HE Global

The Scale and Scope of UK Higher Education Transnational Education

June 2016

About HEGlobal

HEGlobal is a joint initiative between the UK HE International Unit and the British Council. It exists to empower UK universities in their transnational education (TNE) activity. For more information about the programme visit www.heglobal.international. ac.uk
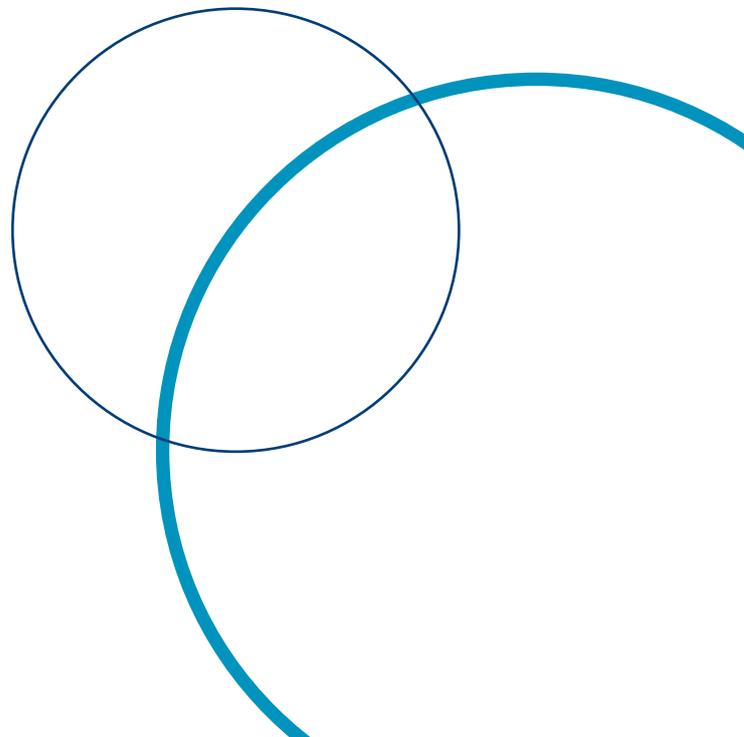
The UK HE International Unit

The UK Higher Education International Unit (IU) represents the UK higher education sector internationally. The Unit works to help universities meet their international aims by actively promoting UK universities abroad, providing trusted information for and about them, and creating new opportunities through its ability to act at sector level. The IU draws on UK university expertise to influence policy in the UK and overseas, and delivers high quality services and programmes to overseas governments and UK universities.

The British Council

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

The Scale and Scope of UK Higher Education Transnational Education

June 2016

Acknowledgements

Table of contents

Table of figures

Table of case studies

Executive summary

This report presents the findings of research into the scale and scope of UK outgoing higher education transnational education (UK HE TNE).

The report is based on a detailed survey of all UK HE providers delivering TNE in 2014/15. Responses account for two thirds of TNE students, and two thirds of those providers with significant volumes of TNE students reported to the HESA AOR.

The report looks at both programme and student numbers, and takes into account a wide range of particular data issues related to the overall TNE population, particularly the influence of very large providers. The survey and associated case studies show that there is great diversity to delivery models, partnerships, strategic approaches and characteristics in UK outgoing HE TNE. There is 'no one size fits all' as far as TNE programmes are concerned.

The main findings show:

Scale of delivery

- The top 5 countries that UK TNE is delivered in have remained constant since 2012/13. But there are changes in the next 5 countries, showing this is an evolving landscape.
- There are only 15 countries in the world where the UK does not offer any HE TNE.
- The growth rate of TNE students between 2013/14 and 2014/15[1] is 13%, compared to the 11% reported in the overall HESA AOR.
- Business and Management is the UK HE TNE subject delivered in most countries. Following that, Medicine and related studies programmes are delivered across a high number of countries, and then Arts & Humanities.

Scope of delivery

- Since 2012/13, the flexibility of offer in mode of delivery has increased. More programmes are now being offered as full time, part time, or both.
- There is a small but growing mobility of students between UK HE TNE host countries and the UK as part of TNE programmes.

Future plans

- Four in five higher education institutions (HEIs) intend to expand their TNE provision over the next 3 years.
- There is a growing sophistication of approaches to TNE development and management across UK universities, resulting in improved benefits for TNE hosts.
- Partnership approaches with host country partners are becoming more equitable. The UK partner is usually the lead on those areas of its global calling card of excellence – curriculum, quality assurance and assessment. In all other areas of programme delivery (e.g. teaching, staff development, academic, and pastoral support) there is either an equal distribution of responsibility or a strong focus on joint delivery and ownership.
- TNE provides opportunities for external expansion but also internal review. This can strengthen the core capacity and capability of an institution and support further growth in the areas of curriculum development, material delivery and partnership activity.

Alongside the quantitative analysis in this report is a series of twelve case studies. They represent some of the possible journeys to TNE provision, from different types of universities, operating in different global regions and focusing on certain aspects of education and learning provision in the host country(ies). Even where the TNE mode sounds similar, the case studies often adopt different delivery models. Each example reflects on what has worked well for that particular provision, and offers lessons for future sustainability and/or TNE growth.

---

1. Excluding the BSc in Applied Accounting offered through Oxford Brookes University and ACCA.

1. Introduction

1.1 In November 2015, WECD was appointed to undertake research into the scale and scope of UK higher education transnational education (UK HE TNE) for the HEGlobal programme, a joint initiative between the UK HE International Unit and the British Council to support UK universities' TNE activity.

1.2 Globalisation has affected the nature and extent of the demand and supply of international education, opening up the options for learners but also creating an increasingly competitive global marketplace for higher education institutions that are adopting a range of operating models to enhance their presence in an international market and/or facilitate their entry into new markets. HE TNE activity involves higher education institutions delivering their educational services in another country rather than the students travelling to the foreign university to study. It can include but is not limited to branch campuses, distance learning, online provision, joint and dual degree programmes, flying in faculty for short courses, or mixed models (known as blended learning).

1.3 HE TNE represents a modest but growing part of the UK international education portfolio and is recognised as integral to the future development of UK education and global reputation. It also has profound implications for policymakers in both the home and host countries. One of the key sources of UK HE TNE data has been the Aggregate Offshore Record (AOR) returns collected by the Higher Education Statistics Agency (HESA). AOR data has been collected since 2007/08 from subscribing higher education providers (HEPs) in the devolved administrations of the United Kingdom, and includes students studying wholly outside the UK who are either registered with the reporting provider or who are studying for an award of the reporting provider.

1.4 To build on the AOR data and further explore UK HE TNE provision, a UK HE TNE survey was conducted in 2013 (covering UK HE TNE provision for the academic year 2012/13)[2]. The report that was produced provided greater detail about UK TNE than previously available, and improved data confidence.

1.5 This is an up-to-date report of the scale and scope of UK delivered TNE in the academic year 2014/15. The primary aim of the study is to provide evidence for higher education providers and policy bodies to support and grow UK HE TNE. It also aims to inform an international audience about the opportunities to engage with and the quality of UK HE TNE.

1.6 Within this context, this study's objectives were defined as follows:
- To outline the amount of UK TNE currently (2014/15) in operation – primarily by country, institution and programme type.
- To indicate changes in TNE trends in the past year, and identify key trends in TNE management.
- To highlight any additions to the TNE literature and policy, both theoretical and practical.
- To showcase the diversity in approaches and models of practice.
- To provide evidence for university leaders in setting international strategy.
- To inform future discussion about how the UK could increase its TNE presence and maximise the value of UK HE TNE.

1.7 The working definition of TNE for the 2014/15 TNE Survey was as follows: 'the provision of a higher education degree programme leading to a UK qualification for students based in a country other than the one in which the awarding institution is located. This includes joint, double or dual awards'. Articulation arrangements where students registered with the overseas partner are guaranteed entry into a UK-validated programme if they achieve an agreed level of performance in their studies with the overseas partner are excluded for this definition.

1.8 In order to meet the study objectives, the following research activities were undertaken between November 2015 and March 2016 as follows:
- Review of relevant literature to inform all research tasks and in particular to set the context for this study and conclusions drawn including

---

2. The Value of Transnational Education to the UK: BIS RESEARCH PAPER NUMBER 194, November 2014.

recommendations for further research in the future. Literature reviewed undertaken for the purposes of this study is not exhaustive on the subject of internationalisation of education and focuses on key reports published in the last few years on TNE.

- A survey with UK HE TNE providers covering their TNE provision in the academic year 2014/15 (referred to as 2014/15 TNE Survey hereafter), followed by survey analysis. The survey received 62 responses from UK HEIs, 55 of which have active transnational education programmes, including two thirds of the 22 higher education institutions with the largest enrolments (i.e. more than 5,000), providing coverage of around 68% of all active transnational education students in 2014/15.

- It is worth noting that comparisons with the 2012/13 TNE Survey are undertaken only where possible, given that the two surveys not only use different definitions of TNE and categorisation of information but also their responses are based on two different sets of institutions.

- Review and analysis of relevant AOR data – drawing upon data provided by HESA for the academic years 2008/09, 2012/13 and 2014/15. AOR provides information about UK transnational education for different types of TNE activity e.g. branch campus, distance learning etc. and the following key variables: student numbers; geographic coverage; level of study; and number of UK institutions using each delivery model. AOR data only record students registered for their full degree programme overseas. It also captures students enrolled on transnational education programmes where eight consecutive weeks or more are spent within the UK. Such programmes include articulation arrangements[3] and joint or double degrees. Any comparisons, therefore, with the 2014/15 TNE Survey data need to consider that the 2014/15 TNE Survey includes students who may study for part of their degree within the UK but it excludes those in articulation/transfer agreements.

- 12 case studies with UK HE TNE providers involving direct liaison with selected institutions to further explore some of the issues highlighted by the survey and the literature review and develop promotional case studies of good practice across modes, global host regions, and types of TNE activity.

1.9 To present the findings of the study, the remainder of this report is structured as follows:
- Section 2 provides an overview of key issues surrounding UK HE TNE drawing upon the literature review. Appendix A presents key documents that have been reviewed to inform this study.

- Section 3 presents the scale of UK HE TNE in 2014/15 in terms of overall programmes, countries and enrolments. It also presents an overview of the profile of respondents to the 2014/15 TNE Survey. A detailed methodological note is provided in Appendix B.

- Section 4 provides detailed analysis of TNE programmes by their main characteristics i.e. method of delivery; level, subject, mode and length of study; the nature of delivery i.e. location, accreditation, language and history of provision; and, responsibility for different aspects of delivery.

- Section 5 presents an overview of key drivers underpinning TNE provision, its strategic positioning within HEIs and HEIs' future plans in relation to TNE provision. The information presented in this section draws upon the findings of the 2014/15 TNE Survey but also the literature review and discussions with key stakeholders and TNE providers.

2.The context

2.1 Globalisation over the last two decades has meant that economies, industries, markets, cultures and policy-making around the world have become increasingly linked. As a consequence, education provision and in particular higher education has become global. Countries and higher education institutions (HEIs) to varying degrees increasingly recognise that their mission and identity must be global for a number of reasons. Alongside this, learners are increasingly demanding an international experience.

2.2 The value, including the economic value, of the global education market has been recognised by many countries including the UK. The HE sector is regarded as one of the UK's most important export earners for the UK economy - and internationalisation has become a major priority for all UK universities[4] and the UK Government alike. Implementation in full of the recommendations of the Browne Review[5] by the UK's Coalition Government in 2010 consolidated the competitive ethos and rationale underpinning the operational and funding context within which HEIs operate in the UK and ensured that HEIs are not only concerned with education, the pursuit of knowledge, ideas and research but also with contributing to national wealth[6].

2.3 More recently, as stated by Jo Johnson, the UK Minister of State for Universities and Science, at the Going Global 2015 Conference on International Higher Education in London in June 2015, 'Global education leads to wealth, health and mutual understanding. It builds foundations for cultural and economic enrichment. … Across all our international education activity, we have an ambition to grow. We are committed to increasing education exports from £18 billion in 2012 to £30 billion by 2020'.

2.4 There are two types of internationalisation of education that run in parallel: internationalisation at home and internationalisation abroad or transnational education (TNE), which is the focus of this study. TNE has the potential to enhance cultural and economic positioning of a country with a strong higher education sector and research and science base like the UK while at the same time rebalancing the global higher education market, allowing more students to study in their own countries and reducing the costs to developing countries in terms of foreign exchange and 'brain drain'. It can build capacity both at home and overseas, a key driver for universities offering TNE and partners and countries hosting TNE alike.

2.5 The literature review undertaken for the purposes of this study has shown that key reports, published in the last few years, provide a strong foundation for our understanding of TNE and make a strong case for why TNE should exist. The literature review also highlights a wide range of issues that need to be considered in exploring TNE, including areas where there is still considerable scope for further development. These are discussed below.

Defining and measuring TNE

2.6 TNE is often defined as the 'provision of education for students based in a country other than the one in which the awarding institution is located.' TNE essentially involves the mobility of providers or institutions and academic programmes 'across jurisdictional borders to offer education and training opportunities.'[7] In many instances, TNE can involve the movement of students, with some short-term study in the awarding country and/or students accessing TNE from education hubs.

---

3. An articulation agreement is a formal agreement/document produced when two or more academic institutions follow a process leading to a partnership to provide a formalised pathway for student transfer documenting the transfer policies for a specific academic program or degree in general. Articulation agreements are also called transfer agreements, transfer guides, and transfer pathways by various audiences. Is 'audiences' right? Suggest instead 'Articulation agreements are sometimes referred to as transfer agreements, transfer guides, progression or pathways.

4. UK higher education today and place of internationalisation: Professor Michael Worton, Vice-Provost (International) and Fielden Professor of French Language and Literature, UCL, Repéres no.15 (May 2012).
5. Securing a Sustainable Future for Higher Education, An Independent Review of Higher Education Funding & Student Finance, 12 October 2010.
6. For further discussion on challenges to and opportunities for UK HEIs in the Bologna Process and the European Higher Education Area (EHEA) and UK Government Policy, see: Going Mobile: Internationalisation, mobility and the European Higher Education Area, by Simon Sweeney, with the support of British Council the European Commission and the Higher Education Academy. As stated in the publication, however, the publication reflects the views only of the author.
7. Impacts of transnational education on host countries: academic, cultural, economic and skills impacts and implications of programme and provider mobility: British Council. (2014).

2.7 Defining TNE is often described as 'challenging.' There have been numerous attempts to capture the full activities covering TNE including definitions from a quality assurance perspective. In the UK, regulatory bodies such as the Quality Assurance Agency (QAA) and higher education literature has traditionally recognised the following distinct forms of TNE: i) distance learning; ii) international branch campuses; and iii) partnerships that include franchises and validated centres.

2.8 For the purposes of this study, TNE delivery has been defined as follows (see also section 4 of the report):
• Distance/online learning e.g. either with local support or without local support.
• Local delivery partnerships e.g. franchised delivery, joint and dual degrees, twinning arrangements, validation and quality arrangements.
• Physical presence e.g. branch campus, study centre or flying faculty.

2.9 As TNE has developed around the world there has been a growing diversity and complexity to TNE and a move to it being partnership-led and many of the partnerships are multidimensional, typically transcending the boundaries between distance/online learning, branch campus, franchise and validation. For example, some partnerships blend validating the early years of a degree with franchising the final year and supporting the whole degree with distance/online learning.

2.10 To capture the increasingly diverse and complex nature of TNE, a more multi-dimensional typology has been called for. An alternative typology developed by Professor Nigel Healey[8] on the basis of analysis of 40 TNE partnerships in China, Singapore, Malaysia and India focuses on the factors that give rise to the risk of reputational damage, rather than categorizing a TNE arrangement on the basis of its form. This alternative typology uses a matrix, assessing the risk of market failure of a TNE partnership along six dimensions: composition, structure, function, scope, process and outcome.

• Composition: recognises the nature of the TNE partnership. The risk of market failure is likely to increase the greater the divergence between the mission of the UK University and its partner.
• Structure: this focuses on the nature of the partnership agreement – the extent of formality, and whether there are legally binding contracts.
• Function: this dimension explores the goals and mission of the partnership.
• Scope: highlights the range of activities covered by the partnership.
• Process: this dimension explores the goals to be achieved and responsibilities of each partner.
• Outcome: this covers whether the outcome of the partnership is a process or a product.

2.11 This alternative typology provides a way to classify TNE partnerships for a multidimensional risk profile. As stated in the article by Professor Nigel Healey, 'for risk management and quality assurance purposes, this is a more promising approach, since it teases out the primary sources of the risk of failure in the market, rather than presuming that one type (e.g. validation) is necessarily riskier than another (e.g. branch campus).'

2.12 Definitional issues surrounding TNE also have direct implications for measuring UK HE TNE. As mentioned in the introduction, one of the key sources of UK HE TNE data has been the AOR returns collected by HESA. One of the key fields in the AOR data, TYPE, defines the arrangements under which overseas programmes are provided as follows:
• Registered at reporting institution - studying overseas for UK HEI award at overseas campus of reporting institution.
• Registered at reporting institution - studying overseas for UK HEI award other than at an overseas campus of reporting institution.
• Registered at reporting institution - distance, flexible and distributed learning[9] for UK HEI award where the location of the student is known to be overseas.

• Registered at overseas partner organisation - studying overseas for an award of the reporting institution.
• Any other student studying overseas for an award of the reporting institution.

2.13 In the last couple of years, feedback has been provided indicating deficiencies with the current specification of TYPE in the AOR. HESA and other stakeholders including BIS, the British Council, Universities UK and HEGlobal are already working to refine and improve definitional and related measurement issues. Improvement has been already noted in data collection and analysis but there is not yet a general agreement over an established typology of TNE. Information is therefore not conclusive as yet for HESA to provide a comprehensive review of valid entries for the TYPE field and update the one that currently exists. Nonetheless, the HESA AOR data provide a useful baseline/comparative basis for other/further TNE investigative work including this study.

Recent trends in UK universities' approach to TNE

2.14 The literature review highlights the continuing importance of branch campuses whilst at the same time indicate a move towards more 'partnership-led' models of TNE.

2.15 Over the last decade a number of universities have opened branch campuses. A very well known example for the UK has been the University of Nottingham campus in Ningbo, China and in Semenyih. Malaysia. Manchester Business School and Middlesex University are other notable players, as well as Lancaster and Strathclyde universities that signed agreements in May 2009 to establish campuses in Pakistan. Aberystwyth University followed Middlesex University in opening a campus in Mauritius in 2014. The University of Liverpool and Xi'an Jiaotong University in China formed a

partnership for setting up Xi'an Jiaotong-Liverpool University (XJTLU), an independent university based in Suzhou, Jiangsu, China. The UK's existing and currently planned branch campuses are concentrated quite heavily in the UAE, China, Malaysia and Singapore, though single campuses have been established in less well known locations such as Uzbekistan (Westminster).

2.16 Branch campuses therefore remain important aspects of institutional international strategies but as the literature notes there is a slowing pace in investment in these, as institutions now better understand the challenges of setting up a branch campus, and host countries are also becoming more selective and ambitious in delivering TNE themselves. At the same time, innovative approaches and business models are emerging in setting up branch campuses. For example, a 'new approach is being taken by those developing international campuses in the USA, with partner universities themselves providing the majority of the start-up costs and ongoing funding, rather than receiving governmental support'[10].

2.17 Another trend is the increasing interest in distance/online learning as a form of TNE provision by UK universities. This mode of delivery covers both, supported distance/flexible learning and unsupported distance/online learning. Other popular forms have been franchise, validation, joint, multiple, dual, double and concurrent degree programmes.

2.18 In general, however, UK universities have started to move into a different type of engagement, 'with partnerships at the centre[11]. There has been a trend towards more 'partnership-led' models. As Professor Michael Worton notes 'Only a small number of UK universities have and will set up campuses overseas, but all will enter into partnerships with universities, companies and businesses, NGOs and governments abroad'[12]. Partnerships are 'becoming

8. Towards a risk-based typology for transnational education, by Professor Nigel Healey Higher Education, 69 (1), pp. 1-18 (2015).
9. 'Distance, flexible or distributed learning' denotes educational provision leading to an award of an awarding provider delivered and/or supported and/or assessed through means which generally do not require the student to attend particular classes or events at particular locations.

10. International Trends in Higher Education 2015: The University of Oxford, 2015.
11. British Council: Transnational Education – A UK Perspective.
12. UK higher education today and place of internationalisation: Repéres no.15, May 2012.

much more strategic, long-term and sustainable, rather than being opportunistic and short-term, as has been the case in the past.'[13]

2.19 Recent trends highlight that UK universities now have a broad and diverse range of TNE partners, including private companies, private for-profit education companies, public universities (autonomous and under state control) and government ministries. For example: 'Staffordshire University partners with an autonomous public university, the University of Madras. The London Metropolitan University has a partnership with public Nanyang Polytechnic and public health care provider Singapore General Hospital.'[14]

2.20 Evidence from the HEIs participating in the 2014/15 TNE Survey indicates that all HEIs have a strategic approach to TNE. Furthermore, good practice case studies with HEIs involved in TNE (undertaken as part of this study), have clearly demonstrated that good practice and success is based on a sophisticated approach and a much wider way of thinking around internationalisation. In fact, in some cases, it could be argued that internationalisation has been broadened and appears to accommodate internationalism, as defined by Simon Sweeney i.e. as a commitment to wider societal benefits as represented in the UN Universal Declaration on Human Rights and UN Development Goals[15].

Key issues in the TNE discourse

2.21 Firstly, there are the noted problems with current definitions for TNE being too broad and various literature calls for revised definitions or typologies that capture the changing forms of TNE.

2.22 Secondly, the TNE literature highlights quality assurance as a key challenge for universities, regulators and policymakers with regard to TNE. Providing education across borders exposes UK universities to varying degrees of reputational risk. 'Distance-learning courses may be compromised by online fraud (e.g. learners using friends to complete assessments). Maintaining quality control in a branch campus may be more difficult because managers and staff operate in an alien culture far from the home campus. Partnership arrangements may be undermined by the 'principal-agent' problem, with the partner colleges (agents) having different objectives (e.g. profit maximisation rather than academic quality) from the awarding UK universities (principals)[16].'

2.23 Thirdly, a key issue for UK HEIs is the expense and time involved in setting up TNE programmes and most notably in understanding a country's regulatory and legal requirements[17]. A challenge is to understand the local operating environment and the various approaches adopted by host countries to facilitate and manage TNE.

2.24 A fourth key issue that relates to TNE delivered in partnership, is the view that there is more of a competitive rather than collaborative relationship between TNE and local providers. At a national level in particular, a noted negative attribute of TNE is competition for students and staff between TNE programmes/providers and local institutions.

2.25 A fifth key issue is a lack of awareness/confusion/low profile about TNE programmes in some host countries, particularly with regard to employers, students and facility not actively engaged in TNE. This represents a risk for TNE students. This key issue highlights the need for improved efforts

by host country recognition bodies to publicly communicate their recognition and acceptance of TNE as a form of education[18].

2.26 Another key issue is the generally high cost of TNE compared with local programmes. 'Issues about pricing, affordability and how TNE tuition fees compare with alternative education options are clearly very important. TNE and non TNE students view that the high cost of TNE compared with local programmes represents the main negative attribute of TNE'[19].

2.27 A further key issue is that TNE may be only moderately addressing skills gaps in the local labour market, depending on the type of programmes being offered. This 'stresses the importance of understanding and addressing information asymmetrics that exist between academia and industry as regards the skills needed by employers in the host country[20].' For example, specialised courses covering niche topics were felt to have a positive impact on addressing local skills gaps.

2.28 A few further key issues have been highlighted and relate to TNE student experiences[21], including but not limited to, for example:
• Issues surrounding the opportunities offered for cultural experience when studying a TNE programme given that TNE students rank developing intercultural competence highly.
• Learning opportunities at TNE campuses differing from standards of the awarding university.

2.29 Over the course of this research project, extensive investigation has been employed to analyse some of the issues discussed above including the motivations, challenges, opportunities and realities of UK HEIs actively engaged in the TNE landscape and this has provided valuable insights

into the strategic undertaking, the decision making process, the manner by which programmes are cultivated and sustained and the mechanisms in place to measure success and sustain support at home for future development.

2.30 The literature review has also shown that certain aspects of TNE attract considerable research activity: definitional issues, take up and reach in terms of programmes and students, and associated economic gains. This is a perfectly valid approach but leads to the next stage of required research; namely, impact and sustainability. Further research needs to be conducted regarding motivations, strategy development and sustainability planning for TNE engagement. More specific work will also be needed in the future to capture the impact of various UK policies and global trends (economic, social and pedagogical) on institutional international and internationalisation approaches.

2.31 A persistent challenge in addressing all of the TNE issues identified here is the need for improved data on the UK's TNE offer. The HESA aggregate offshore record (AOR) is an excellent starting point to consider the scale and scope of UK HE TNE, but it is limited, including by its narrow structure and definitions. Most institutions report difficulty in responding to the AOR field, and many interpret the data categories differently. It is important for HESA to review the AOR and that any changes in data reporting and collection can flex as TNE evolves, but this must not increase reporting burden on universities to an extent that becomes unmanageable. HESA is currently considering ways to take this forward, and doing so in discussion with key stakeholders including HEGlobal.

13. UK higher education today and place of internationalisation: Repéres no.15, May 2012.
14. Towards a risk-based typology for transnational education (Higher Education, 2015).
15. Going Mobile: Internationalisation, mobility and the European Higher Education Area, by Simon Sweeney, with the support of British Council the European Commission and the Higher Education Academy, November 2012.
16. Towards a risk-based typology for transnational education (Higher Education, 2015).
17. The Value of Transnational Education to the UK: BIS RESEARCH PAPER NUMBER 194, November 2014.

18. Shape of things to come: The evolution of transnational education – data, definitions, opportunities and impacts analysis: British Council. Going Global 2013.
19. Impacts of transnational education on host countries: British Council. Going Global 2014.
20. Shape of things to come: The evolution of transnational education – data, definitions, opportunities and impacts analysis: British Council. Going Global, 2013.
21. Impacts of transnational education on host countries: British Council. Going Global 2014.

Case study

Bangor College China

About Bangor University
- Bangor, North Wales
- Founded in 1884
- 5 Colleges: Arts and Humanities; Business, Law, Education and Social Sciences; Natural Sciences; Health and Behavioural Sciences; and Physical and Applied Sciences
- 10,765 students in the UK
- 2,465 international students in the UK
- 1,070 TNE students

About Bangor College China
- Changsha, Hunan province, China
- Launched in 2014
- Bangor University and Central South University of Forestry and Technology
- Joint School campus
- 550 students registered with Bangor University

Bangor College China is the first international campus to open in Hunan province. The campus offers undergraduate programmes in Finance, Accounting, Electronic Engineering, and Forestry. Students follow the same curricula as those at Bangor University and will graduate with two degree certificates, one from Bangor University and one from Central South University of Forestry and Technology. Teaching is delivered by Bangor University staff, some based in China and some flying faculty, as well as by local Chinese academics. The University is responsible for quality assurance and follows the QAA guidance provided from its first review.

Bangor College China grew quickly. From signing a memorandum of understanding in April 2013, it opened to 200 students in September 2014. This was the maximum number of students the campus was permitted in its first year of operation.
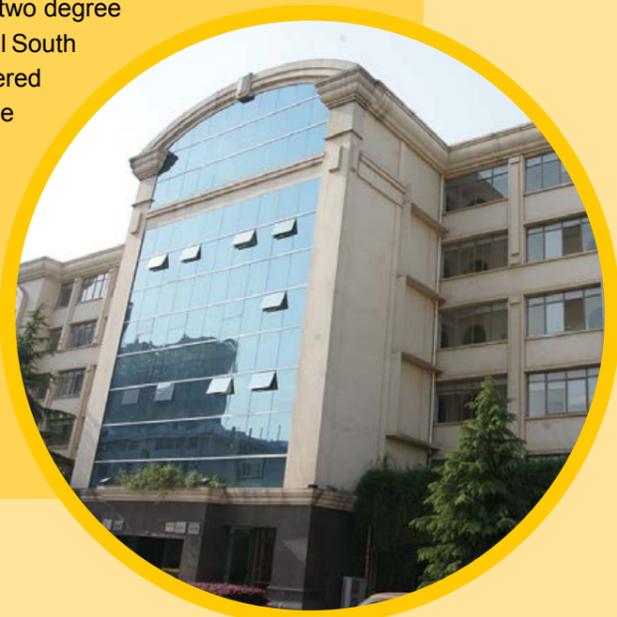
Shared vision between the partners meant that the campus was quickly established, and attracted maximum student numbers in its first year.

Success factors
- Staff exchanges
- Common aims
- Understanding motivations
- Ministerial support

Staff exchanges

From the implementation stage, staff from the UK visited Changsha and vice versa. This included representatives from several service departments as well as academics. These visits allowed potential operational challenges to be identified and addressed early on, e.g. securing funding to boost broadband capacity when IT staff recognised the service initially employed was insufficient to operate the University's virtual learning environment.

Common aims

The two universities share many characteristics: they are small institutions with strong community roots, and similar academic agendas. Recognising this match meant they worked well together from the outset. Student entry criteria are high at both universities, suggesting a high calibre of TNE learners.

Understanding motivations

Bangor University's decision to develop a joint campus has multiple drivers. The University's vision is to be an "international university for the region". It recognises the opportunities of TNE for attracting international postgraduate students to the University.

Ministerial support

The Chinese government was actively looking to encourage international activity between provincial universities. They were drawn to the academic strengths of both partners' portfolios, and keen to provide the socio-economic benefits that a substantial investment like Bangor College China could bring to a region..

Case study

University of Greenwich validated degrees at October University for Modern Sciences and Arts

About University of Greenwich
- London, South East England
- Founded in 1890 as Woolwich Polytechnic
- 4 Faculties: Architecture, Computing and Humanities; Education and Health; Engineering and Science; and the Business School
- 26,815 students in the UK
- 7,445 international students in the UK
- 16,085 TNE students

About the University of Greenwich and October University for Modern Sciences and Arts partnership
- Cairo, Egypt
- Established in 2003
- University of Greenwich and Cairo October University for Modern Sciences and Arts
- Validated programmes with dual awards
- 5,000 students registered with University of Greenwich

MSA University degrees are all delivered in partnership with UK universities. The University of Greenwich validates all MSA University programmes in the Faculties of Engineering, Pharmacy, Computer Sciences, Biotechnology and Management Sciences, and students graduate with two awards, one from MSA University, and one from the University of Greenwich.

The University of Greenwich and MSA University have worked together since 2003.

Success factors
- Tutors in residence
- Continuing professional development
- Joint research

Tutors in residence

University of Greenwich programme staff spend 85-90% of their time in Cairo supporting students in the programme faculties. This means that they have a good understanding of local conditions and culture and can facilitate clear communications between academic staff at the two universities.

Continuing professional development

Both universities believe in supporting their staff, and the University of Greenwich sponsors MSA university staff to gain Post Graduate Certificates in Higher Education.

Joint research

Working together, the universities have developed a joint research infrastructure. This allows each to access the other's research strengths, increase their collaborative output and impact. It also enables the University of Greenwich to access local funding opportunities in Cairo and contribute to the local research economy. This approach is helping both universities to grow their research capacity, and encourages postgraduate growth on the programmes.

> **It is about being thorough in terms of approach, and being confident that your partner has the personnel and physical assets to deliver a programme of the quality that you expect.**

Professor Martin Snowden,
Pro Vice-Chancellor for Internationalisation, The University of Greenwich

Case study

Staffordshire University's validated degrees at Asia Pacific University of Technology and Innovation (APU)

> **Value to Staffordshire is in reputation building and presence in the TNE market.**

Chris Slade, Director of Partnerships, Staffordshire University

About Staffordshire University
- Stoke-on-Trent and Stafford, Central England
- Founded in 1971 as Staffordshire College of Technology
- 4 Faculties: Arts and Creative Technologies; Business, Education and Law; Computing, Engineering and Sciences; and Health Sciences
- 17,735 students in the UK
- 2,355 international students in the UK
- 17,155 TNE students

About the Staffordshire partnership with APU
- Kuala Lumpur, Malaysia
- Staffordshire University and Asia Pacific University of Information Technology
- Established in 1992
- Dual degrees
- 6,110 students registered with Staffordshire University

Staffordshire University and APU have partnered in degree delivery since 1993 when APU was established as the Asia Pacific Institute of Information Technology. The two institutions first offered higher diploma and postgraduate level awards in computing. APU established bases in Sri Lanka in 1999 and India in 2002, transporting the Staffordshire University partnership with them. This allowed the TNE territories that Staffordshire University offers programmes in partnership with APU to grow.

APU achieved university status in 2012. Students studying with APU across computing, engineering, technology and business now graduate with a dual degree which lists both Staffordshire University and APU.

Success factors
- Evolving over time
- Relationship management
- Mutual respect

Evolving over time

As the partnership became embedded in both universities, consistency in the staff support and communication became the norm. Staffordshire University visits APU four or five times annually to establish and maintain those connections. This enables both university teams to better understand the programme operations 'on the ground'. Over time, the partners' mutual respect embedded further, enabling them to grow the scale of their collaboration and increase the number of dual award programmes.

Relationship management

Face-to-face communication has been key to building personal connections between the universities, in particular to understanding local context and expectations. The partners supplement international travel with frequent virtual communication such as Skype. Staffordshire University employs partnership account managers who devote time to building international understanding between the organisations.

Mutual respect

Staffordshire University and APU openly acknowledge that they have very different league table rankings. Because they are not direct competitors, they can instead focus on delivering to their own strengths, and combining their expertise in different areas. Recognising the differences between the partners allows them to retain their identities and ensures the longevity of the relationship.

3. The scale of UK HE TNE

3.1 This section presents the scale of UK HE TNE in 2014/15 in terms of overall programmes, countries and enrolments. It also provides an overview of the UK HE TNE provision drawing upon the HESA AOR data and presents the profile of respondents to the 2014/15 TNE Survey.

Key points

- According to the 2014/15 AOR data, of the 134 UK HEIs in the HESA database, 99 are currently involved in provision of UK HE for students that study wholly outside the UK and are either registered with the reporting institution or are studying for an award of the reporting institution.

- A total of 665,995 students are involved in TNE provision according to the same data. The 2014/15 AOR data also indicate that 75% of all TNE students study with approximately 14% of UK HEIs involved in TNE provision.

- Approximately 43% of all TNE students in the 2014/15 AOR data study with Oxford Brookes University. Nearly 99% of TNE students with Oxford Brookes University are ACCA (the Association of Chartered Certified Accountants) registered students.

- Analysis of the 2014/15 AOR data excluding the Oxford Brookes ACCA registered students highlights that 75% of TNE students study with 26.5% of HEIs involved in TNE provision in the UK.

- In total, 62 institutions responded to the 2014/15 TNE Survey, 55 of which have active transnational education programmes. These represent 68% of the total number of TNE students in the 2014/15 AOR including Oxford Brookes ACCA students (and 45% of the total number of TNE students in the 2014/15 AOR excluding the Oxford Brookes ACCA students).

- According to the 2014/15 AOR data, there are 22 UK HEIs that individually have more than 5,000 active students each, representing a total of 546,625 students. 14 of these institutions responded to the 2014/15 TNE survey and cover 427,625 students.

- The 55 HEIs that responded to the 2014/15 TNE Survey deliver between them 2,260 programmes in 181 different countries. The 2014/15 TNE Survey has shown that on average, the number of programmes per institution delivered through TNE activity is 45 while the median is 20.

- According to the 2014/15 TNE Survey:
  - Over one quarter (28%) of TNE programmes are delivered for students in Asia, whilst the European Union accounts for just under a quarter (23%). Africa and the Middle East account for 14% and 13% respectively.
  - There are only 15 countries in the world where UK HEIs are not delivering TNE programmes. Singapore and Malaysia together account for 15% of all UK HE TNE programmes.
  - Two thirds of all UK HE TNE programmes are only delivered in one host country. Providers delivering programmes in multiple countries are more likely to be involved in local delivery partnerships and distance/online learning TNE provision in the host countries than have a physical presence in these countries.
  - Business and Management is the UK HE TNE subject delivered in most countries – 88 out of the 181 reported host countries in the 2014/15 TNE Survey. The second most popular subject is Medicine and related studies (in 66 countries), followed by Arts & Humanities (in 65 countries).

UK transnational Higher Education – overview of HESA'S AOR data

3.2 HESA's latest AOR data published in January 2016 (and representing 2014/15 provision) list a total of 134 HEIs. According to these latest data, these institutions report that they provide TNE as per the AOR definition, i.e. they have students that are studying wholly outside the UK who are either registered with the reporting provider or who are studying for an award of the reporting provider. This includes all students active at any point in the reporting period, including students becoming dormant part way through the year, and those withdrawing from courses.

3.3 Review of the 2014/15 AOR data shows that there are 665,995 TNE students who fit this definition and study with a UK institution. As shown in Figure 3.1, analysis of the 2014/15 AOR data also indicates that 75% of students in the AOR database are engaged with 10.5% of all UK HEIs that report having TNE (14 institutions out of 134).

3.4 The 2014/15 AOR data also show that there are 22 UK HEIs that individually have more than 5,000 active students each, representing a total of 546,625 students. As shown in Table 3.1, there were 18 institutions reporting more than 5,000 TNE students in 2012/12; in 2014/15 the number of institutions reporting more than 5,000 increased to 22.

Figure 3.1: AOR Student Numbers and UK Providers (Logarithmic Scale)
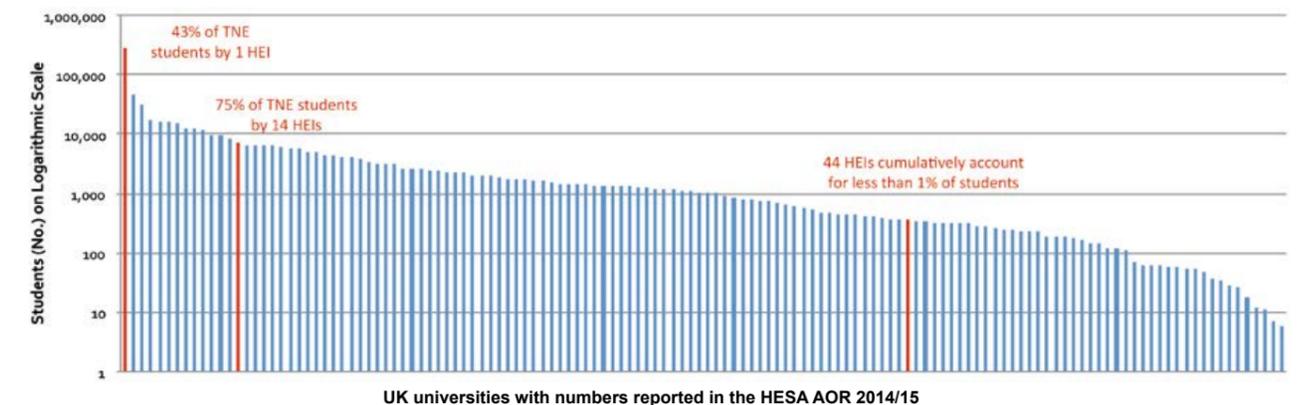
Source: 2014/15 AOR Data.

Table 3.1: UK HE TNE Students (AOR)

	2012/13	2014/15
All TNE Students	598,925	665,995
TNE Students in HEIs with more than 5,000 students (number of institutions)	499,535 (18)	546,625 (22)
% of TNE students in HEIs with more than 5,000 students	83.4%	82%

Source: AOR Data.

3.5 Figure 3.2 presents the numbers of international students of the same UK providers of TNE provision presented in Figure 3.1. Comparing Figure 3.1 and Figure 3.2 highlights that the distribution of international students studying in the UK with these providers is more even than their TNE students. 75% of international students study with 42% of institutions (compared with 75% of TNE students studying with 10.5% of these institutions). Figure 3.3 provides an overview of both, TNE and international student provision, by UK institutions involved in TNE provision (i.e. those that submit AOR returns).

3.6 Approximately 43% of all TNE students in the 2014/15 AOR data appear to study with Oxford Brookes University and nearly 99% of these include Oxford Brookes University ACCA (the Association of Chartered Certified Accountants) registered students. Oxford Brookes University and ACCA have worked together to develop a BSc (Hons) Degree in Applied Accounting, which is

available exclusively to ACCA students who wish to obtain a degree while studying towards the ACCA Qualification. Students of ACCA are automatically registered for the Oxford Brookes University degree when they enrol with ACCA[22].

3.7 Table 3.2 demonstrates the impact that the Oxford Brookes ACCA student figures have on the total TNE figures, thus representing a significant outlier and potentially skewing the findings of the study. When therefore analysing the 2014/15 TNE survey data by student numbers those on the Oxford Brookes University BSc (Hons) Degree in Applied Accounting (Oxford Brookes ACCA registered students) are excluded. Table 3.2 also shows that between 2012/13 and 2014/15 the increase in TNE excluding Oxford Brookes ACCA students is relatively higher at 13.4% compared with 11.2% overall increase (i.e. when Oxford Brookes ACCA student numbers are included).

Table 3.2: UK HE TNE Students (AOR)

	2012/13	2014/15	% INCREASE
All Students including Oxford Brookes ACCA students	598,925	665,995	11.2%
All Students excluding Oxford Brookes ACCA students	337,260	382,610	13.4%

Source: 2012/13 and 2014/15 AOR Data.

22. The analysis excludes Oxford Brookes ACCA students and includes all other non-ACCA TNE Oxford Brookes students

Figure 3.2: International Student Numbers in the UK and UK Providers with TNE Provision (Logarithmic Scale)

Source: 2014/15 HESA Data.
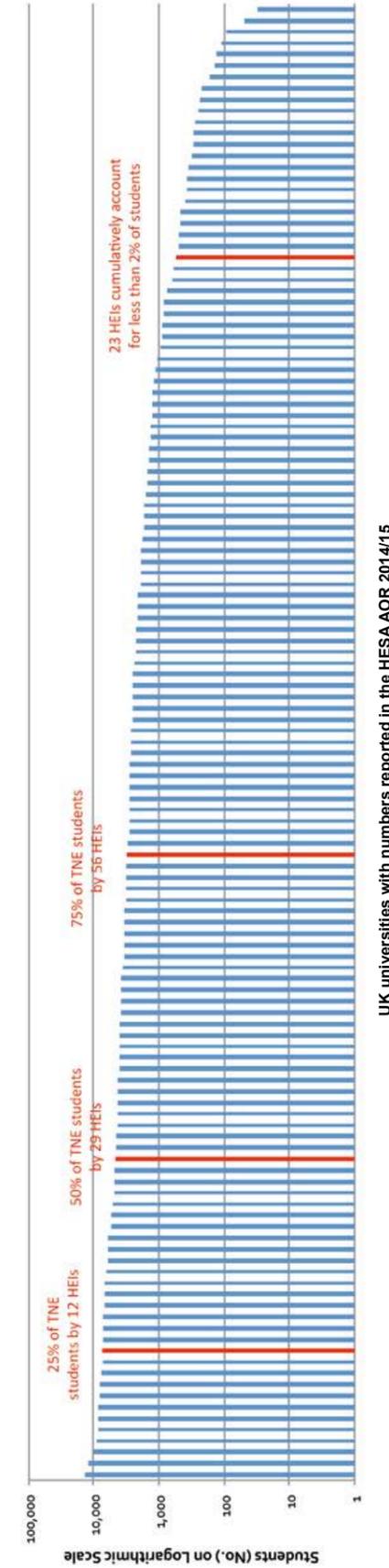
Figure 3.3: AOR and International Students for UK Providers with TNE Provision (Logarithmic Scale)
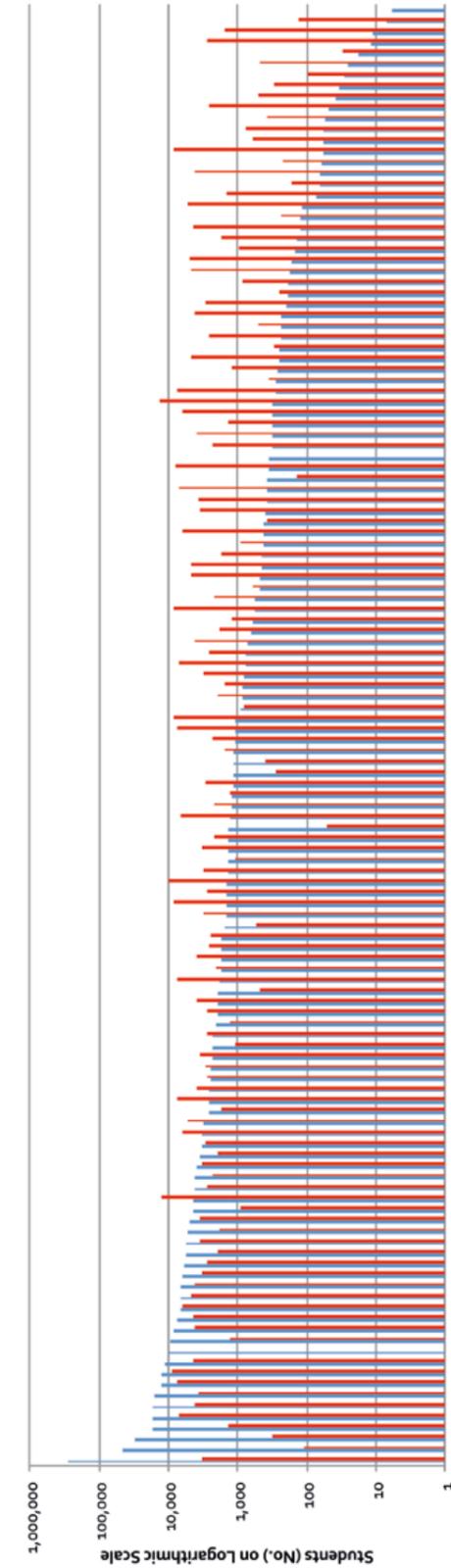
3.8 Figure 3.4 shows the distribution of TNE provision by UK HEIs excluding Oxford Brookes ACCA TNE students. Excluding these students from the analysis of the 2014/15 AOR data highlights that 75% of TNE students study with 19% of UK HEIs with TNE provision (compared with 10.5% of UK HEIs when these students are included).

3.9 Figure 3.5 shows the distribution of TNE provision by UK HEIs excluding Oxford Brookes ACCA TNE students, University of London and Open University TNE students (i.e. excluding 361,160 students). Excluding these students from the analysis of the 2014/15 AOR data highlights that 75% of TNE students study with 24% of UK HEIs with TNE provision.

Figure 3.4: AOR Student Numbers and Providers - excluding Oxford Brookes
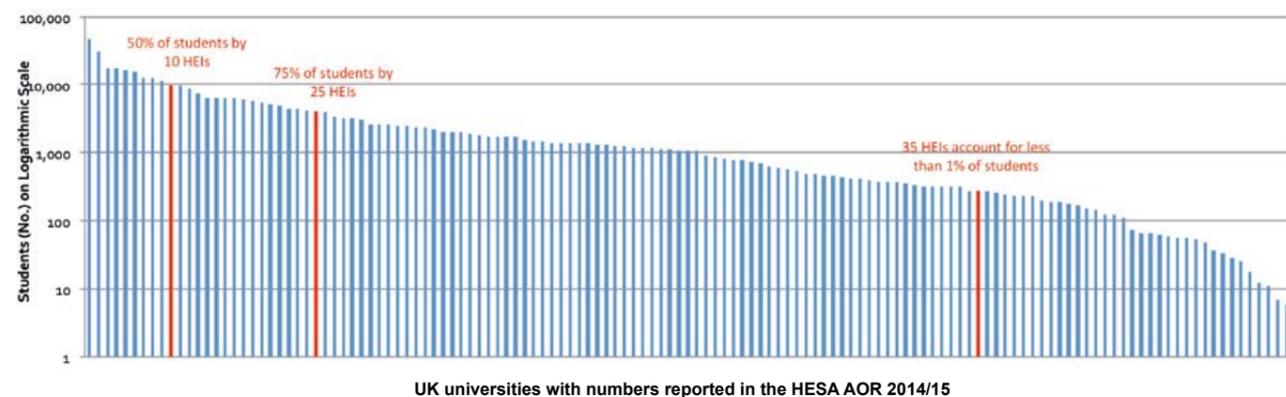
Source: 2014/15 AOR Data.

Figure 3.5: AOR Student Numbers and Providers - excluding Oxford Brookes, Open University and University of London
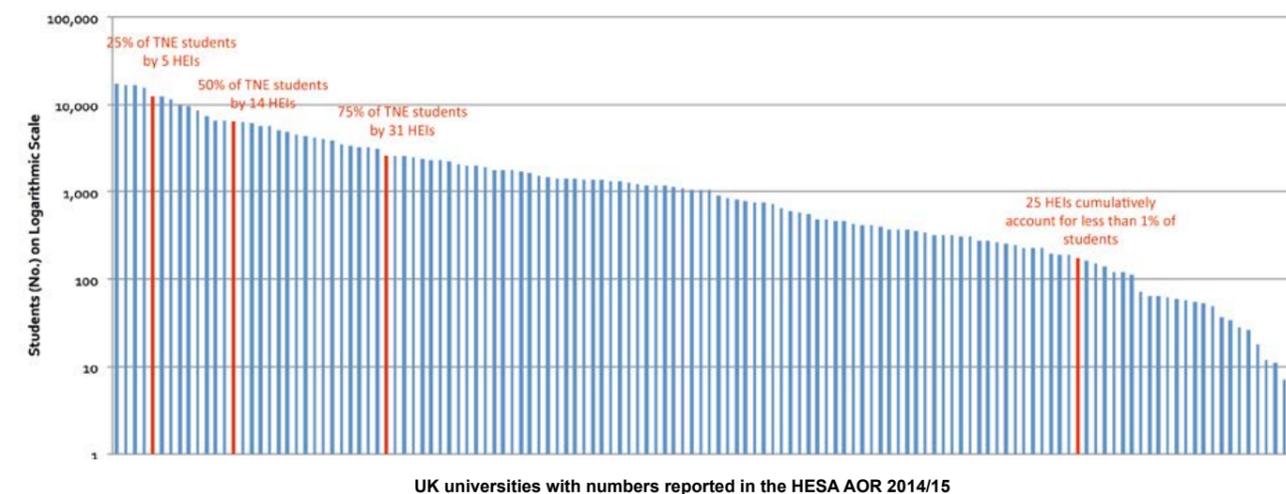
Source: 2014/15 AOR Data.

Figure 3.6: AOR and International Students – excluding University of London, Open University and Oxford Brookes University ACCA students
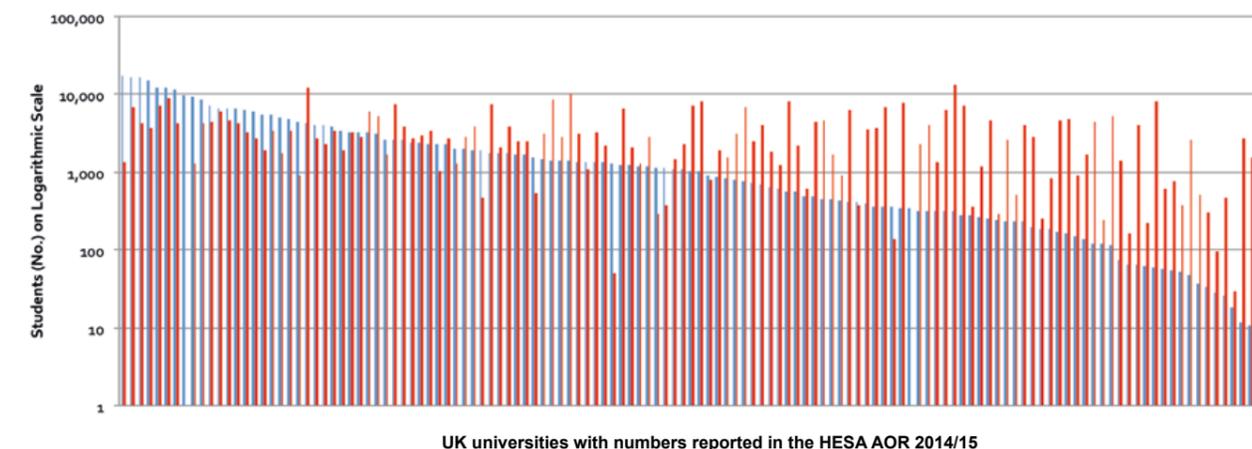
Source: 2014/15 HESA Data

3.10 Figure 3.6 presents provides an overview of both, TNE and international student provision, by UK institutions involved in TNE provision i.e. those that submit AOR returns, excluding, however, the University of London, Open University and Oxford Brookes ACCA students.

3.11 Tables 3.3 and 3.4 present UK HE TNE provision by host country based on the top 10 host countries with the most TNE students in 2014/15. Table 3.3 provides information on UK TNE provision including Oxford Brookes ACCA students whilst information in Table 3.4 excludes Oxford Brookes ACCA students. Each table also provides comparisons with the 2008/09 and 2012/13 AOR data.

Table 3.3: UK HE TNE Provision: Top 10 Host Countries with most TNE students registered in 2014/15 (ranked by number of students) - including Oxford Brookes ACCA registered students

2008/09 Ranking	2012/13 Ranking	2014/15 Ranking	Country
3	▲2 1	➡ 1	Malaysia
4	▲1 3	▲1 2	China
2	➡ 2	▼1 3	Singapore
21	▲17 4	➡ 4	Pakistan
25	▲19 6	▲1 5	Nigeria
1	▼4 5	▲1 6	Hong Kong
9	▼2 11	▲4 7	Oman
30	▲23 7	▼1 8	Ghana
16	▲3 13	▲4 9	Sri Lanka
15	▼2 17	▲7 10	Egypt

Source: AOR Data.

3.12 Key observations from Tables 3.3 and 3.4 can be summarised as follows:
- According to the 2014/15 AOR data, Asian and African countries dominate the host countries for UK TNE provision.
- Malaysia is the largest recipient of UK TNE provision, irrespective of whether Oxford Brookes ACCA student numbers are included or excluded.

Table 3.4: UK HE TNE Provision: Top 10 Host Countries with most TNE students registered in 2014/15 (ranked by number of students) - excluding Oxford Brookes ACCA registered students

2008/09 Ranking	2012/13 Ranking	2014/15 Ranking	Country
3	▲2 1	➡ 1	Malaysia
1	▼1 2	➡ 2	Singapore
2	▼1 3	➡ 3	Hong Kong
4	➡ 4	➡ 4	China
9	▲4 5	➡ 5	Oman
15	▲6 9	▲3 6	Egypt
16	▲6 10	▲3 7	Sri Lanka
5	▼2 7	▼1 8	Greece
14	▲8 6	▼3 9	United Arab Emirates
11	▼3 14	▲4 10	India

Source: AOR Data.

- Comparing Tables 3.3 and 3.4 highlights that Oxford Brookes ACCA student numbers skew the ranking of host countries in terms of TNE student enrolments. Exclusion of Oxford Brookes ACCA student numbers from the 2014/15 AOR data means that Pakistan, Nigeria and Ghana 'disappear' from the list of the top 10 UK HE TNE host countries in terms of student enrolments. On the other hand, Greece (the only European country

in the list), United Arab Emirates and India 'appear' among the top largest UK HEI TNE host.
- Excluding Oxford Brookes ACCA student numbers also shows that across the three points in time i.e. 2008/09, 2012/13 and 2104/15, Malaysia, China, Singapore and Hong Kong have consistently been in the top five countries for UK HE TNE provision.

3.13 Tables 3.5 – 3.9 present UK HE TNE provision by host country based on the top 10 host countries with the most TNE students in 2014/15, presented according to the HESA categories of the arrangements under which overseas programmes are delivered and the institution TNE students are registered[23] with, as follows:
- Table 3.5 shows registrations at the UK reporting institution – with TNE students studying overseas for UK HEI award at overseas campus of reporting institution. United Arab Emirates top the list of host countries with the most TNE students reported as 'studying at overseas campus of the UK reporting institution' in both reporting periods, 2012/13 and 2014/15. Over time, there has been a change in the ranking positions of China and Malaysia: between 2008/9 and 2014/15, there has been a reduction in the number of TNE students in China reported as 'registered at UK reporting institution and studying at overseas campus of UK reporting providers'. Within the same period, there has been an increase of TNE students in Mauritius reported as 'registered at UK reporting institution and studying at overseas campus of UK reporting institutions'.

  Branch campus registrations are the lowest numbers of TNE delivered through physical presence in country. The three highest ranking countries in table 3.5 each have returns of over 6,000 students in the 14/15 AOR. Student numbers reported after that tend to be at just one university, and often small campuses. There is no difference in the ranking of the top 10 host countries for branch campuses either including or excluding Oxford Brookes ACCA students.

- Table 3.6 shows registrations at the UK reporting institution 'with TNE students studying overseas for UK HEI award other than at an overseas campus of reporting institution'. Malaysia and Hong Kong top the list of host countries with the most TNE students reported as 'other than at an overseas campus of the UK reporting institution'.

  There is no difference in the ranking of the top 10 host countries either including or excluding Oxford Brookes ACCA students.

- Table 3.7 shows registrations at the UK reporting institution 'with TNE students studying through distance, flexible and distributed learning for UK HEI award where the location of the student is known to be overseas'. The ranking of the top 10 host countries with most TNE students is different to the previous categories. Singapore tops the list of host countries with the most TNE students studying distance, flexible and distributed learning for a UK HEI award. Nigeria and United States also appear among the top five host countries with the most TNE students studying distance, flexible and distributed learning for a UK HEI award.

  There is no difference in the ranking of the top 10 host countries either including or excluding Oxford Brookes ACCA students.

- Tables 3.8 and 3.9 show the top 10 host countries with TNE students reported as being 'registered at the overseas partner organisation, studying for an award of the UK reporting institution'. Table 3.8 includes Oxford Brookes ACCA student numbers and Table 3.9 does not. Table 3.8 shows that China tops the list of host countries in 2014/15, followed by Pakistan and Malaysia. Malaysia tops the country list in Table 3.9 followed by China, with Pakistan dropping out of the top 10.

23. 'Students' registration involves students registering with an institution when they first begin their studies and again at the beginning of each academic session/stage. In TNE arrangements the institution that delivers the course, provides the support and facilities during the studies, and the institution with the degree awarding power for the students' chosen subject, may not all be the same insitution. Depending on the TNE arrangements between the UK and the host country institutions, students could either register with the UK or the host country institution or both.

Table 3.5: Registered at reporting provider - studying overseas for UK HEP award at overseas campus of UK reporting provider

2008/09 Ranking	2012/13 Ranking	2014/15 Ranking	Country
3	[▲2] 1	[→] 1	United Arab Emirates
2	[▼1] 3	[▲1] 2	Malaysia
1	[▼1] 2	[▼1] 3	China
10	[▲6] 4	[→] 4	Mauritius
5	[→] 5	[→] 5	Belgium
6	[→] 6	[→] 6	Hong Kong
-	[▲] 8	[▲1] 7	SIngapore
4	[▼] -	[▲] 8	India
-	[→] -	[▲] 9	Bahrain
-	[→] -	[▲] 10	Tanzania

Source: AOR Data.

Table 3.6: Registered at reporting provider - studying overseas for UK HEP award other than at an overseas campus of reporting provider

2008/09 Ranking	2012/13 Ranking	2014/15 Ranking	Country
1	[→] 1	[→] 1	Malaysia
2	[→] 2	[→] 2	Hong Kong
5	[▲2] 3	[→] 3	Oman
8	[▲4] 4	[→] 4	Singapore
9	[▲3] 6	[▲1] 5	Sri Lanka
7	[▼1] 8	[▲2] 6	Egypt
4	[▼3] 7	[→] 7	China
3	[▼2] 5	[▼3] 8	Greece
12	[→] 12	[▲3] 9	Germany
10	[▲1] 9	[▼1] 10	India

Source: AOR Data.

Table 3.7: Registered at reporting provider - distance, flexible and distributed learning for UK HEP award

2008/09 Ranking	2012/13 Ranking	2014/15 Ranking	Country
1	[→] 1	[→] 1	Singapore
2	[→] 2	[→] 2	Hong Kong
14	[▲10] 4	[▲1] 3	Nigeria
10	[▲2] 8	[▲4] 4	United States
6	[▼1] 7	[▲2] 5	Malaysia
4	[▲1] 3	[▼3] 6	Ireland
12	[▲1] 11	[▲4] 7	Canada
5	[▼1] 6	[▼2] 8	Trinidad & Tobago
7	[▼2] 9	[→] 9	Germany
34	[▲18] 16	[▲6] 10	South Africa

Source: AOR Data.

Table 3.8: Registered at overseas partner organisation - studying overseas for an award of the UK reporting provider

2008/09 Ranking	2012/13 Ranking	2014/15 Ranking	Country
7	[▲4] 3	[▲2] 1	China
47	[▲46] 1	[▼1] 2	Pakistan
16	[▲14] 2	[▼1] 3	Malaysia
-	[▲] 5	[▲1] 4	Nigeria
1	[▼3] 4	[▼1] 5	Singapore
34	[▲28] 6	[→] 6	Ghana
28	[▲21] 7	[→] 7	Mauritius
20	[▲12] 8	[→] 8	Kenya
8	[▼1] 9	[→] 9	Hong Kong
22	[▲4] 18	[▲8] 10	Egypt

Source: AOR Data.

Table 3.9: Registered at overseas partner organisation - studying overseas for an award of the UK reporting provider – excluding Oxford Brookes ACCA

2008/09 Ranking	2012/13 Ranking	2014/15 Ranking	Country
16	▲15 → 1	→ 1	Malaysia
7	▲5 → 2	→ 2	China
22	▲16 → 6	▲3 → 3	Egypt
1	▼2 → 3	▼1 → 4	Singapore
9	▼5 → 14	▲9 → 5	Greece
-	▲ 8	▲2 → 6	Kuwait
27	▲23 → 4	▼3 → 7	Saudi Arabia
8	▲1 → 7	▼1 → 8	Hong Kong
18	▲7 → 11	▲2 → 9	Oman
3	▼6 → 9	▼1 → 10	Trinidad & Tobago

Source: AOR Data.

3.14 Section 4 of this report presents the findings of the 2014/15 TNE Survey in relation to trends in registration of TNE students, subjects studied and mode of study.

Profile of the 2014/15 TNE survey respondents

3.15 62 institutions responded to the 2014/15 TNE Survey. However, as some HEIs responding to the 2014/15 TNE Survey did not deliver any UK HE TNE (7 institutions), these were excluded from the analysis. Therefore, the analysis is based on 55 institutions, thus giving a response rate of 56% to the 2014/15 TNE Survey, i.e. 55 respondents to the 2014/15 TNE Survey as a proportion of the total eligible population (99 institutions in 2014/15 AOR data).

3.16 Over two thirds (67%) of the larger TNE providers have responded to the 2014/15 TNE Survey. For example, according to the 2014/15 AOR there were 22 HEIs that individually have more than 5,000 active students[24]. 14 of these HEIs responded to the UK TNE survey i.e. a response rate of two thirds.

3.17 The 55 institutions that responded to the 2014/15 TNE Survey represent 454,690 TNE students. According to the 2014/15 AOR records these 55 institutions have 477,130 TNE students i.e. there is a difference of approximately 22,440 TNE students between the two sources (with more students reported in the 2014/15 AOR returns). Detailed analysis of the responses and discussion with larger respondents shows that differences in reporting depend on two main factors: definitional and data collection related. For example, a large TNE provider reported that some programmes reported in the AOR return fall outside the definition of the 2014/15 TNE Survey. The 2014/15 TNE Survey also excludes number students for some programmes that information about their number of students could not be easily provided by HEIs as their records were kept in a different format.

3.18 The methodological note in Appendix A provides further detailed information comparing coverage of the 2014/15 TNE Survey and the 2014/15 AOR data.

3.19 UK HEIs tend to be affiliated to different groups of universities, or 'mission groups'. Table 3.10 shows responses to the 2014/15 TNE Survey and

Table 3.10: 2014/15 TNE Survey and HESA's AOR Respondents (by type of university)

HEI Group	Total members	UK TNE Survey		HESA AOR	
		No.	% members	No.	% members
GuildHE	28	10	36%	15	54%
Million+	17	5	29%	17	100%
Russell Group	24	12	50%	23	96%
University Alliance	19	11	58%	19	100%
Other	81	20	25%	61	75%

Source: WECD, 2014/15 TNE Survey and HESA AOR 2014/15.

HESA's AOR for selected mission groups. The UK TNE survey had the highest level of returns from University Alliance (58%) and Russell Group (50%) HEIs. Compared to the 2012/13 TNE survey[25], the distribution by HEI grouping is very similar.

3.20 Respondents to the 2014/15 TNE survey have reported 2,260 degree level UK HE TNE programmes, ranging from Foundation programmes through to Doctoral programmes. The 2012/13 TNE Survey was based on analysis of 2,785 individual UK transnational education programmes.

3.21 Discussions with HEIs participating in the 2014/15 TNE Survey indicate that the programmes reported in the 2014/15 TNE Survey might underrepresent the actual number of programmes delivered by respondents. In some instances, and in particular among institutions with large numbers of TNE programmes, some programmes have been bundled together when reported (mainly for practical purposes e.g. ease of reporting when programmes involve relatively small number of students).

UK HE TNE by region and host country

3.22 The 2014/15 TNE Survey asked about the number of TNE programmes delivered by UK HEIs and their host country. The 2014/15 TNE Survey

results indicate that UK HEIs are delivering in 181 different countries across all global regions, excluding Antarctica. According to the 2014/15 TNE Survey, therefore, there are only 15 countries in the world where UK HEIs are not delivering TNE programmes. The 2014/15 AOR data indicate that UK HE TNE is delivered in 189 countries.

3.23 The 2014/15 TNE Survey results have been analysed to provide information about UK HE TNE provision by region and country by exploring: a) the proportion of UK HE TNE programmes delivered in host countries (and regions) worldwide by UK HEIs; b) the top five host countries where the UK HEIs state that most of their TNE students are based; and, c) the number of UK HEIs delivering TNE in the top 20 host countries (by number of programmes reported to the 2014/15 TNE Survey).

3.24 Figure 3.7 shows the proportion of TNE programmes delivered by geographical region as reported by UK HEIs in the 2014/15 TNE Survey. Over one quarter of TNE programmes (28%) are delivered in/to students in Asia, whilst the European Union accounts for just under a quarter (23%). Africa (14%) and the Middle East (13%) are the next largest regions in terms of TNE programmes delivered in these areas.

---

24. The University of Wales is excluded here because it has undergone recent, significant organisational changes.
25. The Value of Transnational Education to the UK: BIS RESEARCH PAPER NUMBER 194, November 2014.

Figure 3.7: UK HE TNE by Region – percentage of TNE Programmes delivered in the regions

Asia
28%

European
Union
23%

Africa
14%

Middle
East
13%

Central/
South
America
8%

North
America
7%

Other
Europe
5%

Australia
3%
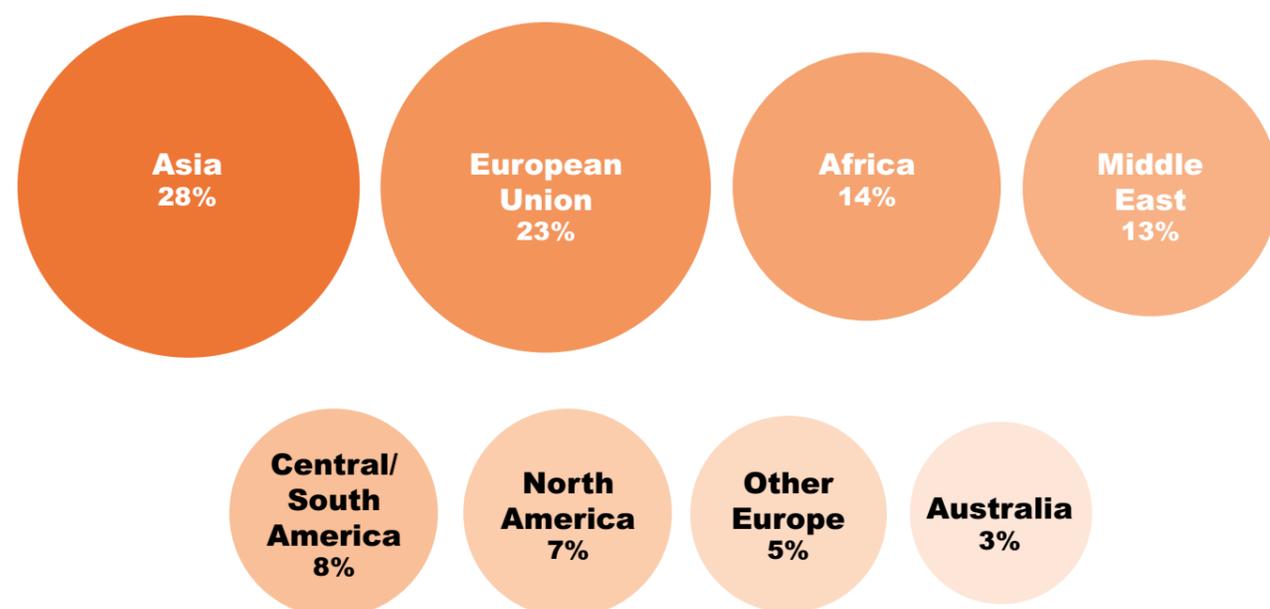
Source: WECD, 2014/15 TNE Survey.

3.25 In terms of individual countries, the 2014/15 TNE Survey shows that two Asian countries (Singapore and Malaysia) together account for 9% of all TNE programmes reported in the 2014/15 TNE Survey. Greece, Hong Kong, United States, Canada and China follow in terms of the proportion of all TNE programmes reported to the 2014/15 TNE Survey delivered in these countries.

3.26 The 2014/15 TNE Survey did not ask HEIs to provide numbers of TNE students by programme reported in every host country that their TNE programme is delivered. Instead, HEIs were asked to identify only the top five countries where they deliver their TNE programmes based on student enrolments in that host country. Based on this measure, the top five host countries in terms of student numbers where UK HEIs deliver the TNE programmes that they have reported to the 2014/15 TNE Survey include: Singapore, Malaysia, Greece, Hong Kong and United States. These are followed by Canada and China in the sixth and seventh positions.

3.27 The distribution of UK HE TNE programmes reported to the 2014/15 TNE Survey across the globe should not be equated with the distribution of UK HE TNE students worldwide. A large number of TNE programmes delivered in a host country does not automatically equate to a large number of TNE students for the respective TNE provider in that country.

3.28 Responses to the 2014/15 TNE Survey are also analysed to provide information about the representation of UK HEIs in various countries worldwide. This analysis is based on the respondents' feedback to the question about the top five host countries in terms of enrolments in the TNE programmes they have reported to this survey. presents information for the top 20 countries by the total number of programmes reported to the 2014/15 TNE Survey and delivered in the respective host country by all the respondents to the survey.

3.29 As shown in Table 3.11, there is a relatively high concentration of UK HEIs in some countries that is also accompanied by a relatively large number of UK HE TNE programmes delivered in these countries e.g. Singapore, Malaysia, China and Hong Kong. However, the number of UK HEIs operating in a host country and the number of total UK HE TNE programmes delivered in that country are not directly proportional.

Table 3.11: Representation of UK HEIs and Programmes by Host Country

Host Country	UK HEIs Delivering TNE	No of Programmes Delivered by all UK HEIs in the country
Singapore	21	205
Malaysia	16	178
Greece	9	127
Hong Kong	14	120
United States	4	120
Canada	4	105
China	16	92
Germany	10	92
Nigeria	3	87
India	9	82
Sri Lanka	6	74
Trinidad and Tobago	4	68
South Africa	4	62
Oman	8	57
Australia	3	53
Dubai	9	50
France	1	50
Switzerland	4	48
United Arab Emirates	5	45
Ireland	6	42

Source: WECD, 2014/15 TNE Survey.

3.30 Appendix C provides more detailed information about the subject areas of programmes in these countries. As shown in Table 3.12, Business and Management is the UK HE TNE subject delivered in most countries – 88 out of the 181 reported host countries in the 2014/15 TNE Survey. The second most popular subject based on the 2014/15 TNE Survey results is Medicine and related studies (in 66 countries), followed by Arts & Humanities (in 65 countries).

3.31 As also shown in Table 3.13, approximately two thirds of TNE programmes (66.8%) reported to the 2014/15 TNE Survey are delivered only in one host country, with just over a third of TNE programmes (33.2%) delivered in more than one countries. The equivalent figures in the 2012/13 TNE Survey were: 61% of programmes delivered in one host country and 39% in more than one country. Any comparisons between the two surveys need to be undertaken with caution given that the samples of responding HEIs in the two surveys are different. Nevertheless, these figures would suggest that the respondents to the 2014/15 TNE Survey are less likely than the respondents to the 2012/13 TNE Survey to deliver their programmes in more than one host country.

Table 3.12: Subject by Number of Countries Delivered

Subject	No. of Countries Delivered in
Business and Management	88
Medicine and Related	66
Arts and Humanities	65
Social Studies and Law	62
Engineering, Technology and Architecture	53
Maths and Computing	53
Science	39
Education	15

Table 3.13: Number of Countries UK HE TNE is Delivered

No of countries where UK HE TNE programmes are delivered	% of TNE programmes delivered
1 Country	66.8%
2-5 Countries	12.0%
6-9 Countries	4.9%
10-14 Countries	2.0%
15-19 Countries	2.0%
20+ Countries	12.2%
Total	100.0%

Source: WECD, 2014/15 TNE Survey.

3.32 The 2014/15 TNE Survey data also show that the largest TNE providers (i.e. those with 5,000+ TNE students) tend to deliver in more than one host country. These programmes are across a range of subjects rather than being similar programmes which might be replicated in a number of countries. All of the largest TNE providers deliver in five or more countries. A small number of the relatively smaller TNE providers (i.e. with fewer than 5,000 TNE students) deliver in five or more countries, with four delivering in more than 10 countries.

3.33 Figure 3.8 shows that according to the 2014/15 TNE Survey results, institutions delivering programmes in multiple countries are more likely to be delivering these programmes through local delivery partnerships and distance/online learning TNE provision in the host countries than having a physical presence in these countries. Of all the TNE programmes that are delivered only in one host country, approximately 75% are delivered through local delivery partnerships, 20% through physical presence and 5% through distance/online learning provision.

Figure 3.8: TNE programme delivery by number of countries delivered and type of delivery
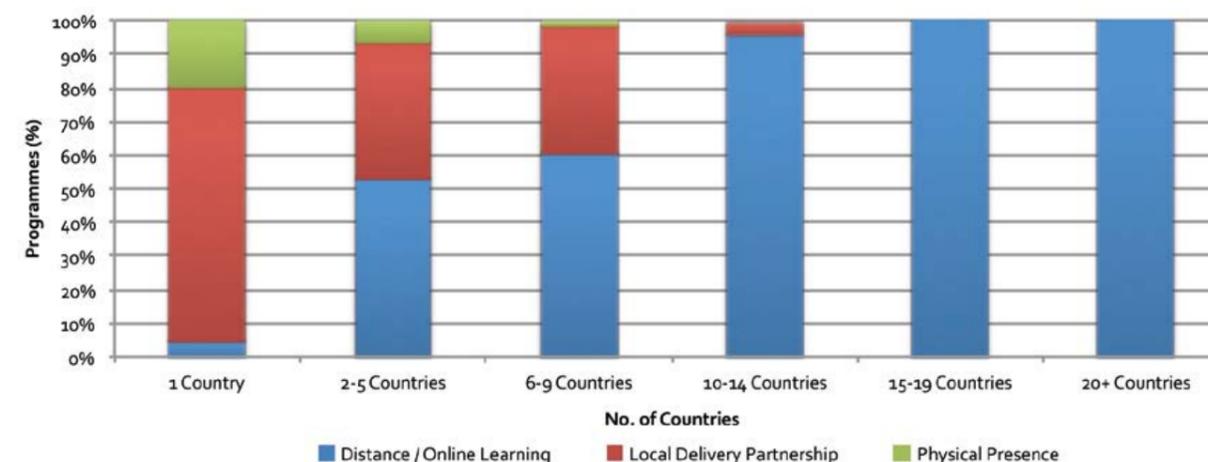
Source: WECD, 2014/15 TNE Survey.

3.34 The subject profile of different delivery methods by number of countries a university is delivering to is presented in Figures 3.9 to 3.11.

3.35 For distance learning programmes, which are, as discussed in paragraph 3.34, more likely to be delivered in multiple countries than one only country, the subject profile is skewed by the presence of two large providers but also the small numbers of programmes in some cases. Some subject areas with large numbers of programmes e.g. Business and Management and Medicine and related studies have a relatively even distribution across the number of countries. Others, such as Arts and Humanities, are delivered in a relatively small number of countries.

3.36 For local delivery partnerships (see Figure 3.10), there is a sliding scale of provision by numbers of countries i.e. the more countries an institution is involved with through these type of TNE arrangements, the fewer programmes are delivered.

3.37 A similar pattern is observed where programmes are delivered through a physical presence (see Figure 3.11). A relatively small number of programmes reported to the 2014/15 TNE survey are delivered in more than country (5%) and all but one of these programmes are Business and Management subjects.

3.38 TNE delivery methods based on the 2014/15 TNE Survey results are discussed in more detail in section 4.

Figure 3.9: Distance Learning - by number of countries delivered and subject

Source: WECD, 2014/15 TNE Survey.

Figure 3.11: Physical Presence - by number of countries delivered and subject

Source: WECD, 2014/15 TNE Survey.

Figure 3.10: Local Delivery Partnership - by number of countries delivered and subject
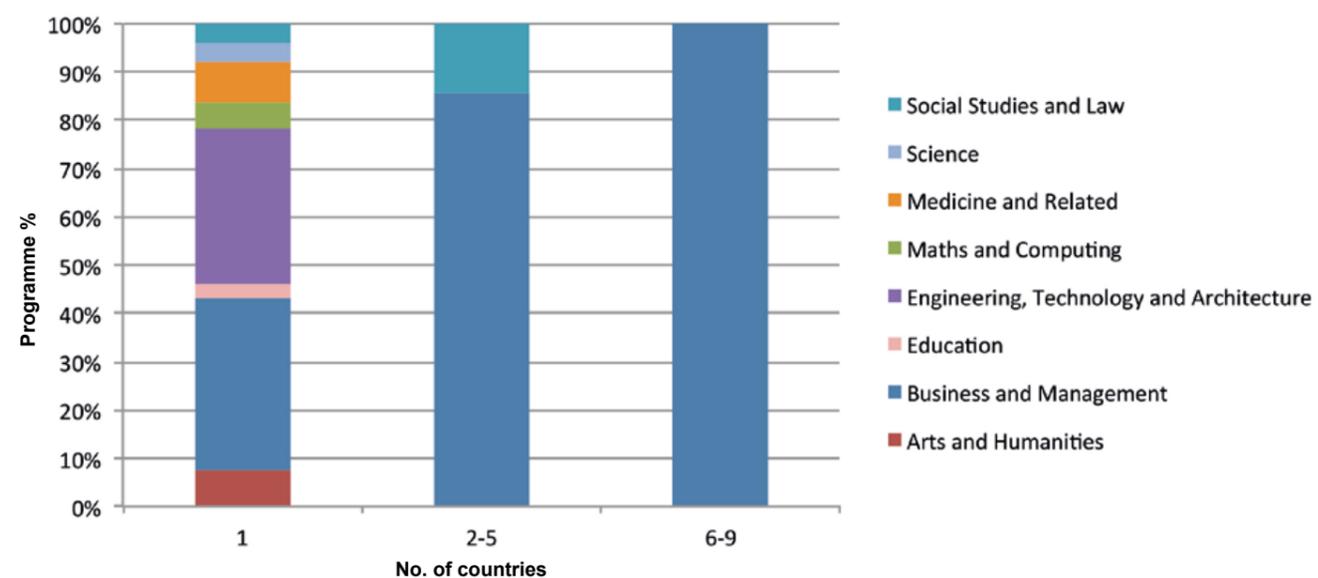
Source: WECD, 2014/15 TNE Survey.

Case study

Oxford Brookes University's programme BSc Applied Accounting with the Association of Chartered Accountants (ACCA)

About Oxford Brookes University
- Oxford, Central England
- Founded in 1992
- 15 Schools and Departments across 4 Faculties: Business; Health and Life Science; Humanities and Social Sciences; and Technology, Design and Environment
- 15,430 students in the UK
- 2,350 international students in the UK
- 284,675 TNE students

About the BSc Applied Accounting degree
- Worldwide
- Established in 2000
- Oxford Brookes University and ACCA
- Online learning
- 280,055 students registered with Oxford Brookes University

Oxford Brookes University and ACCA developed a BSc (Hons) Degree in Applied Accounting. The programme has been offered worldwide since 2000.

The BSc is only delivered to ACCA students. Students are automatically registered for the Oxford Brookes University degree when they enrol with ACCA. This gives them the option of attaining a UK degree as part of their studies.

Automatically enrolling ACCA students for the degree programme increases Oxford Brookes University's TNE student numbers. Students have up to ten years to complete the modules, and are reported in each of those years to the UK Higher Education Statistics Agency (HESA) data collection as studying with Oxford Brookes University. This means that the TNE numbers reported to HESA are very high, which is sometimes referred to in TNE theory and literature as 'the Oxford Brookes effect'.

Success factors
- Flexible study options
- Clear roles and responsibilities

Flexible study options

Teaching and learning arrangements are flexible. Students can study with an approved learning partner in-country, or can self-study. Full-time, part-time and revision courses are offered by approved learning partners around the world. Partners are regularly visited by ACCA to assure standards. Self-study students use resources including self-study guides and exam support. The amount of time allowed to complete the modules means that students who might not otherwise be able to fit study around their day-to-day lives have greater opportunity to engage with, and complete, the programme.

Clear roles and responsibilities

Oxford Brookes University and ACCA are each responsible for different parts of the provision. ACCA provides educational resources and tools, e.g. study materials. Oxford Brookes University monitors and grades students' Research and Analysis Projects, and delivers employability and skills development support.

The worldwide partnership is creating an international community of accountants with globally-recognised degrees.

Case study

Heriot–Watt University Dubai and Malaysia Campuses

> " We don't talk about branch campuses; we are an international university with multiple locations. "

Ruth Moir, Assistant Principal (International Development), Heriot-Watt University

About Heriot-Watt University
- Edinburgh, Central Scotland
- Founded in 1821
- 7 Schools: Energy, Geoscience, Infrastructure and Society; Engineering and Physical Sciences; Life Sciences; Management and Languages; Mathematical and Computer Sciences; Textiles and Design; and the Edinburgh Business School
- 10,705 students in the UK
- 4,465 international students in the UK
- 15,450 TNE studentss

About Heriot-Watt Dubai Campus
- Dubai, United Arab Emirates
- Founded in 2005
- Heriot-Watt University
- Branch campus
- 3,800 students registered with Heriot-Watt University

About Heriot-Watt Malaysia Campus
- Putrajaya, Malaysia
- Founded in 2011
- Heriot-Watt University
- Branch campus
- 1,000 students registered with Heriot-Watt University

Heriot-Watt University is an international multi-campus university: it has several campuses in Scotland alone. Since 2000, the University has extended its reach establishing international campuses in Dubai and Malaysia. Heriot-Watt University is now a recognised and valued member of the higher education landscape in both regions, as well as in the UK. The campuses add strength to Heriot-Watt University in all its locations, widening access to Heriot-Watt University degree programmes and increasing opportunities for students to gain an international experience through inter-campus transfers on the same programmes.

Success factors
- Planning and buy-in
- Learning from experience
- Relevance to local and international contexts
- A whole institutional approach

Planning and buy-in

Heriot-Watt University incorporated due diligence into its planning and also invested early on in working with stakeholders - such as alumni groups and professional bodies - to inform its delivery plans and generate local support. This ensured local buy-in to programmes and the university's academic management structure and planned approach to the assurance and quality of standards safeguards the quality of its degree awards.

Relevance to local and international contexts

The Dubai and Malaysia campus developments both responded to national government initiatives in higher education. The University's portfolio has been designed in the context of local economic development needs. In both cases, the governments in these locations supported the university and this was followed up by securing individual programme accreditations.

A whole institutional approach

The experience of operating an international campus in Dubai provided valuable learning which informed the subsequent planning and development of the Malaysia Campus. Heriot-Watt University recognised that 'at home' support is as important as 'in country' support when developing new campuses. Internal champions promoted and led work in the Malaysia Campus development ensuring that support was drawn from across all the University teams.

Learning from experience

The processes for setting up and running Heriot-Watt's Malaysia's campus were informed by the University's experience in Dubai. In particular, the University devoted time to debating the rationale for the campus. Colleagues across the university were recruited to multiple work streams and an integrated academic management structure and quality assurance structure was introduced across all campuses.

Case study

Goldsmiths, University of London validated degrees at LASALLE College of the Arts

About Goldsmiths, University of London
- London, South East England
- Founded in 1891
- 20 academic departments, centres and institutions
- 18,170 students in the UK
- 2,845 international students in the UK
- 1,240 TNE students

About the Goldsmiths and LASALLE College of the Arts partnership
- Singapore
- Degree validation started in 2012
- Goldsmiths, University of London and LASALLE College of the Arts
- Validated programmes
- 1,240 students registered with Goldsmiths, University of London
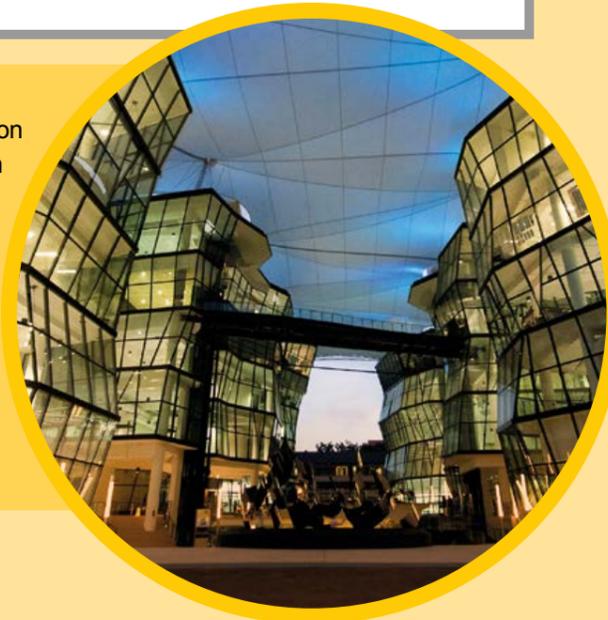
LASALLE College of the Arts, a tertiary institution in cutting edge contemporary arts and design education and practice, delivers 18 programmes in design, fine arts, media arts, performing arts and creative industry-related disciplines which are validated by Goldsmiths. The programmes were specifically developed to meet the needs of Singapore's creative industries. This means the degrees are immediately relevant to students and employers, and have the added benefit of global input and benchmarking to UK standards.

Making sure that internal strategies work well together allows the University to create high quality, enhanced TNE.

Success factors
- Strategic approach
- Strong quality assurance
- Enhanced Validation Plus model

Strategic approach

Goldsmiths' Internationalisation and Collaborative Provision strategies are interrelated. The University has strong societal and cultural values which are articulated in both the strategies. Alongside this, the strategies state a clear policy of focusing on high calibre global teaching partnerships. The Internationalisation strategy embraces all forms of TNE, making it flexible enough to enable the right agreements to be made with the right partners around the world.

Strong quality assurance

The joint programmes meet both the UK Quality Assurance Agency and Singapore Council for Private Education expectations. Goldsmiths benchmarks activity to ensure the programmes meet the UK Quality Code, while LASALLE College of the Arts has been awarded the EduTrust Star, the highest quality award for private colleges in Singapore. Robust frameworks and review systems are in place including external peer-review, internal moderation by academic links, annual and periodic partnership and programme reviews, and External Examiner moderation.

Enhanced Validation Plus model

Goldsmiths is committed to offering overseas programmes which are not simply validated but augmented by collaborative academic activities. These are developed to fit the specific TNE programme. For the programmes validated in Singapore, the activities include around 30 teaching, learning and research collaborations per year, student projects, and supporting PhD study for LASALLE College of the Art's staff in London.

4. The scope and reach of UK HE TNE

4.1 This section looks at the detail of UK HE TNE provision at programme level as reported by UK HEIs participating in the 2014/15 TNE Survey. It provides detailed analysis of TNE programmes by their main characteristics i.e. method of delivery, level, subject, mode and length of study; the nature of delivery i.e. location, accreditation, language and history of provision; and, responsibility by UK or host HEI for different aspects of delivery.

4.2 All analysis referring to student numbers/headcount in this section excludes Oxford Brookes ACCA students.

Key points

- The 2014/15 TNE Survey results indicate that just over half of TNE programmes are distance/online learning programmes, and around two out of five are delivered through a local delivery partnership.

- Most distance/online learning programmes were first delivered before 2000, and most of the students on those programmes receive local support.

- The favoured method of local partnership delivery is through a franchised programme.

- Branch campus is the most common form of physical presence in the host country. Where HEIs have a physical presence, most programmes are postgraduate taught.

- Business and Management programmes account for two out of five TNE students followed by Social Studies and Law which accounts for one in five.

- Over one third of TNE programmes are Business and Management programmes and 15% are Arts and Humanities. Since 2010 there has been an increase in Arts and Humanities, and Engineering, Technology and Architecture programmes and students.

- Almost one half of TNE programmes are undergraduate degrees (47%), with the remainder mostly postgraduate taught programmes (44%).

- Whilst most programmes have started in the past seven years, most students are on programmes that began before 2005 and have been offered each year since then. There have been three main chronological 'spikes' of activity as far as student numbers are concerned: in 1994 (when 20% of TNE programmes based on student headcount had their first student intake); in 1996 (10%); and in 2009 (9%).

- Nearly all TNE study takes place in the host country. However, programmes first delivered after 2010 are much more likely to involve study in both the host country and the UK.

- There is an almost equal split between students registered jointly, at both the UK and the host country's institution, and those registered with the UK HEI only. Over time, joint registration has increased whilst UK only registration has decreased.

- Excluding ACCA students, only around one in ten programmes (9% of programmes or 15% of students) are professionally accredited. These tend to be either solely UK or Global professional standards, most commonly the AACS (Association to Advance Collegiate Schools of Business).

TNE delivery methods

4.3 The broad methods of UK HE TNE delivery include:
- Distance/online learning e.g. either with local support or without local support.
- Local delivery partnerships e.g. franchised delivery, joint and dual degrees, twinning arrangements, validation and quality arrangements.
- Physical presence e.g. branch campus, study centre or flying faculty.

4.4 As mentioned in the introduction of the report, articulation and transfer arrangements are not included in the definition of TNE for the purposes of this study.

4.5 Figure 4.1 depicts the key delivery methods of TNE programmes in the five countries with the most TNE students as reported by the respondents to the 2014/15 Survey. It shows that:
- Just over half (52%) are distance/online-learning programmes.
- 40% are delivered in co-operation with a local partner.
- Fewer than one in ten (8%) are delivered through the UK HEI having a physical presence.

4.6 The distribution of UK HE TNE delivery methods is similar whether it is based on students' numbers or the number of programmes.

4.7 There are some distinct differences in the characteristics of provision of UK HE TNE delivery methods depending on the level of study, subject studied and first year of engagement in TNE delivery. This information is presented in Table 4.1. For example, further analysis of information provided in relation to distance/online learning TNE provision shows that:
- Virtually all 'Other' qualifications[26] are delivered through distance/online learning.
- Most (56%) students are undergraduates but most programmes are offered at postgraduate level (61%).
- Almost all (93%) students are studying on programmes offered on both a full- and part-time basis.
- No programmes are offered on a full-time basis.
- 70% of students were on programmes first delivered before 2000.
- Only 4% are on programmes have been developed and delivered after 2010.

Figure 4.1: TNE delivery method in the top 5 countries of delivery (as defined by student numbers)

Physical presence 8%

Distance/online learning 52%

Local delivery partnership 40%
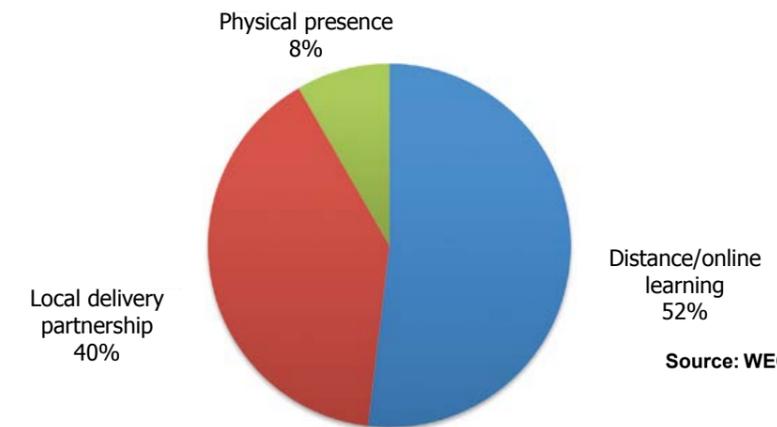
Source: WECD, 2014/15 TNE Survey.

26 'Other' qualifications predominantly include Ordinary and Foundation Degrees, and Certificates and Diplomas of HE.

Table 4.1: TNE Delivery Methods and Variations by Programmes and Students*

Various TNE delivery aspects	Distance/ online learning		Local delivery partnership		Physical presence	
	% of students	% of programmes	% of students	% of programmes	% of students	% of programmes
Undergraduate	56% **	29%**	83%	69%	51%**	35%
Postgraduate[27]	34%	61%	17%	30%	40%	61%
Other	9%**	11%**	1%**	1%**	9%**	4%**
All	100%	100%	100%	100%	100%	100%
Solely full-time	0%	0%	47%	38%	64%	63%
Both full & part-time	84%**	62%**	42%	38%**	2%	13%**
Solely part-time	16%**	37%**	11%**	24%**	34%**	25%**
All	100%	100%	100%	100%	100%	100%
1st intake post-2005	20%**	52%	71%	85%	35%	69%
1st intake pre-2005	80%**	48%**	29%	15%	65%	31%
All	100%	100%	100%	100%	100%	100%
Humanities, Education, Social Studies and Law	45%**	35%**	15%	25%	4%	13%
Business and Management	33%	23%	49%	44%	52%**	37%**
Science, Medicine, Maths, Computing and Engineering	20%	41%	36%	32%	44%**	50%**
All	100%	100%	100%	100%	100%	100%

Source: WECD, 2014/15 TNE Survey; HESA AOR 2014/15.

* Excluding Oxford Brookes ACCA students.

** Where two HEIs account for at least 75% of programmes and students within that cell.

27. Combines postgraduate teaching and research. Only 0.6% of postgraduate students are research students the remainder are taught. Therefore the category is not split as the large majority are postgraduate taught.

• Two out of five (40%) distance/online learning students are taking Social Studies and Law programmes and one third (33%) are taking

4.8 In terms of **local delivery partnerships**, the 2014/15 TNE Survey results show that:
  • Most students (83%) and programmes (69%) are undergraduates.
  • Only one in ten programmes (11%) and a quarter of students (24%) are solely part-time.
  • Most programmes (71%) were first delivered prior to 2006, which account for 85% of students.
  • Half of the programmes (49%) are in Business and Management and these account for nearly half of all students (44%). Engineering, Technology and Architecture, Maths and Computing and Arts and Humanities programmes together account for 40% of students.

4.9 The 2014/15 TNE Survey results also show that in TNE delivered through **physical presence:**
  • Most students are postgraduates (61%).
  • Almost two-thirds of both programmes (63%) and students (64%) are full-time.
  • As with the other methods of delivery most students (65%) were on programmes first delivered before 2006. However, most programmes (69%) have been first delivered after 2005.
  • Almost half of students (49%) are studying Business and Management programmes, and almost one third (30%) are studying Engineering, Technology and Architecture.

4.10 The 2014/15 TNE Survey results provide further information on the extent of local support, the nature of the local delivery partnership and the type of physical presence in the host country. Information is analysed by both, number of students covered by the specific type of delivery and programmes. This information is summarised in Table 4.2 and the detail of each broad category of delivery is discussed in more detail below.

4.11 Table 4.3 provides the same information as Table 4.2 but excludes the Open University and the University of London. Taking out these two providers changes

the profile of distance/online learning provision significantly. Together these two HEIs account for 73% of distance/online learning programmes, and 83% of students studying through distance/online learning programmes. If these two providers are excluded from the analysis of distance learning programmes, then the proportion of programmes with local support falls to zero, and the proportion of students receiving local support falls to 2%. The profile of local delivery partnerships is affected by the removal of the Open University and the University of London but in a much less significant way, only changing some of the figures by a few percentage points. The profile of provision delivered through a physical presence is not affected at all.

4.12 As shown in Table 4.2, the 2014/15 TNE Survey results show that in relation to **distance/online learning programmes**[28].
  • Over half (57%) of distance/online learning programmes are offered without any local support. However, most students on such programmes (71%) receive local support.
  • Nearly all programmes offered on full- and part-time basis, and full-time programmes, which tend to be undergraduate, are delivered with local support. Virtually no part-time programme or students (mainly postgraduate) receive local support.
  • The older the programme the more likely it is to have local support. Programmes with local support account for 86% of programmes and 94% of students on courses first delivered before 2006. This compares to 3% of programmes and 3% of students on programmes first delivered after 2005/06.
  • Most Humanities, Education, Social Studies and Law programmes are delivered with local support, but most Science, Medicine, Maths and Engineering are delivered without local support.
  • Most Business and Management programmes are delivered without local support, but most students are undertaking programmes with local support.

4.13 In relation to the nature of local delivery partnerships, the 2014/15 TNE Survey results show that:
  • The favoured method of local partnership delivery is through a franchised programme, which accounts for 45% of programmes and 45% of students.

28. University of London International Programmes, The Open University and the University of Liverpool are the largest providers. University of London International Programmes is the only provider amongst these to offer distance programmes without local support.

Table 4.2: Specific Type of Delivery by Programmes and Students*

	% of students*	% of programmes
Distance/online learning		
...with local support	71%	38%
...with no local support	28%	57%
Blended	0%	4%
Total	**100%**	**100%**
Local delivery partnership		
Double dual, or multiple degree	11%	9%
Franchised programme	45%	45%
Joint Degree	9%	14%
'Top-up' programme	0%	0%
Validation or 'quality assurance' programme	35%	32%
Total	**100%**	**100%**
Physical presence		
Branch campus	53%	71%
Flying faculty or 'outreach'	47%	25%
Study centre	1%	4%
Total	**100%**	**100%**

Source: WECD, 2014/15 TNE Survey.
* Excluding Oxford Brookes ACCA students.

- The distribution of delivery method by undergraduate and postgraduate programmes is very similar. Franchised programmes are the favoured method of delivery in both cases, with validation or quality assurance programmes the second. One third of postgraduate programmes are delivered through joint, double dual or multiple degrees; however, these only account for 10% of students. One in five undergraduate degrees are offered in these ways accounting for one quarter of students.
- Part-time programmes tend to be either franchised or validation programmes. On the other hand, those programmes offered on both a full- and

part-time basis are either franchised or joint degree. Full-time programmes are split between franchised, validation or double dual, or multiple degree programmes.
- Few programmes delivered through local partnerships were active before 2005. There is no consistent pattern in the development of local partnership delivery methods since 2005.
- Just under half of Humanities, Education, Social Studies and Law programmes and students are delivered through validation (46% and 47% respectively), whilst over half of Business and Management programmes (56% and 61%) are

Table 4.3: Specific Type of Delivery by Programmes and Students excluding the Open University and the University of London

	% of students*	% of programmes
Distance/online learning		
...with local support	0%	2%
...with no local support	97%	79%
Blended	3%	19%
Total	**100%**	**100%**
Local delivery partnership		
Double dual, or multiple degree	9%	12%
Franchised programme	45%	50%
Joint Degree	14%	10%
'Top-up' programme	0%	0%
Validation or 'quality assurance' programme	32%	27%
Total	**100%**	**100%**
Physical presence		
Branch campus	53%	71%
Flying faculty or 'outreach'	47%	25%
Study centre	0%	4%
Total	**100%**	**100%**

Source: WECD, 2014/15 TNE Survey.
* Excluding Oxford Brookes ACCA students.

franchised programmes. Over half of Science, Medicine, Maths and Engineering programmes are franchised (53%) but most students are on validation programmes (36%).

4.14 In relation to physical presence, analysis of the relevant 2014/15 TNE Survey data shows that:
- Most TNE programmes delivered through a physical presence are branch campus-based (71%). Using flying faculty or 'outreach' was the second most favoured method of physical presence delivery.
- Branch campuses account for the majority of undergraduate programmes (85%) and students

(61%). Whilst most postgraduate programmes (63%) are delivered through a Branch campus, most students (53%) are taught using flying faculty.
- Almost all physical presence programmes are either full- or part-time; few are delivered flexibly (i.e. delivered on both a full- and part-time basis). The large majority of part-time programmes (86%) and students (70%) are taught using flying faculty models. 44% of full-time programmes (44%) are branch campus-based, but most full-time students (57%) are taught using flying faculty.
- Three quarters of physical presence programmes first delivered before 2006 tend to be relying

upon using flying faculty. Since 2006, using flying faculty is still the preferred approach, however, 42% of programmes are branch campus-based and these account for 63% of students.

- Branch campuses accounting for 42% of Humanities, Education, Social Studies and Law programmes, 67% of Business and Management, and 83% of Science, Medicine, Maths and Engineering.
- Most students on Humanities, Education, Social Studies and Law programmes study at Branch campuses (73%), compared to 62% of Business and Management students.
- Over half (54%) of Science, Medicine, Maths and Engineering are taught using flying faculty.

4.15 Comparing these 2014/15 TNE Survey results with the 2012/13 TNE Survey indicates some notable changes between the two surveys. For example, the 2012/13 TNE Survey showed that the largest proportion of UK HE TNE was delivered through distance learning arrangements – 40% of all programmes. The 2014/15 TNE Survey indicates increased distance/online learning arrangements – at 52% of all TNE programmes.

4.16 This difference between the two surveys needs to be interpreted with caution given that the respondents in the two surveys vary (see methodological note in Appendix A). Furthermore, it is not possible to directly compare the specific categories (e.g. branch campus, flying faculty, validation etc.) between the two surveys as the categories are different. For example, the 2012/13 TNE Survey includes categories such as 'other collaborative provision' and 'other overseas study (e.g. flying faculty/PhDs)' that are not used in the 2014/15 TNE Survey.

Subject, Level And Mode Of TNE Programmes

4.17 HEIs were asked to provide details of their 2014/15 TNE programmes including subject, level and mode of study. As shown in Figure 4.2:
- Over one third of all TNE programmes reported are in Business and Management (36% of all TNE programmes).

- The next largest subject – Arts and Humanities – accounts for 15% of all TNE programmes.
- Maths and Computing, Engineering, Technology and Architecture, Social Studies and Law, and Medicine and Related, each account for around one in ten TNE programmes.

4.18 In terms of more specific subject categories, according to the 2014/15 TNE Survey results, the largest TNE programmes after Business and Administrative Studies were:
- Computer Sciences (11% of TNE programmes).
- Engineering (8%).
- Social Studies (7%).
- Veterinary Sciences; Agriculture and Related Subjects (6%).
- Creative Arts and Design (5%).

4.19 The ranking and size of subjects is similar in the 2014/15 TNE Survey and the 2012/13 TNE Survey. The 'top four' subject areas are the same - except that Maths and Computing ranked below Engineering, Technology and Architecture in the 2012/13 TNE Survey. The proportions for all of the subject groupings are also very similar. The largest difference is five percentage points for Business and Management that represents 36% of programmes in the 2014/15 TNE Survey compared with 31% in the 2012/13 TNE Survey.

4.20 Figure 4.3 shows the number of students by subject area as reported in the 2014/15 TNE Survey:
- Business and Management studies account for the subject area for 42% of all TNE students.
- Social Studies and Law is the next largest subject area, accounting for one in five TNE students (21%).
- Maths and Computing, and Engineering, Technology and Architecture programmes account for around 15,000 TNE students each.

4.21 As shown in Figure 4.4, the 2014/15 TNE Survey indicates that:
- Business and Management, Maths and Computing, and Engineering, Technology and Architecture account for similar proportions of

Figure 4.2: TNE Programmes by Study Subject[29]

Source: WECD, 2014/15 TNE Survey.

Legend:
- Business and Management
- Arts and Humanities
- Maths and Computing
- Engineering, Technology and Architecture
- Social Studies and Law
- Medicine and Related
- Science
- Education
- No linked qualification
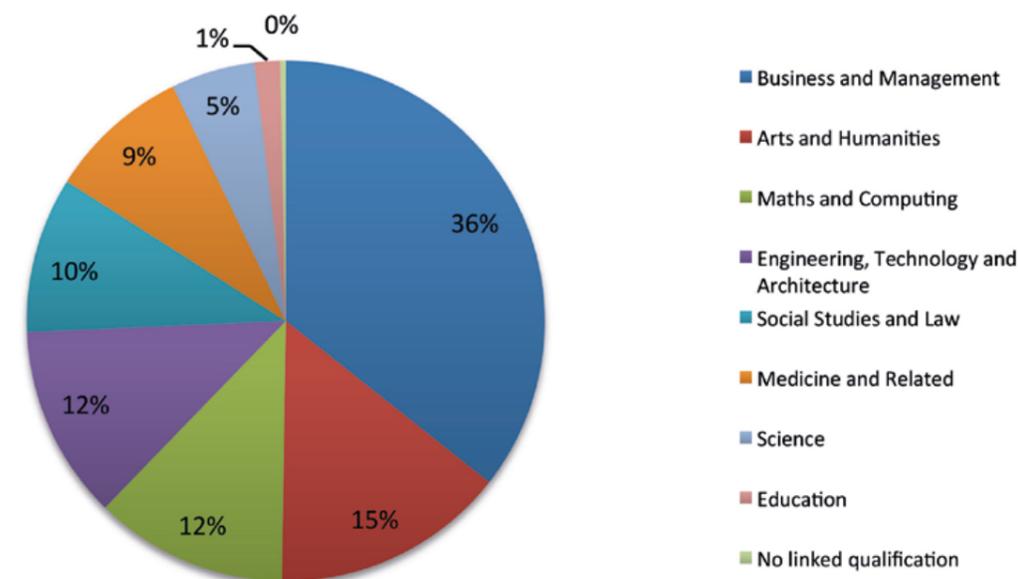
Figure 4.3: TNE Students* by Study Subject

Source: WECD, 2014/15 TNE Survey.

Legend:
- Business and Management
- Social Studies and Law
- Engineering, Technology and Architecture
- Maths and Computing
- Arts and Humanities
- Medicine and Related
- Education
- Science
- No linked qualification
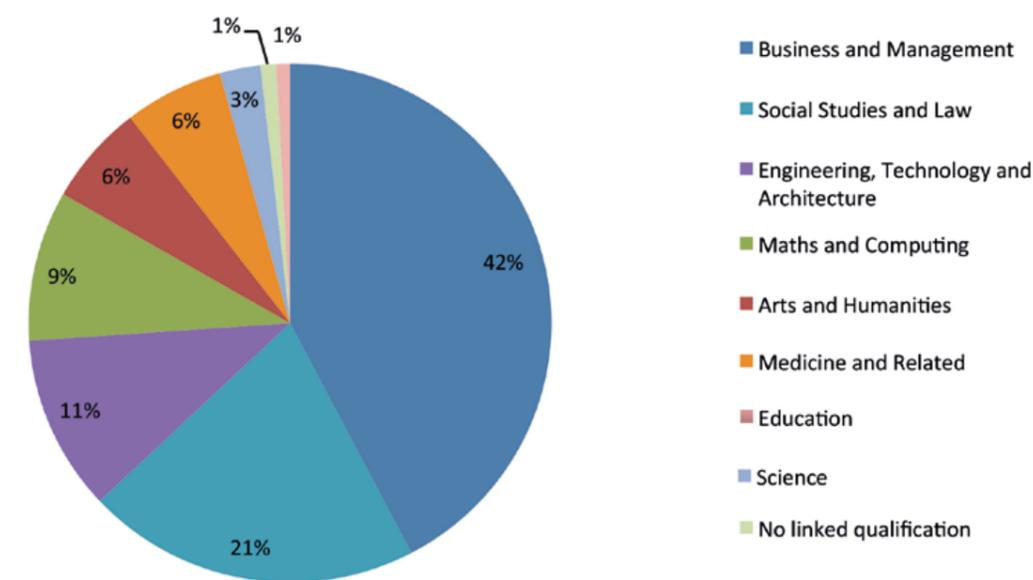
29 Students may not declare a subject at the outset of pursuing a 'No linked' qualification.

TNE programmes and TNE students in overall terms. When, however, figures are broken down by level of study (i.e. undergraduate and postgraduate), this proportionality of programmes and students does not hold true for Engineering, Technology and Architecture (see paragraph 4.32 and Figure 4.11).

- The average TNE programme size, measured by student headcount, varies considerably between subjects – implying that the ratio of TNE students to TNE programmes varies by subject area. For example:
  - o TNE programmes in Arts and Humanities account for a much larger proportion of TNE programmes than students.
  - o For TNE programmes in Social Studies and Law, the proportion of students is much larger than the percentage of programmes.

4.22 The 2014/15 TNE Survey also shows that there have been important changes in the subject offer of programmes:
- Since 2010 there has been an increase in Arts and Humanities, and Engineering, Technology and Architecture programmes and students. From 2010 these two areas have accounted for 37% of programmes and 31% of students, whereas before 2010 they comprised 27% of programmes and 19% of students – a rise of 10 and 12 % respectively.
- There has been a steady decline in the number of Social Studies and Law programmes. Prior to 2005, these programmes made up 19% of programmes and 42% of students but after 2010 both these proportions reduced to 9%.
- Medicine and Related programmes have also seen a decline in their relative programme and student numbers. Over half of programmes (54%) and students (66%) were first delivered/ delivered to between 2004 and 2009. Since 2010, the respective figures are 26% and 13%.

4.23 Figure 4.5 shows TNE programmes by year of first intake (i.e. when they were first delivered) and subject area. For all subjects, except Social Studies

and Law at least four out of five programmes had their first intake after 2002. For Social Studies and Law there was a spike in 1994 when one quarter of these programmes were first delivered. For most subjects, there was a flurry of activity between 2006 and 2009 when at least one third of programmes in all subject areas (apart from Arts and Humanities) were first delivered. The period between 2012 and 2014 also saw the first year of delivery for a number of programmes, particularly in Arts and Humanities (when 55% of programmes had their first intake), and Engineering, Technology and Architecture (47% of programmes).
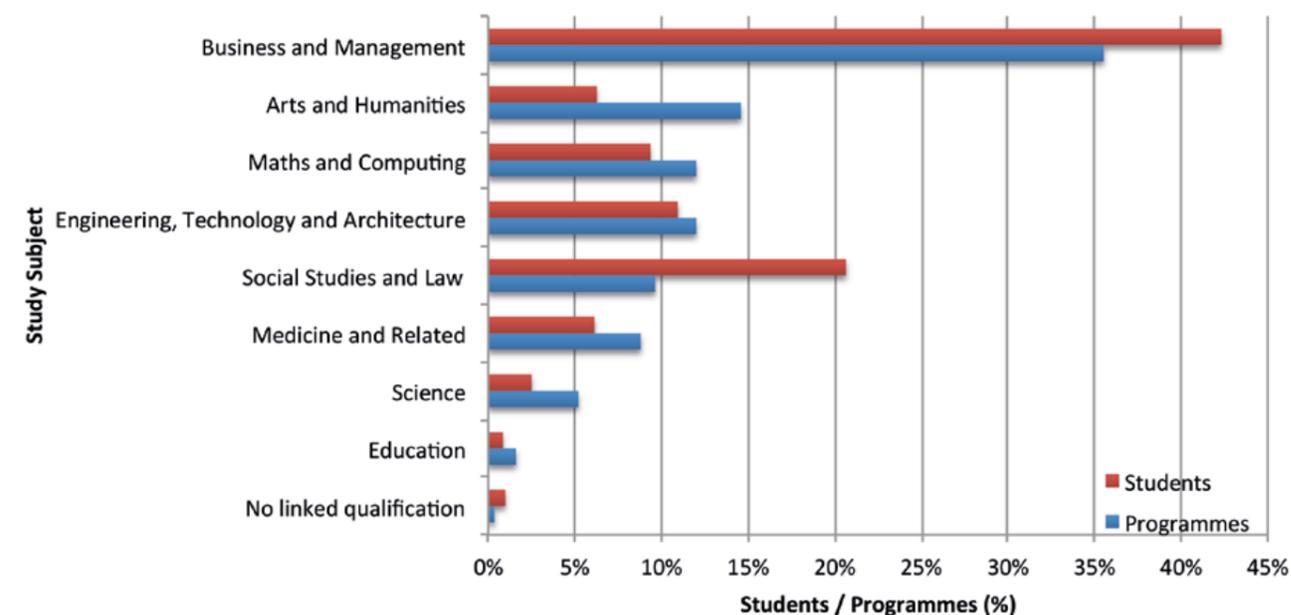
4.24 Figure 4.6 provides the same information but for numbers of students. There is much less consistency in year of first intake across programmes with spikes in activity at different points.

4.25 Figure 4.7 shows that 47% of TNE programmes reported in the 2014/15 TNE Survey are at undergraduate degree level, with the remainder mostly postgraduate taught programmes (44%). Very few programmes are postgraduate research (4%)[30] or other programmes (such as Foundation Degrees). When measured as a proportion of students, however, two thirds of programmes (66%) are at undergraduate level with the remainder mostly at postgraduate taught level (28%).

4.26 The distribution of undergraduate and postgraduate programmes for both student and programme numbers is similar when the 2014/15 TNE Survey results are compared with the 2012/13 TNE Survey. In the 2012/13 TNE Survey, 48% of programmes and 72% of student enrolments were at undergraduate level. The equivalent figures in the 2014/15 TNE Survey (i.e. TNE study at undergraduate level) are 47% (programmes) and 66% (students) respectively. In the 2012/13, 41% of programmes and 26% of student enrolments were at postgraduate taught level. The equivalent postgraduate figures in the 2014/15 TNE Survey are 44% (programmes) and 28% (enrolments) respectively.

Figure 4.4: TNE Programmes and Students* by Study Subject

Source: WECD, 2014/15 TNE Survey.
* Excluding Oxford Brookes ACCA students.

4.27 The 2014/15 TNE Survey shows that the level of TNE programme engagement at undergraduate or postgraduate degree varies by TNE subject (Figure 4.8). For example:
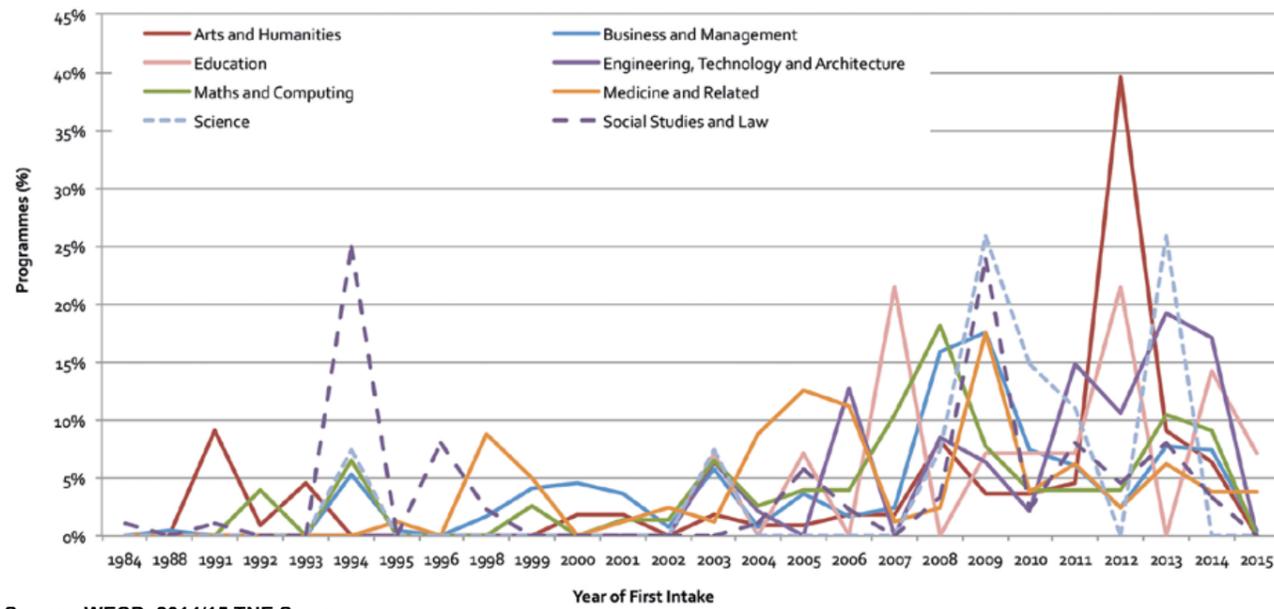- The majority of TNE programmes in Medicine and related subjects (79%) are at postgraduate level (taught) – with 8% at postgraduate research level and 12% at undergraduate level.
- Approximately two thirds of TNE programmes in Education (65%) at delivered at postgraduate taught level – with 13% at postgraduate research level, 13% at undergraduate level and 9% consisting of other types of degrees.
- On the other hand, undergraduate level TNE programmes are relatively more prominent (than postgraduate degrees) in Arts and Humanities, and Maths and Computing, representing 60% and 58% of TNE programmes in these subjects respectively.

- In addition to TNE programmes in Medicine and related subjects and Education, postgraduate research TNE programmes also feature relatively highly in Engineering, Technology and Architecture, and Arts and Humanities (with 7% and 6% of postgraduate research programmes in these areas respectively).

4.28 The same analysis based on TNE students rather than TNE programmes reveals similar patterns of variations between subject areas and level of study (Figure 4.9). For example:
- The majority of TNE students in Medicine and related subjects (56%) and Education (74%) are studying at postgraduate taught level.
- On the other hand, TNE undergraduate students constitute the majority of TNE students in Arts & Humanities (80% of all TNE students studying this subject), Maths and Computing (74%) and Engineering, Technology and Architecture (77%).

---

30 This is in part explained by HEIs finding it challenging to provide information about doctoral students. There are many programmes with only a few students and not all respondents could devote resources to provide this information. Therefore, as far as the number of programmes is concerned, the survey is likely to underrepresent postgraduate research programmes.

Figure 4.5: TNE Programmes by Study Subject and Year of First Intake

Source: WECD, 2014/15 TNE Survey.

Figure 4.6: TNE Students by Study Subject and Year of First Intake
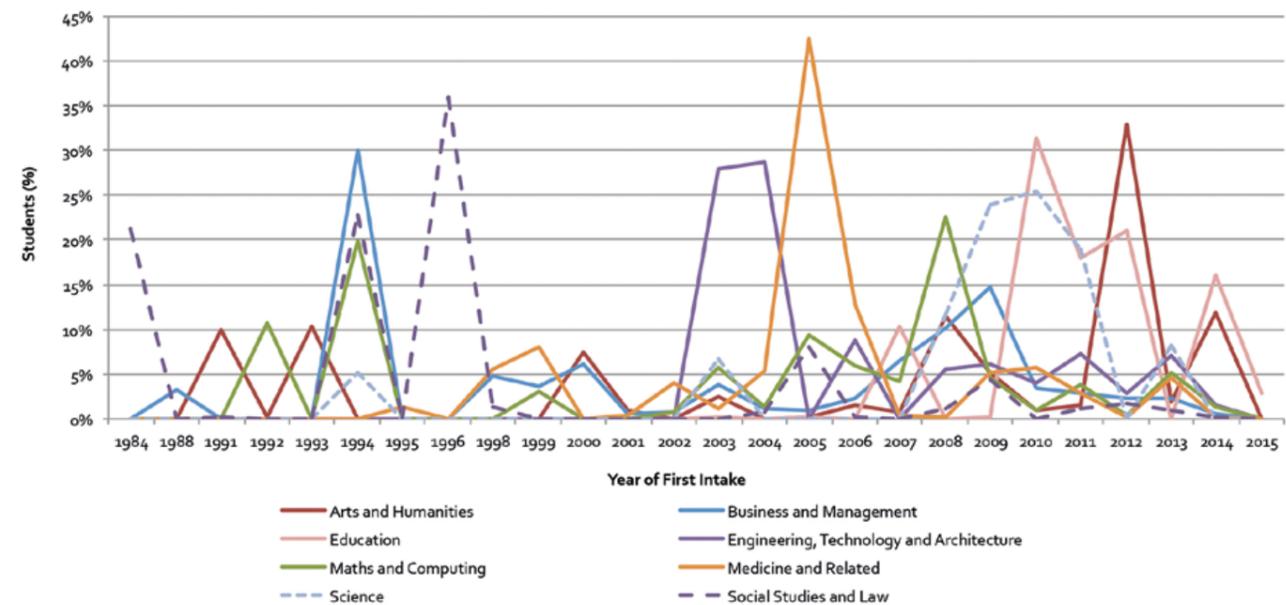
Source: WECD, 2014/15 TNE Survey.
* Excluding Oxford Brookes ACCA students.

Figure 4.7: TNE Programmes and Students* by level[31]
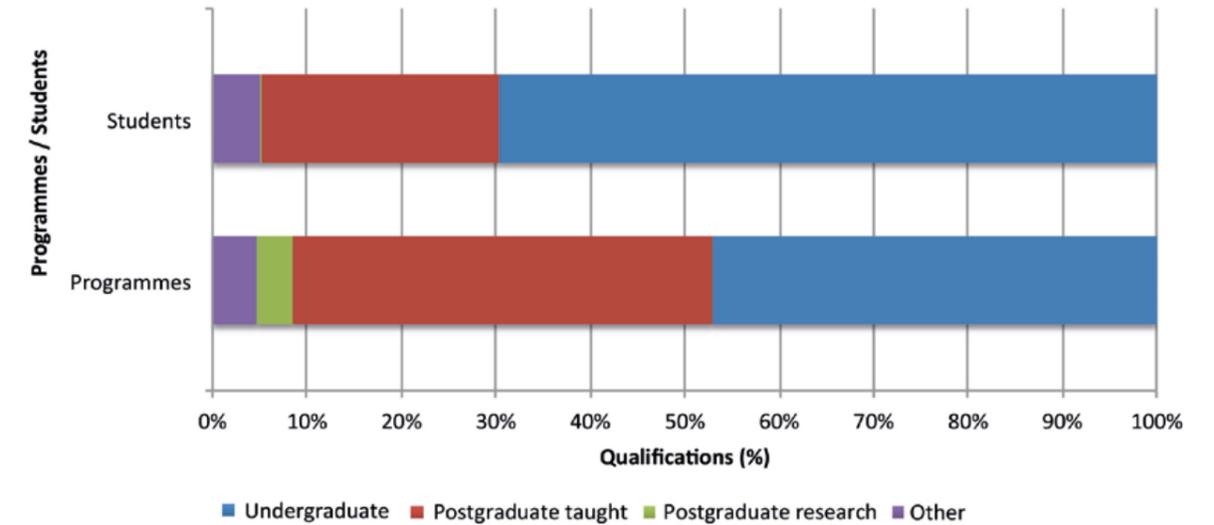
Source: WECD, 2014/15 TNE Survey.
* Excluding Oxford Brookes ACCA students.

Figure 4.8: TNE Programmes – Level of Study and Subject
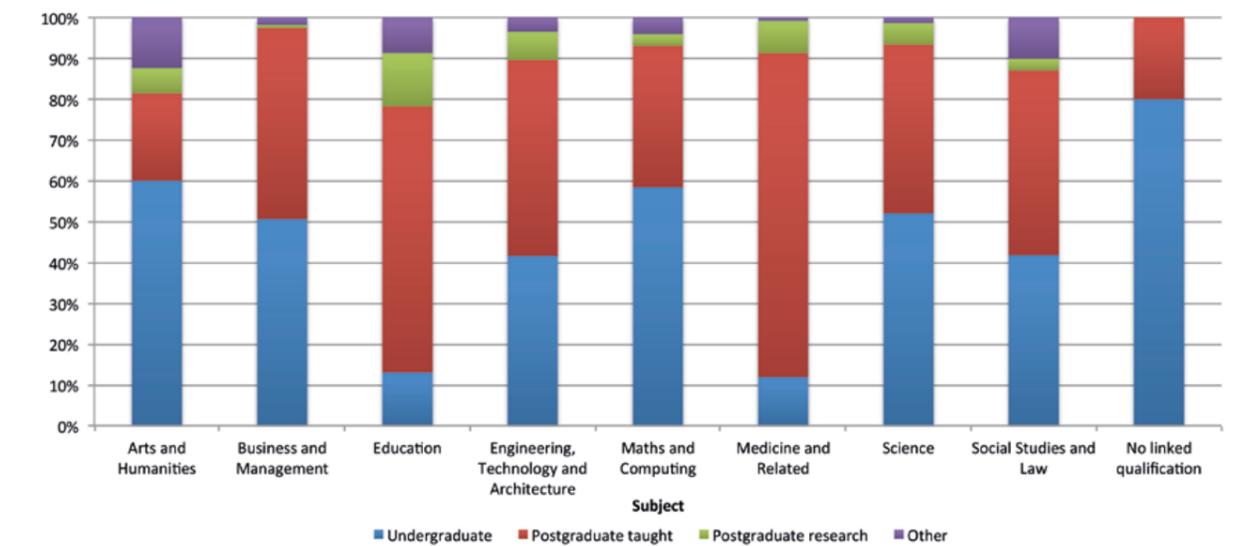
Source: WECD, 2014/15 TNE Survey.

31 'Other programmes' includes Foundation degrees, and short undergraduate and postgraduate programmes, as defined by the individual HEIs.

4.29 Figure 4.10 provides the same information as Figure 4.9, after removing students studying on Open University and University of London programmes. Taking out these two providers affects three subject areas the most. Education (which is the smallest subject area) sees a big decrease in the proportion of students on postgraduate taught programmes (a decrease of 22 percentage points) and increases for students on undergraduate and other programmes. For Medicine and related studies, the proportion of students on postgraduate taught programmes falls by around one fifth and undergraduate student numbers increase by the same amount. Finally, there is a significant increase in the proportion of students on postgraduate taught programmes in Social Studies and the Law.

4.30 Figure 4.11 presents comparisons of TNE programmes and TNE students at undergraduate and postgraduate levels for those subjects where the proportions of TNE programmes and TNE students vary the most. Comparing TNE programmes and TNE students by level of study and subject area highlights that some subjects are represented at a certain level of study by a relatively large number of TNE programmes but not a similar proportion of TNE students. For example, TNE undergraduate programmes in Engineering, Technology and Architecture represent 42% of TNE programmes in this subject but 77% of all TNE students at postgraduate level.

4.31 The 2014/15 TNE Survey shows that the predominant mode of study for TNE programmes is both full- and part-time basis. As shown in Figure 4.12, this is the case in nearly half of TNE programmes and around two thirds of TNE students (61%). In comparison, the 2012/13 TNE Survey showed that there was an almost equal split between part-time, full-time and both in TNE programme numbers. In terms of TNE student numbers, the 2012/13 TNE Survey showed that 52% of students were studying both full- and part-time, 28% full-time and 20% part-time.

4.32 The 2014/15 TNE survey results indicate that:
- Most Maths and Computing (78%), and Social Studies and Law (94%) students are on programmes offered on both a full- and part-time.

- Four out of five students on Engineering, Technology and Architecture programmes (81%) are studying full-time, whilst around half the TNE students on Education (51%) programmes tend to be studying part-time.
- Just under two thirds of students studying postgraduate taught (64%) and undergraduate programmes (63%) can study on either a full- or part-time basis.
- Postgraduate research programmes tend to offer study part-time (52%).

4.33 The 2014/15 TNE Survey has also shown that there has been a reduction over time in programmes offered on both a full- and part-time basis, and increasingly programmes are offered on an either full-time or part-time basis. For example, 38% of programmes and 33% of students from 2010 were studying both full- or part-time, compared to 79% and 81% respectively before 2005.

4.34 Figure 4.13 shows the year the programmes currently delivered were first delivered. It is important to note that of the 103 programmes first delivered before 2000, almost nine out of ten (86%) are University of London programmes accounting for 90% of students. Of the 694 programmes from 23 HEIs included in Figure 4.13, just under one third (32%) are University of London programmes (50% of students), and one in five are University of Greenwich programmes (16% of students).

4.35 One quarter of all TNE programmes reported to the 2014/15 TNE Survey had their first student intake in 2008 and 2009 (first intake refers to the year in which the TNE programme had its first intake of student and not when current students entered the TNE programme). As far as the individual years in the development of UK HE TNE programmes are concerned:
- The main spike in the development of TNE provision was in 1994 (when 6% of TNE programmes had their first student intake).
- Most programmes have begun in the past seven years. In 2008 11% of TNE programmes had their first intake, 2009 (14%), 2012 (10%) and 2013 (9%).
- Two thirds (64%) of TNE programmes were first delivered between 2008 and 2015.
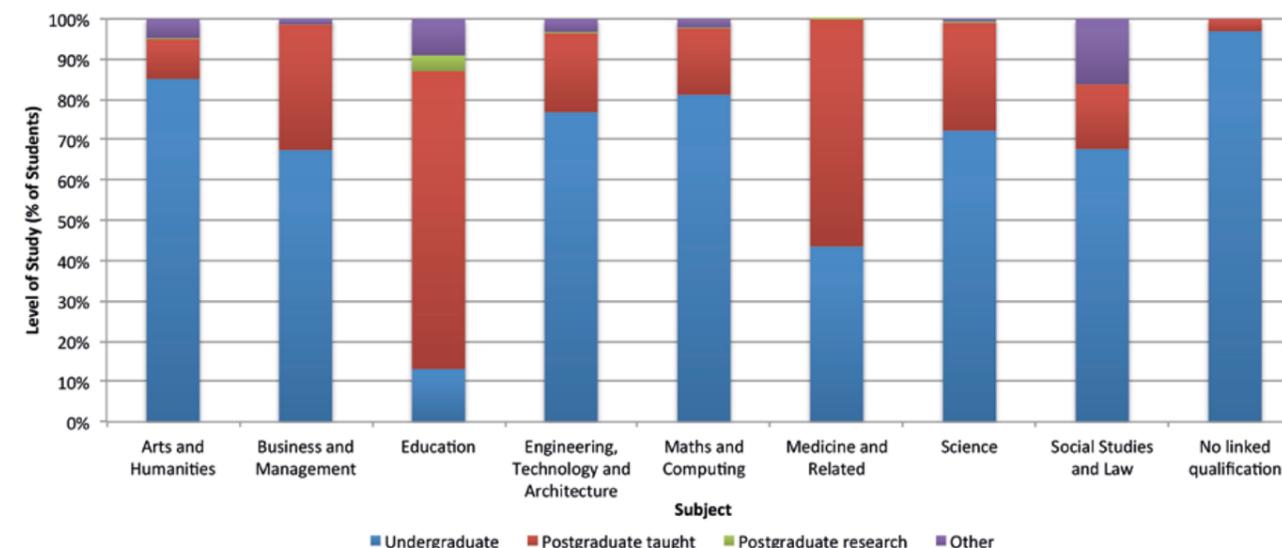
Figure 4.9: TNE Students* – Level of Study and Subject

Source: WECD, 2014/15 TNE Survey.
* Excluding Oxford Brookes ACCA students.

Figure 4.10: TNE Students* – Level of Study and Subject
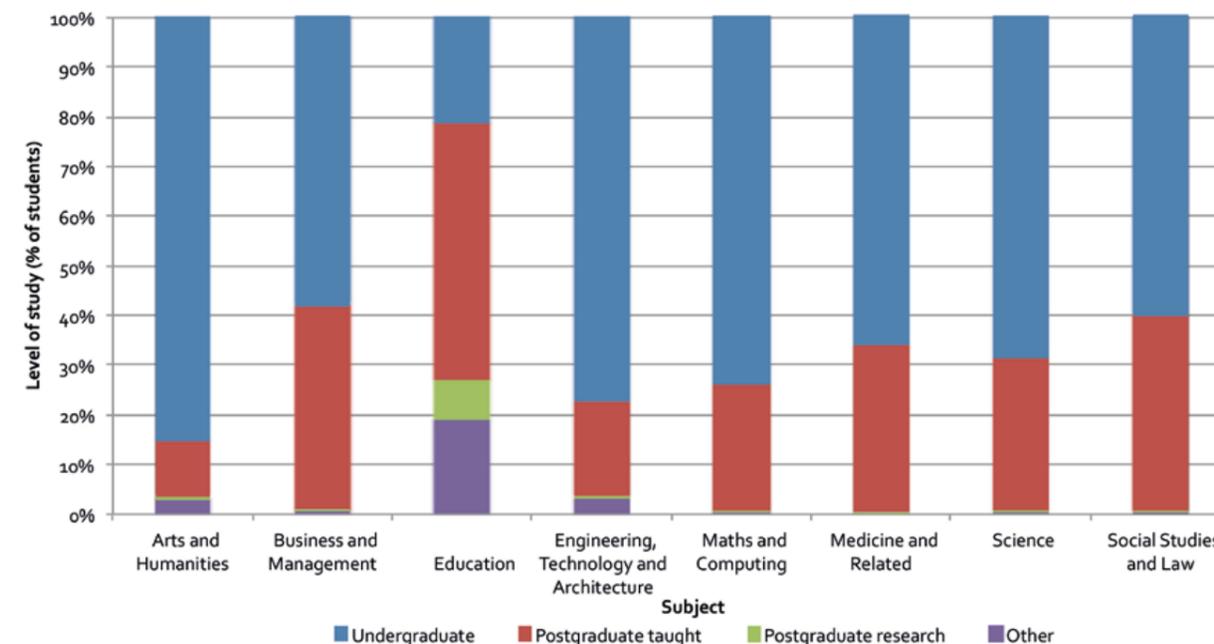
Source: WECD, 2014/15 TNE Survey.
* Excluding Oxford Brookes ACCA students, Open University and the University of London students.

Figure 4.11: Comparison of TNE Programmes and Students at Level of Study

Figure 4.12: TNE Programmes and Students* by Mode of Study

Source: WECD, 2014/15 TNE Survey. * Excluding Oxford Brookes ACCA students.

Figure 4.13: Year* of first TNE intake for programmes delivered in 2014/15
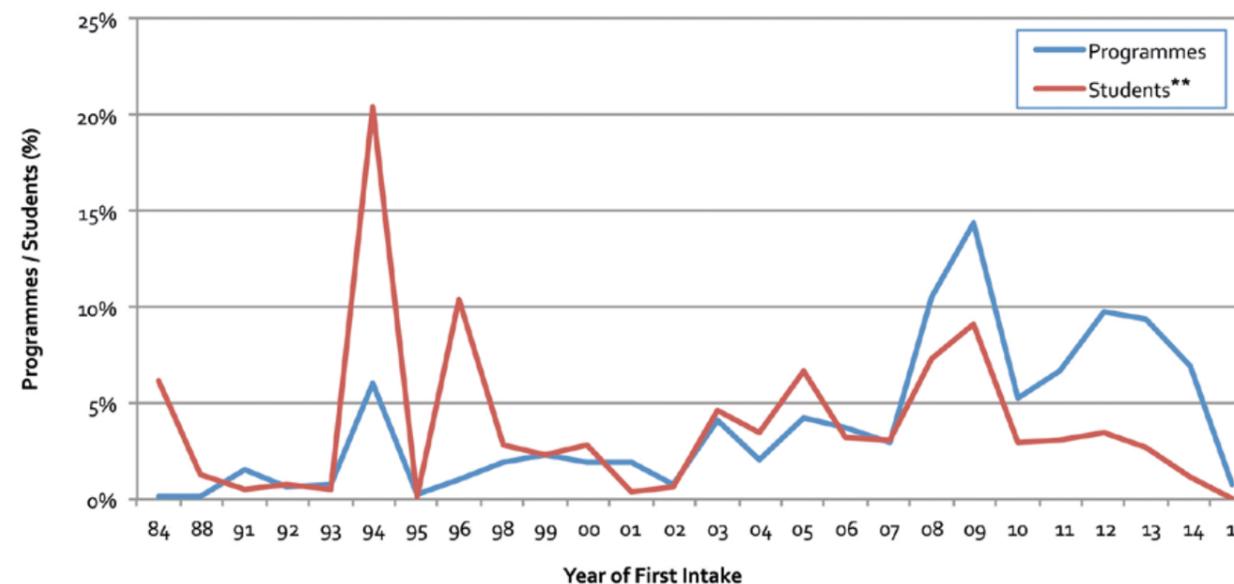
Source: WECD, 2014/15 TNE Survey.
* Year refers to the first part of the academic year i.e. 1984-1994 refers to 1984/5 to 1994/5.
** Students excludes Oxford Brookes ACCA enrolments

4.36 Based on the 2014/15 TNE Survey student headcount:
- Just under one third of programmes (30%) started before 1995 suggesting that many of the largest courses are the longest running.
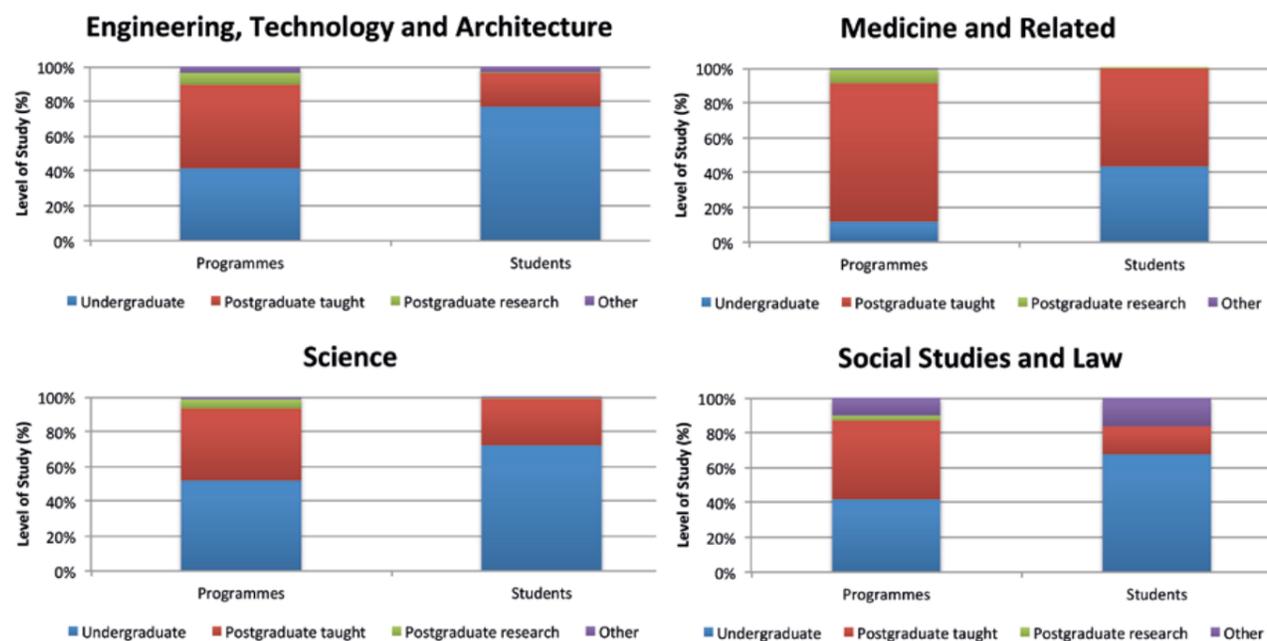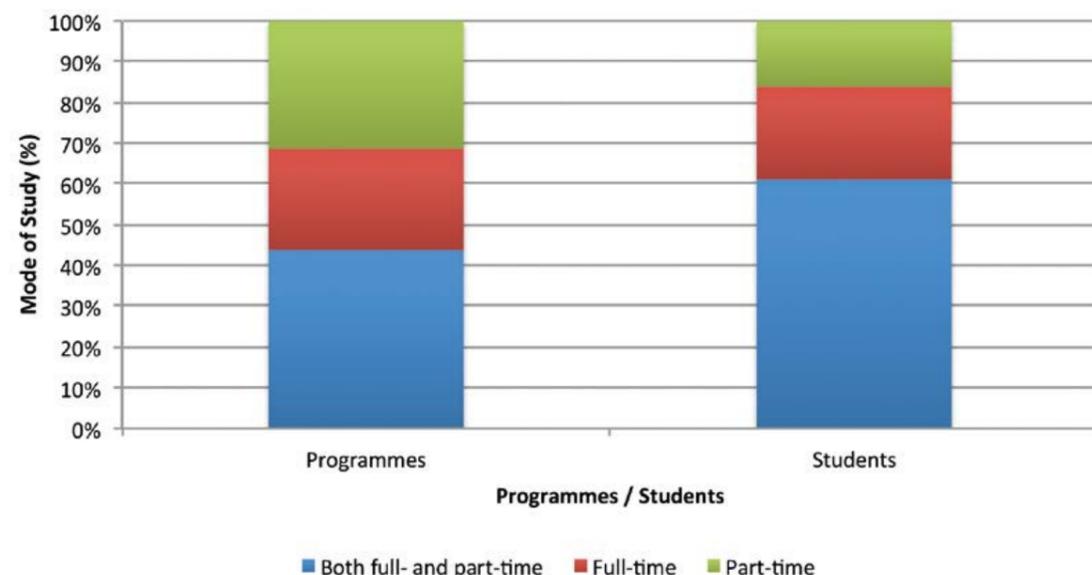- Just under two thirds of programmes (based on current student headcount) had their first intake before 2006.
- There have been three main 'spikes' of activity (i.e. in terms of when current programmes were first delivered), in 1994[32] (20% of TNE programmes based on student headcount had their first student intake), 1996[33] (10%), and 2009[34] (9%).

4.37 Exploring whether these observations and spikes, in particular prior to 2000, are affected by pre- and post-92s HEIs shows that this is not the case. Most TNE programme activity prior to 2000 reported to the 2014/15 TNE Survey has been by Russell Group HEIs. For example, of the 102 pre-2000 TNE programmes, Russell Group HEIs delivered 91 TNE programmes (due mostly to University of London programmes). Since 2000, the number of HEIs (and the range of groups they are affiliated to) delivering TNE has broadened, particularly after 2007.

32 This is due to the University of London starting to deliver a large number of programmes mostly Business Administration distance learning programmes at that time.
33 University of London started delivering seven Law distance-learning programmes at that time.
34 This is mainly due to the Universities of Greenwich, Liverpool and London. For the University of London it is mostly distance learning, for the University of Liverpool it is a mix of distance and local delivery partnerships and for the University of Greenwich it is almost entirely local delivery partnerships.

Delivery of TNE programmes

4.38 The 2014/15 TNE Survey shows that the duration of TNE programmes is greatly dependent on the level of provision, and whether people are studying full- or part-time. Around one in five of all undergraduate TNE programmes last for less than three years[35], or 15% of undergraduate students. Most postgraduate TNE programmes last for two years or less but one third of students are on programmes that last as long as six years.

4.39 Based on TNE student numbers, over one third of postgraduate courses (35%) last for seven years. Just under one quarter last for up to one year (23%), and just over one quarter last for 1-2 years (26%).

4.40 According to the 2014/15 TNE Survey results, virtually all study takes place in the host country, as Figure 4.14 shows. The large majority of provision (both in terms of programmes and student numbers) takes place in the host country. More than nine out of ten programmes are delivered solely in the host country (93%) and this accounts for 97% of students - Only 7% of programmes and 3% of students are on courses that involve study in the UK. Where programmes are split between the host country and the UK, they tend to be primarily postgraduate research or postgraduate taught programmes.

4.41 Analysis of this data by the year programmes were first delivered also highlights that for programmes first delivered after 2010 there has been a significant increase in the proportion of TNE students and TNE programmes that involve studying both in the host country and the UK. Before 2010, 3% of TNE programmes and 4% of TNE students involved studying in both the host country and the UK, but from 2010 the respective proportions have increased to 28% and 9%.

4.42 TNE programmes delivered through distance/online learning or local delivery partnerships are almost all delivered in the host country. TNE students studying through distance/online learning or with institutions involved in local delivery partnerships are also almost all study in the host country. However, 22% of TNE programmes delivered through a physical presence and 31% of TNE students that study with institutions involved in this type of delivery require studying in both the UK and the host country.

4.43 Postgraduate TNE programmes are more likely than undergraduate TNE programmes to involve study in the UK as well as the host country, 15% compared with 1%. Similarly, postgraduate TNE students are more likely than undergraduate TNE students to study in the UK as well as the host country, 8% compared with 2%. This equates to 4,000 students in total (who will be potentially studying in the UK at some point) split almost equally between postgraduate and undergraduate study.

4.44 Part-time students are more likely than full-time students to study on programmes that involve time spent in the UK, 12% compared with 8%. Business and Management programmes are most likely than other subjects to involve study in the UK. Again this equates to 4,000 students split equally between full- and part-time study.

4.45 The 2014/15 TNE Survey has shown that there is a small number of UK HE TNE programmes that are not delivered neither in the UK nor in the host country where the TNE students reside, but instead in a third country. This would, for example, involve Singapore-based UK HE programmes being delivered to a cohort of Malaysian students based in Malaysia.

4.46 Only around one in ten programmes (9% of programmes or 15% of students) are professionally accredited. These tend to be either solely UK or Global professional standards most commonly the AACS (Association to Advance Collegiate Schools of Business). This analysis does not include the Oxford Brookes University ACCA students; if these were included then two thirds of students would be on professionally accredited programmes.

4.47 Figure 4.15 also shows that there is an almost equal split between students registered jointly, at both the UK and the host country's institution (50%), and those registered with the UK HEI only (48%). Only 1% of students are registered with an institution in the host country. As far as numbers of programmes are concerned, more than half have joint registration (57%). In comparison, the 2012/13 TNE Survey found that 58% of TNE programmes had UK-registered students[36], 34% registered students in both the UK and overseas, and 11% registered students only overseas.

4.48 Furthermore, the 2014/15 TNE Survey has shown that where programmes involve local partnership delivery:
- As a proportion of TNE students, at least 60% of students on most programmes are jointly registered. Those on Social Studies and Law, Science, and Education programmes are most likely to be registered solely with the UK HEI.
- The distribution is similar as far as programmes are concerned, except that for Medical and related programmes students tend to be registered jointly.
- Postgraduate and undergraduate TNE students and programmes are both more likely to have students jointly registered.

- Full-time students are much more likely to be registered jointly, whereas most part-time students are registered only at the UK HEI. Those studying programmes offered on both a full- and part-time basis are also registered only at the UK HEI.
- Almost all programmes and students involving local partnership delivery are registered with the provider in the host country.
- Almost all distance/online learning programmes and students are registered solely with the UK HEI.
- There is an almost even split in joint and UK only registration for those programmes and students involving delivery by physical presence.

4.49 Over time, joint registration between TNE partners has increased whilst UK only registration has decreased. For example, almost four out of five students on programmes first delivered after 2006 through a partnership arrangement were jointly registered. This compares with just over one in five first delivered before 2006.

---

35 The duration of some undergraduate programmes was given as less than 3 years, as short as 6 months in some cases. On closer inspection, it appears that for these programmes, respondents were giving the number of months of study in the UK, rather than the total duration of the programme. In reality, and based on closer inspection of these responses, it is unlikely that any undergraduate programme lasts less than three years.

---

36 This includes 4% of programmes that initially registered students overseas and then transferred their registration to the UK. The 2014/15 TNE Survey has not included articulation and transfer arrangements in the definition of TNE.
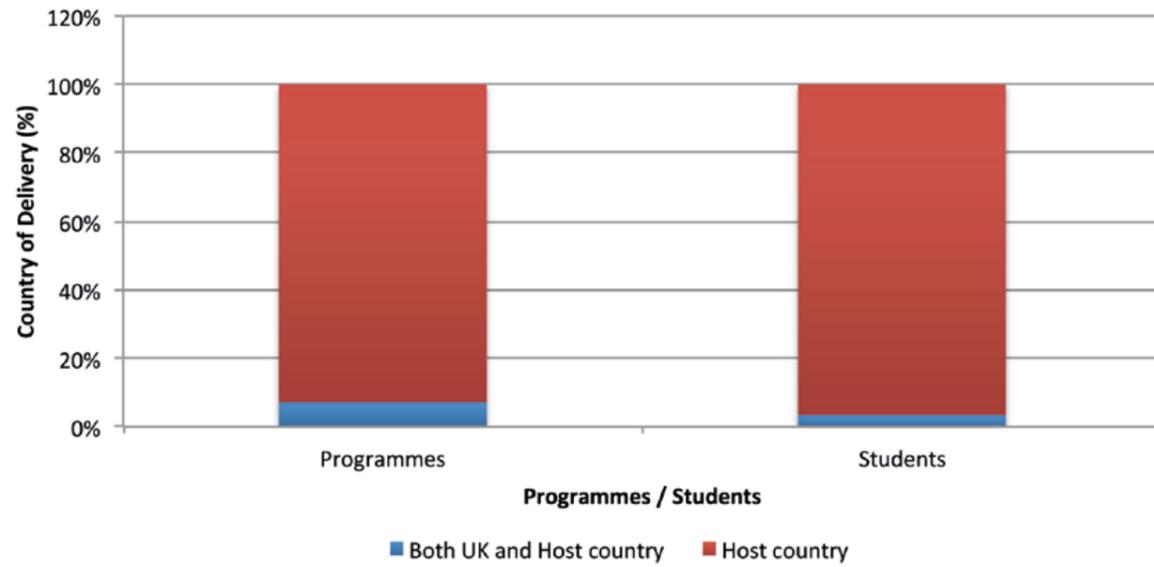
Figure 4.14: TNE Programmes and Students* by Location of Study

Source: WECD, 2014/15 TNE Survey. Based on 993 programmes.
* Excluding Oxford Brookes ACCA students.

Figure 4.15: Place of Student Registration by Programmes and Students*
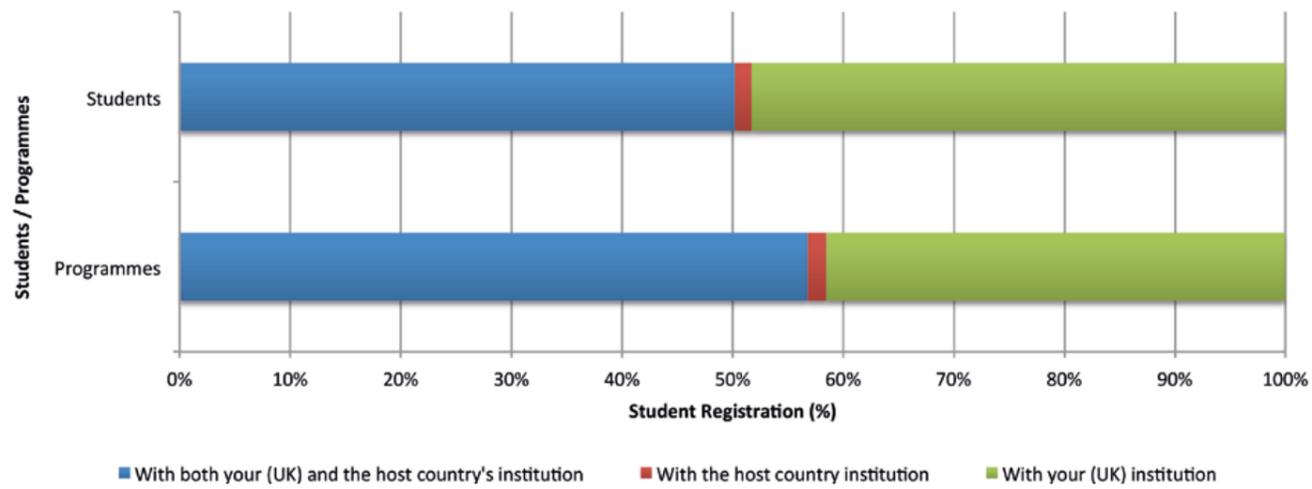
Source: WECD, 2014/15 TNE Survey. Based on 1,132 programmes.
* Excluding Oxford Brookes University ACCA students.

Case study

SWJTU-Leeds Joint School

About the University of Leeds
- Leeds, North England
- Founded in 1904
- 9 Faculties: Arts; Biological Sciences; Business; Education, Social Sciences and Law; Engineering; Environment; Mathematics and Physical Sciences; Medicine and Health; and Performance, Visual Arts and Communications
- 30,030 students in the UK
- 7,045 international students in the UK
- 310 TNE students

About the SWJTU-Leeds Joint School
- Chengdu, Sichuan province, China
- First enrolments in 2016
- University of Leeds and Southwest Jiaotong University
- Joint school
- 200 first intake planned for September 2016

i The University of Leeds has only recently taken on TNE activity of this scale, after careful consideration of its match with the University's mission. Recognising that it could respond constructively to the Chinese government's sustainable development plans beyond traditional Shanghai bases, the University looked to Chengdu.

There, the University met with Southwest Jiaotong University with whom it had long-established staff connections, shared academic interests and joint commitments to research-led teaching. The University of Leeds' Faculty of Engineering and Southwest Jiaotong University identified an opportunity to design a unique UK-Chinese English curriculum, resulting in the development of blended learning programmes delivered by the Joint School at SWJTU.

Success factors
- Rigorous opportunity analysis
- Staff buy-in
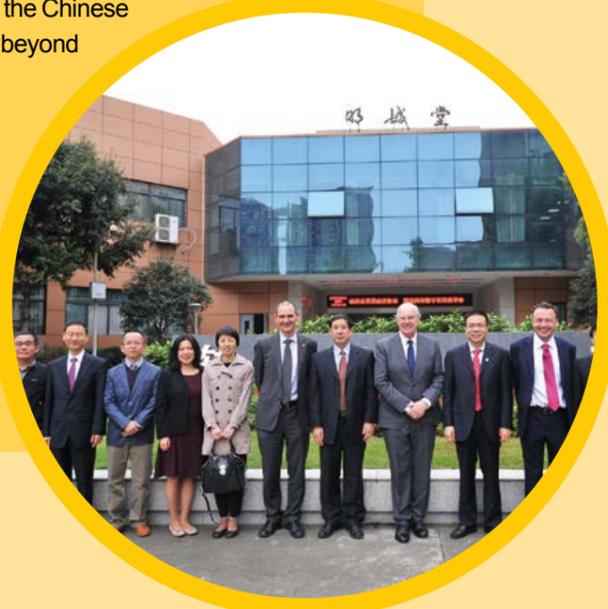
Rigorous opportunity analysis

Prior to agreeing any commitments for the Joint School, the University of Leeds undertook detailed research. This included reputational analysis, geographical research and market intelligence about the Joint School's growth potential. The University developed sustainability plans and identified a long term vision to raise the profile of the School.

Staff buy-in

The University of Leeds and Southwest Jiaotong University actively encourage cultural awareness between their teams through staff exchange, a key feature of the Joint School's development. Recognising the impact of overseas delivery on individual staff, the University of Leeds built processes to manage workload and backfill academic time. A member of senior management with academic credibility championed the project from the outset. This focus on people involved in the Joint School's delivery means that staff at both universities have increasingly international outlooks, and are open to embracing new pedagogies and teaching opportunities.

> **The partnership is really exciting when two sets of academics get together to discuss the pedagogy.**

Jacqui Brown, Head, International Office, The University of Leeds
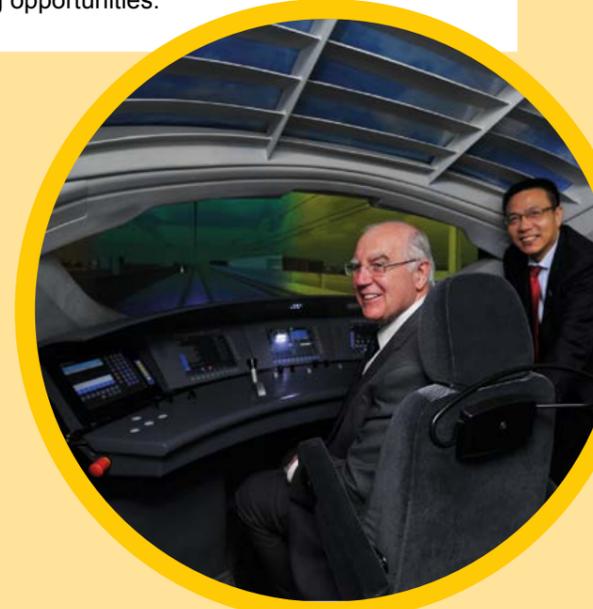
Case study

University of Bradford's franchised degrees at Namal College

About the University of Bradford
- Bradford, North England
- Founded in 1832 as the Mechanics Institute
- 5 Faculties: Engineering and Informatics; Health Studies; Life Sciences; Management and Law; and Social Sciences
- 11,525 students in the UK
- 1,940 international students in the UK
- 5,635 TNE students

About Namal College
- Mianwali, Punjab, Pakistan
- Established in 2008
- University of Bradford and Namal College
- Franchised degrees to associated College
- 275 students registered with University of Bradford

The University of Bradford supports Namal College to grow its capacity, with a view to the College achieving its own degree-awarding powers in due course. Namal College was constructed in 2008, but needed staff to deliver its intended programmes. The University of Bradford joined with the College to teach two-year programmes. The offer was soon extended and Namal College students can now study undergraduate degrees in engineering and computer science.

The University of Bradford develops and owns all degree materials, which Namal College then tailors to the local context. Students are assessed through the same means as those in the UK and graduate with University of Bradford degrees.

> **Namal aims to get degree-awarding powers. This would be evidence of real capacity-building, as the institution didn't exist before Bradford was involved.**

Rizwana Ahmed,
Academic Partnership Officer, The University of Bradford

Success factors
- Familiarity
- Quality of students
- Robust governance
- Adapting to local requirements

Familiarity

The University of Bradford was familiar with the local context from working with a local hospital to deliver radiography training. Since establishing its partnership with Namal College, the University of Bradford maintains its local connections and prioritises regular communication with the College. Staff visit Pakistan once a year, but frequent virtual communications between visits ensure that any issues are flagged and resolved dynamically. This is important when Foreign and Commonwealth Office travel advice means that the University may, at times, place restrictions on staff travel to Pakistan.

Robust governance

The Academic Partnership Sub Committee at the University of Bradford reports directly to the University's Learning and Teaching Committee. The Sub Committee meets every 4-6 weeks to review activity, ensuring timeliness and transparency of oversight. Complete partnership reviews take place every five years.

Adapting to local requirements

The Pakistani Engineering Council only accredits four-year degree programmes, but the University of Bradford's engineering degree is just three years. To accommodate the Council's requirements without changing the programme, the University accredits a Foundation year in Pakistan which attaches to the degree course. This year is akin to the Foundation Certificate offered in the UK, maintaining comparability of programmes between the UK and Pakistan.

Quality of students

Namal College has a strong reputation in Pakistan, with high entry standards. More eligible applications are received for the programmes than spaces available. The College focuses on recruiting the very best students, and offers financial support to ensure this.

Case study

Newcastle University Medicine Malaysia (NUMed)

About Newcastle University
- Newcastle, North East England
- Founded in 1963
- 3 Faculties: Humanities and Social Sciences; Medical Sciences; and Science, Agriculture and Engineering
- 23,110 students in the UK
- 7,055 international students in the UK
- 1,260 TNE students

About NUMed
- EduCity, Johor, Malaysia
- Newcastle University
- Established in 2009
- Branch campus
- 620 students registered with Newcastle University

Newcastle University established NUMed, a medical campus, in Malaysia in 2009. The campus delivers undergraduate degrees in medicine and biomedical sciences. These programmes are identical to the courses offered at Newcastle University, and students graduate with degrees from Newcastle University.

NUMed Malaysia Sdn Bhd is the operating company of the branch campus. It is wholly owned by Newcastle University.

> This campus is viewed as 'not-for-profit', but for reputational gain and an extension of the institution's global footprint, and to act as a nexus for other interests in South Asia.

Professor Reg Jordan,
Provost and Chief Executive Officer, NUMed

Success factors
- Partnering with Malaysia
- A global footprint
- Bringing learning back to the UK

Partnering with Malaysia

Medical students have to obtain clinical experience as part of their studies. This requires NUMed to have strong partnerships with local and national health authorities. In order to deliver UK programme content, extensive training for Malaysian-based staff is needed in the UK. These relationships are facilitated through the University and campus having a relationship with Malaysia, rather than with individual partners.

A global footprint

TNE growth is part of Newcastle University's international strategy. The University has a vision of global activities combined with regional roots in the UK. It embraced the idea of NUMed to grow the university's global reputation and not as an income source. NUMed is a route into Asia for the University, but a route that is carefully designed to respond to local needs both in the UK and Malaysia.

Bringing learning back to the UK

Whilst recognised as an important part of Newcastle University's global reach, NUMed has been allowed to develop independently. The experience of meeting UK and Malaysian accreditation requirements has heightened the quality of the NUMed programmes. Newcastle University actively engages with that learning, taking the NUMed campus experience to inform due diligence practices and programme content in the UK.

5. Strategic context and future outlook

5.1 This section presents an overview of key drivers underpinning TNE provision, its strategic positioning within HEIs and HEIs' future plans in relation to TNE provision. The information presented in this section draws upon the findings of the 2014/15 TNE Survey but also the review of the literature and discussions with key stakeholders and TNE providers.

Key points

- Almost all HEIs that commented plan to increase the number of TNE programmes, subjects, countries and students. The number of programmes, subjects, countries and students are all set to rise according to four out of five HEIs (80%). This suggests that the appetite for UK TNE is not plateauing, and overseas markets are not saturated.

- The main drivers for TNE provision are 'increasing student numbers', 'increasing institutional reputation' and 'increasing income'.

- Larger TNE providers (i.e. those with more than 5,000 TNE students) are more likely to place TNE within their institution's international strategy, whereas those with fewer than 5,000 TNE students tend to include this type of provision within their overall HEI strategic plans.

- In terms of organisational and management related issues, UK institutions are predominantly responsible for curriculum development, quality assurance and assessment. Responsibilities for staff development, learning resources, buildings and infrastructure, teaching, pastoral support and academic support are relatively evenly shared between the UK and host institutions.

- The location of responsibility varies between different delivery types. For distance/online learning programmes, responsibilities rest predominantly with the UK. Where there is a local delivery partnership, responsibilities tend to lie either with the Host institution or jointly. Where a physical presence exists, responsibility for most aspects lies with the UK institution.

5.2 Institutions were provided with a set list of reasons for engaging in TNE and asked to rank these reasons with a rank of '1' being the most important, '2' the next most important and so on. Responses are summarised in Figure 5.1.

5.3 As shown in Figure 5.1:
- 'Increasing student numbers' received the highest rank from eight HEIs. 'Increasing institutional reputation' and 'increasing income' both are ranked with the highest rank from another seven HEIs (each reason).
- Whilst not the main reason for engaging in TNE, 'creating' and 'developing institutional relationships' and 'access to new markets' are also identified as important reasons.
- Larger TNE providers (i.e. those with more than 5,000 TNE students) have given the top rank to 'increasing income' and 'increasing status/ reputation'. Smaller TNE providers have given the highest rank to 'increasing student numbers', and then 'increasing status and reputation'.

5.4 Feedback from the 2014/15 TNE survey respondents also indicates that provision of TNE is mostly treated strategically at institutional level. As shown in Figure 5.2, all but one respondent have a strategic document that refers to and sets out their TNE strategy. Only one respondent does not formally document its TNE strategy; nevertheless, this institution treats its TNE provision as a top priority for the institution.

5.5 Among those that have a documented approach to TNE provision, TNE tends either to sit within the institution's overall strategy (for 48% of respondents), or within the international strategy (which could include partnership links for UK students to study abroad or academic and research links) for another 48%. Furthermore, three HEIs had a distinct, standalone TNE strategy.

Figure 5.1: Main drivers for TNE provision
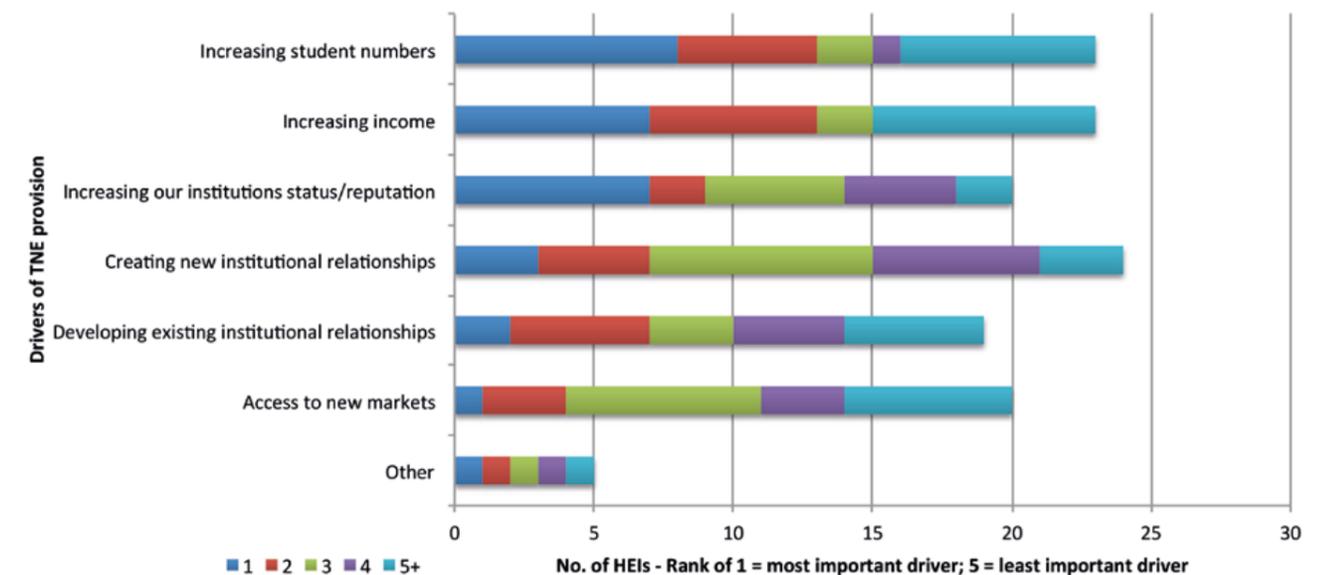
Source: WECD, 2014/15 TNE Survey.
Based on 29 responses.

Figure 5.2: Strategic Position of TNE within the HEI Strategy

Figure 5.3: TNE Programmes responsibility for different aspects of provision
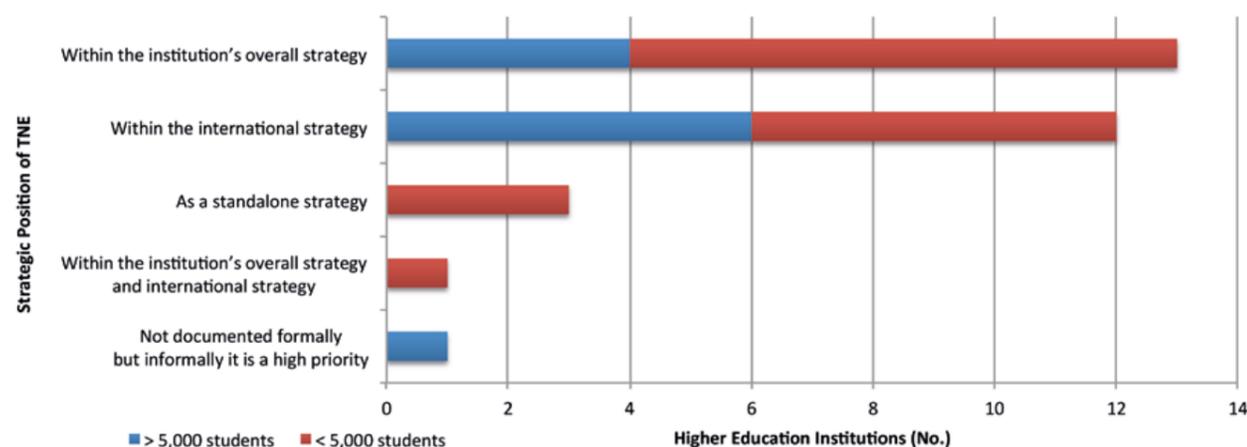
5.6 The 2014/15 TNE Survey results also show that larger TNE providers (in terms of TNE provision with more than 5,000 TNE students) are more likely to place TNE within their institution's international strategy (55% compared to 32% of those HEIs with less than 5,000 students), whereas those with fewer than 5,000 TNE students tend to include this type of provision within their overall HEI strategy (47% compared to 39% of those HEIs with more than 5,000 students).

5.7 The 2014/15 TNE Survey has not provided detailed information around the organisational and management structures involved in TNE delivery. However, feedback provided by HEIs responding to this survey could be further explored to provide more insightful information in relation to these issues in the future. For example, HEIs were asked to provide numbers of currently employed academic and non-academic TNE staff that spend 50% or more of their time on TNE activity. Responses are summarised below:
• Over half of the respondents (57% or 31 HEIs) provided staffing levels covering 1,537 programmes.

• A total of 782 academic and 44 non-academic UK employed staff are currently involved in delivering these programmes.
• For those HEIs that provide staff, programme and student numbers, this represents one member of staff for every two programmes (28 HEIs) and 291 students (15 HEIs).
• Only 5% of TNE staff employed by a UK HEI are based overseas (this excludes staff employed, for example, directly by a branch campus).

5.8 Partnership approaches with host country partners are becoming more equitable. The UK partner is usually the lead on those areas of its global calling card of excellence – curriculum, quality assurance and assessment. In all other areas of programme delivery (e.g. teaching, staff development, academic, and pastoral support) there is either an equal distribution of responsibility or a strong focus on joint delivery and ownership. The partner institution tends to have greater responsibility for onsite services than other aspects of provision, e.g. buildings and infrastructure, teaching and pastoral support.
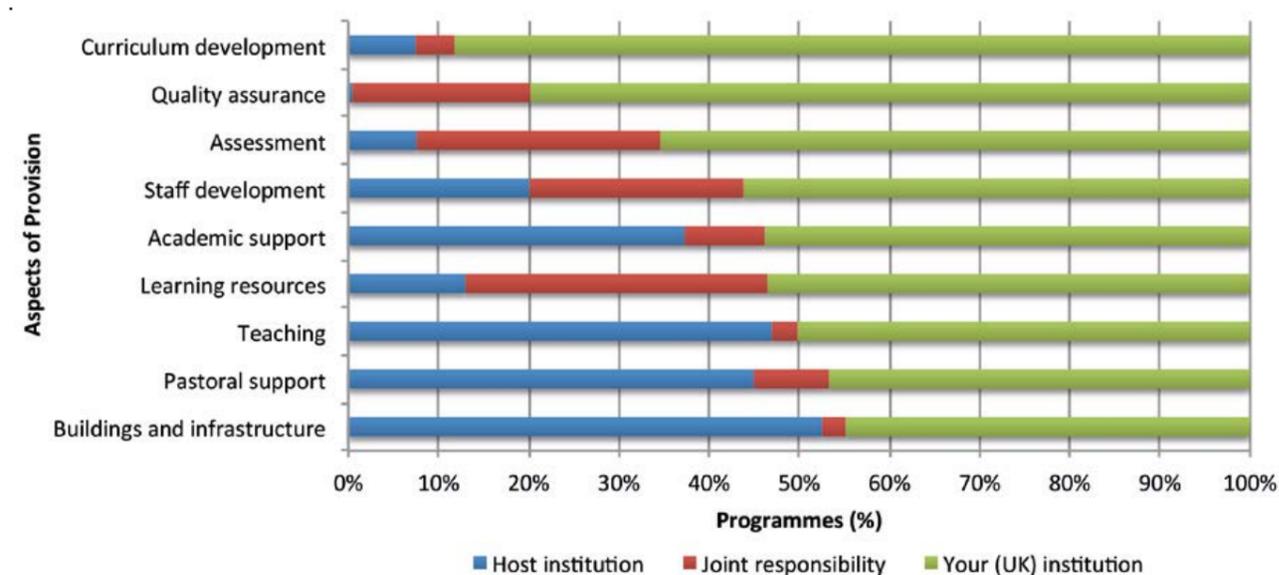
5.9 The 2014/15 TNE Survey indicates that the location of responsibility varies by delivery method. For example:
• Curriculum development and quality assurance rest with the UK HE institution on at least two thirds of programmes.
• Overall, the UK HEI has responsibility for assessment in 64% of TNE programmes, but where delivery is through local partnership this falls to 38%.
• Where there is a local delivery partnership model in place, responsibilities tend to lie either with the host institution (for teaching, academic support, pastoral support, and buildings and infrastructure) or jointly (for assessment, learning resources and staff development).
• At least nine out of ten distance/online learning programmes, all aspects of provision lie with the UK Institution and for curriculum development and quality assurance the figure is closer to 100%.
• Where a physical presence exists, responsibility for most aspects lies with the UK institution

except for academic support, pastoral support and learning resources (joint responsibility in the majority of cases), and buildings and infrastructure (host institution).

5.10 Analysis of data relating to the location of responsibility by size of TNE providers indicates that there is little difference between large TNE providers with more than 5,000 students and relatively smaller ones with less than 5,000.

5.11 In terms of future plans, as shown in Figure 5.4, HEIs plan to increase all aspects of their TNE provision as follows:
• The number of programmes, subjects, countries and students are all set to rise according to four out of five of the 31 HEIs who responded to this question.
• Virtually all HEIs who responded to this part of the survey state that they are going to increase the number of countries they deliver to.
• Those planning to increase the number of students

Figure 5.4: Plans for TNE provision in the next three years
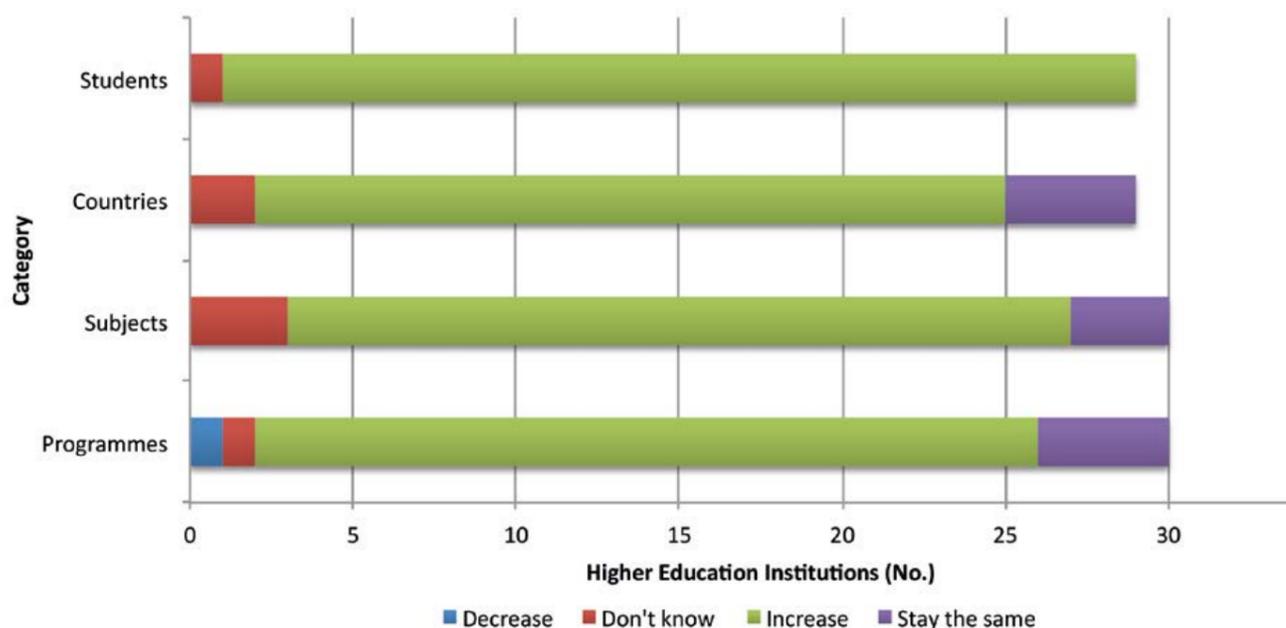
Source: WECD, 2014/15 TNE Survey.

currently deliver to 147,000 students (excluding Oxford Brookes ACCA programme) or 97% of the total of students on programmes delivered by the 30 HEIs responding to this question (excluding Oxford Brookes).

• Those planning to increase the number of programmes, currently deliver 1,200 TNE programmes.

• Those planning to increase delivery to more countries currently deliver to an average of 22 countries each.

5.12 Those planning to increase the number of programmes range from those who are going to deliver specific, new programmes, those planning to expand certain aspects (e.g. increase postgraduate TNE programmes), with the largest category being those who were planning to increase TNE provision across the board. When asked about their country plans, responses are split equally into: a) plans to expand in specific countries; b) general plans to 'diversify into new markets'; and, c) plans to expand in one or more regions.

5.13 Review of AOR data for 2012/13 and 2014/15 indicates that the 70% of the 2014/15 TNE Survey respondents have increased their TNE provision between the two periods of reporting – suggesting that responses related to future TNE plans may be skewed by those who are relatively more active in provision of TNE.

Lessons for effective delivery

5.14 Discussions with providers have also provided some insight into the decision-making process (including strategic, management and delivery considerations) for institutions thinking about engaging with TNE.

5.15 HEIs often have robust internal decision making processes and clear guidelines for developmental activity and these are regularly reviewed to accommodate internal and external factors. As institutions become more adept and practiced in delivering TNE, the decision-making processes are streamlined and increasingly based upon thematic, strategic or outcome based initiatives and engagement reflects the identity of the institution, or the direction in which they wish to travel.

5.16 A key emerging theme in discussions with institutions was the need for a 'champion' within both the host and UK institutions, with enough seniority and credibility to drive change and support growth, underpinned by process and administrative support to ensure consistency of delivery and quality.

5.17 The consultations also highlighted that the road to successful TNE engagement is long and resource intensive. There is an absolute necessity for support at home to ensure success abroad. The management of programmes and relationships takes time, consideration and communication – not always in person – and relies upon quality assurance, transparency and shared objectives.

5.18 Where partners are aligned in objectives and expectations, the outcomes and quality of delivery are significantly higher, and the levels of success greater.

5.19 TNE activity has significant impact on resource management for institutions, and this needs to be factored into sustainable planning. TNE engagement provides an opportunity for external expansion but also internal review and this can in turn strengthen the core capacity and capability of an institution and support further growth in the areas of curriculum development, material delivery and partnership activity but also global student experience and exposure and employability.

Case study

University of Glasgow - Nankai University Joint Graduate School

About the University of Glasgow
- Glasgow, Central Scotland
- Founded in 1451
- 4 Colleges: Arts; Medical, Veterinary and Life Sciences; Science and Engineering; Social Sciences
- 26,815 students in the UK
- 8,430 international students in the UK
- 1,065 TNE students

Nankai University Joint Graduate School
- Tianjin, China
- Established in 2014
- University of Glasgow and Nankai University of Tianjin
- Joint school
- 80 students registered with University of Glasgow

The University of Glasgow and Nankai University of Tianjin have worked together for many years. Their joint initiatives include a Confucius Institute at the University of Glasgow and a shared Collaborative Innovation Centre for Chinese Economy.

In 2014, the universities partnered to create the Nankai University Joint Graduate School. The School offers three two-year dual MSc degrees in Environmental Management, International Relations and Urban and Regional Planning. The programmes are taught in English by academics from both the University of Glasgow and Nankai University. Students graduate with a dual award, and two degree certificates, one from each of the University of Glasgow and Nankai University of Tianjin. The partnership also includes collaborative research.

> " A partnership to form an international learning and research environment to empower students and staff to discover and share knowledge that can change the world. "

Jared Philippi, International Projects Manager, College of Social Sciences, The University of Glasgow

Success factors
- Project management
- TNE as a springboard
- Wider recognition

Project management

The Joint Graduate School is a University-wide initiative, one advanced by the College of Social Sciences reporting to a project board of senior leadership staff from across the University. Below that, sub-groups have specific tasks and responsibilities. A dedicated project manager works across the University of Glasgow and Nankai University of Tianjin to support the School's development. The universities hold regular joint management board meetings, either in-person or via video link.

Wider recognition

The Joint Graduate School has led to further partnerships between the Tianjin province and the University of Glasgow. One example is the Collaborative Innovation Centre for China Economy at the University of Glasgow's Adam Smith Business School. Establishing the Collaborative Innovation Centre in turn helped the Adam Smith Business School when seeking recognition of its work, and the School now has triple accreditation from the Association to Advance Collegiate Schools of Business, the Association of MBAs and the European Foundation for Management Development Quality Improvement System.

TNE as a springboard

Existing partnerships and relationships between the two universities and staff set the foundation for the Joint Graduate School. From a small initial intake, student numbers are projected to grow to 360 around 2019 and beyond. Since its creation, the School has grown to provide the infrastructure for collaborations extending beyond the TNE courses. Articulation agreements, student and staff mobility initiatives are currently in development as well as additional TNE programmes. The establishment of collaborative research is key to the Joint Graduate School, and the partnership has already received a major ESRC-NSFC research funding award.

Case study

Lancaster University Ghana

About Lancaster University
- Lancaster, North West England
- Founded in 1964
- 3 Faculties: Arts and Social Sciences; Health and Medicine; and Science and Technology, and the Lancaster University Management School
- 12,955 students in the UK
- 4,355 international students in the UK
- 7,275 TNE students

About Lancaster University Ghana
- Accra, Ghana
- Founded in 2012
- Lancaster University and Trans National Education Ghana Ltd
- Branch campus
- 400 students registered with Lancaster University

Lancaster University Ghana is the first British University branch campus in Ghana and the only one of its kind in Sub-Saharan Africa. Ghana acts as a gateway to the African continent, where the student age population and professional classes are growing and there is demand for more higher education options. The campus was established to develop graduates with skills and knowledge to meet Ghana and West Africa's industrial, societal and public sector needs.

Lancaster University provides teaching and research for programme design and delivery, and students graduate with Lancaster University degrees. Trans National Education Ghana Ltd provides the land, buildings and employs the local academics and support staff.

Success factors
- Governance structures
- Academic lead in country
- Staged growth
- 'Whole-of-Lancaster University' approach

Governance structures

A Partnership Management Group including academic faculties and professional services teams from Lancaster University in both the UK and Ghana meets every six weeks. A Senior Management Committee provides strategic oversight and reports directly to Lancaster University's Senate.

Under Staged growth

The partners recognise that quality grows as the partnership matures, and student demand follows that. This solidifies the campus' sustainability for the partners and they can look to embed collaborations in future. The partners hope that the campus will extend beyond TNE programmes to include research collaborations, with a particular view to establishing a research Centre for West African Studies.

Academic lead in country

Trans National Education Ghana Ltd appointed an academic to lead the initiative on their behalf. This appointment ensured that their lead contact had a good understanding of the higher education environment and that the two partners engaged as equals, despite representing different sectors.

'Whole-of-Lancaster University' approach

Lancaster University views Lancaster University Ghana as a fully integrated element of the institution. Both the Ghana and UK campuses have had comparable investment into capital and human resources in relation to service needs and scale. This demonstrated the University's commitment to the campus early on to the in-country partner Trans National Education Ghana Ltd.

In just three years, quality has demonstrably grown, and student demand has followed.

Case study

University of Liverpool's online degree programmes with Laureate Online Education

About the University of Liverpool
- Liverpool, North West England
- Founded in 1881
- 3 Faculties: Health and Life Sciences; Humanities and Social Sciences; and Science and Engineering
- 22,720 students in the UK
- 7,725 international students in the UK
- 16,875 TNE students

About the University of Liverpool and Laureate Online Education partnership
- Worldwide
- Established in 2002
- University of Liverpool and Laureate Online Education
- Online degrees
- 8,560 students registered with University of Liverpool

The University of Liverpool has offered extensive e-learning provision for 20 years. In 2002, the University partnered with Laureate Online Education to offer wholly online, global programmes. Based in the Netherlands, Laureate Online Education has students registered in over 150 countries.

The partnership offers programmes across management, education, health, psychology, law and information technology. Graduating students receive University of Liverpool degrees.

Success factors
- Shared priorities
- Clear roles and responsibilities
- Learner demographics

Shared priorities

The University of Liverpool and Laureate Online Education both identify as global education providers. Liverpool Online makes use of learning models that enhance TNE students' learning experience without boundaries, and to extend participation opportunities so that more people can access the courses.

Clear roles and responsibilities

The governance and delivery expectations of each partner are clearly documented in the Quality Assurance Operational Framework, which is regularly reviewed. Laureate Online Education is responsible for student recruitment, marketing, recruiting staff, the online platform and student support. The University of Liverpool is responsible for academic oversight, quality and standards of the programmes.

Learner demographics

The programmes have been designed to cater to a specific group of TNE learners: working professionals looking for postgraduate qualifications. Many programmes have specific industry accreditation, making them geared to career progression.

Recognising student learning priorities and availability led to the creation of relevant, accredited programmes.

APPENDIX A
Bibliography

BIS (2014), The Value of Transnational Education to the UK: BIS Research Paper Number 194

British Council (2014), Impacts of Transnational Education on Host Countries: Academic, Cultural, Economic and Skills Impacts and Implications of Programme and Provider Mobility

British Council (2013), Shape of Things To Come: The Evolution of Transnational Education – Data, Definitions, Opportunities and Impacts Analysis: Going Global

British Council (2009), Transnational Education – A UK Perspective by Van-Cauter, K.

British Council (2015), TNE data collection systems

Council of Europe (2002), Code of good practice in the provision of TNE

Council of Europe (2007), Code of good practice in the provision of TNE: revisions

CIHE (2007), Global Horizons for UK Universities, Fielden, J., CIHE, November 2007

Higher Education Academy (2015), Transnational education and employability development

Higher Education Academy (2012), Internationalisation, Mobility and The European Higher Education Area, Sweeney, S., Higher Education Academy, November 2012

Healey, Nigel (2015) Towards a Risk-based Typology for Transnational Education (Higher Education, 69 (1), pp. 1-18)

HMGovernment (2013), Industrial Strategy, International Education: Global Growth and Prosperity

KPMG (2013), Globalization of Higher Education, a Framework for Global Expansion

OBHE (2015), An early warning system for TNE

QAA and UK HE International Unit (2013), Consultation on strengthening the quality assurance of UK transnational education

QAA (2013), Review of UK Transnational Education in China 2012: Overview

QAA (2014), Quality Assurance of Cross-Border Higher Education Project

QAA (2015), Developing a strategic and coordinated approach to the external quality assurance and enhancement of UK TNE

QAA, TNE country reports

Repéres no.15 (May 2012), UK Higher Education Today and Place of Internationalisation: Professor Michael Worton,

Strategic Plans of all case studies

The Browne Review (2010), An Independent Review of Higher Education Funding & Student Finance, Securing a Sustainable Future for Higher Education

The University of Oxford International Strategy Office (2015), International Trends in Higher Education

Universities UK & UK HE International Unit (2015), – Transnational Education Conference, Presentations

APPENDIX B
Methodological Note

1. Structure of the survey

In December 2015, UK HEIs were asked to complete a survey detailing their TNE provision. All UK HEIs were contacted by HEGlobal. HEIs were contacted whether they were known to deliver TNE or not.

The survey focused on TNE activity on 2014/15, and defined UK HE TNE as:

"The provision of a higher education degree programme leading to a UK qualification for students based in a country other than the one in which the awarding institution is located. This includes joint, double or dual awards."

The questionnaire was placed online and included four sections:
- **Sections 1 and 2** introduced the survey and asked for: the respondents' and their HEIs' contact details; numbers of academic and non-academic staff involved in TNE; the number of programmes they delivered, and; the number of countries they delivered TNE in.

- **Section 3** asked for information about TNE programmes rather than the institution. HEIs were asked to provide detailed information for each of their programmes including:
  o Subject, level, duration, and mode, language and location of study.

  o Whether the programme has professional accreditation.

  o Year first delivered, numbers of new and active enrolments, and completion rate; and,

  o For the top 5 countries by student headcount: how the programme was delivered; with whom the student was registered; responsibility for different aspects of provision (e.g. buildings, pastoral support and curriculum development), and; method of delivery.

- **Section 4** explored content, priorities and future plans. It asked: where does TNE fit strategically within the institution including:
  o The main drivers for engaging in TNE; and,

  o Plans for TNE on the next three years.

Respondents were also asked if they would consider being a case study.

A copy of the UK HE TNE Survey can be found at the end of this note.

2. Survey responses

The deadline for completion of the survey was 18th December 2015. However, this deadline was extended to February 2016 to allow HEIs time to complete a detailed and complex survey. Feedback from respondents and potential respondents' was that Section 3 was difficult to complete for two main reasons: due to the large numbers of programmes some HEIs delivered, and because their Management Information (MI) systems were not set up in a way that they could generate programme level information to easily answer the survey questions. Some HEIs also operated distributed management of TNE provision, which meant that TNE information was spread across departments in the institution and this made it very difficult to collate an HEI level response.

In discussions with individual HEIs, and learning from a similar exercise undertaken by HEFCW , HEIs were allowed to submit responses in different formats:

- Firstly, a spreadsheet for Section 3 was developed in the same format as the online questionnaire. This could be completed offline and emailed to WECD. Five HEIs chose this method.

- HEIs were also able to provide downloads from their MI systems in a format that corresponded with the variables in the questionnaire. MI downloads were provided by 14 HEIs who tended to be the universities with the largest number of TNE programmes.

- Finally, as the final deadline approached, HEIs were requested to complete a minimum dataset. This asked for aggregate TNE data on: number of students, countries, level of provision, nature of delivery, and the HEIs TNE strategies and plans. Two HEIs completed a minimum dataset return.

Over the lifetime of the survey, HEGlobal sent out reminders to those HEIs who had not responded. In addition, WECD contacted those HEIs who had completed some sections but not others or who had contacted WECD directly with queries about completion. Responses were accepted up to 19th February 2016 and the overall response rates are shown in Table A1 below. It provides comparisons with HESA's annual Aggregate Offshore Record for 2014/15. According to

HESA's annual Aggregate Offshore Record, there were 134 UK HEIs in 2014/15. Based on this number, 62 (or 46%) of all universities responded to the TNE survey.

Some HEIs to the TNE Survey and the AOR said that they did not deliver TNE. There were 8 such HEIs in the TNE Survey and 35 in the AOR. If we subtract this number from the AOR return there were 99 HEIs delivering in 2014/15 giving a response rate to the TNE Survey of 56%.

Table B1: HEI response rate and comparisons with HESA's AOR

	UK TNE Survey		HESA AOR
	No.	% AOR	
Participating HEIs	**134**	**100%**	**169**
HEI Responses	62	46%	134
Nil response	7	-	-
Valid HEI responses i.e excl. Nil response	**55**	**41%**	**134**
Total students	454,690	68%	665,995
Total students (survey HEIs)	454,690	95%	477,130
Total students (excl. Oxford Brookes ACCA students)	174,635	45%	385,940
HEIs with >5,000 TNE students	14	67%	21

Source: WECD, 2014/15 TNE Survey; HESA AOR 2014/15.

According to the TNE survey, the 54 HEIs delivering TNE had almost half a million students (454,690). This represents 68% of the total number of TNE students included in the AOR (665,995).

Comparing the students numbers for HEIs responding to the TNE survey, with the same HEIs' responses to the AOR finds that the UK TNE survey represents 95% of those TNE students identified in the AOR.

Both the 2014/15 TNE Survey and the AOR student numbers include Oxford Brookes University ACCA (the Association of Chartered Certified Accountants) registered students. Oxford Brookes University has an arrangement the ACCA whereby all students who

register on the ACCA programme are also registered with Oxford Brookes. These comprise around two out of five TNE students according to the AOR. If this number is excluded from the TNE Survey and AOR counts, then the TNE Survey covers around half (45%) of all UK TNE students.

The AOR identifies 21 HEIs that individually have more than 5,000 active students each. 14 of these HEIs responded to the UK TNE survey, a response rate of two thirds (67%). This number excludes the University of Wales that has undergone recent, significant organisational changes. This meant that the University of Wales did not provide any detail of their TNE programmes in the UK TNE Survey but did provide

a large AOR return. We have therefore not included the University of Wales when comparing large TNE providers.

3. 2014/15 UK HE TNE survey - questionnaire

Dear Heads of International
You are invited to participate in a study into the Scale and Scope of UK Higher Education Transnational Education (HE TNE) on behalf of HEGlobal (http://heglobal. international.ac.uk).

Your participation in this study is vital as it provides an opportunity to input into future policy and business decisions and promote the quality and opportunities in the UK HE TNE to an international audience.

Sensitive data will be treated in confidence. Statistical reporting will be at aggregate levels, as will trend analysis.
For the purposes of this study, UK HE TNE is defined as:
"The provision of a higher education degree programme leading to a UK qualification for students based in a country other than the one in which the awarding institution is located. This includes joint, double or dual awards."

Only programmes which lead to UK higher education degrees are in the scope of this census. Where the initial programme does not result in a degree, even if they include agreed progression to another programme (such as articulation or pathway programmes), are not within scope. It is only the element that results in a UK degree (at any undergraduate or postgraduate level) that should be included.

Further notes on the terminology and definitions used in the questionnaire are included in relevant questions. However, if you need to clarify any issues/discuss the questionnaire or the study, please do not hesitate to contact:

Peter Dickinson: peter.dickinson@w-ecd.com or Harun Baig: harun.baig@w-ecd.com
The deadline for the completion of the survey is 18 December 2015.
The survey consists of the following parts:
Section 1 - Your details
Section 2 - Institutional HE TNE activity in 2014/15
Section 3 - HE TNE activity at programme (s) level 2014/15
NB: Section 3 will need to be completed for each individual TNE programme
Section 4 - Institutional HE TNE plans in the next three years

Section 1 – Your Details

To begin the survey, please enter your email address:

Q1.2 What is your name? ....

Q1.3 What is your job title? ....

Q1.4 What is the name of your institution? ....

Q1.5 What is your telephone number? ....

Q1.6 What is your email address? ....

Section 2 – Institutional HE TNE activity in 2014/15

Please answer the following from the perspective of the whole institution

Q2.1 Approximately how many academic and non academic TNE staff are currently employed by your institution in the UK and overseas? (Please only include staff who spend 50% or more of their time on TNE activity)

Mainly based in the UK..

Mainly based overseas..

Don't know (enter X)..

Q2.2 In total, how many TNE Programmes does your institution currently provide and in how many countries?

Number of programmes..

Number of countries ....

Scale and Scope of UK HE TNE - Section 3: Programme level information 2014/15

This questionnaire is for **programme level information and data** for the study into the Scale and Scope of the UK Higher Education Transnational Education (HE TNE) on behalf of HEGlobal (http://heglobal.international.ac.uk). Sensitive data will be treated in confidence. Statistical reporting will be at aggregate levels, as will trend analysis.

Only programmes which lead to UK higher education degrees are in the scope of this census. Where the initial programme does not result in a degree, even if they include agreed progression to another programme (such as articulation or pathway programmes), are not within scope. It is only the element that results in a UK degree (at any undergraduate or postgraduate level) that should be included.

If you deliver a large number of programmes, there is an excel spreadsheet you can complete. If the format, delivery and students are similar, you will be to copy details to from one programme to another. Please click here.

If you need to clarify any issues with these programme-level questions, please do not hesitate to contact:
Peter Dickinson: peter.dickinson@w-ecd.com
Harun Baig: harun.baig@w-ecd.com

To continue with this questionnaire, please enter your work email address:

Section 3 – UK HE TNE activity at programme level

This section will need to be completed for each TNE programme provided by your institution in 2014/15

Programme details

Q1   Full name of the programme: ....

Q2 What is the principal subject of the programme? (Only select the main subject)

○ Arts and Humanities   ○ Business and Management

○ Education   ○ Engineering, Technology and Architecture

○ Maths and Computing   ○ Medicine and Related

○ Science   ○ Social Studies and Law

○ No subject specialism   ○ Other

○ Not possible to provide

If 'Other' or 'Not possible to provide' please give details: ....

Q3 At what levels is the programme offered? (Please tick✓ all that apply)

○ Undergraduate   ○ Postgraduate taught

○ Postgraduate research   ○ Other

If 'Other', please specify:

Q4 What is the predominant mode of study for each level of award? (Please select only one per row)

	Full-time*	Part-time**	Both full and part-time***
Undergraduate	○	○	○
Postgraduate taught	○	○	○
Postgraduate research	○	○	○
Other	○	○	○

If 'Other', please specify: ....

*   Full-time: attendance during working day hours i.e. this programme is the student's main occupation.
**   Part-time: attendance fits around another full time commitment e.g. this programme could be the student's second occupation.
*** Both full- and part-time: e.g. the programme is offered as both a full time course in fewer years and a part time course over more years.

Q5 Which countries do you deliver this programme in?

Please select all countries

Q6 With which institution does a student register for this programme? (Please select only one)

○ With your (UK) institution

○ With the host country institution

○   With both your (UK) and the host country's institution

○ Other

If 'Other', please specify: ....

Q7 What was the academic year of the first student intake for this programme?
(Please use academic years e.g. 2012/13)

Q8 What is the duration of the programme (in months)?

Q9 Where is the location(s) of study for this programme? (Please select all that apply)

○ Host country   ○ Other country(ies)   ○ UK

Q10 Does the programme include the student attending university in the UK? (Please tick • only one)

○ Yes, it is mandatory   ○ Yes, it is optional   ○ No

Q11 What is/are the language(s) of study for this programme? (Please select all that apply)

○ English

○ Other

If 'Other', please specify: ....

Q12 **If the programme is delivered in more than one country, for most students what are the expected number of years of study in that/those country/ies?**

Host country:...

Other country(ies): ....

UK:...

Comment: ....

Q13 **For most students, where is the student based in each year of study?** (Please select all that apply)

	Yr 1	Yr 2	Yr 3	Yr 4	Yr 5+
Host country	○	○	○	○	○
Other country(ies)	○	○	○	○	○
UK	○	○	○	○	○

Comment ....

Q14 Does this programme have professional accreditation? (Please tick only one)

○   Yes   ○   No

If 'Yes', is this accreditation (Please select all that apply):

○   UK   ○   Global

○   Host country   ○   Other

If 'Other', please specify: ....

Q15 If you answered 'Yes' to Q14, which professional body(ies') accredit it? (Please list all relevant bodies)

Q16 What are the number of TNE enrolments on the programme (headcount)?

New/Year 1 enrolments* in 2014/15: ....

Total active** enrolments: ....

*   Enrolled with the UK provider and/or the overseas partner(s)

** Active means number of students (headcount) who are studying, paying fees or sitting examinations in 2014/15 (insert the highest number)

Q17 What was the completion rate for the full programme in 2014/15? (Please select one)

○ 0%-10%   ○ 11%-20%   ○ 21%-30%

○ 31%-40%   ○ 41%-50%   ○ 51%-60%

○ 61%-70%   ○ 71%-80%   ○ 81%-90%

○ 91%-100%

Programme Delivery in 2014/15

Q18 Which are the top five countries (by student headcount) where you deliver this programme?

Country 1: ....

Country 2: ....

Country 3: ....

Country 4: ....

Country 5: ....

Q19 In these top five countries, is the lead for programme delivery in the host country undertaken? (Please select one per row)

	Fully by your institution	Fully by the partner in the host country	In partnership
Country 1:	❍	❍	❍
Country 2:	❍	❍	❍
Country 3:	❍	❍	❍
Country 4:	❍	❍	❍
Country 5:	❍	❍	❍

Q20 Across these top five countries, who tends to have lead responsibility for the following aspects of the programme? (Please select one per row)

	Your (UK) institution	Host institution	Joint responsibility
Curriculum development	❍	❍	❍
Teaching	❍	❍	❍
Assessment	❍	❍	❍
Quality assurance	❍	❍	❍
Academic support for students	❍	❍	❍
Pastoral support for students	❍	❍	❍
Buildings and infrastructure	❍	❍	❍
Provision of learning resources	❍	❍	❍
Staff development	❍	❍	❍

Q21 In these top five countries, which of the following best describes the main or dominant type of delivery in 2014/15? (Please select all that apply)

	Physical presence (e.g. branch campus, study centre or flying faculty)	Distance/online learning (e.g. with local support and with no local support)	Local delivery partnership (e.g. franchised programme, joint degree, twinning arrangement)
Country 1:	❍	❍	❍
Country 2:	❍	❍	❍
Country 3:	❍	❍	❍
Country 4:	❍	❍	❍
Country 5:	❍	❍	❍

Which type of physical presence is this? (Please select one per column)

	Branch campus	Study centre	Flying faculty or 'outreach'
Country 1:	❍	❍	❍
Country 2:	❍	❍	❍
Country 3:	❍	❍	❍
Country 4:	❍	❍	❍
Country 5:	❍	❍	❍

Which type of distance/online learning is this? (Please select one per column)

	...with no local support	...with local support (e.g. in partnership with local 'tuition provider' or 'study centre')
Country 1:	❍	❍
Country 2	❍	❍
Country 3:	❍	❍
Country 4:	❍	❍
Country 5:	❍	❍

Which type of local delivery partnership is this? (Please select one per column)

	Double, dual or multiple degree	'Top-up'	Franchised	Joint degree	Validation or 'quality assurance' programme	Twinning arrangement	Joint doctor/ PhD/ 'Co-tutelle'
Country 1:	❍	❍	❍	❍	❍	❍	❍
Country 2:	❍	❍	❍	❍	❍	❍	❍
Country 3:	❍	❍	❍	❍	❍	❍	❍
Country 4:	❍	❍	❍	❍	❍	❍	❍
Country 5	❍	❍	❍	❍	❍	❍	❍

Q22 If the programme delivery is currently blended, in general what proportion of delivery is delivered through each element?

Physical presence/face-to-face learning (%)   ....

Distance delivery/online learning (%)   ....

Local delivery partnership (%)   ....

Other (%)   ....

Total = 100%   ....

If 'Other', please specify: ....

Scale and Scope of UK HE TNE: Section 4 Institutional HE TNE plans in the next three years

To continue with the survey, please enter your email address:

Q1 Where does TNE feature within your institution's strategy? (Please tick• one response)

○ Within the institution's overall strategy   ○ Within the international strategy

○ As a standalone strategy   ○ Not documented formally but informally it is a high priority
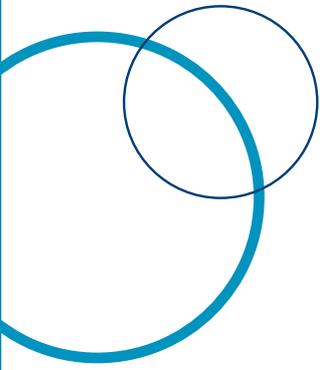
○ Not included in any strategy

Q2 What are the main reasons for your institution to engage in TNE activities?

(Please rank in order of importance where 1 is the most important, 2 is the second most important, and so on...)

Increasing student numbers   [   ]

Increasing income   [   ]

Creating new institutional relationships   [   ]

Developing existing institutional relationships   [   ]

Access to new markets   [   ]

Gaining know how and experience in TNE   [   ]

Increasing our institutions status / reputation   [   ]

Other reason (a)   [   ]

Please specify (a): ....

Other reason (b)   [   ]

Please specify (b): ....

Other reason (c)   [   ]

Please specify (c): ....

Q3 What are your plans for your TNE provision in the next 3 years? (Please tick• one box per row)

	Increase	Decrease	Stay the same	Don't know
The number of programmes to...	○	○	○	○
(If 'increase' or 'decrease', please provide details of which programmes)				
The number of subjects to...	○	○	○	○
(If 'increase' or 'decrease', please provide details of which subjects)				
The number of countries we deliver in...	○	○	○	○
(If 'increase' or 'decrease', please provide details of which countries)				
The number of students we deliver to...	○	○	○	○
(If 'increase' or 'decrease', please provide details of the nature of these changes)				

Q4 As part of the study we want to showcase key aspects of UK TNE, such as good practice around innovation, quality, relationship working and developing provision. The report will include good practice examples. Would you be willing to take part in additional case study research:

○ Yes   ○ No

NB: All case study text will be agreed with the universities included in that section of the report.

Q5 If 'Yes', could you please describe the aspects of TNE you would want to include and the reasons you believe it demonstrates good practice. If there are URL links please include them:

....

....

....

Minimum dataset

1. In total, how many TNE Programmes does your institution currently provide and in how many countries?

Number of programmes   [   ]

Number of countries   [   ]

2. Approximately how many students are on the following types of qualifications?

Undergraduate   [   ]

Postgraduate taught   [   ]

Postgraduate research   [   ]

Other   [   ]

3. Which are the top five countries where you currently deliver TNE programmes (please provide approximate number of students)?

a. ....   d. ....

b. ....   e. ....

c. ....

4. How is TNE delivered – please provide approximate number of students where possible/available?

[   ]   Physical presence? Which type?

○ Branch campus

○ Study centre

○ Flying faculty or 'outreach'

[   ]   Local delivery partnership? Which type?

○ Double dual, or multiple degree

○ 'Top-up' programme

○ Franchised programme

○ Joint degree

○ Validation or 'quality assurance' programme

○ 'Twinning' arrangement

○ Joint doctorate/ PhD/ 'Co-tutelle' programme

[   ]   Distance learning? Which type?

○ With no local support

○ With local support (e.g. in partnership with local tuition provider or study centre

5. What are your plans for your TNE provision in the next 3 years? (Please tick one box per row)

	Increase	Decrease	Stay the same	Don't know
No. of programmes	○	○	○	○
No. of subjects	○	○	○	○
No. of countries delivered in	○	○	○	○
No. of students delivered to	○	○	○	○

6. Where does TNE feature within your institution's strategy? (Please tick one response)

[   ]   Within the institution's overall strategy

[   ]   Within the international strategy

[   ]   As a standalone strategy

[   ]   Not documented formally but informally it is a high priority

[   ]   Not included in any strategy

APPENDIX C
Representation of UK HEIs by Host Country

Host Country	UK HEIs Delivering TNE	Programmes Delivered in Total (i.e. by all respondents to the survey)	Subjects Delivered (% of all programmes delivered to that country)
Singapore	21	205	• Arts and Humanities (18%) • Business and Management (35%) • Education • Engineering, Technology & Architecture (17%) • Maths and Computing • Medicine and Related • Science • Social Studies and Law
Malaysia	16	178	• Arts and Humanities • Business and Management (39%) • Education • Engineering, Technology & Architecture (20%) • Maths and Computing (15%) • Medicine and Related • Science • Social Studies and Law
Greece	9	127	• Arts and Humanities (20%) • Business and Management (37%) • Engineering, Technology & Architecture • Maths and Computing • Medicine and Related • Science (12%) • Social Studies and Law
Hong Kong	14	120	• Arts and Humanities (12%) • Business and Management (42%) • Education • Engineering, Technology & Architecture (12%) • Maths and Computing • Medicine and Related • Science • Social Studies and Law (14%)

United States	4	120	• Arts and Humanities • Business and Management (20%) • Education • Engineering, Technology & Architecture • Maths and Computing • Medicine and Related (23%) • Science • Social Studies and Law (31%)
Canada	4	105	• Arts and Humanities • Business and Management (23%) • Engineering, Technology & Architecture • Maths and Computing • Medicine and Related (27%) • Science • Social Studies and Law (21%)
China	16	92	• Arts and Humanities (19%) • Business and Management (27%) • Education • Engineering, Technology & Architecture (19%) • Maths and Computing • Medicine and Related • Science • Social Studies and Law
Germany	10	92	• Arts and Humanities • Business and Management (39%) • Engineering, Technology and Architecture • Maths and Computing • Medicine and Related (9%) • Science (9%) • Social Studies and Law (32%)
Nigeria	3	87	• Arts and Humanities • Business and Management (45%) • Engineering, Technology and Architecture (15%) • Maths and Computing (14%) • Medicine and Related • Science • Social Studies and Law

India	9	82	• Arts and Humanities (23%) • Business and Management (43%) • Engineering, Technology and Architecture (15%) • Maths and Computing • Medicine and Related • Social Studies and Law
Sri Lanka	6	74	• Arts and Humanities • Business and Management (36%) • Engineering, Technology and Architecture • Maths and Computing (23%) • Medicine and Related • Science • Social Studies and Law (20%)
Trinidad and Tobago	4	68	• Arts and Humanities • Business and Management (38%) • Education • Engineering, Technology and Architecture (15%) • Maths and Computing (12%) • Medicine and Related • Science • Social Studies and Law (12%)
South Africa	4	62	• Arts and Humanities • Business and Management (39%) • Engineering, Technology and Architecture • Maths and Computing (15%) • Medicine and Related • Science • Social Studies and Law (15%)
Oman	8	57	• Arts and Humanities (5%) • Business and Management (58%) • Engineering, Technology and Architecture (5%) • Maths and Computing (28%) • Medicine and Related • Science
Australia	3	53	• Arts and Humanities • Business and Management (19%) • Education • Engineering, Technology and Architecture • Maths and Computing • Medicine and Related (26%) • Science • Social Studies and Law (26%)

Dubai	9	50	• Arts and Humanities • Business and Management (38%) • Engineering, Technology & Architecture (36%) • Maths and Computing (12%) • Science • Social Studies and Law
France	1	50	• Arts and Humanities • Business and Management (30%) • Education • Engineering, Technology and Architecture • Maths and Computing • Medicine and Related (24%) • Science • Social Studies and Law (22%)
Switzerland	4	48	• Arts and Humanities • Business and Management (17%) • Maths and Computing • Medicine and Related (31%) • Science • Social Studies and Law (23%)
United Arab Emirates	5	45	• Arts and Humanities (18%) • Business and Management (53%) • Education • Maths and Computing • Medicine and Related • Science (9%) • Social Studies and Law
Ireland	6	42	• Arts and Humanities • Business and Management (24%) • Engineering, Technology and Architecture (29%) • Maths and Computing • Medicine and Related (24%) • Science • Social Studies and Law

Source: WECD, 2014/15 TNE Survey.
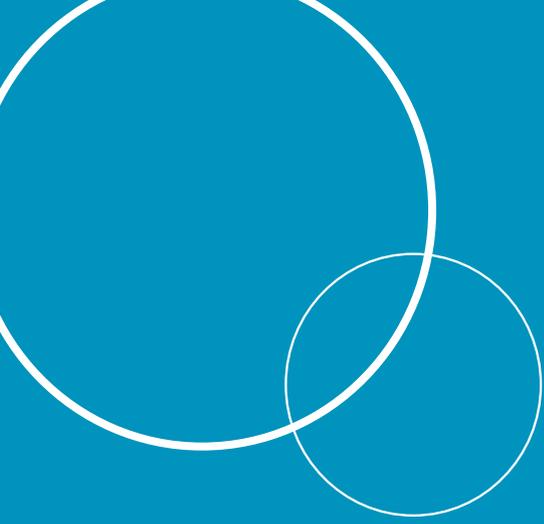
HE Global

Universities UK

international
unit