https://www.universitiesuk.ac.uk/universities-uk-international/insights-and-publications/uuki-blog/uk-malaysia-transnational-education

TNE has also supported Malaysia's aim of becoming a regional HE hub, with significant numbers of international students enrolled at branch campuses in Malaysia. Furthermore, the country has also become an 'exporter' of TNE, with Malaysian universities setting up their own TNE programmes in overseas countries, including Nepal.

Malaysia represents a model to learn from, rather than to copy immediately. The long process of development in Malaysia for TNE ensures that many, if not all, of the pitfalls that can occur have occurred. This makes for an ideal case study, as it provides clear and relevant examples of good and bad practice.

4.6. Opportunities for future TNE growth

Interview findings and responses demonstrate the potential for TNE growth in Nepal. Nepal has historically been compared with Sri Lanka, due to contextual factors and growth potential – with one example being the British Council's opportunity matrix, published in 2013.[59] This report categorised both Sri Lanka and Nepal in Group 5 – 'well below average' - for growth potential. However, Sri Lanka has since evolved into a significant destination hub for TNE.[60]

The scale of UK TNE in Nepal has more than quadrupled in the last five years. However, there is still relatively little diversification in the number of institutions delivering TNE in Nepal, with London Metropolitan University, Wolverhampton, Sunderland and Coventry being the most prominent. The interviewees went on to suggest that the development of a clear and efficient approval process, coupled with policy amendments to support quality assurance, will be critical in unlocking Nepal's potential as a destination for TNE.

Respondents discussed the subjects and qualifications that students in Nepal tend to pursue. They mentioned that about 40 per cent of students aspiring to study abroad are inclined towards business or management, while others opted for IT, engineering, hospitality, languages and Japanese language. Interviewees also emphasised the potential for UK-affiliated programmes, particularly in fields such as AI and data science, where there is high employment demand.

There was also a trend of students completing one year of study in Nepal and two years in the UK, and a small number of students transferring to the UK for their final year. They emphasised that while qualifications were not a major issue, exposure and skills were more important. Those interviewed further suggested that key growth areas for TNE could include:

- master's programmes in IT and computing, which are increasingly in demand in the job market
- postgraduate studies and research
- blended-learning programmes, which are viewed more favourably by regulators than fully online options
- enhanced industry collaborations to provide students with practical experience and job opportunities.

In addition, Nepali students studying abroad expressed that they were attracted to programmes that allow them to study part of the degree in another country aside from the one the institution of their choice is located in. This suggests potential demand for multilateral partnerships and international transfer options.

Summary

There is significant demand for TNE in Nepal, with growing numbers of students studying in partnerships with UK and other overseas universities. TNE partnerships provide valuable skills and have positively impacted local communities, as well as helping to address brain drain – although TNE alone cannot offer a full solution to this problem. Parents and students alike demonstrated the value of quality assurance and reputation when selecting a provider, and this is of direct relevance to both the providers and the governance and regulatory environment in Nepal.

However, the suspension of new approvals for TNE providers means that the sector is dominated by a few players. There are also a variety of operational challenges facing TNE providers.

59. https://www.britishcouncil.org/sites/default/files/the_shape_of_things_to_come_2.pdf
60. https://opportunities-insight.britishcouncil.org/features/growth-of-sri-lankas-private-higher-education-sector

Case studies

5.1. London Metropolitan University TNE collaborations in Nepal

London Metropolitan University (London Met) currently collaborates with three institutions in Nepal:

- Islington College, Kathmandu (ICK) – ICK was introduced to the university in 2010. It was originally established in 1996 as a provider of computing programmes. In 2012 they established a partnership offering BSc Computing, with 500 students, and they have since developed a diverse range of courses in IT Security and Business Administration at both undergraduate and postgraduate level.

- Informatics College Pokhara (ICP) – IPC was established in 2011, and since 2017 London Met has run BA (Hons) Business Administration and BSc (Hons) Computing courses.

- Itahari International College (IIC) – IIC was established in 2017 to provide UK higher education Computing and Business Administration programmes specifically in the region of Itahari, an increasingly significant transport hub in Nepal. In collaboration with London Met, IIC offers BA (Hons) Business Administration and BSc (Hons) Computing.

All three institutions operate under the umbrella of the Innovate Nepal Group (ING). ING is an investment holding company established with the aim of advancing HE provision in Nepal by blending high-quality international qualifications with local context and needs. The collaboration involves ING colleges offering London Met undergraduate and postgraduate programmes under franchise agreements. Under these arrangements, ING colleges manage the admission process, and students are registered as students at both London Met and the relevant ING college. Standard admissions criteria have been agreed with London Met, and student application forms and relevant documents have been approved by them. All programmes operate under London Met academic regulations, and course teams adhere to the university's internal quality assurance regulations.

Many of the ING staff have UK qualifications, although some of these may have been gained outside the UK. London Met also offers training and development sessions on its visits to Nepal, and these can be to staff, students or local businesses.

Since the course's inception, over 12,500 students have graduated with a London Met degree. In addition, London Met has offered a postgraduate scholarship programme to Nepali students who complete their undergraduate studies at Islington College. The scholarship covers the full cost of studying for a master's degree at London Met in the UK, worth more than £33,000. To date eight students have taken advantage of these scholarships.

The partnership started as a transaction and is now transformative in that it fits in with the university's mission of 'changing lives through the power of education'. The education provided by London Met enables the development of high-level skills and helps to fill a gap in the supply of higher education.

- It offers affordable education to those who either cannot afford to or are unable to study outside Nepal. As a former student said:

> *I am from a professional family, my father is a teacher … I am lucky that I learnt English at school but I would not be able to go abroad to study as it is too expensive … I have two brothers and two sisters at home and once I have graduated I will be able to get a good job and help pay for their education.*

- It benefits the local communities, with ancillary businesses such as cafés developing around the colleges.

- It enhances the employability of the graduates, which has led to the development of a cyber security centre in Nepal staffed by alumni.

- It raises the profile of the university in the country and throughout the region. This was noted during the aftermath of the devastating earthquake in Nepal in 2015, where support was provided by the university. This was greatly appreciated by the Nepali society and helped to further raise the status of both the colleges and the university.

To be successful:

- a partnership must work together and have a mutual understanding of each institution's strategic objectives

- the university should have an understanding of and a respect for different working cultures and operational arrangements

- there needs to be 'buy-in' across the university from senior management, academics and professional services

- there needs to be open communication that comes from building trust. This is very important in countries where there is a high-power distance.

5.2. Coventry University collaboration with Softwarica College of IT and E-Commerce

Coventry University, UK, (CU) was founded by entrepreneurs and industrialists as the Coventry School of Design in 1843 and celebrated its 175 years in 2018. CU is a dynamic and outward-looking institution with a tradition of teaching excellence, impactful research and bold international partnerships.

Softwarica College of IT and E-Commerce, established in 2010, has been an exceptional educational institution, offering three undergraduate courses and one postgraduate course since its collaboration with CU in 2019. BSc (Hons) Software Engineering, BSc (Hons) Ethical Hacking and Cybersecurity and BSc (Hons) Computer Science with Artificial Intelligence are the undergraduate courses, and MSc Data Science and Computational Intelligence is the postgraduate course.

Softwarica College is an integral part of the Soft-Ed Group, which has been empowering education through technology in multiple stages of student transitions.

5.2.1. Nature of agreement and proceedings

The collaboration of Softwarica College with CU is framed as an Autonomous Franchised Agreement. These arrangements enable Softwarica College to govern the admission process in accordance with the eligibility criteria set by CU in specified documentation. This documentation adheres to standard admission regulations, agreed and approved by both institutions. Likewise, post enrolment, every department is required to operate in total synchronisation with CU quality assurance frameworks, academic regulations and conduct policies. The CU IT programmes offered by Softwarica College are UK accredited by the British Computing Society. Graduates from both the undergraduate (360 credits each) courses and the postgraduate (180 credits) course have relevant degree equivalence with Tribhuvan University, Nepal.

5.2.2. Faculty and staff

Since its establishment, the college has handpicked human resources that carefully align with academic and support service needs. Most of the staff have international qualifications across multiple educational boards, with extensive experience of relevant industries. To support teaching and learning enhancement, the faculty receive multiple training and development opportunities either during official CU representative visits or virtually.

5.2.3. Alumni network, scholarships and achievements

Within five years, over 1,500 students have graduated with a degree from CU. Considering this was between March 2019 and September 2023, this is viewed as a major achievement. These numbers appear even more noteworthy when around 150 of those students are in receipt of the merit-based scholarship worth around 50 Lakh, and the Coventry Ambassador Scholarship worth around 25 Lakh, bestowed upon five students per academic year.

While tech aspirants are numerous, Softwarica College is also proud to have students like Mr Santoo Shrestha, the third Nepali individual ever to qualify for the Summer Olympics 2024. Mr Shrestha has been a national table tennis winner four times, bringing glory and pride to the institution. He was the flag carrier along with Manita Shrestha Pradhan during the Opening Ceremony for the Paris Olympics. His achievements are a testament to the whole experience one can behold as a fellow Softwarica student. Other achievements for the college in 2024 include:

- first place in the Venture Quest competition organised by Malpi College
- first place in the Biz Fest competition hosted by Prime College
- runner-up in the Martech Masters competition (Marketing Category)
- second place in the Hackathon at KIST College
- runner-up in Ace Spectrum – The AI Collab
- first place in the Robo War competition organised by KU during EEPEX 24
- first place in the Recursion Hack organised by COSMOS College.

These achievements culminate from the college's extensive extracurricular activities in various competitions, collaborations and research activities. Beyond those achievements, the college was involved with the Nepal Food Forum (NFF), where it engaged with over 600 visitors and delegates. The college team presented innovative projects centred on the application of AI in agriculture. A highlight of its participation was Himani, an AI robot fully designed and developed by final-year students, which made history as Nepal's first-ever AI panellist. Himani actively

contributed to discussions on the future impact of AI in agriculture, earning significant recognition and appreciation of student-driven innovations.

In addition to participation in NFF, the college highlighted its commitment to innovation through Tech X, held from 30 July to 4 August 2024 at the college. This annual marquee event attracted over 18,000 visitors from more than 60 participating schools. The year's showcase featured over 35 final-year thesis projects, focusing on key areas such as robotics, AI and cybersecurity.

Notable exhibitions included Hari the Robot, a humanoid teacher assistant; a robotic dog designed for task assistance; an autonomous parking system; an AI diagnostic aid for eye hospitals; a ransomware detection cybersecurity solution; and a banking robot utilising natural language processing and facial recognition for enhanced banking services. A highlight of the event was the Robo Mania League, an electrifying competition where artificial bots battled in an arena under specified rules and time constraints, fostering excitement and highlighting the ingenuity of the participants. With a prize pool of NPR 70,000, the competition drew significant attention and participation. Building on this success, the college launched the Robo Warriors League 2024/2025, an ongoing six-month league that challenges students to secure sponsorships worth NPR 100,000 for bot creations, with a staggering cash prize of NPR 350,000, in addition to prizes of NPR 100,000 and NPR 50,000 for winners and runners-up.

Currently, the college is proud to have secured sponsorship from 24 organisations for the bots and four organisations for the arena, making this league one of the largest of its kind in the country. This initiative not only fosters technical prowess but also builds a community around robotics and innovation, setting a new standard for educational competitions in Nepal.

Together, these events exemplify the college's dedication to fostering creativity and collaboration among the students while highlighting the transformative potential of technology in various fields. The college also facilitates mentorship, resources and networking opportunities, ensuring that students are well equipped to thrive in their respective fields.

5.2.4 Reverting to the community

Aligned with the university's mission of 'Creating a better future', this partnership has delivered significant value to students and the industry. Value for money is

one of the college's core principles, with each programme crafted to equip students with the essential skills needed in their fields, while keeping costs accessible. This ensures students receive high-quality education and training without the burden of excessive expenses.

- Collaboration fosters entrepreneurial growth, contributing to local businesses and industries, thereby benefiting the broader community.
- The college is committed to producing highly skilled professionals in the IT industry, aiming to position Nepal as a premier destination for top-tier talent.
- The curriculum is aligned with industry demands to ensure graduates are not only knowledgeable but also ready to contribute immediately upon graduation.

For collaboration to sustain and succeed:

- to guarantee common aims and reciprocal development, a relationship must be in line with both parties' strategic objectives (i.e. CU and the college)
- respecting one another's academic procedures and operational frameworks will help both institutions develop a co-operative work environment
- senior leadership, academic staff and administrative teams at both institutions must be involved diligently and committed to furthering the collaboration
- when overseeing cross-cultural partnerships, open and consistent communication and trust-building are essential
- regular feedback systems and ongoing quality assurance are essential for upholding academic standards and enhancing the educational experience.

Case study provided by Pramod Poudel, Director at SoftEd Group; co-founder of several HEIs together with EduTech Startups.

Summary

Evidence from the case studies demonstrates the clear need for collaborative action and community engagement. Partnerships must be transparent, with clear lines of communication, and seek to serve the interests of both parties. To this end, programmes offered must be contextually relevant and appropriate to the market and student need.

Conclusions

The current demographics in Nepal for university-age students is significant, and the appetite for international study is evident, as is the associated capability to fund this from a family perspective. The existing TNE programmes are successful and demonstrate an affordable quality option. Both students and parents are in favour of international provision; meanwhile the government is also in favour of increased international capacity and development but is focused more on collaboration and exchanges rather than TNE.

Interview findings highlight concerns with the current policy landscape and restrictions on new TNE partnerships. Local quality assurance mechanisms and audits present another obstacle that may impact on the credibility of TNE in Nepal.

Operational challenges have compounded these issues. Nepal's 35-day nationwide holiday calendar requires careful adaptation of academic schedules, and the prevalent four-year degree structure, which differs from the three-year UK model, has required an additional foundation year to align to local programme requirements. Student and institutional mobility also face obstacles due to limited credit transfer options, visa restrictions when entering the UK and logistical complexities around fee transfers to international institutions.

What is also evident from the interviews, and supported by desk research, is the potential for improvement in these areas by institutions and the aims of the government to increase capacity and status as an international educational hub – both as a means for growth and as a response to the significant brain drain. It was further noted that these hubs could support sustainability agendas if supported by virtual rather than physical operating models.

Survey findings show student interest in international and TNE study as it provides greater flexibility and access to degree subjects such as in programmes on technology, engineering and computer science. Student responses highlighted how important it is to fulfil parental expectations – echoed in the focus group findings – demonstrating the importance of appropriate marketing and contextual understanding of value and impact.

The focus group findings also demonstrate an overall positive experience with TNE and highlight the key role that parents play in the selection process. Responses, from parents and students, indicated TNE's potential in supporting and developing the community and stressed issues of quality assurance and value.

The two case study findings demonstrate that TNE can provide an affordable study option for Nepali students, can support quality delivery domestically and can support the local community and economy through the development of infrastructure and local commerce that arises as a result of these new partnerships.

Although the current legislative and policy climate poses challenges for TNE growth, there is clear potential and interest for development.

6.1. Recommendations

The recommendations in this report are divided into two key categories to ensure clear and actionable guidance for relevant stakeholders: i) Ministry of Education/UGC and ii) TNE providers and their partners.

For Ministry of Education/UGC

6.1.1. Streamline regulatory procedures

To enhance Nepal's appeal as a destination for TNE, it is recommended that the approval process be streamlined. The approval process for new providers has been suspended for several years, with a lack of communication from the Ministry of Education on any likely future changes. A dedicated platform for publishing updated guidelines and approval notices would reduce confusion and encourage more international institutions to apply. Additionally, more explicit timelines and expectations would help potential TNE providers understand the process, ensuring that requirements like accreditation, government approval and sustainability plans are met efficiently.

Furthermore, greater transparency in the accreditation process is essential. While the UGC has updated its guidelines, there is still a lack of clarity on how these criteria are enforced and communicated. Streamlining this process with more straightforward guidelines, timelines and enforcement of requirements would

create certainty for international institutions. Involving global experts for knowledge sharing and to support alignment of TNE development and delivery with international standards would help to ensure that Nepal's HE system meets international standards.

6.1.2. Improve data transparency

Establish more accurate reporting and data-collection mechanisms to align government statistics with on-the-ground realities. Enhance transparency and data reporting through implementing standardised data-reporting systems on TNE providers and programme performance, to enable stakeholders to make informed decisions, aid strategic planning and policymaking, and drive quality improvements across the sector.

6.1.3. Strengthen quality assurance

Although the MOEST Higher Education Division's annual review process is crucial in overseeing TNE programmes, the current system could benefit from further strengthening. Many interviewee respondents noted that while the UK partner institutions have robust QA mechanisms, there remains room for improvement in the local monitoring process. Recent guideline updates provide timelines and QAA processes that will support a greater sense of alignment and understanding in the establishment of UK TNE in Nepal.

The recent developments by the UGC, including updated guidelines and eligibility criteria for foreign-affiliated HEIs, have signalled positive progress in ensuring QA for TNE in Nepal. A more robust QA framework can help the UGC to foster greater confidence in Nepal's ability to handle the growing demand for TNE.

6.1.4. Support institutional diversification and promote international collaboration

While UK TNE has seen significant growth in Nepal, the number of active institutions is still relatively limited, with a few providers, such as Coventry, Sunderland, London Metropolitan and Wolverhampton, accounting for a large proportion of students. This is in part related to suspension of new applications as noted in Section 6.1.1. In addition, the existing subject recognition criteria may inadvertently hinder the development of specific academic fields. Meanwhile, establishing stable collaboration frameworks will facilitate stronger international ties.

By revising these criteria and simplifying the recognition process, Nepal can open the door to a wider variety of international universities and academic disciplines, providing students with more choices and contributing to a more dynamic, competitive and globally relevant HE sector.

For TNE providers and their partners

6.1.5. Curriculum and skills alignment

The current trend of students completing part of their studies in Nepal and finishing in the UK highlights the importance of exposing students to local and international learning environments. However, in addition to obtaining a degree, students increasingly value developing skills that enhance their employability. There is an apparent demand for TNE programmes that emphasise practical experience and industry engagement, particularly in IT, computing and postgraduate research.

By integrating local industry expertise into the curriculum and offering blended-learning formats, TNE providers can ensure that students acquire relevant, marketable skills that meet the needs of both Nepal's economy and the global job market. Parents also recognise TNE's significant contribution to local community development by improving the employability prospects of graduates, indicating a strong local preference for programmes that offer tangible skills over purely academic qualifications.

6.1.6. Incentivise lower-cost TNE options

To incentivise lower-cost TNE options, universities should consider offering a tiered pricing structure that includes premium and low-cost options.

The success of TNE partnerships is partly due to the perception of prestigious foreign education coupled with effective internal management and credit transfer systems. Offering lower-cost options with more affordable fees meets the demand for cost-effective education while preserving quality. The lower-cost options are attractive in regions like Nepal, where the affordability of TNE plays a significant role in attracting students. By presenting a variety of price points, institutions can appeal to a broader demographic, enhancing access to higher education without sacrificing educational value.

6.1.7. Address social and economic inequalities

To address social and economic inequalities in Nepal, TNE providers should prioritise expanding outreach beyond Kathmandu. Although TNE partnerships have already contributed positively to expanding access to international education to lower-income students and addressing gender and social inequalities, challenges persist, especially for female and rural students. While some institutions in Pokhara, Itahari and Biratnagar already offer TNE programmes, expanding TNE offerings beyond Kathmandu and these cities can help with ensuring affordable pricing, and targeted financial support for marginalised groups can help bridge the education gap. By investing in rural outreach and

increasing gender-sensitive policies, TNE providers can reduce geographic and gender-based disparities, creating more equitable access to higher education in Nepal.

6.1.8. Promote international collaboration

To promote international collaboration, TNE providers should focus on expanding research partnerships, joint PhD programmes and student exchange opportunities with international universities. By fostering research partnerships and joint PhD programmes, institutions can strengthen academic ties and provide students with valuable opportunities for mobility and cross-border learning.

6.1.9. Identify sustainable TNE models

The environmental impact of frequent travel by students and staff involved in TNE partnerships is a growing concern. By shifting towards virtual hubs and digital platforms, institutions can support sustainability agendas and enhance access and flexibility for students across borders. This approach would reduce carbon footprints associated with travel, while maintaining academic and research collaboration on a global scale. Emphasising sustainable TNE models aligns with the growing need for universities to balance educational expansion with environmental responsibility.

By addressing these areas, TNE in Nepal could become a more effective tool for educational and economic development, ultimately fostering stronger ties with the UK, while meeting the local demand for higher education.

Appendices

Appendix A – UK TNE in Nepal

Table 1: Common TNE classification framework for international programme and provider mobility (IPPM)

Common TNE classification framework for IPPM	
Two major approaches to TNE provision – independent and collaborative	
Independent TNE provision The foreign sending HEI/ provider is primarily responsible for the design, delivery and external quality assurance of their academic programmes and qualifications being offered in another country.	Collaborative TNE provision A foreign sending HEI/ provider and host country HEI/ provider work together on the design, delivery and/or external quality assurance of the academic programmes
Six categories of IPPM	
1. Franchise programmes Description: The foreign sending HEI/provider has primary responsibility for the design, delivery and external quality assurance of academic programmes offered in the host country. The qualification is awarded by a sending HEI. Face-to-face, distance and blended education can be used. *Commonly used terms:* *import/export, validation, foreign, non-local, international private programmes*	4. Partnership programmes Description: Academic programmes in host country/ies are jointly designed, delivered and quality assured through collaboration between host and sending country partners. The qualification(s) can be awarded by either or both host and sending country HEIs in the form of single, joint or double/multiple degrees. Face-to-face, distance and blended education can be used. *Commonly used terms:* *joint/double/multiple degrees, twinning programme*
2. Franchise programmes Description: The foreign sending HEI/provider has primary responsibility for the design, delivery and external quality assurance of academic programmes offered in the host country. The qualification is awarded by a sending HEI. Face-to-face, distance and blended education can be used. *Commonly used terms:* *import/export, validation, foreign, non-local, international private programmes*	5. Partnership programmes Description: Academic programmes in host country/ies are jointly designed, delivered and quality assured through collaboration between host and sending country partners. The qualification(s) can be awarded by either or both host and sending country HEIs in the form of single, joint or double/multiple degrees. Face-to-face, distance and blended education can be used. *Commonly used terms:* *joint/double/multiple degrees, twinning programme*
3. Self-study distance education Description: Foreign sending distance-education provider offers academic programmes directly to host country students. No local academic support available. Qualification, curriculum and external quality assurance offered by foreign sending HEI. *Commonly used terms:* *fully online education, open university, MOOCs, pure distance education*	6. Distance education with local academic partner Description: A foreign distance-education HEI/provider offers programmes to host country students in collaboration with a local academic partner. Curriculum can be jointly developed, and the qualification awarded by foreign HEI or by both partners. External quality assurance provided by foreign sending HEI/provider or both partners. *Commonly used terms:* *online or distance education with reference to local academic partner*

Source: https://www.britishcouncil.org/sites/default/files/tne_classification_framework-final.pdf

Capacity tool

A clear understanding of the TNE landscape and internal variety and models of delivery are necessary such that the most suitable, and therefore potentially sustainable, approaches are selected. A tool developed by Jane Knight for the British Council provides an analytical tool for capacity review and planning.

Tables 2 and 3 provide a platform and framework for ongoing analysis within Nepal – both from the perspective of current activity and for future developments.

At its core level, TNE provision can be divided into two key categories: independent and collaborative (see Table 2).

Table 2: Independent versus collaborative programme and provider mobility

Two major approaches to TNE provision	
Independent	Collaborative
Independent TNE provision The foreign sending HEI/ provider is primarily responsible for the design, delivery and external quality assurance of their academic programmes and qualifications being offered in another country.	Collaborative TNE provision A foreign sending HEI/ provider and host country HEI/ provider work together on the design, delivery and/or external quality assurance of the academic programmes

Source: https://www.britishcouncil.org/sites/default/files/tne_classification_framework-final.pdf

These two core elements can be further divided into three sub-categories for each, thus creating a total of six categories of programme and provider mobility (Table 3).

Table 3: Six categories of modes of programme and provider mobility

Row	Independent	Collaborative
1	Franchise programmes	Partnership programmes
2	International branch campus	Joint universities/colleges
3	Self-study distance education	Distance education with local academic partner

Source: https://www.britishcouncil.org/sites/default/files/tne_classification_framework-final.pdf

Appendix B – List of contributing stakeholders

Prospective TNE students
Current TNE students
Parents
Transnational HE providers:
●   Asian Institute of Technology and Management
●   The British College
●   Softwarica College
●   The Westminster College
Approved UK TNE institutions
●   London Metropolitan University
●   University of Sunderland
●   University of Westminster
University Grants Commission
Higher Education Division of the Ministry of Education
British Council Global – HESA Data
Universities UK International
Department of Business and Trade, Nepal
Foreign, Commonwealth and Development Office (FCDO)
Education agents and consultants based in Nepal
●   Study Global Nepal
●   Glocal Private Limited
●   Garima Bista (Education consultant)
The Times Higher
QAA UK
UK ENIC

Note of appreciation

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Appendix C – UK–Nepal TNE partnerships

(Based on available website data at the time of publication)

Institution Name (based in Nepal)	Partner name (the UK partner)	Ranking of UK partner*	Programme details
The British College	Leeds Beckett University	801–1000th	BSc (Hons) Computing
			Weekend MBA (Executive)
			MBA (Graduate)
			MSc Information and Technology
The British College	University of the West of England, Bristol	601–800th	BBA (Hons) Business and Management
			BSc (Hons) Cyber Security and Digital Forensics
			BSc (Hons) Computer Science – Artificial Intelligence
The British College	Pearsons, Dubai and 'Top London University'**		BA (Hons) Hospitality Management (BHM)
British International College	Keele University	501–600th	BSc (Hons) Data Science
			MSc Advanced Computer Science
Softwarica College of IT and E-Commerce	Coventry University	601–800th	BSc Computer Science with Artificial Intelligence (Franchise)
			BSc Computing (Franchise)
			MSc Data Science with Computational Intelligence (Franchise)
			BSc Ethical Hacking and Cyber Security (Franchise)
Islington College	London Metropolitan University	601–800th	BSc (Hons) Computing
			BSc (Hons) Computer Networking and IT Security
			BSc (Hons) Multimedia Technologies
			BSc (Hons) Computing with Artificial Intelligence
			BBA specialising in International Business
			BBA specialising in Digital Business Management
			BBA specialising in Advertising and Marketing
			BBA Specialising in Events and Tourism Management
			BA (Hons) Accounting and Finance
			MSc IT and Data Analytics
			MSc IT and Cyber Security
			MBA specialising in International Business Management
			MBA specialising in Digital Media
			MBA specialising in Project Management
			MBA specialising in Advertising and Marketing
			MBA specialising in Events and Tourism
			MBA specialising in Cyber Security

Informatics College Pokhara	London Metropolitan University	601–800th	BSc (Hons) Computing
			BA (Hons) Business Administration
Itahari International College, Morang	London Metropolitan University	601–800th	BSc (Hons) Computing
			BBA (International Business)
			BBA (Digital Business Management)
			BBA (Advertising and Marketing)
Naaya Aayam Multidisciplinary Institute	University of Northampton	1201–1500th	BSc (Hons) Environmental Science
			BSc (Hons) Computing
			BSc (Hons) Computing (Software Engineering)
			BEng Computing (Computer Networks Engineering)
			BA Business Administration (BBA)
			MSc Computing
The Westminster College (TWC)	University of Westminster	801–1000th	BSc (Hons) Computer Science
			BSc (Hons) Cyber Security and Forensics
			Pathway Foundation programmes
ISMT College Kathmandu Campus	University of Sunderland	1201–1500th	BA (Hons) Business and Management (BBA)
			BSc (Hons) International Tourism and Hospitality Management (BHM)
			BSc (Hons) Cyber Security and Digital Forensics
			BSc (Hons) Computer Systems Engineering (IT)
			BSc (Hons) Computer Science (subject to approval)
			MBA
			MSc Computing (subject to approval)
ISMT College Pokhara	University of Sunderland	1201–1500th	BSc (Hons) Computer Systems Engineering (IT)
			BA (Hons) Business and Management (BBA)
ISMT College Chitwan	University of Sunderland	1201–1500th	BSc (Hons) Computer Systems Engineering (IT)
			BSc (Hons) International Tourism and Hospitality Management
ISMT College Biratnagar	University of Sunderland	1201–1500th	Information not available on the website
ISMT College Butwal	University of Sunderland	1201–1500th	BSc (Hons) Computer System Engineering
			BSc (Hons) International Tourism and Hospitality Management
Silver Mountain School of Hotel Management, Kathmandu	Queen Mary University of London	141st	BA (Hons) IHTM
			BA International Culinary Arts
			MBA Hospitality
Ace International Business School, Sinamangal	Queen Margaret University Edinburgh	reporter***	BBA (teach out)

College	University	Ranking	Programme
Ace International Business School, Sinamangal	Glasgow Caledonian University	801–1000th	BBA
			MBA
Patan College for Professional Studies	University of Bedfordshire	1001–1200th	BSc Software Engineering
			BSc Computer Science and Software Engineering (top up)
			Foundation year BSc Software Engineering
			BSc Business Management
			BSc Business Management with Business Analytics
			BSc Business Management with Digital Marketing
			BSc Business Management with Finance
Biratnagar International College (formally Merryland College)	University of Wolverhampton	801–1000th	BSc (Hons) International Business Management
			BSc (Hons) Computer Science
Herald College Kathmandu	University of Wolverhampton	801–1000th	BSc (Hons) Computer Science
			BSc (Hons) International Business Management
			International MBA (IMBA)
			BSc (Hons) Cyber Security
Sunway College Kathmandu	Birmingham City University	801–1000th	BSc (Hons) Computer and Data Science (4-year sandwich)
Stamford College, Kathmandu	University of East London	1001–1200th	BSc Computer Science
			BSc Data Science and AI
Asian Institute of Technology Management (AITM) College	University of the Highlands and Islands	reporter***	BA (Hons) Hospitality Management (not yet approved – not on AITM website)
Embark College	University of Roehampton	801–1000th	In the process of getting approval
Kathmandu School of Law, MMIHS, Pokhara University	Liverpool John Moores University	601–800th	Proposed partnership

* Times Higher Rankings – World Rankings 2025

**Top London University not disclosed: https://www.thebritishcollege.edu.np/programme/ba-hons-hospitality-management

***Universities that submitted data to the Times Higher but failed to meet the eligibility criteria for their global rankings table are listed as 'reporter'.

Appendix D – Additional resources

- UK Home Office Immigration Statistics Quarterly Release https://www.gov.uk/government/collections/immigration-statistics-quarterly-release

- Global Student Living Insight Nepal: Features Nepalese students in top destinations plus a survey of what matters most for them to choose where to study internationally https://gslglobal.com/2023/03/03/inbound-insight-nepal/

- Asian Development Bank Report on the country's HE system https://gslglobal.com/2023/03/03/inbound-insight-nepal/

- Transnational education in Sri Lanka: Operational and quality assurance landscape. British Council, August 2024 https://opportunities-insight.britishcouncil.org/sites/siem/files/field/file/news/Sri%20Lanka%20TNE%20Report_August%202024.pdf

- Statista (19 June 2023). Number of international students studying in HE institutes in Malaysia in 2022, by country of origin (in 1,000s) https://www.statista.com/statistics/866731/international-studentsin-malaysia-by-country-of-origin/

- Issues with HE sector in Nepal:

  - https://nipore.org/current-state-of-higher-education-in-nepal/

  - https://myrepublica.nagariknetwork.com/news/tertiary-education-at-a-crossroads-in-nepal/

  - https://kathmandupost.com/columns/2023/01/30/rethinking-higher-education

  - https://kist.edu.np/blog/nepal-s-higher-education-reform-obstacles-prospects-and-advancement-routes

  - https://www.timeshighereducation.com/student/where-to-study/study-in-nepal

  - https://www.collegenp.com/article/understanding-the-state-of-higher-education-in-nepal/

  - https://www.nepallivetoday.com/2023/08/02/why-nepali-universities-are-failing/

  - https://myrepublica.nagariknetwork.com/news/education-minister-shrestha-decides-to-take-initiatives-to-appoint-experts-as-chancellor-vice-chancellor-of-universities/

  - https://economynext.com/sri-lanka-looks-to-sign-agreement-with-nepal-on-higher-education-141732/

  - https://www.universityworldnews.com/post.php?story=20230425162616674

- Key international destinations:

  - https://myrepublica.nagariknetwork.com/news/australia-emerges-as-top-choice-for-higher-education-among-nepali-students-1/

  - https://www.freepressjournal.in/education/australian-universities-revoking-offers-to-indian-and-nepali-students-amid-visa-crackdown

  - https://www.sbs.com.au/news/article/we-have-never-refused-so-many-students-why-visa-approvals-have-dropped-to-record-levels/dj2aj3kio

  - https://www.timeshighereducation.com/news/nepalese-peak-new-red-flag-australian-enrolment

  - https://myrepublica.nagariknetwork.com/news/number-of-nepali-students-going-to-study-in-us-increased-by-27-9-percent-last-year/

  - https://np.usembassy.gov/open-doors-report-shows-5-percent-increase-in-nepali-students-studying-in-the-united-states/#:~:text=Kathmandu%20%E2%80%93%20According%20to%20the%202021,States%20has%20increased%20by%205.6

  - https://www.chronicle.com/package/nepali-students-tough-road-to-america/

  - https://theannapurnaexpress.com/story/49616/

  - https://www.facebook.com/groups/223620869634/

- Effects of brain drain:
    - https://kathmandupost.com/special-supplement/2023/12/31/yearender-2023-youth-exodus-drains-nepali-colleges
    - https://myrepublica.nagariknetwork.com/news/brain-drain-a-concerning-trend-in-nepal/
    - https://theannapurnaexpress.com/story/45254/
    - https://kathmandupost.com/columns/2023/08/26/reversing-brain-drain-1693070873
    - https://myrepublica.nagariknetwork.com/news/outflow-of-money-from-nepal-for-higher-education-should-be-stopped-pm-dahal/
    - https://monitor.icef.com/2023/07/government-of-nepal-increases-taxes-for-nepali-students-studying-abroad
    - https://thepienews.com/nepal-bars-students-from-intl-vet-and-language-courses/
- Aspirations to become an education hub:
    - https://thepienews.com/one-in-six-english-uni-student-studying-overseas-ofs/
    - https://myrepublica.nagariknetwork.com/news/nepal-should-be-developed-as-educational-hub-minister-gurung/
    - https://thepienews.com/nepal-seeking-to-become-international-education-hub/;
    - https://kathmandupost.com/columns/2023/08/23/a-hub-for-higher-education ;
    - https://kathmandupost.com/national/2023/11/25/ku-organises-conference-of-vice-chancellors ;
    - https://thehimalayantimes.com/kathmandu/nepal-should-be-developed-as-educational-hub-minister-gurung ;
    - https://english.khabarhub.com/2024/29/337880/
    - https://www.worldbank.org/en/news/press-release/2021/10/26/government-of-nepal-and-the-world-bank-launch-60-million-nurturing-excellence-in-higher-education-program
- Quality of TNE

  https://oxfordbusinessgroup.com/
- Developing equitable TNE partnerships: Where to begin (Last updated Monday 3 June 2024 at 3.38pm)
    - https://www.universitiesuk.ac.uk/universities-uk-international/insights-and-publications/uuki-insights/developing-equitable-tne-partnerships
    - https://wenr.wes.org/?s=Nepal
    - https://wenr.wes.org/2023/02/franchise-and-validation-programs-opportunities-and-challenges-in-a-post-pandemic-world
    - UGC Annual Report_2019.indd (ugcnepal.edu.np)
    - https://www.collegenp.com/article/state-of-higher-education-in-nepal-challenges-and-opportunities/
    - https://www.researchgate.net/publication/358242973_STRATEGIC_PLAN_2021-2030_Quality_Assurance_and_Accreditation_of_Higher_Education_Institutions_in_Nepal
    - https://ugcnepal.edu.np/uploads/web-uploadsfiles/UGC%20Final%20Annual%20Report.pdf
    - https://nepalforeignaffairs.com/new-rules-unveiled-for-operation-of-foreign-academic-institutions/
    - https://www.unesco.org/en/articles/nepal-implements-national-framework-education-203