
Transnational education in Sri Lanka: Operational and quality assurance landscape

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Executive summary



Sri Lanka has one of the highest literacy rates in South Asia, with 92 per cent of the population aged 15 and above being literate in 2021. This can be attributed to the country's Free Education Policy, which has been practised since 1945. The policy has entitled children to free and basic education, demonstrating the government's commitment to education.

With regards to higher education, the number of students enrolling into universities and higher education institutions (HEIs) to pursue both undergraduate and postgraduate enrolments have risen steadily over the last few years. As of 2022, there were over 490,000 students studying in state universities and HEIs approved by the University Grants Commission. Enrolments into other private HEIs remain undocumented, and hence the actual proportion of higher education participation in Sri Lanka may be indeed higher.

A longstanding issue surrounding the higher education landscape is that there is a lack of higher education opportunities due to limited capacity in state universities. In 2022, 171,532 students qualified for university education. However, state universities had a limited capacity of 44,000 spots available for new students. Students qualifying for university education have turned to other means of attaining them through private higher education and transnational education (TNE). As Sri Lanka



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embarks on its economic resurgence today, the government has reiterated their priority to bring in more reputable foreign degree programmes through the form of international branch campuses and partnerships between foreign universities and local HEI providers.

In this light, this report aims to offer a comprehensive understanding of the operational and quality assurance landscape of the robust TNE within Sri Lanka. In 2022-2023, Sri Lanka was the second largest country for UK TNE, accounting for 10 per cent of all UK TNE enrolments globally. It was also the fastest growing country in the top ten host countries for UK TNE. From 2020-2021 to 2022-2023, the number of Sri Lankan enrolments increased significantly by 50 per cent. With 53,915 TNE enrolments in 2022-23, Sri Lanka therefore represents one of the most significant markets for UK universities.

Despite the size and significance of Sri Lanka as a UK TNE partner, there is surprisingly little research done on the partnership development, quality assurance framework, operations, and administration of TNE in Sri Lanka. A thorough understanding of this environment will allow TNE stakeholders to make informed decisions when they engage in the construction, revision, and maintenance of TNE in Sri Lanka, particularly in anticipation of further growth. Overall, the report will contribute to the future development of UK TNE in the country. The key findings of the research can be summarised as follows:

1. TNE is becoming an important avenue for higher education in Sri Lanka, as it addresses longstanding issues that the higher education sector has faced and has the capacity to contribute to gender parity.

The Sri Lankan higher education sector has its unique challenges. Graduates and employers have cited how fresh graduates did not possess certain soft skills required for the workforce. Teaching quality of higher education has also been criticised for excluding innovative pedagogy and assessments, and research quality has been reported to have low relevance to society. On the accessibility of higher education, it is known that there are limited vacancies in state universities, which cannot entirely cater to many students who are qualified for higher education.

Research in this paper demonstrated that TNE is well-positioned to address these challenges. TNE programmes were found to offer students international exposure. Students develop cross-cultural collaboration skills through interactions with international faculty and classmates and are equipped with the relevant soft skills for employability. TNE programmes were also found to leverage digital platforms for teaching and learning purposes. This provides more flexible learning options and encourages innovative pedagogy, which can enhance a student's quality of education. Online learning also allows students from the different regions in Sri Lanka have equal access to higher education.

The TNE mapping exercise also revealed how TNE programmes covered a wide range of disciplines, ranging from mature fields like business and engineering, to the emerging fields of digital marketing and filmmaking. This allows students to choose from beyond the traditional options of higher education programmes. These options are also sensitive to the market's needs and can boost students' employability.

TNE-related institutions were also reported to have the ability to tap into their parent campus's research resources, facilities, and manpower to conduct research- thereby improving the volume of research output and quality in Sri Lanka.

With regards to gender parity, TNE-related institutions demonstrated how they prioritised the equal representation of the genders in their student recruitment processes. Some TNE-related institutions even implemented policies to foster an environment of equality and inclusion.

2. Further growth of TNE activity can be anticipated, given the authorities' ambition to incentivise and provide for a more robust TNE sector.

The government has demonstrated a commitment to establish more international branch campuses (IBCs) and partnerships between foreign universities and local TNE providers. This was evinced by formal engagement with key ministers and university officials from the countries of foreign universities involved in TNE. Most recently, key Australian officials from reputable Australian universities were invited to Sri Lanka, to discuss the provision of Australian TNE in Sri Lanka.

Support for more IBCs have been robust, given the government's intention to attract reputable foreign universities to set up branch campuses in Sri Lanka. This has been reported to be by means of financial provision and facilities. For example, the Port City in Colombo has been earmarked for the establishment of international branch campuses of foreign universities. It seeks to attract significant foreign investments and endeavours toward becoming an international education hub. Similarly, there has been discussion to provide facilities for these branch campuses, with a particular focus on subject areas that the government has deemed to be of priority to the nation's growth.

There is also now an emphasis on formalising TNE through definitive regulation and monitoring. A legal framework is now in the works for the private higher education sector, to support private higher education institutes (both foreign and local) through incentives and guidelines for establishment. This will affect both international branch campuses and TNE delivered by local partners.

Overall, the research suggested that the government is supportive of an entrepreneurial local private higher education sector to pursue relations with foreign universities.



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3. Current government intervention to unify the higher education sector has the potential to simplify the higher education management system.

Research also highlighted that the government is inclined to unify both the state and non-state sector. This is most prominently observed through the proposal of a National Higher Education Commission, to replace the University Grants Commission- the current main coordinating body for higher education in Sri Lanka. With one body responsible for the management of both sectors, there will be clearer co-ordination of higher education and maintenance of consistent academic standards. This will give TNE providers more clarity on the operational and policy environment surrounding higher education in Sri Lanka. When TNE providers are fed with contextual information, they will be better positioned to make well-informed decisions surrounding TNE operations. However, it was also noted that while this ambition could be positive to TNE providers, it runs the risk of over-regulating a sector that is otherwise successful, in detriment of sustainable TNE growth.

4. Quality of TNE programmes can be further improved on to secure public confidence in TNE as a viable alternative to higher education in Sri Lanka.

Research highlighted that some sections of the public- academics and students, expressed scepticism over the quality of TNE programmes. This was mainly attributed to the assessment criteria of certain courses, where final year degrees were awarded based on written assessments. Reportedly, firms and individuals have monetised on this requirement by offering assignment writing services to students. This led to the impression that such degrees were easy to obtain, resulting in scepticism over such programmes.

Moreover, the quality of TNE programmes do not have to adhere to a local quality assurance framework. This has led to the general perception that there are no clear standards for TNE programmes, which runs the risk of generating inconsistency in the quality of all TNE programmes. The lack of inclusion within the local

qualification's framework has also undermined the credibility of TNE programmes, as suggested by some students interviewed.

5. Quality assurance mechanisms require further revisions and formalisation. More discussion with TNE-focused organisations could be taken into consideration.

Previously, the quality assurance of Sri Lankan higher education had not been centralised across the state, non-state, private and vocational training sector.

At present, there is the Sri Lanka Qualifications Framework (SLQF), which is a national-level framework that consolidates the different accreditations awarded by institutions under the purview of the University Grants Commission (UGC), the Ministry of Higher Education, and vocational training institutes. Some of these institutions host TNE programmes, and hence, these programmes are liable to the SLQF as well. While the SLQF can indeed establish consistency in the quality of higher education, this is only the case at the concerned institutions under the government's purview. TNE providers that do not fall within the scope of concerned institutions are not obliged to implement it in their programmes. As alluded to above, it is not necessary for TNE to conform to local quality assurance standards.

While there has been acknowledged agility for foreign institutions to establish TNE operations in Sri Lanka, the quality assurance mechanisms and overall regulations governing the operations of foreign universities in Sri Lanka was deemed as untransparent and not fully understood by stakeholders. This might be attributed to how there are no local mechanisms to affirm and benchmark the quality of TNE programmes to that of the local higher education standards. There is a sense of flexibility in forging TNE partnerships though the absence of regulations, which may over time negatively impact public perceptions of TNE's quality.

At present, there is now a willingness to extend a formal and transparent regulatory environment to the TNE and private higher education sector. Developing a

national system of programme approval, regular reporting and monitoring of student outcomes, programme delivery and teaching quality are all aspects that require urgent improvement and formalisation, in light of the government's plans to attract more foreign universities to Sri Lanka. Such initiatives are welcomed, with TNE-related agencies indicating a willingness to help out in this aspect. To further contribute to a transparent quality assurance landscape, TNE providers can focus on evidencing their internal quality assurance processes, to the benefit of both the government and society.

6. There are concerns of inter-institutional quality and partnership management that require addressing.

A related issue is the robustness of inter-institutional quality assurance and partnership management. The high UK TNE enrolment numbers can mask a dissatisfaction in the quality assurance and programme approval processes, uncertainty over expectations regarding teaching and learning, and overall culture of business dealings.

Where Sri Lankan institutions have developed longstanding relationships with UK universities, there is evidence of greater attention paid to quality assurance. However, there are concerns that for newer partnerships, there were weaker quality assurance processes and less transparency from both the UK and Sri Lankan sides. It was noted that UK universities can sometimes act in a transactional manner, with a 'hands-off' approach that does little to cultivate a longer-term sense of partnership and improvement.

It was felt that national-level quality assurance and regulatory guidance would support changes in behaviours, attitudes, and operations, and encourage a greater sense of shared ambitions and mutual benefit.

7. Documenting current TNE activity would be useful for Sri Lankan and UK stakeholders seeking to enhance TNE provision in Sri Lanka.

The overall process of collecting and recording TNE activity in Sri Lanka is minimal, with little co-ordinated understanding of the overall levels of activity, partnerships and programmes. Data on the accurate number of TNE enrolments in Section 4 were unavailable over the course of this research, whilst data on the overall number of universities engaging in active/inactive TNE activities were also unavailable- obscuring a comprehensive picture of TNE activity in Sri Lanka.

Addressing this would support better decision-making for both Sri Lankan and UK stakeholders seeking to enhance TNE provision in Sri Lanka. It will provide baseline insights for conceiving future strategic directions.

Furthermore, encouraging a stronger culture of data collection for TNE would ensure that as one of the UK's

largest partners, quality of UK TNE in Sri Lanka will become more consistent and robust.

8. While the UK dominates TNE in Sri Lanka, Australian universities feature prominently in terms of visibility and reputation.

Statistical analysis showed that the UK is the largest provider of TNE in Sri Lanka in terms of enrolment numbers, with partnerships with local private institutions being the most common form of delivery. UK TNE presence has also grown rapidly, indicating that UK universities are the preferred partners for the Sri Lankan sector.

Whilst overall enrolment numbers are lower, Australian university presence has also been growing steadily over time in terms of enrolments. Unlike UK TNE, Australian TNE featured prominently through two high profile branch campus-type operations. Australian universities were noted for conducting rigorous quality assurance processes and enjoy a growing reputation amongst students and prospective Sri Lankan higher education partners.

9. There are new and emerging fields of study that will be popular amongst Sri Lankan students, with scope for more arts, humanities, and inter-disciplinary provision.

There has been a shift in the disciplinary areas covered in Sri Lanka, indicating new directions of interest for Sri Lanka students and a diversifying economy. Whilst business and IT remain the dominant study interest areas, there is an increased focus on subjects with the potential to stimulate the creative sector, such as digital marketing and film. Furthermore, future economy skills such as artificial intelligence and data science are becoming more in demand.

The shift towards these subjects reflects the future direction of the Sri Lankan economy. Universities that offer interdisciplinary programmes targeted at Sri Lanka's future economic development may be able to attract students by embedding employability and critical skills into their courses- with work-readiness and industry placement becoming increasingly tied to student choice.

10. There can be an improvement in the non-academic provision of TNE degrees, enhancing students' welfare and gender equity.

A related point is how TNE degrees can move beyond the provision of academic knowledge, and support other aspects of university education such as student welfare. Research suggested that it was important for TNE to demonstrate sensitivity for students' welfare. TNE environments could provide more assurance on the safety of female students through inclusive campuses, working spaces and accessible transportation. Whilst some of these features may go beyond the traditional features of TNE, it was highlighted that some Australian universities have

implemented positive changes in response to students and parental feedback. Ensuring safety and comfort of students on campus has become an increasingly important determinant in student choice.

Similarly, TNE programmes were also noted to enable more women to be relevantly skilled and positioned to

join the formal economy. Whilst TNE (and higher education more broadly in Sri Lanka) has relatively high rates of female enrolment, it is felt that more could be done to empower progression into higher paid jobs.

Recommendations

The study identified six main areas for further policy considerations, to allow TNE stakeholders such as Sri Lankan policymakers, TNE local providers and UK universities to make informed decisions in anticipation of TNE development. There are three public policy recommendations addressing areas of scaling TNE activity, improving operational processes and quality assurance, and three recommendations for the UK TNE sector regarding capacity and resource building.

Recommendation 1: Public repository to document TNE activity in Sri Lanka

As highlighted in the key findings, the scale of TNE activity remains largely undocumented. The database can include features such as: an understanding of the enrolment numbers; course-level data of all TNE courses; a measurable mechanism to evaluate the success rate of TNE in employability, etc. All these features will serve to provide the public with a transparent picture of TNE opportunities in Sri Lanka. Simultaneously, this database will also give foreign universities interested in TNE guidance on introducing and designing TNE programmes that are aligned with the current landscape of TNE in Sri Lanka.

Building this repository is relatively feasible. The establishment of new TNE providers can be retrieved from the currently proposed scheme to record the applications of potential TNE providers. Similarly, the collection of course-level data can also build upon the data reflected in the TNE mapping exercises attached here in the Annex.

Recommendation 2: Developing a unified, nationwide system of quality assurance for all higher education programmes in Sri Lanka

To ensure that TNE programmes are equally comparable with the local higher education standards, it is important to consider a local mechanism for evaluating the quality of TNE programmes nationwide. This is so that TNE providers are mandated to provide a quality of higher education in consistent with the general standard of Sri Lankan higher education.

This suggestion can also contribute to current discussions to unify the higher education sector in Sri

Lanka. The government can consider integrating a TNE-specific qualification framework into the national qualifications framework. The implementation of such a consideration will require that the government is aware of all TNE programmes available in Sri Lanka, which will build upon the database as suggested in Recommendation 1.

Recommendation 3: Encouraging public-private partnerships for TNE operations and expanding TNE-related services

Section 6 reveals that support for the TNE sector falls predominantly on government intervention. While this is a reasonable strategy, a stronger support system for the higher education sector can also be derived from public-private partnerships within Sri Lanka- which have been proven to be realistic. Example of such instances can be found in Section 8.1.

To further streamline the processes of establishing IBCs and TNE programmes, the government can also optimise support from the private sector. This can manifest by way of conceiving a justification report for



the private sector to invest in higher education. The report should highlight the benefits of investing in the higher education sector, with the intention of incentivising the private sector to invest in it. Notably, this was a way in which the Malaysian government spearheaded the development of internationally known branch campuses within Malaysia. This example is disclosed in Section 8.1.

Recommendation 4: Expand geographical reach of UK TNE in Sri Lanka

The next few recommendations are for parties engaged in UK TNE. UK TNE should expand its offering of TNE services. Current TNE students highlighted during the interviews that most of UK TNE was in Colombo. UK TNE can also learn from Australian TNE, which is also prevalent in less urban areas (see Section 4.4). Moreover, UK TNE can consider establishing more branch campuses within Sri Lanka, to increase the variety of TNE delivery models for students. Currently, this TNE type is only made available to students by Australian universities.

Recommendation 5: Improving both the academic and non-academic features of TNE provision

UK TNE should also address the negative perception that some students have regarding the certain TNE programmes. One possible way is to diversify the assessment scheme to include in-person examinations. This means that students are assessed holistically, and their grades are not solely determined by written assessments. This can hence counter the scepticism that some TNE degrees are not attained by students' own merit.

In improving the quality of TNE, an equal consideration should also be paid to the non-academic features of students' university experience. Notably, when asked to share ways for TNE providers to improve the quality of TNE in Sri Lanka, students expressed satisfaction with the academic experience, but asked for more non-academic features such as complimentary career counselling by the university. There were other similar suggestions raised during the stakeholders interview. These can be found in Section 8.2.

Recommendation 6: Exploring the relevance of interdisciplinary programmes through TNE

As the key findings have highlighted, the idea of interdisciplinary programmes should not be neglected. This is because interdisciplinary programmes offer many benefits. For one, it equips students with diverse skills and position them well to address today's pressing challenges- which are multi-faceted. Furthermore, this may open more employability opportunities for students as they are not restricted to a single field. Hence, it is worth conducting a study to explore the feasibility of providing interdisciplinary programmes through TNE and its relevance to the Sri Lankan economy.



Introduction

1.1. Background & Aim

‘Thinking global’ has been at the core of Sri Lanka’s national strategy even before it experienced the economic crisis that began in 2021. In 2019, then-Prime Minister Ranil Wickremesinghe cited “international connectivity” as the mainstay of Sri Lanka’s future policymaking. More specifically, he acknowledged how the country’s insular policies have restricted its capacity to grow and emphasised the need to move away from it.¹

As Sri Lanka embarks on its economic resurgence today, the government has reiterated this priority by phasing out protectionist measures and expressing its plans to establish more foreign universities.² Just last year, the government announced their intention to establish an international university in Colombo Port City and called for foreign universities to express their interest in this endeavour.³ The need for international universities in Sri Lanka comes with the recognition of two longstanding issues surrounding higher education in Sri Lanka.

Firstly, there is a limited access to higher education, characterised by a lack of opportunities due to low enrolment capacity in public universities and the high costs of private higher education institutions (HEIs). In 2022, 171,532 students qualified for university education. However, state universities had a limited capacity of 44,000 spots available at state universities.⁴ While private higher education remains an option, it was only for the relatively privileged. For instance, a 2016 report by the Asian Development Bank found that students were paying an average tuition fee of LKR 500,000 to LKR 1,200,000 (then £2,300 to £5,600) in total for transnational programmes.⁵

Secondly, there is a mismatch in skillset between the educated labour force and the demand for specific skilled labour. This mismatch can be attributed to the lack of relevant university curricula offered in Sri Lanka’s higher education sector- which has been deemed as unsuitable for private sector employment.⁶

With the vision to expand the higher education sector through international universities, the State Minister of Higher Education has also highlighted the need to regulate private higher education.⁷ Historically, the policies undergirding the education sector have been regarded as “inconsistent” by state officials.⁸ This was attributed to the weak interconnectivity between the respective sectors (secondary, technical, vocational and higher education). This context, therefore, highlights the need for a proper understanding of the operational environment enabling higher education in Sri Lanka. More specifically, given the demand for transnational education (TNE) as alluded to above, this report serves to guide universities and policymakers in understanding the operational environment for TNE in Sri Lanka.

The main aim of this report is to offer a comprehensive understanding of the operational and quality assurance landscape of TNE in Sri Lanka. An informed understanding of this environment will allow TNE stakeholders to make informed decisions when they engage in the establishment, revision, and maintenance of TNE in Sri Lanka. Overall, the report will contribute to the future development of UK TNE in the country and indirectly increase the higher education opportunities available for Sri Lankan students.

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 2. Talal Rafi, “Budget 2024: Sri Lanka’s Road to Economic Recovery?”, <https://www.orfonline.org/expert-speak/budget-2024-sri-lankas-road-to-economic-recovery> (Jan 2024)
 3. Colombo Port City Economic Commission, <https://www.portcitycolombo.gov.lk/news/n-20230612-1> (Jun 2023)
 4. Parliamentary Report No.100, “Report of Select Committee of Parliament to Make Suitable Recommendations for the Expansion of Higher Education Opportunities in Sri Lanka”, <https://parliament.lk/uploads/comreports/1689939464085452.pdf> (2022), 23
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 6. Presidential Expert Committee, “Sustainable Sri Lanka 2030 Vision and Strategic Path”, <https://www.presidentsoffice.gov.lk/wp-content/uploads/2019/05/Final-v2.4-Typeset-MM-v12F-Cov3.pdf> (Jan 2019), 263
 7. Adaderana Sri Lanka, State Minister reveals plans to establish three international universities in Sri Lanka (adaderana.lk) (Feb 2024)
 8. Presidential Expert Committee, “Sustainable Sri Lanka 2030 Vision and Strategic Path”, <https://www.presidentsoffice.gov.lk/wp-content/uploads/2019/05/Final-v2.4-Typeset-MM-v12F-Cov3.pdf> (Jan 2019), 10

1.2. Transnational Education & the UK

Broadly construed, TNE refers to a country “offering its qualifications in another country, through a local host institution”.⁹ The UK Quality Assurance Agency defines TNE as the “delivery of higher education level awards by recognised UK degree-awarding bodies in a country, or to students, other than where the awarding provider is based”.¹⁰ In a report on the scale of UK TNE 2020-21, the UK was recognised as the leading provider of TNE with about 510, 825 students from around the globe in 2020/21.¹¹ Since then, the UK government has continued to work closely with the British Council to uphold the quantity and quality of UK TNE globally, as outlined in their International Education Strategy (2023).¹² This explains the report’s interest in investigating the opportunities available for international education collaboration between Sri Lanka and the UK.

TNE has a significant social impact. Its partnerships are mutually beneficial. TNE has contributed significantly to both global and national agendas.¹³ For instance, TNE has been recognised as essential to the United Nations’ Sustainable Development Goals (SDGs). On the global scale, TNE collaborations work towards the fulfilment of SDG 4, which refers to Inclusive and Equitable Quality Education¹⁴. At the microeconomic level, TNE has been

recognised for its potential to deliver social and economic benefits to local economies. A 2022 study conducted by the British Council on the value of TNE partnerships revealed two interrelated benefits, including:

1. Increasing opportunities for higher education in economies with a demand for skilled labour but a lack of higher education institutions.
2. Reducing the brain drain in economies with qualified students but a shortage of quality higher education¹⁵.

According to the same study, 9.9 per cent of Sri Lanka’s higher education enrolments are UK TNE enrolments.¹⁶ This report, then, is not just to the benefit of UK universities and policymakers. It aims to support the Sri Lankan government’s priority to expand higher education opportunities, by attracting international higher education partners particularly from the UK. These projected outcomes align with both Sri Lanka’s national vision for expanding their higher education sector and the UK’s national strategy to increase education exports by 2030.¹⁷

9. British Council, “Transnational Education Strategy”, <https://www.britishcouncil.org/sites/default/files/transnationaleducationstrategy.pdf> (2023), 2

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13. British Council, “The Value of Transnational Education Partnerships”, https://www.britishcouncil.org/sites/default/files/value_tne_fullreport.pdf (2022), 81

14. British Council, “Transnational Education Strategy”, <https://www.britishcouncil.org/sites/default/files/transnationaleducationstrategy.pdf> (2023), 28

15. British Council, “The Value of Transnational Education Partnerships”, https://www.britishcouncil.org/sites/default/files/value_tne_fullreport.pdf (2022)

16. Ibid, 23

17. UK Government, “Ministerial foreword to the 2023 International Education Strategy update”, <https://www.gov.uk/government/publications/international-education-strategy-2023-update/ministerial-foreword-to-the-2023-international-education-strategy-update-minister-halfon-and-lord-johnson#:~:text=Our%20International%20Education%20Strategy%20builds,> (2023)

Methodology

The research process was determined by a combination of quantitative and qualitative research methods. The quantitative research conducted helped enumerate the TNE partners in Sri Lanka, along with the type of TNE and programmes offered, and the duration & mode of such programmes. In a complementary fashion, the qualitative research constructed the operational framework of such TNE activity and explicated the decision-making considerations behind the framework.

The research was undertaken in five phases:

1. Mapping of foreign universities providing TNE in Sri Lanka.
2. Desk research of official policy documentation and reports.
3. Interviews with stakeholders which includes representatives from the UK and Sri Lanka's government and its policy-making community, UK and Sri Lankan universities.
4. Focus groups with students undergoing studies at UK-Sri Lankan TNE institutions.
5. Five case studies of TNE best practices in Sri Lanka

2.1. TNE Mapping

The two main providers of TNE in Sri Lanka was understood to be the UK and Australia. Data on UK TNE was sourced from the UK Higher Education Statistics Authority (HESA), while data on Australian TNE was sourced from the International Higher Education Data and Research department, Australia. From HESA, the 2022-23 HESA Aggregate Offshore Record provided a list of UK TNE providers in Sri Lanka. It offered a comprehensive coverage of UK TNE by specifying the partnership types between Sri Lankan organisations and UK TNE providers, the breakdown in number of enrolled students receiving UK higher education by offshore degree type, and the duration and pricing of such TNE programmes available. Australian data was just as specific, retrieved from the period of 2018 to 2022, which enabled this report to map a reliable and thorough landscape of the current TNE activity in Sri Lanka. A list of TNE providers, their partner organisations, partnership type, tuition fees and programme can be found in Annex A (UK) and Annex B (Australia) of this report.

2.2. Desk Research

An extensive comb through official documentation from a variety of sources was conducted. Primary sources included past British Council reports on Sri Lanka, reports published by international development organisations such as the Asian Development Bank, the World Bank and the World Economic Forum, and reports published by the Institute of Policy Studies of Sri Lanka, the Sri Lankan Ministry of Higher Education, and the Sri Lankan Presidential Expert Committee. These reports consisted of key policy and strategy documents, economic and development research papers, and regulatory reports. The Sri Lankan Ministry of Higher Education website was also a key source of information on the Sri Lankan higher education system. Secondary sources also included academic papers from external think tanks such as the Melbourne Centre for the Study of Higher Education. Overall, desk research aimed to document the prominent regulatory frameworks underpinning TNE activity in Sri Lanka and identify the broader opportunities and barriers for TNE in Sri Lanka.

2.3. Stakeholders Interviews

Interviews were conducted with Sri Lankan, UK and Australian stakeholders, to understand their prevailing attitudes towards current TNE practices and preferences for the development of TNE in Sri Lanka.

These stakeholders included representatives from:

- UK universities with TNE in Sri Lanka
- Australian universities with TNE in Sri Lanka
- British Council in Sri Lanka
- Department of Business and Trade, UK government
- UK Quality Assurance Agency
- Staff from the Ministry of Higher Education, Sri Lanka
- Senior Officials from the University Grants Commission, Sri Lanka
- Sri Lankan public and private universities

Interviews were structured according to the following main themes:

1. Evolution of TNE practices in Sri Lanka: Notable trends, historical shifts and TNE's broader role in influencing Sri Lankan higher education priorities.
2. Awareness of TNE models and system currently in practice in Sri Lanka and their unique features.
3. Successes and challenges of TNE (faced by the various types of stakeholders).
4. TNE's social and economic impact: Increasing accessibility & affordability of HE and improving gender equality.
5. Identifiable quality assurance mechanisms (or a similar governance structure) for TNE in Sri Lanka.

Focus groups were also conducted with students currently enrolled at TNE institutions in Sri Lanka, to understand their motivations behind exploring TNE as an educational pathway. These discussions were also centred around students' perceived benefits and challenges of participating in TNE programmes, and their aspirations for the future of TNE in Sri Lanka.



Higher Education Landscape of Sri Lanka

3.1. Higher Education System

Sri Lanka has one of the highest literacy rates in South Asia. In 2021, 92 per cent of the population aged 15 and above was literate.¹⁸ This can be attributed to the country's Free Education Policy, which has been practised since 1945.¹⁹ The policy has entitled children to free and basic education, demonstrating the government's commitment to education.

With regards to higher education, the number of students enrolling into universities and HEIs to pursue both undergraduate and postgraduate programmes have risen steadily over the last few years. In 2019, there were about 420,000 enrolments.²⁰ This increased to around 430,000 enrolments in 2020,²¹ followed by 450,000 enrolments in 2021.²² Most recently, there were over 490,000 enrolments in 2022.²³ It is important to note that these enrolments are only for universities and HEIs approved by the UGC, which includes both state universities and some private HEIs offering foreign qualifications. Enrolments into other private HEIs remain undocumented, and hence the actual proportion of higher education participation in Sri Lanka may indeed be higher.

The Sri Lankan higher education landscape can be understood through three main strands: i) state-governed higher education sector, ii) the private higher education sector (also commonly termed as the non-state higher education sector in Sri Lanka), and iii) the extent of government intervention in the private higher education sector.

The state-governed sector is managed by government bodies. It is primarily supervised by two government bodies- the Ministry of Higher Education (MOHE) and the University Grants Commission (UGC). These two bodies take charge of the administrative and operational processes across universities under their respective purview. For instance, they have decision-making power over the hiring of administrative staff, the

provision of infrastructure and funding, student admissions and the like. The UGC undertakes a more administrative function in managing these universities and has the authority to grant a degree-awarding status to private HEIs that have satisfied their criteria. The UGC was established by the Universities Act in 1978, to serve in the following capacities:

1. Plan and coordinate university education
2. Allocate funds to universities and higher educational institutes (HEIs)
3. Maintain academic standards.
4. Regulate the administration of universities and HEIs and the admission of students to these bodies.

Conversely, the private higher education sector has no central body to regulate the administrative and operational processes. They are regarded as private entities, established under the Company Act of 1982.²⁴ Even so, the development and needs of private institutes are still attended to by certain parties. Firstly, the Sri Lanka Association of Non-State Higher Education Institutes (SLANSHEI) was formed in 2016 by seven private institutions. SLANSHEI's main function is to address the unique challenges faced by non-state universities, and to work towards a high standard of education that can create employable talent for both the domestic and international economy.²⁵

Secondly, there is a private higher education division within the MOHE- the Non-State Higher Education Division. This division sets out guidelines that private institutes should adhere to, to be conferred the degree-awarding status by the government. These requirements are:

1. Clear governance structure and board, to be accountable for administrative, academic and financial matters.

18. The World Bank, <https://data.worldbank.org/country/sri-lanka>

19. Ministry of Foreign Affairs, Sri Lanka, https://mfa.gov.lk/cool_timeline/free-education-policy-in-sri-lanka/#:~:text=October%201945%2C%20the%20Free%20Education,is%20entitled%20to%20free%20education.&text=enabled%20Sri%20Lanka%20to%20succeed,Goal%20of%20Universal%20Primary%20Education

20. University Grants Commission, "Sri Lanka University Statistics 2019: Student Enrolment", https://www.ugc.ac.lk/downloads/statistics/stat_2019/Chapter3.pdf, 37

21. University Grants Commission, "Sri Lanka University Statistics 2020: Student Enrolment", https://www.ugc.ac.lk/downloads/statistics/stat_2020/Chapter%203.pdf, 41

22. University Grants Commission, "Sri Lanka University Statistics 2021: Student Enrolment", https://www.ugc.ac.lk/downloads/statistics/stat_2021/Chapter%203.pdf, 41

23. University Grants Commission, "Sri Lanka University Statistics 2022: Student Enrolment", https://www.ugc.ac.lk/downloads/statistics/stat_2022/Chapter%203.pdf, 41

24. Asian Development Bank, "Innovative Strategies in Higher Education for Accelerated Human Resource Development in South Asia: Sri Lanka", <https://www.adb.org/sites/default/files/publication/185628/strategies-higher-education-sri.pdf> (2016)

25. Sri Lanka Export Development Board, <https://www.srilankabusiness.com/news/slanshei-contribution-to-non-state-higher-education-sector.html> (2018)

Improving Relevance and Quality of Undergraduate Education project. The QAC's responsibilities were derived from two international organisations for quality assurance- 1) the International Network for Quality Assurance Agencies in Higher Education, and 2) the Asia Pacific Quality Network. The Council serves to improve the quality of higher education programmes offered by universities under the UGC, and other government approved HEIs. It does so through three main ways:

1. Acting on policy directions issued by the UGC.
2. Monitoring the quality of current programmes by conducting external reviews of universities, with the aim to reform them to increase the relevance of higher education in Sri Lanka.
3. Designing and implementing a regulatory framework- known as the Sri Lanka Qualifications Framework. An implementation of this framework²⁷ is required for all state universities, as well as non-state HEIs that are government approved. This framework thus serves as a necessary guide for institutions to work towards, to further improve the quality of higher education in Sri Lanka. A detailed understanding of this framework is found in Section 5.2.

Overall, these agencies function to establish, strengthen and sustain the higher education sector in Sri Lanka.

3.2. Higher Education Structure

The higher education sector is structured in the following manner: State universities are national universities, and they are inclusive of the oldest and most prestigious universities in Sri Lanka such as the University of Colombo, the University of Peradeniya and the University of Sri Jayawardenapura. Currently, there are 18 state universities, which are under the purview of the UGC.²⁸ Meanwhile, the MoHE oversees two specialised universities and SLIATE, a primary provider of advanced technological education delivering programmes across 11 of such institutes nationwide.²⁹

There are also higher education institutions established under other government ministries. For instance, the Kotelawala Defence University operates under the Ministry of Defence, while the University of Vocational Technology is governed by the Ministry of Vocational and Technical Training. Similarly, the Ocean University of Sri Lanka and the National Institute of Education are managed by the Ministry of Education.

Strong management that demonstrates capability in general administration, financial management and navigation in disciplinary and welfare matters.

3. Financially stable with fundamental educational facilities and infrastructure.
4. Demonstrate sufficient physical resources for conducive academic learning, training and recreational activities.
5. Capacity to deliver quality education and presence of quality assurance criteria.
6. Teaching and research competencies of academic staff.²⁶

In this sense, the private higher education sector in Sri Lanka is still partially informed by government intervention.

Apart from addressing the administration and operations of universities in Sri Lanka, the UGC also houses the Quality Assurance Council (QAC). The QAC was established in 2005, under the World Bank's

26. Non-State Higher Education Division, Ministry of Education, "Recognition of Degree Awarding Institutes", <https://www.mohe.gov.lk/images/newguidelinesonDAS.pdf> (Date unspecified)

27. University Grants Commission, https://www.ugc.ac.lk/index.php?option=com_content&view=article&id=21:quality-assurance-and-accreditation&catid=2:standing-committees

28. Ministry of Higher Education, https://www.mohe.gov.lk/index.php?option=com_udm&view=university_details&Itemid=222&govern_body_id=2&institute_type_id=1&lang=en

29. Ministry of Higher Education, https://www.mohe.gov.lk/index.php?option=com_content&view=article&id=131&Itemid=221&lang=en

Figure 1: Higher Education Structure

	Public Sector			Private Sector		
Degree/higher diploma status recognised by	MOHE and UGC*					
Degree-awarding powers conferred by	MOHE and UGC			Respective Institutions		
Responsible bodies	Other government ministries	UGC	MOHE	-----		
Types of institutions	Ministry-specific universities	State universities	Universities under MOHE	Degree awarding. Institutes	Professional Institutes	Others**
Total no. of institutions	Total: 4	Total: 18	Total: 3	Total: 27	Total: 5***	Total: ***
Notable Examples	<ul style="list-style-type: none"> General Sir John Kotelawala Defence University (KDU) University of Vocational Ocean Technology University of Sri Lanka National Institute of Education (NIE) 	<ul style="list-style-type: none"> University of Colombo University of Jaffna 	<ul style="list-style-type: none"> Buddhist Pali University Bhiksu University of Sri Lanka Sri Lanka Institute of Advanced Technological Education (SLIATE) 	<ul style="list-style-type: none"> Sri Lanka Institute of Information Technology (SLIIT)1 National School of Business Management (NSBM)1 	<ul style="list-style-type: none"> Sri Lanka Law College British Computer Society Sri Lanka 	<ul style="list-style-type: none"> Curtin Colombo¹ Edith Cowan University Sri Lanka¹

Legend:

*Foreign degree programmes are recognised if the foreign universities offering these programmes are listed within either the International Handbook of Universities or the Commonwealth Universities Yearbook.

**Inclusive of foreign universities’ international branch campuses

***Numbers not formally reported but derived from desk research.

1: Institute offers transnational programmes, leading to an award/accreditation by a foreign university

Within the private higher education sector, there are about 27 private degree-awarding institutes.³⁰ These are institutes operating under the purview of the non-state higher education division within the MOHE. These institutes offer Sri Lankan degrees recognised by the UGC. Aside from locally recognised accreditation, some of these institutes also host degree programmes from foreign universities. As these institutes have been approved by the MOHE, degrees awarded from these institutes are recognised by the UGC.

Meanwhile, professional institutes refer to learning institutes catered towards vocational and industry-specific training. Programmes in these institutes are designed to qualify students for vocational work in the respective industries.

Lastly, there are a variety of other higher education institutes within the private sector. These institutes are privately-owned and operated and may host degree programmes by foreign universities. These institutes are not conferred the degree awarding title by the government. However, they may still offer

30. Ministry of Higher Education, https://www.mohe.gov.lk/index.php?option=com_content&view=article&id=352&Itemid=336&lang=en#recognized-degrees

accreditations that are internationally recognised. For instance, both Curtin University and Edith Cowan University have branch campuses in Colombo. Students attending these campuses will be awarded degrees from the parent universities themselves.

Overall, the higher education sector in Sri Lanka has diverse offerings- ranging from locally accredited programmes to foreign accreditations.

3.3. Sector Challenges

Despite the robust higher education system and structure in Sri Lanka, there are still unique challenges that the sector faces, as prefaced in the Introduction section.

The first is the mismatch between graduates' skills set and the skills required for the workforce. This can be attributed to a lack of specific soft skills within university curricula. In the latest Tracer Study conducted by the UGC, a majority of employers surveyed (74 per cent) cited that their greatest challenge in graduate recruitment was finding graduates with soft skills such as English Language, Communication, Interpersonal, Leadership and Influencing skills.³¹ The idea that such skills could increase employability was also corroborated by the importance graduates placed on these skills. Most graduates surveyed (84 per cent) agreed that possessing such skills helped them to secure their current job.³² This suggests that in addition to technical and discipline-specific skills, graduates have to possess certain soft skills to secure employability.

Another unique challenge would be the quality of higher education. Generally, the quality of higher education can be understood through two main facets- teaching and research. Teaching quality refers to not just the quality of teachers, but other factors that affect the learning environment of students, such as the pedagogy adopted and the curriculum's structure. A lack of such factors may influence students' employability outcomes. For instance, universities and graduates appear to be unaware of emerging market trends. Employers surveyed in the Tracer Study also cited how Sri Lankan graduates do not have the following market-relevant skills:

“literacy and numeracy, time management and organisation, oral and written communication, teamwork, capacity for creative problem-solving, initiative and enterprise, critical and analytical thinking, ability to apply discipline-related knowledge and concepts, information gathering, evaluation and synthesis, emotional intelligence and interpersonal skills, and adaptability.”³³

Employers noted how these skills can be gained regardless of the academic discipline and should be incorporated into the university curriculum through innovative pedagogy and assessments.

Research quality, then, refers to factors such as research output and the ability to translate such output into applicable knowledge for industry and society. It was recently reported in a 2022 Parliamentary Report on the Expansion of Higher Education Opportunities in Sri Lanka, that state universities had a research output of “low quality” and “low relevance to national needs”.³⁴ This is concerning, as state universities were conceived for the purpose of aiding national and policy development.³⁵ The perceived substandard research output of state universities were attributed to insufficient funds allocated to state universities, which undermines the quality of university education received.³⁶

The last challenge is regarding the accessibility to higher education. In academic year 2021-2022, the number of candidates that were admitted into state universities and government-approved non-state HEIs were 25.4 per cent of the number of candidates that qualified for higher education in Sri Lanka.³⁷ This might be attributed to how there are limited spaces in state universities.³⁸ Other than the availability of university spaces, access to university is also understood by the affordability of higher education. As mentioned previously, the tuition fee for private higher education- especially degree programmes offered by foreign universities, is high. Hence, even if there are more spaces open for students through these alternative degree pathways, their high costs might not be affordable for students, thus limiting students' access to higher education.

31. University Grants Commission, “Tracer Study 2018”, <https://www.ugc.ac.lk/downloads/statistics/webTracer/2018/Tracer%20Study%202018.pdf> (2018), 60

32. Ibid, 54

33. University Grants Commission, “Tracer Study 2018”, <https://www.ugc.ac.lk/downloads/statistics/webTracer/2018/Tracer%20Study%202018.pdf> (2018), 69

34. Parliamentary Report No.100, “Report of Select Committee of Parliament to Make Suitable Recommendations for the Expansion of Higher Education Opportunities in Sri Lanka”, <https://parliament.lk/uploads/comreports/1689939464085452.pdf> (2022), 13

35. Ibid, 14

36. Ibid, 23

37. University Grants Commission, “Sri Lanka University Statistics 2020: Student Enrolment”, https://www.ugc.ac.lk/downloads/statistics/stat_2020/Chapter%203.pdf, 19

38. Presidential Expert Committee, “Sustainable Sri Lanka 2030 Vision and Strategic Path”, <https://www.presidentsoffice.gov.lk/wp-content/uploads/2019/05/Final-v2.4-Typeset-MM-v12F-Cov3.pdf> (2019), 259

TNE in Sri Lanka

4.1. TNE Landscape

Scale of TNE in Sri Lanka

The scale of TNE in Sri Lanka is large- as implied by the number of local enrolments into UK TNE programmes alone. In 2022-2023, Sri Lanka was the second largest host country for UK TNE, with 53, 915 enrolments. Through the five-year period from 2018-2019 to 2022-2023, Sri Lanka had a 50 per cent increase in UK TNE enrolments from 2020-2021, at an average growth rate of 17 per cent.³⁹ There were significantly lesser enrolments into Australian TNE, with 3145 recorded enrolments in 2022. However, Australian TNE enrolments increased quickly within the five-year period from 2018 to 2022- with almost a three-fold increase in enrolments, at an average growth rate of 33 per cent. From this, it can be inferred that there has been a sustained interest in UK and Australian TNE within the Sri Lankan higher education sector.

Despite the robust UK and Australian TNE activity, the total number of TNE enrolments in Sri Lanka is unknown, because there exists no official repository to track every enrolment.⁴⁰ While there are no local statistics on TNE enrolments, the Sri Lankan government does publish statistics on student numbers at approved non-state HEIs- some of which host TNE programmes. In 2022, there were about 26, 189 students enrolled in such institutions.⁴¹ The institution with the highest enrolment number of 10, 402 students is the Sri Lanka Institute of Information Technology (SLIIT).⁴² It houses a blend of both local and TNE degrees from the UK, Australia, United States, Canada and New Zealand- including about 58 Australian TNE programmes and 32 UK TNE programmes.⁴³ As statistics for non-state HEIs also included students enrolled in local degree courses, the gap between the number of students at domestic private HEIs and those recorded as studying UK or Australian TNE courses suggests that a large number of TNE students are enrolled at TNE institutions that do not have Sri Lankan degree-awarding powers.

However, overseas degrees awarded through TNE programmes can still be recognised by the Sri Lankan government even if the local partner does not have degree-awarding powers, as long as the foreign universities offering these programmes are listed within either the International Handbook of Universities or the Commonwealth Universities Yearbook.⁴⁴ Foreign universities' presence within these handbooks is the only factor to determine whether a TNE qualification is officially recognised.

Types of TNE in Sri Lanka

There are 6 types of TNE partnerships observed in Sri Lanka. Firstly, franchised programmes refer to partnerships where the foreign university delivers its courses through a collaborative partner in Sri Lanka. The collaborative partner does not necessarily have to be a degree-awarding body, and the delivery of these courses will result in an award of credit by the foreign university. Secondly, validated programmes refer to partnerships where the partner institution develops courses that are then approved by the foreign university. Like franchised programmes, partner institutions need not be a degree-awarding body.

Thirdly, articulation agreements refer to collaborative agreements between two institutions to allow students to enter a university course with advanced standing. In Sri Lanka, this is commonly regarded as a degree transfer programme, where students study for 1-2 years at a Sri Lankan private HEIs, and then continue their programme at a university abroad. Next, joint award refers to how a foreign university works with one or more degree-awarding bodies to design, approve, deliver and assess courses. These courses are then jointly awarded to students by all degree-awarding bodies involved in the above processes.

There is also a dual award, which refers to how a foreign university works with one or more degree-awarding bodies to jointly conceive programmes. In such programmes, students need not satisfy the

39. Higher Education Statistics Agency, "Student open data- transnational education", <https://www.hesa.ac.uk/data-and-analysis/students/transnational>

40. Parliamentary Report No.100, "Report of Select Committee of Parliament to Make Suitable Recommendations for the Expansion of Higher Education Opportunities in Sri Lanka", <https://parliament.lk/uploads/comreports/1689939464085452.pdf> (2022), 22

41. Ibid, 21

42. National Human Resources Development Council of Sri Lanka, "Statistical Bulletin on Education", https://nhrdc.gov.lk/nhrdc/media/attachments/2023/05/09/stat-bulletine-on-edu-2022-for-web_compressed.pdf (2022), 31

43. <https://www.sliit.lk/international/international-students/programmemes/>

44. https://mohe.gov.lk/index.php?option=com_content&view=article&id=137&Itemid=227&lang=en

requirements of all partners involved before receiving the award. What this means is that a foreign university collaborates with one or more degree-awarding bodies in designing courses. The course in question then takes on these forms- a joint initial curriculum or two parallel and equivalent curricula. Students complete two separate blocks of study consecutively at each partner institution, and eventually earn two distinct qualifications awarded individually by the two degree-awarding bodies.⁴⁵ Lastly, international branch campuses refer to how foreign universities establish their own campuses in Sri Lanka. Students attending these campuses are conferred degrees from the main university body.

Non-state HEIs are amongst the institutions engaging in these TNE partnerships with both UK and Australian universities. It is also interesting to note that non-state HEIs can house different types of TNE partnership models. For instance, the Sri Lankan Institute of Information Technology (SLIIT) is engaged in joint awards, franchised programmes, and articulation agreements with several foreign universities.⁴⁶ Similarly, the International College of Business and Technology (ICBT) is engaged in both franchised and validation programmes with foreign universities. In addition to being offered a variety of courses from different foreign universities, students are also able to experience a variety of TNE models. At these institutions, students have the agency to engage in different kinds of TNE activity. This makes for a robust and diverse TNE landscape in Sri Lanka. It is no wonder why the Sri Lankan government has established plans to bring in more international universities in accordance with their strategy to develop the nation as a higher education hub within South Asia.

4.2. UK TNE in Sri Lanka

Background

The TNE mapping exercise and data from HESA records of 2022-23 revealed that 44 UK HEIs had

formal TNE partnerships in Sri Lanka with 53, 915 enrolments. The most common type of UK-Sri Lanka TNE partnerships was observed to be the 'validated' arrangement, primarily due to its cost-effectiveness for students with limited willingness to pay and its common curriculum with Sri Lanka's domestic higher education. Following validation, the second most common partnership model is the 'franchise' arrangement. It should be noted that there has yet to be an international branch campus established by a UK university in Sri Lanka.

The largest single partnership in terms of enrolments is that between Cardiff Metropolitan University and International College of Business and Technology (ICBT) with 8,220 enrolments in 2021-22. This was observed mostly in the fields of Business Management, Information Technology, Psychology, Biomedical Science, Project Management and Law. These programmes are all classified as 'validated' by the Cardiff Metropolitan University. Similarly, The University of Bedfordshire is in partnership with the British School of Commerce, reaching 3,160 enrolments in 2021-22. The British School of Commerce offers validated UG and PG programmes in Business, Law, and IT. Key courses include LLB Hons, MBA, Advanced Diploma in Business, and Foundation in Business. Program durations vary from four months to three years full-time, and 1.5 years part-time. Moreover, Coventry University partners with the National Institute of Business Management (NIBM) and the International Institute of Health Sciences (IIHS), offering 3,180 enrolments in validated UG and PG programmes across fields like Digital Banking, English, HR Management, Data Science, and Nursing. Courses are available full-time and part-time, with durations ranging from 1 to 3 years.

It is also interesting to note that certain UK universities are engaged in more than one type of partnership, which offers students a variety in TNE programmes for the same university.

Table 1: UK universities with multiple partnerships

Institution	Types of Partnership ⁴⁷
Kingston University	<ol style="list-style-type: none"> Validated programme Double degree
Cardiff Metropolitan University	<ol style="list-style-type: none"> Validated Franchised programme

45. The Quality Assurance Agency for Higher Education, "Qualifications involving more than one degree-awarding body", <https://www.qaa.ac.uk/docs/qaa/quality-code/qualifications-involving-more-than-one-degree-awarding-body.pdf> (2020), 7

46. Refer to Annex A and B

47. Refer to Annex A

The concentration of private higher education institutions in Sri Lanka is notably high in Colombo, the nation's capital and its largest city. It is primarily attributed to several advantageous factors, notably the availability of qualified personnel, robust infrastructure, and accessibility to advanced technology. This geographical concentration has historically been accepted, as students have demonstrated a propensity to migrate towards Colombo, facilitated by well-developed road networks.

While Colombo remains a significant hub for private higher education, other regions in Sri Lanka are also experiencing growth. Kandy, the cultural capital, hosts several private institutions offering specialised programmes. Galle, known for its historical significance, is gradually becoming an education hub. In the north, Jaffna is emerging as a centre for higher education, particularly following the end of the civil war. Kurunegala in the Northwestern Province is seeing increased private education activity. Moreover, Gampaha, adjacent to Colombo, benefits from its proximity to the capital by hosting numerous private institutions. Examples include the Horizon Campus in Malabe and the South Asian Institute of Technology and Medicine (SAITM) in Malabe, which is close to Colombo but technically outside its administrative limits.

This shift reflects a strategic response to the changing dynamics of educational delivery, leveraging emerging technologies to broaden access and accommodate evolving student preferences. However, it is important to note that currently, there are no specific government plans or other incentives for establishing institutions in suburban areas. To summarise, Colombo hosts the bulk of private higher education institutions in Sri Lanka, while other cities have fewer of such institutions-contributing to a growing but unevenly distributed higher education landscape in the country.

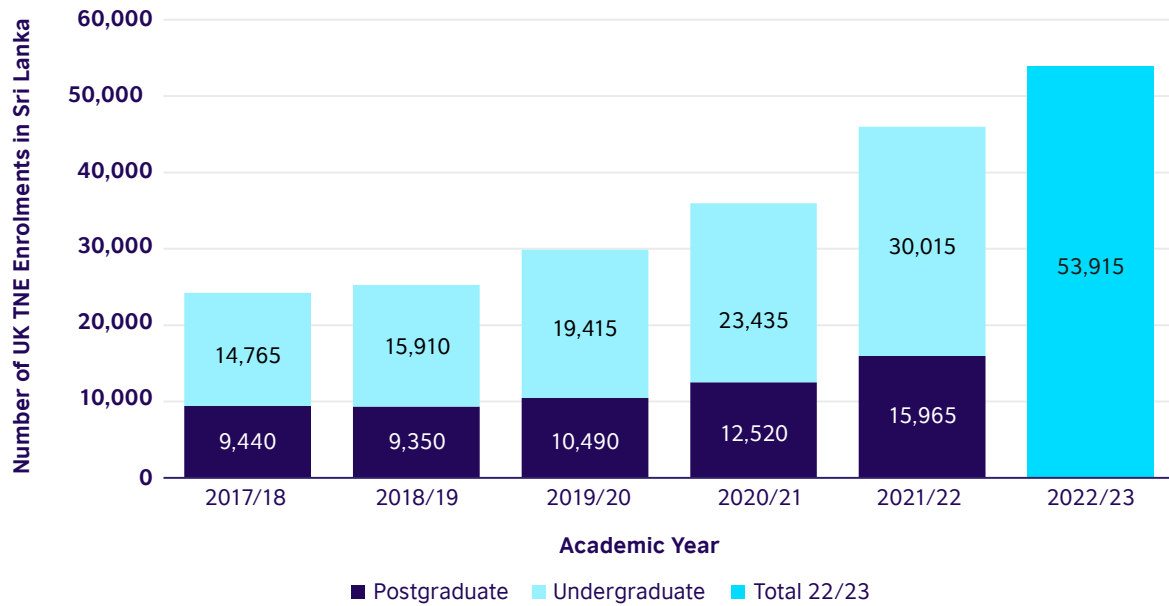
TNE programmes offered by UK universities traditionally emphasised on undergraduate studies, serving a broad demographic of students seeking reputable international degrees. However, a subset of universities has strategically incorporated postgraduate options into their TNE offerings, recognising the evolving needs and preferences of students. Recent trends indicate a growing inclination among postgraduate students towards international

mobility, with the UK emerging as a preferred destination for advanced studies and potential settlement. This strategic integration underscores a proactive approach by universities to adapt to evolving student preferences, contributing to the UK's reputation as a global education hub and fostering international collaboration and academic excellence.

The prevalence of STEM disciplines within the ecosystem of TNE programmes is notable, reflecting a perceived preference among students for fields that often lead to higher-paying employment opportunities. This emphasis is particularly pronounced in areas such as Electrical and Electronic Engineering, Mechanical Engineering, Software Engineering, and Network and Information Security. Business-related courses, including Business Management and Hospitality Management, also enjoy significant representation. While humanities and social sciences programmes are available, they constitute a smaller proportion compared to STEM and business disciplines. This inclination towards STEM disciplines underscores a strategic response to the demand for fields perceived to offer enhanced economic prospects, especially within the context of private education and TNE programmes. Concurrently, emerging fields like digital marketing and filmmaking are witnessing a surge in popularity. This trend reflects evolving market demands and the increasing recognition of the significance of digital platforms in contemporary business strategies. Digital marketing, with its focus on online advertising, social media engagement, and data analytics, addresses the growing need for companies to establish and maintain a strong digital presence. Similarly, the rise of filmmaking as a sought-after discipline underscores the growing influence of visual storytelling in various industries, from entertainment to advertising and beyond. As these fields continue to evolve and expand, they present exciting opportunities for both students and educators within the landscape of transnational education programmes.

Prices for these programmes vary, typically ranging from £1500 to £2200 per year. Payment options also vary, with some programmes allowing payment in Sri Lankan Rupees (LKR), while others accept payments in GBP and USD- sometimes offering conversion rates for transactions conducted in LKR.

Figure 2: UK TNE Enrolments in Sri Lanka

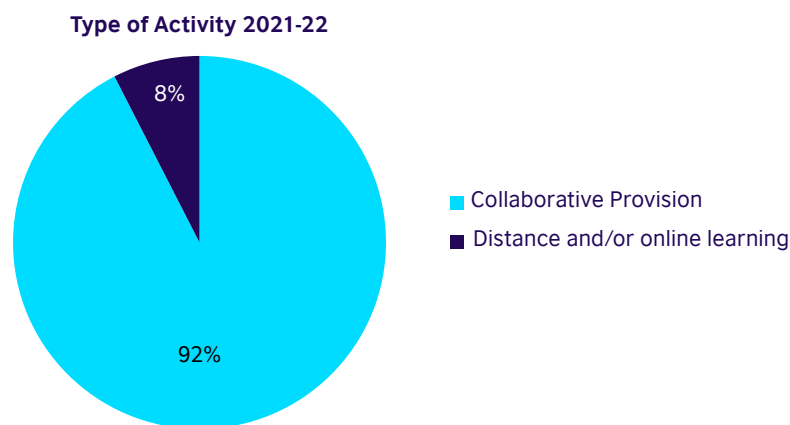


Source: HESA Aggregate Offshore Record (21-22) & (22-23)

The data in figure 2 shows that UK TNE in Sri Lanka has risen overall in the last five years. For 2022/23, only overall enrolment figures are currently available. The

most significant rise in UK TNE enrolments happened in 2021/22, with a 27 per cent increase.

Figure 3: UK TNE in Sri Lanka by type of provision, 2021/22



Source: HESA Aggregate Offshore Record (21-22)

Figure 3 shows that most UK TNE enrolments are delivered through collaborative provision between UK university and local Sri Lankan institutions. This could include direct collaborations between degree awarding institutions, e.g., joint or dual degrees, or franchise/validation models between UK universities and foreign

non-degree awarding bodies). Notably, there are no international branch campuses of UK universities in Sri Lanka, and thus, such enrolments are not represented in Figure 3. Table 2 provides further details on HESA categorisation mapping into TNE model.

Table 2: HESA Categories for recording TNE

HESA Category for recording TNE enrolments	Model of TNE
Registered at reporting provider- studying overseas for UK HEP award at overseas campus of reporting provider	International branch campus
Registered at reporting provider- studying overseas for UK HEP award other than at an overseas campus of reporting provider	Collaborative Provision (this could include direct collaborations between degree awarding institutions, e.g., joint or dual degrees, or franchise/validation models between UK universities and foreign non-degree awarding bodies). In both cases, students recognize their degree as international but may not differentiate these categories. It is an internal arrangement (as to how they are registered) between the UK university and its partner, but ultimately, the award is from the UK university.
Registered at overseas partner organisation- studying overseas for an award of the reporting provider	Distance learning, including online learning

The TNE mapping in Annex A demonstrates a range of TNE delivery models, but the majority of UK universities engaged in TNE operations in Sri Lanka have exclusivity agreement and have just one exclusive partner in the region.

Mutual Benefits of UK TNE

The collaboration between UK universities and partners in Sri Lanka constitutes a pivotal component of Sri Lanka’s higher education landscape, effectively addressing both the quantitative and qualitative gaps therein. With a mere quarter, roughly 25 per cent,⁴⁸ of eligible students gaining admission to state universities, TNE partnerships emerge as a crucial avenue for the majority who would otherwise find themselves unable to pursue tertiary education. Some affluent students, despite being enrolled in public universities, are increasingly drawn to non-state universities due to the appeal of earning an international degree.

Beyond merely expanding access, TNE arrangements bridge the quality chasm prevalent within Sri Lanka’s educational framework. By leveraging partnerships with UK institutions, TNE not only offers students opportunities but also fills curriculum gaps. This diverse academic spectrum ensures that students have access to a breadth of subjects, a facet often limited within state universities. Moreover, TNE initiatives circumvent the prolonged waiting periods characteristic of state university admissions, enabling immediate enrolment. This addresses the backlog predicament, wherein students frequently endure a

wait of 1-2 years before commencing their studies. Innovative pedagogical strategies inherent to TNE enhance the learning experience, augmenting traditional educational approaches with contemporary methodologies.

Through TNE partnerships, UK universities significantly enhance their global outreach and competitiveness. By establishing collaborations with international institutions, the university creates a diverse community of students and alumni, aligning with its goals of internationalisation. Additionally, these partnerships serve as a valuable income source, ensuring financial sustainability for the institution.

Furthermore, access to the university’s curriculum and resources enriches the educational offerings of partner institutions, while upholding the esteemed standards of UK education globally, thereby reinforcing the university’s reputation for excellence. TNE partnerships offer local institutions a pathway to international competitiveness by providing UK-accredited degrees. Through exposure to the university’s curriculum and teaching standards, partners undergo capacity building, while gaining access to cutting-edge technology and resources. Consistent partnerships with a reputable UK institution enhance the credibility and reputation of local partners, attracting students seeking globally recognised qualifications.

For students, TNE partnerships offer accessible pathways to affordable international education, overcoming any financial barriers. These collaborations also provide students with invaluable

48. <https://studentlanka.com/2023/12/05/no-students-admitted-for-university-degree-courses-in-2023-based-on-2022-a-1/>

opportunities to experience UK education through hybrid models, enriching their learning and cultural exposure. National Universities are not able to absorb all students, hence TNE fills the capacity gap. Additionally, students gain globally recognised qualifications, enhancing their career prospects and mobility. Programmes such as Biomedical Sciences and Arts of Design address capacity gaps in local universities, offering more opportunities for students to pursue their desired fields of study.

In summary, TNE provision in Sri Lanka not only expands access to higher education but also improves its quality and relevance. By bridging gaps in capacity and curriculum, TNE partnerships benefit students, universities, and the education system as a whole. Despite the associated costs, the instrumental role of TNE in widening educational opportunities cannot be overstated. It represents a vital component of Sri Lanka's higher education landscape- fostering collaboration, innovation, and internationalisation.

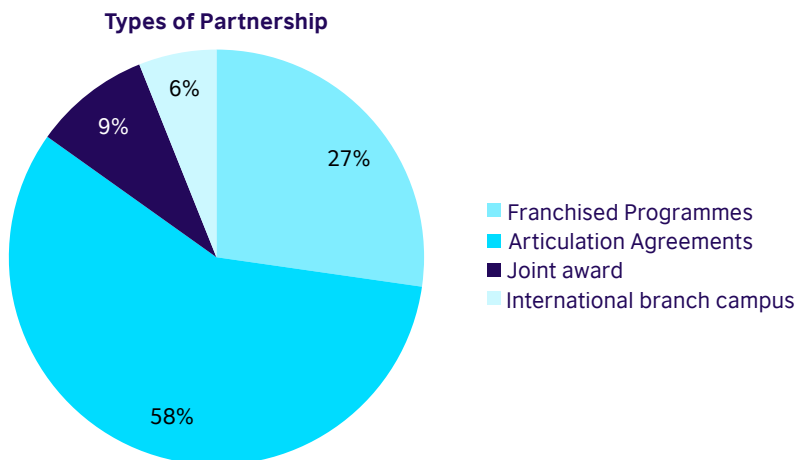
4.3 Australian TNE in Sri Lanka

Background

Data from the Australian Higher Education Statistics Department revealed that 22 Australian universities currently have TNE activity in Sri Lanka. Most of these Australian higher education programmes are delivered via offshore Sri Lankan partners, which are private higher education institutes in Sri Lanka. Only two Australian universities have established their branch campuses in Sri Lanka, both in the capital Colombo: Curtin University has Curtin Colombo, while Edith Cowan University has ECU Sri Lanka.

Notably, the data reflected a diversity of Australian TNE partnerships in Sri Lanka. Four types of TNE partnership models were observed through the mapping exercise. They are ranked here in order of prevalence: 1) Articulation agreements, 2) Franchised programmes, 3) Joint awards and 4) International branch campus (see Figure 4).

Figure 4: Australian TNE in Sri Lanka by Type of Partnership Models, 2022



Source: International Higher Education Data and Research Department, Australia (2024)

Articulation agreements with Australian universities were most common at non-state higher education institutes such as the Sri Lankan Institute of Information Technology (SLIIT) and the National Institute of Business Management (NIBM). SLIIT has articulation agreements with 9 Australian universities, while NIBM has such agreements with 3 Australian universities.

Deakin University was recorded to have the greatest number of partnerships with five different Sri Lankan HEIs. This was then followed by RMIT (Royal Melbourne

Institute of Technology) University, who has partnerships with three Sri Lankan HEIs. However, according to the Australian Higher Education Statistics Department, there are currently no students enrolled in Deakin TNE and only 23 students enrolled in RMIT TNE in Sri Lanka.⁴⁹

Similar to UK universities, two Australian universities are also engaged in more than one type of partnership with Sri Lankan HEIs.

49. Data gathered from the International Higher Education Data and Research department, Australia

Table 3: Australian Universities and Partnerships

Institution	Types of Partnership ⁵⁰
Victoria University	1. Joint award 2. Franchise programmes
Deakin University	1. Joint award 2. Articulation agreement

However, unlike the robust enrolment at UK universities with more than one partnership, only a small proportion of Sri Lankan students are enrolled in these programmes. At present, 170 students are enrolled in Victoria University’s Sri Lankan TNE, while no students are enrolled in Deakin University’s Sri Lankan TNE.

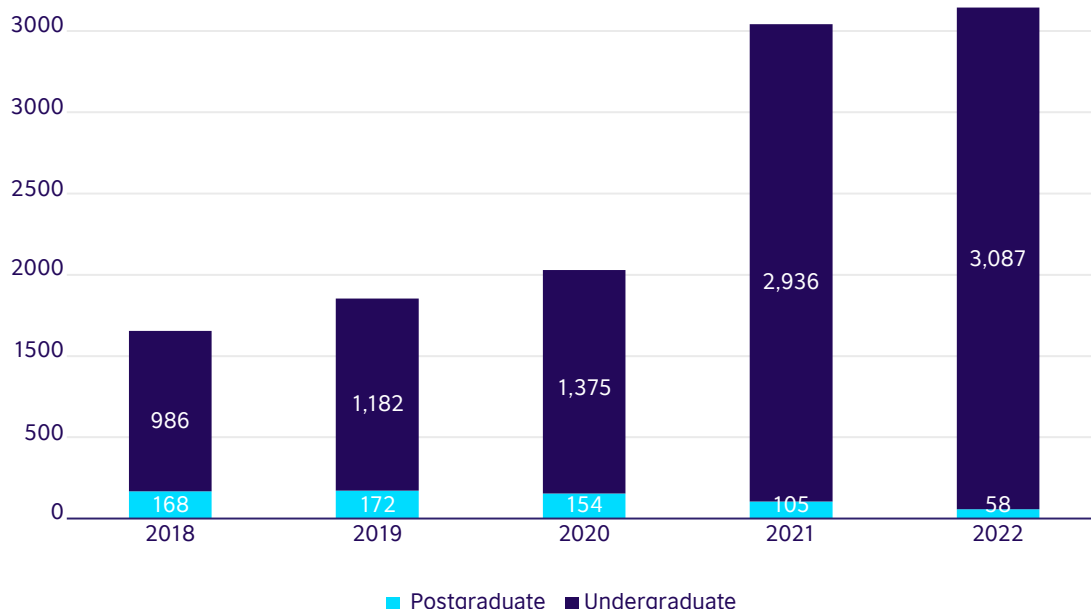
Landscape of Australian TNE

The demand for Australian TNE in Sri Lanka has increased over the years (see Figure 5). As of 2022, at least 3,145 students are enrolled in these TNE programmes.⁵¹ This data includes the enrolment numbers for both undergraduate and postgraduate programmes. The Australian enrolment numbers are less in comparison to that of the UK, which suggests

that more students are interested in UK TNE in Sri Lanka. Nevertheless, there is still a considerable number of students interested in Australian TNE in Sri Lanka.

More specifically, most students were interested in Australian undergraduate programmes. As observed in Figure 5, there were significantly more enrolments in undergraduate programmes than there were in postgraduate programmes. From 2018 to 2022, there were fewer enrolments in Australian TNE postgraduate programmes, signalling a growing disinclination for Australian postgraduate programmes in Sri Lanka.

Figure 5: Australian TNE Enrolments in Sri Lanka, 2018-2022



Source: International Higher Education Data and Research Department, Australia

50. Refer to Annex B for the names of Sri Lankan institutions that AUS franchised programmes are delivered at

51. This is because Australian data did not record the exact number of enrolments for one university, The College of Law (data only noted that enrolments were less than 5). Full list of courses can be found in Annex B

Table 4: Top 10 Australian universities by TNE enrolments in Sri Lanka, 2022

University	TNE Partnership enrolments (PG & UG, 2022)
1. Edith Cowan College	1,050
2. Edith Cowan University	608
3. Curtin University	533
4. Swinburne University of Technology	336
5. University of Technology Sydney	221
6. Victoria University	170
7. Monash College	140
8. University of Southern Queensland	58
9. RMIT University	23
10. Federation University Australia	6

Source: *International Higher Education Data and Research Department, Australia*

The Australian university with the highest number of offshore TNE enrolments in Sri Lanka in 2022 was Edith Cowan College and University (ECU). Two other Australian universities with a high number of offshore TNE enrolments are Curtin University and Swinburne University of Technology (see Figure 6). These universities offer a variety of TNE programmes. ECU delivers its programmes from its branch campus in Colombo. Similarly, Curtin has its campus in Colombo, titled 'Curtin Colombo'. Curtin also engages in a franchised arrangement with the Sri Lankan Institute of Information Technology (SLIIT). This means that SLIIT delivers Curtin's courses. Meanwhile, Swinburne's arrangement is an articulation agreement with Nawaloka College of Higher Studies. This means that Nawaloka delivers its own courses that are stepping stones to another relevant course at Swinburne.

Students at ECU Sri Lanka, Curtin and SLIIT undertake undergraduate courses in the following niche areas: Information Technology, Engineering, Cyber Security, Business Administration, Commerce, and Biomedical Sciences.⁵² Meanwhile, students at Nawaloka undertake diploma courses in areas such as Business, Engineering and IT, which will allow them to transfer to an undergraduate course at Swinburne. This is known as a diploma-to-degree pathway transfer.

From the above, it can be inferred that 70 per cent of TNE students are enrolled in STEM-related and business management disciplines. This suggests a preference for fields that lead to better employment prospects, a

notion similarly observed in UK TNE activity. It can also be inferred that most Australian TNE students have preference for these two types of TNE- the international branch campuses and franchised programmes, which are offered by both ECU and Curtin. This is interesting, as most Australian universities have are engaged in articulation agreement partnerships with Sri Lankan HEIs.

Other Australian universities in Sri Lanka also delivered STEM and business-related programmes. Half of the Australian universities with activity in Sri Lanka offered at least an undergraduate course in the field of Engineering,⁵³ while 9 out of 22 universities offered at least an undergraduate course in the field of Information Technology and 8 out of 22 in the field of Business. At the postgraduate level, there were only two known types of courses offered- Master in Business Administration and Master in Architecture. Across the Australian universities, there were also some Arts-related disciplines offered. They are the Bachelor of Design (Fashion), Bachelor of Creative Industries, Bachelor of Fine Arts and Bachelor of Communication.

Tuition fees for these programmes were not well-documented. Most universities either chose not to specify them or advised readers to contact them for more information. For universities that were transparent about their fees, fees were estimated to fall within the range of LKR 200, 000 (£530) to LKR 600,000 (£1,600) per semester. Meanwhile, MBA programmes cost about AUD 560-795 per subject taken within the programme.

52. Refer to Annex B

53. Refer to Annex B

The exact costs for each programme can be found in Annex B.

Presently, most Australian TNE activity takes place in Colombo. Offshore partner institutions are mainly located in Colombo, with the exception of 2 partner institutions- the SLIIT and SLTC. These two institutions have various campuses across Sri Lanka. In addition to its Colombo campus, SLIIT also delivers Curtin programmes in its Kandy, Kurunegala and Malabe campuses. SLTC delivers most of its RMIT University programmes at its residential campus in Padukka. Given the recent news that the government has earmarked Colombo Port City as an area to develop transnational education by calling for the establishment of international universities, it remains that Colombo will be both a mature and emerging area for TNE in Sri Lanka.

Interviews with Australian Universities

Interviews held with Australian universities included conversations with a Dean of International Relations, Deputy Vice-Chancellor (Global), Pro Vice-Chancellor of International Research Partnerships and Executive General Manager (International). These interviews echoed the sector's landscape above, revealing the strategic importance of TNE partnerships in Sri Lanka for Australian institutions with one institution even expanding into a full, locally managed branch campus- emphasising the growing demand for overseas degree programmes set in a local context.

The traditional partnership models are still predominant, with Australian universities highlighting a heavy focus on the requirement of programme delivery overseas, mostly taught by local academics, in matching the level of quality provided at their Australian campuses. Where the difference between Australian universities is in their expectation of an undergraduate's academic journey toward either employment or further study. Whereas some Australian TNE programmes are targeted at providing students with a holistic education which will enable them to thrive in the domestic context (i.e. meeting the skill needs of the domestic economy), some other Australian universities choose to deliver degrees with the requisite skills to be employed in the Australian economy. This revealed a differential in graduate expectations as well, with the former aiming to produce skilled workers who are expected to make an impact on the local economy whilst graduates of the latter may often look to complete their studies in Australia or immigrate for work or to further their postgraduate studies. This also highlights the difference in the type of students applying for the programmes, with students applying for courses which see them complete their final years in

Australia generally coming from higher-income families compared to those who intend to graduate and join the domestic workforce. To combat potential inequality, institutions did implement subsidy plans for students who were unable to afford the travel expense incurred by completing their studies abroad – maximising opportunities and promoting inclusivity across their cohorts.

Strong demand for TNE courses was perceived by most Australian universities, with many expanding their offerings within Sri Lanka. Institutions cited an average of 3-4 programmes offered with local partners when they first began – starting out with mostly IT or business-focused degrees such as Software Engineering, Programming and International Business then branching out to include research-intensive sciences like Biomedical Engineering. This has changed over time as universities interviewed have mentioned significant expansions in their Sri Lankan offerings, with diverse degrees such as Nursing and Psychology being rolled out. This evolution is matched by a continued commitment to quality by universities who recognise the lack of a domestic regulatory framework and have worked around it to ensure the TNE programmes offered are of similar standards to their Australian versions. All universities interviewed cited a strong emphasis on quality assurance, with heavy investment both in terms of time and money in ensuring only high-calibre academics are recruited to teach their programmes in Sri Lanka. Extensive background checks are also conducted to gauge an academic's suitability before hiring, with online training and in some instances, short-term trips to Australian campuses to shadow teaching sessions done to maintain consistency of delivery across both countries.

On student experience, all interviewed institutions mentioned the need to import the university's student experience to Sri Lanka but set within the local context. Local partner institutions implement popular extra-curricular activities such as sports and hobby clubs for student participation and socialisation, building a sense of local community in the student cohort. Considerations included adapting the Australian institution's 'sticky campus' concept to the Sri Lankan campus, In one instance, the university invested heavily in a welcoming environment conducive for students to lounge about and interact with friends on campus rather than leaving once their classes ended. This involved logistical investments such as creating common work and socialisation spaces for students to spend time at, which reinforces the university's common vision for student experience across continents.

Gender inequality and inclusivity were not cited as issues by Australian institutions with mostly equal gender demographics seen in registration numbers, though this is subject to known differences in some courses (e.g. higher male representation in STEM courses). However, universities do adapt to local circumstances with one university creating comfortable waiting areas for parents who often drive their kids to class and wait till they are done – in comparison with Australian students who mostly make the trip themselves.

Growth in the higher education sector is expected, with more investment in the expansion of current programmes mentioned by all interviewed. Quality local partners who can navigate the domestic environment will continue to be valued for the expertise they bring in managing the ground level operations. Most estimate that the current financial situation in Sri Lanka will continue to boost demand for transnational education programmes as a reputable overseas education is still valued by local students. This in turn places the spotlight on Australian universities who have recognised the need to balance quality with quantity; ensuring that the proper processes are in place to maintain high standards of graduates.

It is worth noting that one Sri Lanka higher education institution that delivers both UK and Australian university degrees emphasised that Australian universities typically make more of an effort in the

partnership. Reflecting on over twenty years of TNE partnerships with both the UK and Australia, it was felt that Australian universities were more attuned to the cultural ways of doing business in Sri Lanka and made a greater effort to invest in the partnership. This included more visits, greater realism on student enrolments, support structures for curriculum and teaching, and aligning with longer-term ambitions and visions. Whilst UK universities had succeeded in escalating TNE enrolment in Sri Lanka, and remain very popular with students, it was felt that UK universities could be transactional in their business dealings, prone to sudden changes in institutional direction, and less concerned about the long-term partnership. It was also felt that overall, UK universities had less robust quality assurance procedures with younger Sri Lankan higher education private institutions, leading to a perception of declining quality. In this way, the sentiment was that Australian universities had greater consistency in their approaches to quality assurance, whereas there was wide differentiation in the approach of different UK universities. Whilst this example should not be taken as representative of UK TNE operations in Sri Lanka, there are some best practice lessons that can be learned from the Australian institutions' attitudes and engagements with Sri Lanka institutions.



Significance of TNE in Sri Lanka

The review of both UK and Australian TNE in Sri Lanka has demonstrated two main ways in which TNE is significant to Sri Lanka. Firstly, TNE can address the longstanding issues within the Sri Lankan higher education sector. This includes issues of accessibility, skills mismatch and quality of higher education as highlighted earlier in Section 3.3. Secondly, TNE also demonstrates a capacity to further gender parity, and address gender-related issues surrounding higher education in Sri Lanka.

5.1 Quality of Higher Education

Firstly, TNE can serve as an alternative means to improve the quality of higher education in Sri Lanka. As highlighted in Section 3.3, the quality of higher education is understood through teaching and research. Regarding teaching quality, TNE is well-positioned to address how factors like teaching pedagogy and curriculum design affect students' employability. This is because TNE programmes cover a wide range of disciplines ranging from mature fields such as business and engineering, to emerging fields like digital marketing and filmmaking. Moreover, TNE programmes emphasise practical skill development through their innovative pedagogy and offer students international exposure. A general feature of TNE is that its students are trained in English and exposed to cross-cultural collaboration with foreign teaching staff and students. With regards to research quality, TNE institutions have the ability to tap into their parent campus's research resources, facilities and manpower to increase the volume of research output and research quality within Sri Lanka. TNE institutions hence serve as an alternative platform to improve the quality of higher education in Sri Lanka. Already, the government has recognised this- the Non-State Higher Education division of the MoHE has submitted the recommendation to establish more branch campuses of reputable foreign universities.⁵⁴ Apart from ECU Sri Lanka and Curtin Colombo, there are no other credible international universities' campuses established in Sri Lanka.

5.2 Accessibility to Higher Education

Through the interviews conducted, Sri Lanka's public and private officials commended TNE programmes for their pivotal role in expanding access to higher education, particularly for individuals who may face barriers to entry into state universities. By offering flexible learning options and innovative delivery methods, TNE programmes allow aspiring students from diverse backgrounds, including minorities and those from different regions, have equal opportunities for educational advancement. Similarly, the university partners interviewed cited how TNE programmes are unique opportunities for individuals to access high-quality education from prestigious institutions around the world without the need for extensive financial resources. By leveraging digital platforms and innovative teaching methods, TNE programmes bridge the gap between local educational opportunities and the global academic landscape. This accessibility is crucial in addressing the disparities in higher education access and fostering a more inclusive society.

Moreover, TNE can help Sri Lanka meet its current demand for higher education. Given that admissions to state universities are extremely competitive, many students- who are well- qualified, still lose opportunities to pursue higher education. A recent report by the Sri Lankan Presidential Expert Committee stated that Sri Lanka can no longer cope with the demand for higher education through public universities alone.⁵⁵ The report also underscored the need to diversify the higher education sector in order to accommodate this demand. Presently, the government has already put forth the suggestion to establish more private medical colleges, to address the increasing demand for medical education.⁵⁶ TNE partnerships hence provide an alternative means for more students to pursue higher education and offer a promising solution to this current issue.

54. Parliamentary Report No.100, "Report of Select Committee of Parliament to Make Suitable Recommendations for the Expansion of Higher Education Opportunities in Sri Lanka", <https://parliament.lk/uploads/comreports/1689939464085452.pdf> (2022), 30

55. Presidential Expert Committee, "Sustainable Sri Lanka 2030 Vision and Strategic Path", <https://www.presidentsoffice.gov.lk/wp-content/uploads/2019/05/Final-v2.4-Typeset-MM-v12F-Cov3.pdf> (Jan 2019)

56. Parliamentary Report No.100, "Report of Select Committee of Parliament to Make Suitable Recommendations for the Expansion of Higher Education Opportunities in Sri Lanka", <https://parliament.lk/uploads/comreports/1689939464085452.pdf> (2022), 30

As the majority of TNE partners are based in Colombo, it's evident that students from other regions are placed at a comparative disadvantage due to geographical limitations. The clustering of institutions in Colombo is mainly due to a range of beneficial factors, including the presence of skilled professionals, strong infrastructure, and access to cutting-edge technology. However, the economic crisis is reshaping Sri Lanka's educational landscape, with students opting to study locally due to high costs in Colombo. Tertiary education providers have responded by offering diploma and certificate courses in regional cities, reserving specialised programmes for Colombo. Some institutions are creating hub-like operations across major cities, reducing travel distances. Technology plays a crucial role, enabling the establishment of campuses in suburban areas to enhance accessibility and adaptability to crises. This shift emphasises the importance of leveraging technology to meet evolving student needs amidst economic challenges. TNE programmes present a viable alternative that is both accessible and cost-effective. By providing quality education at competitive prices, TNE programmes empower individuals to pursue advanced degrees without the financial burden associated with traditional avenues. This affordability factor not only enhances accessibility but also contributes to the overall socioeconomic development of Sri Lanka by equipping its workforce with the skills and knowledge needed to thrive in today's globalised economy.

With regards to affordability, Sri Lankan public and private officials highlighted that the government cost per student in state universities is much higher due to additional staff and other expenses, suggesting a need for restructuring.

5.3 Employability and Skills Development

UK TNE, specifically, as highlighted by the feedback gathered through stakeholder interviews, has the potential to produce more market-relevant graduates and address the skills mismatch issue. As mentioned in Section 3.3, university graduates lack the relevant skills for the workforce.

In general, the employability rate of non-state sector graduates was 66 per cent, which is slightly more than that of state sector graduates (65.5 per cent).⁵⁷ As highlighted in Section 3.3, English-speaking and interpersonal skills were deemed as necessary by most employers.

Interviews with stakeholders highlighted that UK-TNE programmes cultivate such skills. UK-TNE has been

widely recognised for their emphasis on practical skill development and international exposure, which are essential for enhancing students' employability and fostering entrepreneurship prospects. Stakeholders commended TNE initiatives for their tailored approach in meeting the skill demands of Sri Lanka's economy, contributing to students' global competitiveness and career advancement opportunities. Stakeholders noted how the collaborative effort between Sri Lankan and UK institutions reflects a shared commitment to delivering high-quality education that equips graduates with the necessary skills and experiences to thrive in today's dynamic job market.

More specifically, Sri Lanka's university partners noted that the tailored approach of TNE programmes met the evolving skill demands of the country's workforce. They commended these programmes for their emphasis on practical skill development and international exposure, directly contributing to enhancing graduates' employability and nurturing entrepreneurship. This recognition highlights the strategic alignment of TNE initiatives with the dynamic needs of Sri Lanka's economy. By equipping graduates with relevant skills and global perspectives, TNE ensures they are well-prepared to excel in their careers and drive innovation across various sectors.

More specifically, Sri Lankan university partners acknowledged that TNE programmes stand out for their proficiency in addressing specific skills demands in the dynamic fields of STEM and business, significantly bolstering employability prospects and nurturing a culture of entrepreneurship among graduates. These programmes have meticulously designed curriculum to meet both the rigorous standards of UK syllabus and the nuanced skill requirements of local industries. This dual focus ensures that graduates emerge with not just globally recognised qualifications but also the practical expertise needed to excel in their respective job markets- both in their home countries or abroad. Invaluably, TNE provides students with practical skills and international exposure- which are essential for navigating the contemporary job market and seizing entrepreneurial opportunities. This acknowledgment reflects a comprehensive understanding of how TNE supports Sri Lanka's economic growth by producing highly skilled and competitive graduates. It underscores the importance of aligning educational initiatives with both international and local industry demands to foster a workforce capable of driving innovation and sustaining economic development.

Students from focus group discussions also noted how the pivotal role of TNE in providing them with practical skills and international exposure, could contribute to the acceleration of their career advancement.

57. University Grants Commission, "Tracer Study 2018", <https://www.ugc.ac.lk/downloads/statistics/webTracer/2018/Tracer%20Study%202018.pdf> (2018), 11

Students recognised the importance of TNE programmes not only in enhancing their employability prospects but also in gaining a competitive edge more swiftly through such initiatives. This feedback underscores the significant impact of TNE on students' career trajectories by facilitating a quicker completion of their studies and expedited entry into the job market. Moreover, students emphasised that TNE enhances the development of soft skills essential for success in the dynamic job market, further enhancing their readiness to excel in their chosen careers. This recognition reinforces the value students place on acquiring globally relevant skills and experiences through TNE programmes.

Feedback from UK universities engaged in TNE partnerships highlighted the shared goal of enhancing students' employability through practical skills development and international exposure. These partnerships are strategically focused on meeting the skill demands of Sri Lanka's economy, thereby contributing to students' career advancement opportunities. Such feedback underscores the collaborative efforts between UK institutions and their Sri Lankan counterparts to deliver impactful TNE programmes that empower graduates with the skills and experiences needed to succeed in a globally competitive job market.

Overall, the feedback highlighted the positive impact of TNE in shaping the future workforce of Sri Lanka and strengthening its position in the global arena.

5.4 Meeting Course Demands

Stakeholders interviewed conducted revealed that TNE consumers distinctly prefers undergraduate degrees over postgraduate programmes. This is largely driven by the mobility priorities among postgraduate students.

More specifically, there is a noticeable trend among students showing a strong interest in courses that promise highly paid job prospects. Students expressed a desire to secure financial stability and career advancement opportunities through the focus group discussions. As the job market becomes increasingly competitive, students are strategically aligning their educational pursuits with fields that offer lucrative salaries and attractive benefits. This inclination towards higher-paying job opportunities not only underscores the practical considerations driving educational choices but also highlights the importance of economic factors in shaping career aspirations. Moreover, it underscores the need for educational institutions to offer programmes that not only cater to industry demands but also provide students with the necessary skills and qualifications to thrive in

financially rewarding positions.

Furthermore, this trend intersects with the broader societal shift towards valuing vocational and professional skills that lead to tangible financial gains. As such, educational institutions are under pressure to adapt their offerings to meet the evolving demands of both students and the job market, ensuring that graduates are well-equipped to succeed in their chosen fields and secure lucrative employment opportunities.

UK universities also recognised the demand for certain disciplines- STEM-related and business fields were noted to be in high demand. Apart from these disciplines, emerging sectors such as digital marketing and filmmaking were cited to be gaining traction. In the digital age, businesses are increasingly relying on online platforms to reach their target audience, creating a growing need for professionals skilled in leveraging digital channels for marketing purposes. Digital marketing encompasses a range of disciplines, including search engine optimisation (SEO), content marketing, social media management, and data analytics, offering diverse career opportunities for those with the right expertise. Similarly, the entertainment industry, particularly filmmaking, continues to evolve with advancements in technology and changes in consumer preferences. As streaming services gain prominence and content consumption habits shift, there is a rising demand for talented filmmakers, storytellers, and content creators capable of captivating audiences across various platforms.

5.5 Contributions to Gender Parity

Course demand

Traditionally, women have exhibited a stronger interest in disciplines such as social sciences, humanities, and health sciences. However, recent years have marked a notable departure from this trend. Stakeholders interviewed recognised that an increasing number of women were demonstrating a keen interest in technology and were actively pursuing STEM education. This evolving pattern not only signals a broader societal recognition of the importance of gender diversity within critical sectors but also signifies a significant step towards fostering inclusivity and innovation within STEM industries.

Inclusivity beyond Accessibility

All TNE programmes prioritise accessibility, ensuring that minorities have equal opportunities for participation. In certain institutions, minorities are even overrepresented, reflecting a commitment to

inclusivity and diversity. In addition to ensuring accessibility for minorities, many institutions offering TNE programmes implement gender policies. These policies are designed to foster an environment of equality and inclusion, aiming to create opportunities for individuals of all genders to participate and thrive. Consequently, these efforts not only promote diversity among students but also prioritise gender balance within the TNE community.

Sri Lanka university partners noted that there were noticeable efforts to ensure inclusivity within TNE programmes. Such efforts extended beyond accessibility to address gender balance. While gender imbalances may exist in some educational settings, TNE initiatives actively attempted to create environments where individuals of all genders feel welcome and valued. Through initiatives such as gender-sensitive policies and inclusive curriculum development, TNE programmes promoted diversity and equity, fostering a learning environment where all students can thrive and contribute to a more inclusive society.

UK Universities interviewed also echoed similar sentiments. They noted that TNE programmes not only expanded students' access to education, but also fostered a more diverse and inclusive student body. Gender balance within TNE cohorts were also noted to be actively maintained through inclusive recruitment practices and supportive environments. This reflects the commitment of TNE institutions to creating learning environments where individuals of all genders feel empowered and valued. Through these combined efforts, TNE programmes break down barriers to education and create opportunities for individuals to reach their full potential on a global scale.

Addressing gender inequality

Lastly, TNE can address issues of gender parity in Sri Lanka. The gender parity issue is not observed within the context of higher education access, but within the economic prospects for graduates. Notably, there were twice as many female graduates than male graduates across both state universities and the non-state sector in 2018.⁵⁸ In 2021, the statistics have remained the same.⁵⁹ Hence, female access to higher education is not a significant issue in Sri Lanka.

The gender parity issue emerges within the context of women's economic activity. Historically, the workforce participation of women has been significantly lower

than that of men. This suggests that the high number of female graduates may not necessarily translate into a high rate of participation in the workforce. In a 2018 Youth Labour Market Assessment conducted by Verite Research, an independent think tank in Sri Lanka, it was found that 75 per cent of 25–29-year-old women surveyed cited “personal family responsibilities” as reasons for not participating in the labour force.⁶⁰ The 2023 figures released by the World Bank also reflected a lower percentage of women participation in the labour force (32 per cent).⁶¹ While this may not be something solvable by TNE, given that a major reason for this is a structural issue on balancing family responsibilities between women and men, TNE can still empower women through a crucial facet of a woman's economic trajectory.

One such aspect is the disparity between men and women's salary levels. According to the annual Global Gender Gap report (2023) published by the World Economic Forum, Sri Lanka ranked 132nd globally for estimated earned income, with a score of 0.389 (out of 1) for the gender gap between male and female earned income.⁶² The 2018 Tracer Study⁶³ reported that there were more female graduates from both state and non-state HEIs receiving less than Rs 45,000 monthly gross salary. In contrast, there are lesser male graduates from both sectors who received less than Rs 45,000 from these institutions.⁶⁴ This was attributed to the fact that arts graduates, which consist of more females, received relatively lower salaries than their non-arts counterparts.

In this sense, TNE's ability to offer courses that are sensitive to the market's demands, and its international exposure can effectively enable more women to be relevantly skilled and positioned to join the formal economy with a higher income prospect.

58. University Grants Commission, “Tracer Study 2018”, <https://www.ugc.ac.lk/downloads/statistics/webTracer/2018/Tracer%20Study%202018.pdf> (2018), 8-9

59. Statistics.lk, “Graduate Output by academic programme and sex, 2021”, <http://www.statistics.gov.lk/GenderStatistics/StatcalInformation/Education/GraduateOutputByAcademicProgrammexAcademicYear> (2021)

60. Verite Research, “Youth Labour Market Assessment Sri Lanka”, <https://www.veriteresearch.org/wp-content/uploads/2019/02/Youth-Labour-Market-Assessment-26.12.2018.pdf> (2018), 57

61. <https://genderdata.worldbank.org/en/economies/sri-lanka>

62. World Economic Forum, “Global Gender Gap Report 2023”, https://www3.weforum.org/docs/WEF_GGGR_2023.pdf (June 2023), 331

63. The 2018 study is the most recent study done by the UGC

64. University Grants Commission, “Tracer Study 2018”, <https://www.ugc.ac.lk/downloads/statistics/webTracer/2018/Tracer%20Study%202018.pdf> (2018), 45

Operational Environment for TNE in Sri Lanka

6.1 Background

There are two main ways students receive TNE in Sri Lanka: through international branch campuses (IBCs) and foreign universities' partnerships with local collaborating partners. This includes all three types of universities- state, non-state HEIs with degree-awarding state and non-state HEIs without degree-awarding powers. The vast majority of TNE partnerships are with the private sector- which includes both non-state HEIs with and without degree-awarding powers. There is no proper documentation on state universities' TNE partnerships with foreign universities. TNE partnerships are less common within the public sector, with two notable partners being the Open University of Sri Lanka and the University of Peradeniya.

Because of resource constraints, private entities are often unable to apply for degree-awarding status. The entities that are successful in doing so, are recognised to have started their education offerings through UK and Australian TNE programmes. Over time, these entities scale in resources and capacity, leading them to position themselves as HEIs that can offer quality higher education, which led to the government granting them degree-awarding powers.

For IBCs, the establishment of a physical presence in Sri Lanka requires registration with the Sri Lanka Board of Investment and Registrar of Companies. IBCs are legally regarded as private companies within Sri Lanka. Conversely, there is no regulation for foreign universities' partnerships with local partners. Quality assurance, for these TNE activities, is formally conducted in two ways. TNE activities are either regulated by external quality assurance bodies outside of Sri Lanka, or a foreign university administration (the parent campus).

6.2 Three Key Challenges

Quality Assurance

The most significant challenge for TNE operations in Sri Lanka, as identified by both the government and TNE providers, is the historically fickle quality assurance environment. Since the inception of higher education in Sri Lanka, there has been no formal mechanism to establish a common standard for evaluating the quality of higher education across state universities, vocational training institutes and the private higher education sector. Even though some TNE programmes are under the purview of the MoHE and are hence liable to the Sri Lanka Qualifications Framework (SLQF) outlined by the QAC (see Section 3.2), they are approved only via ad-hoc administrative arrangements, and not a consistent one.⁶⁵ There is hence an inconsistent quality assurance standard applicable for all TNE programmes. Without a consistent quality assurance standard, it is also impossible to understand how TNE programmes fare in comparison with the public higher education in Sri Lanka.

This has resulted in two interrelated implications. Firstly, there is no additional in-country accreditation by Sri Lanka for TNE programmes. Instead, TNE programmes answer to external quality assurance bodies. For instance, Asia Pacific Institute of Information Technology (APIIT) Sri Lanka's degree programmes conform to the quality assurance frameworks imposed by the UK's Quality Assurance Agency.⁶⁶ The quality of APIIT's programmes is also regularly audited by the foreign universities they partner with. Hence, the quality of TNE is not determined by Sri Lanka's authorities. This has resulted in the other implication that the Sri Lankan public has low confidence in the validity of certification from TNE programmes.⁶⁷ Without clear guidelines and oversight, there's a risk of inconsistency and ambiguity in programme quality and legitimacy. This absence not only affects the

65. Parliamentary Report No.100, "Report of Select Committee of Parliament to Make Suitable Recommendations for the Expansion of Higher Education Opportunities in Sri Lanka", <https://parliament.lk/uploads/comreports/1689939464085452.pdf> (2022), 20

66. APIIT, <https://apiit.lk/about/>

67. Parliamentary Report No.100, "Report of Select Committee of Parliament to Make Suitable Recommendations for the Expansion of Higher Education Opportunities in Sri Lanka", <https://parliament.lk/uploads/comreports/1689939464085452.pdf> (2022), 22

credibility of TNE programmes but also undermines trust among students, educators, and employers. Recognition and acceptance by prominent entities like the UGC are pivotal for bolstering confidence in TNE as a legitimate higher education pathway.

Students from the focus group discussions claimed that the general Sri Lankan public perceived a TNE degree as substandard, and not as equivalent to getting a local degree from local universities. This perception is mainly attributed to the assessment criteria of business management courses, where many of the final year degree modules are awarded based on six written assignments. Firms and individuals have monetised on this requirement, offering assignment writing services to these students. Students who can afford this can thus get their assignments written for them and get their degrees. This situation has further contributed to the public stigma regarding the quality of TNE. UK universities must hence address this by revising their assessment options.

Students in the focused group expressed concern about the legitimacy of TNE as a recognised platform for receiving higher education, even though certain TNE programmes are endorsed by government agencies such as the UGC.⁶⁸ Yet, this public perception may be an overstatement as overall numbers for TNE are still high in Sri Lanka. These might be because of TNE's internationally visible and recognised qualifications, as well as the active marketing strategies by TNE and non-state HEI providers.

The devaluation of TNE qualifications were also echoed by public and private officials from the Sri Lanka Association of Non-State Higher Education Institutes (SLANSHEI),⁶⁹ Quality Assurance Council of UGC⁷⁰ and other MOHE non-state members. These stakeholders stressed the importance of accreditation and accountability from relevant authorities. They emphasised that a robust regulatory framework was essential to ensure the credibility and acceptance of TNE programmes in Sri Lanka. Without proper oversight, there's a risk of substandard programme proliferating, which could ultimately devalue the qualifications offered through TNE. All of them acknowledged that the lack of accreditation and accountability from the UGC has raised doubts among students and parents, further complicating the landscape and emphasising the need for a comprehensive regulatory framework. Stakeholders emphasised for accreditation and accountability from relevant authorities to ensure credibility and

acceptance of TNE programmes.

Similarly, Sri Lankan university partners interviewed also recognised the concerns regarding credibility due to the absence of a regulatory framework. They emphasised the urgent need for accreditation and recognition to address these concerns and to ensure that TNE programmes meet international standards of quality and rigour. Without such recognition, the reputation of both the domestic and international partners involved in TNE collaborations could be at stake.

Lack of Clarity in Policy Environment

The next key challenge that TNE providers face is that there is a lack of coherent approach to develop the private and TNE sector. Historically, state officials have raised concerns that private universities would create more competition for state university students. With regards to foreign education providers particularly, there is domestic pressure within Sri Lanka to limit them from entering the sector. Domestic sensitivity towards private universities may have hence affected student demand for TNE. Such concerns have derailed the development of a robust private higher education sector.

Moreover, it has been recognised that there is no proper legal framework in place to enable the expansion of private higher education opportunities.⁷¹ For instance, foreign universities interested in establishing branch campuses have no formal guidance on the process of establishing their campuses, other than registering their activity with the Sri Lankan Board of Investment and Registrar of Companies.⁷² This lack of guidance hence complicates the operations of TNE providers.

While there may be some efforts thus far to improve on the accessibility and affordability of TNE as documented in Section 5.2, it may not be effective, as students may not be aware of them. For instance, students in the focused group discussions noted that TNE is only available to those residing in urban areas like Colombo. They mentioned that less urbanised cities catered more towards public education, and so those residing there only had the option of pursuing state university education. While this point can be contested by the provision of TNE in other areas such as Kandy, Kurunegala, Malabe and Padukka (see Section 4.3), it remains that students are unaware of such provision. TNE providers in less urban areas should thus consider ways to enhance awareness of their services.

68. Refer to Section 6.3 for more details

69. Sri Lanka Association of Non-State Higher Education Institutes (SLANSHEI) is an umbrella organisation formed in the year 2016 through the initiation of seven leading private institutes working for a common set of goals aimed at addressing the needs of the non-state higher education sector in the country

70. QAC (eugc.ac.lk)

71. Parliamentary Report No.100, "Report of Select Committee of Parliament to Make Suitable Recommendations for the Expansion of Higher Education Opportunities in Sri Lanka", <https://parliament.lk/uploads/comreports/1689939464085452.pdf> (2022), 23

72. Ministry of Higher Education, "National Education Policy Framework Sri Lanka", https://moe.gov.lk/wp-content/uploads/2024/02/09/NEPF_English_final.pdf (Sept 2023), 197

On the affordability of TNE, a known drawback of TNE is that it renders a high tuition fee. While TNE programmes might be more expensive than local alternatives, they still represent a more cost-effective option compared to options involving physical mobility. However, it is important to note that they may still be financially out of reach for many. Interviews conducted with stakeholders suggested that there are still students with limited financial means who find TNE to be beyond their budget, prompting them to opt for local education instead.

In 2016, it was reported by the Asian Development Bank that students were paying an average tuition fee of LKR 500,000 to LKR 1,200,000 (then £2,300 to £5,600) in total for transnational programmes.⁷³ Hence, only the privileged could enrol in TNE. This notion is similarly observed today. During the focus group discussion with Sri Lankan TNE students, the costs of TNE was a significant point of consideration for enrolment. This underscores the importance of addressing affordability concerns and implementing measures such as scholarships or loan schemes to make TNE more accessible to all segments of society. Financial constraints pose challenges to students opting for TNE programmes, highlighting the importance of affordability measures.

Overlapping Responsibilities

The last key challenge for TNE operations in Sri Lanka is that there is a complicated higher education management system in place, which has trickle-down effects for the establishment of TNE activity. For instance, government bodies, such as the MoHE and the UGC, operate independently but have overlapping responsibilities. As mentioned in Section 3.1, there is a division within the MoHE responsible for private higher education. Similarly, the UGC also endorses certain TNE programmes. This overlap may result in confusion regarding which agency to go to, to be considered for a degree-awarding status, or to be accredited. This lack of clarity might hence deter potential TNE providers and private higher education operators from establishing its services.

6.3 Key Enablers: Government Intervention

There have been discussions by the government to respond to these challenges. Over time, there has been a more formalised strategy, to promote the accessibility, affordability, and quality of the TNE and private higher education sector in Sri Lanka.

Firstly, the government aims to address the quality assurance issues as outlined above, by establishing a consistent and reliable quality assurance framework that can inform the quality of both the public and private higher education sector. The government's efforts for this can be traced back till 2017 when the **Accelerating Higher Education Expansion and Development (AHEAD) project** was first pioneered.⁷⁴ This project received financial support from the World Bank (\$100 million) to develop the whole of Sri Lanka's higher education system, which includes the private and TNE education sector. AHEAD was designed to boost enrolment in market-relevant disciplines, enhance the quality of degree programmes and stimulate research and development within the higher education sector. Notably, the programme explored the need for a nationwide quality assurance system that can accommodate the current quality assurance standards for both government-approved universities and TNE partners that depend on the foreign quality assurance of their home universities. The programme was implemented from 2017 to 2023.

Building upon the momentum established by this project to transform the higher education sector, the government also formed a sub-committee to formulate a national education framework for the next ten years. This is also known as the **National Education Policy Framework 2023-2033**.⁷⁵ The main aim of this framework is to serve as a policy repository for contemporary education-related matters. The framework notably referenced an upcoming quality assurance and accreditation mechanism for all state and non-state universities approved by the MoHE, to maintain consistent quality standards throughout the nation.

This mechanism is also known as the **Sri Lanka Qualifications Framework**.⁷⁶ Another derivative from the AHEAD project, it was last implemented in 2015, by state universities under the UGC, and non-state universities approved by the MoHE. The main function of the SLQF is to consolidate the different accrediting qualifications awarded by different institutions under the purview of the UGC and MoHE, and vocational training institutes in Sri Lanka into a national framework. The framework covers 12 levels of qualification, from the secondary level to the doctorate level. Each level of qualification is understood in this format:

- a. Expected learning outcomes of each qualification level
- b. Requirement to be admitted into the qualification level

73. Asian Development Bank, "Innovative Strategies in Higher Education for Accelerated Human Resource Development in South Asia: Sri Lanka", <https://www.adb.org/sites/default/files/publication/185628/strategies-higher-education-sri.pdf> (2016), 10

74. World Bank, "Programme for Results for AHEAD Project", <https://documents1.worldbank.org/curated/en/412911486473597625/pdf/112649-REVISED-EA-P159995-Box402900B-PUBLIC-Discovered-4-5-2017.pdf> (April 2017)

75. Ministry of Higher Education, "National Education Policy Framework Sri Lanka", https://moe.gov.lk/wp-content/uploads/2024/02/09/NEPF_English_final.pdf (Sept 2023)

76. Sri Lanka Qualifications Framework, https://www.eugc.ac.lk/qac/downloads/SLQF_2016_en.pdf (2016)

- c. Requirement to qualify for the qualification level (Eg. Number of credits)
- d. An appropriate international interpretation of each qualification level
- e. How each qualification level corresponds to the National Vocational Qualifications Framework
- f. Purpose of your qualification level

Thus far, the framework has demonstrated the potential to fulfil three outcomes for the Sri Lankan higher education sector. Firstly, it can improve graduate employability. The SLQF standardises the qualification levels earned from different institutions, which renders a more equitable job-searching experience for graduates. This means that someone from a lesser-known institution may be regarded to be equally capable as someone from a well-known institution, as long as they both hold the same qualification level as outlined in the SLQF. Secondly, it increases the efficiency of graduate recruitment exercises for employers. Being public documentation, the SLQF can be referenced by employers to assess employees' capabilities immediately. This is because the SLQF outlines the types of skills graduates are expected to have at their qualification level. Candidates can then be efficiently matched to a position that aligns with their skill sets. Lastly, the SLQF establishes consistency in the quality of higher education at the institutions concerned. For students across these institutions, the framework serves as a tool for evaluating the quality of education they received at their institution. Similarly, universities can use the framework as the basis for designing their university curriculum.

Notably, the SLQF also tacitly and unofficially informs the quality of TNE- and this includes TNE programmes that are not government-approved. This is because the framework acts as an external evaluator for qualifications obtained from TNE programmes. TNE participants are still able to match the learning outcomes from their TNE programmes to that of the learning outcomes in the SLQF, to determine the SLQF level of their TNE qualification.⁷⁷ As the SLQF is a public resource, students able to assess the quality of their TNE qualifications by benchmarking them against the SLQF. It is hence easier to call out the 'poor' quality of TNE if TNE does not meet the basic higher education standards as stipulated in the SLQF. If TNE programmes aim to be relevant to the domestic market, they should be designed and implemented to match the designated SLQF qualification level. Universities can design market-relevant courses based on the expected learning outcomes determined by each

qualification level highlighted in the SLQF. Hence, even though certain TNE providers are not mandated by law to implement the SLQF, the quality of TNE education can be indirectly and informally regulated by it.

Through the publicity of the SLQF and its potency in determining one's national qualifications and employability, TNE providers are indirectly held responsible for the quality of their programmes, should they want them to remain relevant to Sri Lankan students. In the long run, these guidelines build up public confidence in TNE programmes. Altogether, the framework acts as a system of checks and balances to ensure consistency in quality education throughout the higher education sector.

The government has also proposed a **National Higher Education Commission (NHEC)**⁷⁸ to replace the UGC and become the main coordinating body for higher education in Sri Lanka. NHEC's primary function is to ensure that Sri Lankan higher education coheres with national policies, and that academic standards in all degree and degree equivalent institutions (which includes both state and non-state universities) are maintained. The formation of the NHEC will centralise the overlapping work processes of the UGC and MoHE. Moreover, it will also address the issue as outlined in Section 3.3- that the research quality of Sri Lankan higher education does not adequately address national priorities.

More recently, the UGC also published a **UGC Strategic Plan**⁷⁹ for state universities under its purview. In brief, the strategy aimed at strengthening the administration and management of the UGC's state universities, reforming the quality of university programmes to equip students with the necessary skills for the market and ensuring consistency in quality across all UGC's state universities. The strategy also highlighted the goal to build a "strong quality assurance culture within the university system", through measures to maintain facilities and the learning environment.

Ensuring clear co-ordination across higher education agencies will give TNE providers clarity on the operational and policy environment surrounding higher education in Sri Lanka. When TNE providers are fed with such contextual information, they will be better positioned to make well-informed decisions surrounding the TNE operations.

Overall, these recent updates to simplify the operational environment and the revisions to ensure regulatory clarity for all the various institutes imply the government's priority to address the issues outlined in Section 6.2.

77. Sri Lanka Qualifications Framework, https://www.eugc.ac.lk/qac/downloads/SLQF_2016_en.pdf (2016)

78. National Education Policy Framework, https://moe.gov.lk/wp-content/uploads/2024/02/09/NEPF_English_final.pdf (2023), 26

79. University Grants Commission, "Strategic Plan 2019 to 2023", https://www.ugc.ac.lk/downloads/corporate_plan/University%20Grants%20Commission%20Strategic%20Plan%202019-2023.pdf (Date unspecified)

Very notably, the government has also established incentives and policies to support and promote the TNE and private higher education sector. To improve the affordability of education at private higher education institutions, the government implemented an **interest-free student loan scheme**.⁸⁰ First proposed during Budget 2017, this currently active scheme aims to increase students' access to private higher education including TNE and meet the current demand for higher education. It is offered to students who passed the GCE Advanced Level Examination in 2019, 2020 and 2021, and who are enrolling in selected degree programmes at non-state HEIs approved by the MoHE. Though not explicitly specified, this may include certain TNE courses. For instance, the Institute of Chartered Accountants of Sri Lanka states that its BSc. Applied Accounting degree that is under the interest-free student loan scheme can complete the final year of the programme either in La Trobe or Deakin University, after their first two years in Sri Lanka.⁸¹ TNE then becomes a more viable option to students who were unable to afford it previously.

On promoting TNE, the government has announced the efforts to establish more branch campuses from foreign universities in Sri Lanka. In 2021, an area was earmarked for the establishment of international branch campuses from foreign universities. The **Port City Commission Bill** saw the Parliament of Sri Lanka designate Colombo Port City as a Special Economic Zone in 2021. The United Nations defines a 'Special Economic Zone' as a "geographically delimited area within which governments facilitate industrial activity through fiscal and regulatory incentives and infrastructure support".⁸² The main function of this zone is to attract significant foreign investments. The Bill was passed to exempt companies from all taxes-personal, corporate and the like for up to 40 years. Most recently, it was cited in a bid to attract more international universities to establish themselves in this zone, as mentioned in the Introduction.

The government has also promised a **provision of facilities for International Branch Campuses**.⁸³ In a revised 2022 Budget, President Ranil Wickremesinghe noted that the government will provide facilities through the Board of Investment, to facilitate the establishment of branch campuses with a particular focus on STEM subjects, finance, information

technology and medicine. This provision has just been laid down in the Companies Act and Universities Act. Apart from facilitating the establishment of branch campuses, this strategy's sensitivity towards STEM-related courses also addresses the skill mismatch issue that the higher education sector faces. Instead of merely expanding higher education generally, there is a focus on expanding higher education for more STEM-related opportunities. To further encourage the establishment of TNE, the National Education Commission has also recommended that private investments in higher education be promoted. This will further improve the financial viability of establishing private higher education institutes.⁸⁴

It has also been reported that the government will introduce a **proper legal framework** for the private higher education sector, to support institutions with incentives and guidelines for establishment.⁸⁵ For instance, there will now be regulations guiding the process of submitting applications for the establishments of private HEIs. Further, private HEI operators will be required to specify the courses they offer, the duration required to complete the course and the procedures they plan to undertake for internal quality assurance.⁸⁶ Such proper measures will give TNE operators a clearer idea for establishing their services in Sri Lanka, and thereby increase their confidence in TNE establishment.

The government has also created opportunities for partnerships between foreign universities and TNE providers. For instance, there have been abundant **communication between key ministers from Sri Lanka and key ministers from the countries of foreign universities interested in TNE**.⁸⁷ Moving past historical sentiments towards international education providers, the Sri Lankan government has been demonstrating their appetite for TNE partnerships. They have signed a Joint Declaration on Enhanced Cooperation with Australia, as part of the New Colombo plan, to enhance Technical and Vocational Education and Training in Sri Lanka. Most recently, the Australian higher education minister and the chancellors of top Australian universities was invited to Sri Lanka to discuss the steps required to provide Australian higher education through state universities.⁸⁸ Such high-level exchanges imply the parliament's validation of TNE qualifications.

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80. Ministry of Higher Education, https://mohe.gov.lk/index.php?option=com_content&view=article&layout=edit&id=348:awards-competitions&catid=19:affiliation-institutions&Itemid=169&lang=en
81. ICA, https://www.casrilanka.com/casl/index.php?option=com_content&view=article&id=2637%3Ainterest-free-loans-from-government-for-students-who-wish-to-follow-ca-sri-lankas-bsc-applied-accounting-degree&catid=42%3Astudent-news&Itemid=213&lang=en
82. United Nations Conference on Trade and Development, "World Investment Report 2019", [https://www.un-ilibrary.org/content/books/9789210041584c009#:~:text=Special%20economic%20zones%20\(SEZs\)%20%E2%80%93,developing%20and%20many%20developed%20economies.\(2019\)](https://www.un-ilibrary.org/content/books/9789210041584c009#:~:text=Special%20economic%20zones%20(SEZs)%20%E2%80%93,developing%20and%20many%20developed%20economies.(2019))
83. Parliament of Sri Lanka, Interim Budget Speech (2022), 18
84. Parliamentary Report No.100, "Report of Select Committee of Parliament to Make Suitable Recommendations for the Expansion of Higher Education Opportunities in Sri Lanka", <https://parliament.lk/uploads/comreports/1689939464085452.pdf> (2022), 31
85. Ibid, 40
86. Ibid, 37-38
87. DFAT, "Joint Declaration of Enhanced Cooperation between Australia and Sri Lanka", <https://mfa.gov.lk/jd-a-sl/> (2017)
88. President's Media Division, "Discussions Underway for Multi-Degree Programs at State Universities", <https://pmd.gov.lk/news/discussions-underway-for-multi-degree-programs-at-state-universities-plans-initiated-for-03-international-universities-in-sri-lanka-state-minister-of-higher-education-dr-suren-raghavan/> (2024)

Overall, the inclusion of private universities within Sri Lanka's national education strategy and policies demonstrates the government's commitment to securing the holistic expansion of the higher education sector. Amending laws to create more opportunities for private investment in higher education also creates a conducive environment for the TNE and private higher education sector. These recent updates to simplify the operational environment, to provide for more branch campuses, and the revisions to ensure regulatory clarity for all the various HEIs imply a smoother operational environment for TNE.

6.4 Key Enablers: Non-Governmental

In addition to government intervention, there has also been non-governmental support for TNE operations. This is mostly from external organisations supporting local partners.

Local partners interviewed demonstrated a general optimism regarding the operational environment. For some, this is because their operations are supported by external organisations, which are third party organisations that facilitate the export of higher education from one country to another. An example of such an organisation is Navitas, an Australian private education services company, which owns several private colleges around the world- including one in Sri Lanka. What they do is to link universities up together with these locally based colleges, and bring foreign degrees into the regions where they are based. For instance, Navitas' local company in Sri Lanka- the Australian College of Business and Technology (ACBT),⁸⁹ has helped universities such as Edith Cowan University establish its branch campus within Sri Lanka. Moreover, it also offers Sri Lankan students an integrated pathway into ECU's undergraduate degrees by offering Australian accredited diplomas. Hence, organisations like Navitas support the operations of transnational education.

A local partner revealed that they meet frequently with such organisations and meet frequently with the home universities of TNE programmes. Such meetings are to improve on local partners' operations, and to ensure that students receive a similar quality of education as that compared to students in home campuses.

TNE-focused organisations such as SLANSHEI also expressed a willingness to address issues in TNE operations, especially on the quality assurance front. SLANSHEI cited their attempt to become the national mechanism for quality assurance in the private sector. They noted the challenges around legitimising TNE, and highlighted how they are committed to addressing these challenges.



89. <https://www.acbt.net/about-acbt>

Case Studies

Case study 1: APIIT and Staffordshire

1. 1. Unique/Distinctive Features:

The Staffordshire University study programmes delivered at APIIT Sri Lanka have been carefully selected following a detailed analysis of the manpower needs of the country and the market demand. The programmes contextualised by the careful selection of optional modules.

The introduction of a few Sri Lankan law modules as options into the LLB (Hons) Law award, the development of the BSc (Hons) International Business Management award incorporating modules designed through industry consultation in Sri Lanka and the development of BEng (Hons) Software Engineering award in response to market demand in Sri Lanka are good examples of orienting the franchised awards to the Sri Lankan context. This approach has made the franchised awards, in particular the Law award, highly attractive and competitive in the Sri Lankan jurisdiction. It is the delivery that is mostly contextualised to achieve local industry/ practice orientation. This is achieved through several measures such as taking local examples/case studies for illustration, visits to industry for observation, practitioners contributing to the delivery, guest lectures, industry-based research projects, internships in the industry and work placement modules.

Partnership has continually adapted to meet the changing demands of the education landscape, evidenced by ISO certifications, successful reviews, revalidations, and the expansion of degree offerings. Notably, the partnership has demonstrated a keen understanding of local market needs, contextualizing programmes through the incorporation of Sri Lankan law modules and industry-oriented specialisms. APIIT Sri Lanka's branch expansion in Kandy and the subsequent adoption of the University's new credit framework underscore a commitment to accessibility and innovation in higher education. As APIIT Sri Lanka plans to introduce awards in emerging fields like Psychology, Engineering, and Bio Medical Sciences, the partnership's trajectory reflects a dynamic response to evolving educational needs while upholding quality and relevance in academic delivery.

Each APIIT School takes additional measures to enhance the industry orientation of the curriculum. For example, Business School develops students' entrepreneurship skills through the e-Club, the School of Computing supports students to obtain industry certifications and the Law School imparts practical legal skills through its Mooting, Debating and Mock Mediation Society.

Consequently, engagement with the industry/ professions is built into the delivery of the awards resulting in the production of technically competent and industry/practice-oriented graduates with 100 per cent employability.

APIIT Sri Lanka has over 5,500 graduates to date. This may be the largest group of graduates with a UK qualification from a single UK University trained entirely within Sri Lanka through a non-distance learning model.

2. History of the Partnership:

The partnership between APIIT Sri Lanka and Staffordshire University commenced in 2000 with the introduction of APIIT Diploma in Computing and Information Technology, a programme quality assured by Staffordshire University. Over the years, the collaboration has evolved significantly, reflecting a commitment to providing quality education in Sri Lanka. APIIT Sri Lanka expanded its offerings to include a spectrum of diploma and degree programmes ranging from computing to business administration, all backed by Staffordshire University's quality assurance. This evolution continued and with the introduction of postgraduate programmes in 2007 and the establishment of APIIT Law School in partnership with Staffordshire University in 2009, further solidifying the partnership's contribution to higher education in Sri Lanka. By 2010, APIIT Sri Lanka had transitioned to offering full British degrees, marking a pivotal shift towards aligning with international academic standards.

3. Impact / Perceived Benefits:

3.1. Partner Institution: The partnership significantly impacts APIIT Sri Lanka, serving as a conduit for delivering high-quality education aligned with Staffordshire University's standards. By offering franchised programmes and fostering industry engagement, APIIT Sri Lanka enhances graduate employability and contributes to the

nation's skilled workforce. However, challenges such as the cost of TNE provision persist, necessitating scholarship and loan schemes to ensure equitable access.

3.2. Host University: Staffordshire University benefits from the partnership by extending its global reach and reinforcing its reputation for excellence in TNE provision. Moreover, there is substantial student enrolment; it provides sustainable income to Staffordshire.

4. Main Challenges and Lessons Learned:

One of the significant challenges is instilling a sense of belonging among APIIT students as part of Staffordshire University. Commendable efforts to integrate students into the Staffordshire University community—such as including the University's Academic Link Tutors input into student orientation programmes, hosting guest lectures, and actively participating in APIIT Sri Lanka's International Research Conference have been started. While these initiatives have yielded some progress, there is still much work to be done to overcome this challenge to ensure that students fully identify with Staffordshire University.

To address this issue, additional measures are being implemented. Study tours are being planned to facilitate interaction and collaboration among student communities, providing them with opportunities to mix and form connections. Furthermore, the establishment of an Alumni Association, now integrated into the Staffordshire University Alumni network, aims to foster a stronger sense of identity and belonging among APIIT graduates. Despite these efforts, ongoing initiatives and innovative strategies may be necessary to fully alleviate this challenge and ensure that APIIT students feel truly integrated into the Staffordshire University community.

Other challenges in the partnership include regulatory constraints. For instance, there are limitations on the use of the term “university” for private institutions like APIIT. The 1978 Universities Act restricts the use of the term “University” to private Higher Education Institutions (HEIs). Consequently, private HEIs are prohibited from using the word university. This legislative distinction contributes to a public perception that private HEIs are inferior to their state counterparts, as they are not recognized as “Universities” Additionally, the cost associated with Transnational Education (TNE) provision poses barriers to accessibility, highlighting the need for scholarship and loan schemes.

Moreover, gaps in understanding TNE among state sector officials underscore the importance of advocacy and education on the TNE landscape and quality assurance mechanisms. State officials are often unaware of the robust QA mechanisms implemented by TNE providers. When they make sweeping statements in public claiming that private TNE providers are unregulated, they present an incomplete picture. While it is true that these private TNE providers are not locally regulated, the quality assurance mechanisms in place through TNE collaborations are often more rigorous than those of local state institutions. However, the negative perceptions propagated by state officials significantly influence public opinion, leading to an unwarranted negative perception of TNE providers. These misconceptions are significantly impeding partnerships between Sri Lanka (SLK) and UK institutions. They erode trust, complicate regulatory environments, negatively impact public perception and student enrolment, affect funding and resource allocation, and hinder long-term strategic goals. Ultimately, these negative perceptions can stymie the strategic goals of fostering innovation, cultural exchange, and academic excellence, thereby limiting the benefits of international collaboration.

In navigating these challenges, the partnership has also learned valuable lessons. First and foremost, addressing regulatory complexities and financial constraints requires ongoing innovation and adaptability. Flexibility in approach and a willingness to explore alternative solutions are crucial. Secondly, fostering a sense of identity and belonging cannot rely solely on formal programmes; it necessitates continuous engagement, personal connections, and a genuine commitment to student well-being.

By acknowledging these challenges and learning from experiences, the partnership aspires to create a more integrated and accessible educational environment for APIIT students within the Staffordshire University community. The journey toward a successful partnership involves not only overcoming obstacles but also embracing growth and transformation.

5. Quality Assurance:

Both Staffordshire University and APIIT Sri Lanka prioritise quality assurance, ensuring adherence to academic regulations and standards. There is communication between the two organisations at the leadership, management and operational levels. The delivery of all Staffordshire University awards adheres to the University's academic rules

and regulations. In addition, APIIT Sri Lanka has a process approach to management/administration that has evolved from the ISO 9001: 2015 quality standard. Accordingly, all management/administrative processes and procedures have been developed with a view to upholding standards and maximising student learning and student satisfaction.

A well-defined and rigorously administered quality framework governs all aspects of programme delivery. Student recruitment, in accordance with the prescribed admission criteria, and programme resourcing and delivery, as stipulated by programme specifications and module descriptors, are regularly monitored on-site by Staffordshire University Academic Link Tutors.

All academic staff delivering Staffordshire University programmes are formally approved by Staffordshire University for each subject taught, prior to their teaching on the franchised programme.

Assessment preparation and marking are approved and moderated by external examiners with all student results considered and ratified by Staffordshire University Examination Boards. In addition to the quality assurance mechanisms put in place by Staffordshire University, APIIT Sri Lanka has in place a quality management system to govern all organisation-wide processes. Student progression, student achievement and graduate employability are monitored regularly within this quality framework.

6. Gender & Diversity:

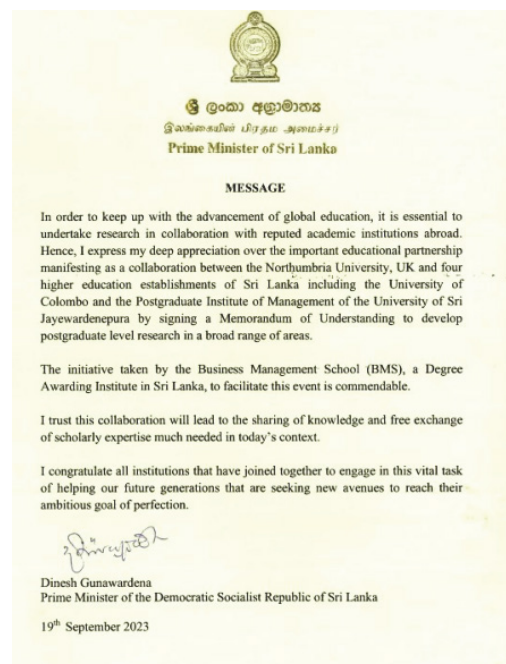
Both institutions prioritise gender equality and inclusivity, advocating for equal opportunities for individuals of all genders and socioeconomic backgrounds across their activities. Their dedication to diversity and inclusion is evident in both policies and actions, earning recognition for cultivating a supportive and welcoming workplace. They actively promote cultural adaptability and gender diversity, fostering an inclusive educational environment where all students feel valued. Furthermore, they've successfully addressed socioeconomic barriers, enabling students from economically disadvantaged backgrounds to access international education opportunities, resulting in a diverse student body with a rich mix of gender, backgrounds and experiences. The Resolvers Club, a student body embedded within APIIT Sri Lanka leads the conversations on gender, equality and diversity within the organisation and amply demonstrates the commitment by the partnership on gender, diversity and inclusivity.

7. Future Plans:

Future plans for the partnership include expanding programme offerings and strengthening industry collaborations to meet evolving market demands. Efforts to address regulatory challenges and enhance understanding of TNE among state sector officials will be integral to ensuring the sustainability and success of the partnership. Additionally, initiatives to promote diversity and accessibility will remain central to the partnership's long-term goals.

Case study 2: BMS and Northumbria

- 1. Unique/Distinctive Features:** The TNE partnership between Northumbria University UK and Business Management School (BMS Campus) Sri Lanka, have been one of the longest TNE partnership for two decades, Northumbria-BMS Campus partnership stands out for its unique features which includes collaboration with government institutions such as the Industrial Technology Institute (ITI) and University of Colombo - Institute of Biochemistry, Molecular Biology, and Biotechnology (IBMBB) in teaching and student research support. Industry interface is facilitated through internship opportunities with private hospitals and leading manufacturing service-based companies, students practical experiences. Students have the option to articulate into level 6 of the BSc (Hons) Biomedical Science/ BSc (Hons) Biotechnology programmes at Northumbria University if they choose to do so.



The partnership has fostered research collaboration between Northumbria University and Sri Lankan national universities, leading to initiatives like a dual Master's Degree programme.

Moreover, it boasts the distinction of offering the first Association to Advance Collegiate Schools of Business (AACSB) double-accredited business degree programme in Sri Lanka and pioneering the introduction of the Biomedical Science and Biotechnology Degrees, accredited by renowned bodies like the Institute of Biomedical Science (IBMS) UK and the Royal Society of Biology (RSB) UK.

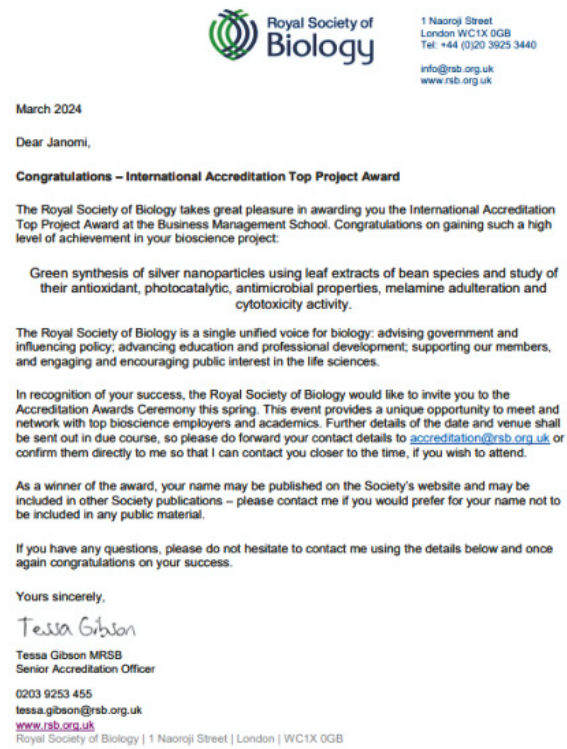
2. History of the Partnership:

The partnership between Northumbria University and BMS Sri Lanka has endured for 23 years, yielding thousands of graduates in business and applied science. Graduates of this collaboration have excelled in various fields, including cancer biology, nanotechnology, and forensic science, with notable achievements such as winning international accreditation awards. Beyond its academic contributions, the partnership has extended its reach to benefit national universities, earning the endorsement of the Prime Minister of Sri Lanka and leading to significant Memorandums of Understanding. This enduring collaboration has demonstrated mutual trust and understanding, particularly evident during challenging times like the COVID-19 pandemic and economic crises in Sri Lanka.

3. Impact / Perceived Benefits:

3.1. Partner Institution: The TNE partnership has significantly impacted BMS Sri Lanka by implementing UK higher education standards across the institution, leading to its recognition as a Degree Awarding Institution. Northumbria academics have provided crucial research mentoring, fostered a research culture and facilitated the publication of the BMS Research Journal of Applied Learning. This collaboration has enhanced the joint brand of Northumbria-BMS for quality education in Sri Lanka. Moreover, local staff have benefited from access to resources and continuous training, contributing to the university's international competitiveness and capacity building.

3.2. Host University: The partnership contributes to the internationalisation goals of Northumbria University UK, enhancing its global reach and financial sustainability while upholding UK education standards. It fosters a diverse community of students and alumni, enriching the



educational landscape. Additionally, the collaboration serves as a significant income source for the university, reinforcing its reputation for excellence in higher education. Through partnerships like these, the host country benefits from increased access to international education resources and the reinforcement of high educational standards.

4. Main Challenges and Lessons Learned:

Challenges in the partnership include navigating inconsistent policies and complex system of recognition by Sri Lanka higher education authorities, alongside resource limitations for specialised courses like biomedical and biomedical technology. Ensuring financial viability and effective fund repatriation are critical for sustainable partnerships. Continuous monitoring and adaptation to quality assurance standards are essential for maintaining educational integrity. Despite challenges, the partnership underscores the importance of resilience and adaptability in navigating complex international collaborations.

5. Quality Assurance:

Both Northumbria University and BMS Sri Lanka prioritise quality assurance, with dedicated centres established to ensure compliance with UK standards like Centre for Quality Assurance in BMS. BMS being a Degree Awarding Institute in terms of the Universities Act 1978 of Sri Lanka, the institution undergoes

rigorous quality assurance processes regularly as the requirement of compliance of the Ministry of Education of Sri Lanka. Students, parents, and partner institutions have commended BMS for its commitment to excellence. BMS higher education programmes are internationally accredited, and their partner such as Pearson, a recognised global learning company offer OFQUAL regulated programmes with BMS in Sri Lanka. Partner accreditation bodies ensure that BMS maintains high academic standards. Additionally, BMS consults regularly University of Kelaniya, Faculty of Commerce and Management Studies in Sri Lanka in confirming adherence to standards and good practices. Northumbria, emphasise quality control through staff monitoring, student feedback mechanisms, and communication.

6. **Gender & Diversity:** Both institutions uphold gender equality policies, promoting equal opportunities for women and men throughout their operations. Commitment to diversity and inclusion is reflected in policies and practices, with recognition received for fostering a supportive and inclusive work environment. Cultural adaptability and gender diversity are actively promoted, ensuring a welcoming and inclusive educational environment for all students. BMS has achieved Great Place to Work Certification 2024 which demonstrates upholding the values of gender equality among its workforces.
7. **Future Plans:** Future plans for the partnership may include expansion into new areas of collaboration, such as Medical Biotechnology and Business Analytics, continuation of successful programmes, and ongoing efforts to maintain educational excellence and international competitiveness. Adapting to evolving educational landscapes and market demands will be crucial, alongside a commitment to fostering diversity, inclusion, and innovation with academic and industry interface in higher education provision. Future plan includes, establishing global centre for TNE graduates to progress to Northumbria for full-time research studies on field which are beneficial for the country and the society.

Case study 3: IIT and Westminster

1. **1. Unique/Distinctive Features:** The partnership between IIT and Westminster stands out for its strong links and unique opportunities for students. One notable feature is the mandatory placement year between L5 and L6, where students gain practical experience in various companies, ranging from multinational corporations to small and medium enterprises.

This hands-on experience significantly boosts their employability, with nearly 100 per cent of graduates securing jobs upon programme completion. Additionally, students have ample chances to develop entrepreneurship skills through activities like Hackathons and competitions such as 'Cutting Edge,' where they collaborate on live projects.

Moreover, the Annual Career Day hosted by IIT serves as a vital platform for students to interact with numerous companies, gaining insights into diverse job opportunities and networking with potential employers. Furthermore, students engage in entrepreneurship development through group projects, hackathons, and participation in local and international competitions like the National Best Quality Awards and Asia Pacific ICT Alliance Awards. Events like 'Cutting Edge' provide avenues for students to showcase their projects to industry professionals, enhancing their visibility and networking opportunities.

Another distinctive aspect is the flexibility offered to students across all programmes to transfer to Westminster for further studies or postgraduate education. This opportunity expands their academic horizons and provides access to internationally recognised degrees. Additionally, both undergraduate and postgraduate students actively contribute to research by publishing papers in conferences and journals, fostering valuable networking opportunities with researchers. This scholarly engagement enriches their academic experience and prepares them for future endeavors.

Lastly, the appeal of British education in Sri Lanka adds another dimension to the partnership, providing students with the opportunity to earn internationally recognised degrees, further enhancing their career prospects and academic pursuits.

2. **History of the Partnership:** The partnership between IIT Sri Lanka and Westminster University commenced in 2005 with Computer and IT Courses. Generally, partnerships are chosen based on potential synergies and benefits to various academic programmes of host University. At the time of the establishment of the partnership Informatics Institute of Technology was already well established, with strong links to industry, and a strong commitment to offering high quality education. Global engagement has always been a core activity of the university, and the synergy between the two was clear from the start. At the time the University was also looking to increase the number of TNE partners and the

opportunity fitted with the University's wider strategy for global engagement.

The past nineteen years has seen growth in the number and range of programmes offered at undergraduate and postgraduate level in the area of computing and an expansion out into new areas of business and fashion. At all times the partnership has tried to respond to the training needs of Sri Lanka for example more recently an MSc in Information Technology has been introduced allowing graduates from a non-IT background to re-train.

3. Impact / Perceived Benefits:

3.1. Partner Institution: IIT Sri Lanka gains access to Westminster's syllabus and quality standards. The delivery of education is handled by Westminster, ensuring high-quality learning experiences for IIT students. Moreover, IIT students have the opportunity to visit Westminster in the UK for short periods, gaining teaching and cultural experiences. This exposure enhances their global perspective and enriches their education. Furthermore, TNE provides a valuable income source for IIT, contributing to financial sustainability and supporting the institution's operations.

3.2. Host University: Westminster expands its outreach by partnering with IIT Sri Lanka. The collaboration results in a diverse community of global citizens. Additionally, Westminster boasts alumni including IIT graduates. Through TNE, Westminster's partner institutions become internationally competitive. Graduates from these partnerships secure good jobs, reinforcing the high standards of UK education globally. Moreover, by offering TNE programmes, Westminster reinforces the reputation of UK education and maintains its commitment to excellence.

4. Main Challenges and Lessons Learned:

Over the past nineteen years, the partnership has encountered and effectively addressed various challenges, contributing to its enduring strength. While no particular challenges have impeded the development of the partnership, the journey has been characterised by continual learning and adaptation. One key lesson learned is the importance of maintaining open lines of communication and fostering strong relationships between the partner institutions. This has enabled proactive problem-solving and the timely resolution of any issues that have arisen. Additionally, the partnership has benefitted from a commitment to mutual understanding and respect, recognising and leveraging the unique strengths and expertise of each institution. By

prioritising collaboration and flexibility, the partnership has been able to navigate changes in the educational landscape and emerge stronger than ever. Looking ahead, these lessons learned will continue to inform and guide the partnership's approach, ensuring its continued success and impact in the years to come.

5. Quality Assurance:

The collaborative partnership between Westminster University (UK) and IIT Sri Lanka has achieved success due to the unwavering commitment demonstrated by both institutions. Dedicated management and staff at IIT, alongside strong support from colleagues and senior management at Westminster University, have been instrumental in ensuring the partnership's effectiveness. Key aspects of quality assurance practices include the appointment of liaison tutors in London to facilitate seamless coordination between both sides, ensuring effective communication, curriculum alignment, and smooth programme delivery. Regular visits by Westminster staff to Sri Lanka provide on-ground support for programmes offered there, fostering mutual learning and strengthening the partnership. Rigorous validation processes are applied to all programmes, ensuring adherence to the highest academic standards, while external examiners play a crucial role in maintaining quality through independent assessments. In-country tutors work closely with students in Sri Lanka, providing personalised support and effective teaching, with regular monitoring allowing prompt addressing of any challenges to maintain programme quality. The commitment to teacher quality is evident through thorough quality checks on course instructors, encompassing assessments of qualifications, teaching methodologies, and student feedback. Continuous professional development for faculty members ensures they remain abreast of best practices and evolving educational trends. Overall, dedication to quality assurance is deeply embedded in daily practices, aiming to create a robust and enriching educational experience for students.

6. Gender & Diversity:

The mutual partnership has made significant strides in promoting gender equality and diversity, with ongoing efforts to create inclusive environments for all students. Initiatives such as targeted recruitment strategies, support networks, and mentorship programmes have been implemented to address barriers to access and participation. Additionally, policies ensuring equal access to resources and opportunities have been established to foster an environment where all

students can thrive regardless of background. Incorporating diverse perspectives into curriculum development and research initiatives remains a priority, contributing to a richer educational experience for all. While progress has been made, continual evaluation and adaptation of strategies are ongoing to ensure that the partnership reflects and supports the diverse student body it serves.

7. Future Plans:

Looking ahead, the partnership is committed to expanding its programme offerings further to meet the dynamic needs of the market and provide students with enhanced educational opportunities. Building stronger collaborations with industry partners will continue to be a focus, ensuring that programme are aligned with industry trends and demands. Efforts to address regulatory challenges and enhance understanding of Transnational Education (TNE) among state sector officials are ongoing, with a view to ensuring the long-term sustainability and success of the partnership. Furthermore, initiatives aimed at promoting diversity and accessibility will remain central to future plans, with a commitment to fostering an inclusive environment where all students can thrive and contribute positively to society. By remaining responsive to changing dynamics and continuing to prioritise diversity and accessibility, the partnership aims to create lasting impact and opportunities for students in the years to come.

Case study 4: SIST and Edinburgh Napier

1. Unique/Distinctive Features:

The partnership between Edinburgh Napier University and Spectrum Institute of Science & Technology (SIST) boasts several distinctive features that set it apart from traditional collaborations in higher education in Sri Lanka. One standout aspect is the implementation of a flying faculty model, which includes faculty members from Edinburgh Napier imparting knowledge and contributing directly to students' learning by delivering classes in-person in Sri Lanka, in addition to delivering synchronous on-line classes from Edinburgh. This is in addition to the teaching and support provided by SIST lecturers. By integrating Edinburgh Napier's educators into SIST classrooms, this model not only enriches the students' learning experience but also strengthens the connection between the two institutions. Through firsthand engagement with Edinburgh Napier's faculty, students at SIST

benefit from fresh perspectives, up-to-date knowledge, and internationally recognised teaching standards.

Moreover, Edinburgh Napier University demonstrates a steadfast commitment to maintaining high standards of academic excellence within the partnership. This dedication is exemplified through provision of all the teaching and assessment materials, including the implementation of double marking for the capstone research project module. Additionally, the use of same external examiners for assessments conducted in both Edinburgh and Sri Lanka ensures alignment with international academic standards, providing students and employers with confidence in the quality of education delivered through the partnership. Edinburgh Napier takes an active role in shaping the academic experience at SIST. The university designs the curriculum and assessments itself, tailoring them to meet global standards while considering local context.

Furthermore, the partnership offers a four-year programme, distinguishing itself from many other international partnerships in Sri Lanka that typically provide three-year programmes (typically a 12-18 month top-up to an HND). This extended duration aligns with Sri Lanka's educational norms, where a four-year bachelor's degree is customary. Despite the potentially higher cost associated with a longer programme, this investment translates into an enriched educational experience and enhances the quality of graduates. Moreover, the extended timeframe not only reflects the local educational context but also amplifies the prospects of students seeking acceptance into master's programmes at home and abroad. By adhering to this educational standard, the partnership not only meets local expectations but also elevates the acceptability of SIST graduates in international academic settings, thereby expanding their opportunities for future academic and professional pursuits.

2. History of the Partnership:

In 2012, the partnership between SIST and Edinburgh Napier took root when a talented student at SIST, won the prestigious Designer Innovative Idea Award for an Edinburgh Napier-run competition with a visit to Edinburgh as the prize. Following this, and two years of discussions and evaluations, fostering connections between the institutions, SIST and Edinburgh Napier formalised their partnership through a collaborative agreement.

This year, in 2024, Edinburgh Napier and SIST celebrate the 10-year anniversary of the BSc (Honours) Microbiology and Biotechnology degree programme in Sri Lanka. The partnership marks a significant milestone, allowing students from diverse backgrounds to pursue a UK degree without the financial burden of studying abroad. Today, the collaboration continues to provide valuable academic opportunities, bridging the gap between quality education and affordability in Sri Lanka.

3. Impact / Perceived Benefits:

3.1. Partner Institution: Partnering with Edinburgh Napier University enables SIST to offer its students access to diverse programmes and expertise. Through this collaboration, SIST students gain exposure to international faculty members and teaching methodologies, enhancing their academic experience. The opportunity to study Edinburgh Napier's curriculum equips SIST graduates with globally recognised qualifications, increasing their competitiveness in the job market. Moreover, the partnership with a prestigious UK institution like Edinburgh Napier elevates SIST's standing in the international education landscape. By providing students with live exposure to international faculty and diverse programmes, SIST reinforces its commitment to delivering quality education and preparing students for success in a globalised world.

3.2. Host University: In addition to financial gains this partnership significantly enhances the university's global outreach efforts. By extending its educational reach to Sri Lanka through SIST, Edinburgh Napier reinforces its commitment to international education and cultivates a diverse and inclusive learning environment. This partnership serves as a platform for fostering collaboration and knowledge exchange between the two institutions, ultimately enriching the educational experiences of students and faculty alike. Hence, the partnership with SIST contributes significantly to Edinburgh Napier's mission of global engagement and excellence in education.

4. Main Challenges and Lessons Learned:

The partnership between Edinburgh Napier University and Spectrum Institute of Science & Technology highlights the importance of adaptability, effective communication, and a student-centric approach for successful partnerships especially during turbulent times such as the pandemic, and political and economic crises.

5. Quality Assurance:

Edinburgh Napier University upholds a rigorous commitment to maintaining the highest standards

of academic excellence within the partnership with Spectrum Institute of Science & Technology (SIST). This dedication is evident through robust quality assurance measures implemented to ensure the integrity and consistency of educational delivery, examples of which are given above and include rigorous assessment practices and the use of the same external examiners across the programme delivered in the two locations.

The BSc (Hons) award is credit-rated at Level 10 of the Scottish Credit and Qualifications Framework (SCQF), reflecting alignment with established standards of academic rigor and attainment. The SCQF serves as a robust framework for ensuring the quality and integrity of educational qualifications, with its principles of transparency and comparability facilitating the recognition of qualifications both within Scotland and internationally.

In essence, Edinburgh Napier University's commitment to quality assurance within the partnership with SIST extends beyond mere compliance to encompass a proactive stance towards maintaining the highest standards of educational excellence. Through stringent assessment practices, engagement of external expertise, and alignment with recognised frameworks, the university demonstrates its unwavering dedication to delivering education of the highest caliber, thereby ensuring the success and credibility of the partnership with SIST.

6. Gender & Diversity:

Edinburgh Napier aims to create an environment where everyone feels proud, confident, challenged, and supported. They recognise the importance of respect and integrity in fostering a positive atmosphere. The commitment extends to Edinburgh Napier's international partnerships, and is a key point of consideration when choosing its partners for education programme delivery overseas.

Edinburgh Napier and SIST prioritise creating an inclusive learning environment, ensuring that all students feel welcome and supported throughout their educational journey.

7. Future Plans:

The future plans for the partnership between Edinburgh Napier University and Spectrum Institute of Science & Technology are centered on curriculum enhancement including industry-informed skills development, and sustainable partnerships. By combining global expertise with local relevance, the partnership aims to empower students and contribute positively to society.

Case study 5: NIBM and Coventry University Group (CUG)

1. Unique/Distinctive Features:

The collaboration between Coventry University Group (CUG) and the National Institute of Business Management (NIBM) has been running successfully since 2018. Coventry offers a range of programmes at undergraduate and postgraduate levels and has seen significant growth over the past six years. In that time, the CUG has not only built on the number of courses in NIBM's traditional subject areas (Business Management and Computing) but have also diversified into new subjects such as English Studies, Global Logistics and Banking.

The success of this collaboration is due in large part to the flexibility of the collaboration model – while some courses closely align to our UK programmes. CUG is also able to create bespoke programmes and localise courses according to the needs of students in Sri Lanka. To date, nearly 3,000 students have been enrolled on Coventry University degrees and more than 1,000 students have already graduated, making this one of the largest TNE collaborations in the country.

For each course, CUG have a dedicated Link Tutor who supports with all academic aspects of the course including training and the sharing of best practices. Additionally, CUG boasts a specialised Academic Partnership Unit (APU) that manages all TNE partnerships. Each partner, including NIBM, is assigned a Partnership Manager from the APU who oversees Link Tutors and manages financial, legal and strategic issues, guaranteeing effective communication between both entities.

2. History of Collaboration:

NIBM was established in 1968 under the purview of the Ministry of Industries and Scientific Affairs and in collaboration with the United Nations Development Programme. It was subsequently incorporated as the National Institute of Business Management by an Act of Parliament (The National Institute of Business Management Law No 23 of 1976).

The collaboration with Coventry University Group launched in 2018 with a suite of five courses – BSc Computing, BSc Ethical Hacking and Network Security, BSc International Technology for Business, BA Professional Accounting and BA Management & Leadership. Since then, CUG have launched a further 17 courses, expanding our portfolio across a variety of disciplines. These include the School of Computing, Mathematics and Data Science, School of Mechanical Engineering,

School of Energy, Construction and Environment, School of Humanities, School of Management, School of Markets and Economy Coventry University London as well as the Coventry University Group. As a result, we have seen year-on-year growth in the number of students enrolling onto their programmes.

In addition, we recently approved delivery of CUG collaborative programmes at an additional location. Students in the region now have the option to study at one of the following:

- Colombo - School of Business / School of Computing and Engineering / National Innovation Center (NIC) / Productivity and Quality Center (PQC)
- Kandy - Kandy Regional Campus

Finally, CUG and NIBM share an understanding on the importance of staff development and, as such, training and knowledge exchange programmes are a key aspect of this collaboration. These enable us to participate in professional development activities and specialised training programmes which support our collaboration and ensure we are adopting best practices.

3. Impact / Perceived Benefits:

3.1. Partner Institution: The benefits of this collaboration extend to NIBM. There are 17 state universities in Sri Lanka which can facilitate the admission of 42,000 new students each year. This is one of the fundamental reasons why the local government views collaborations with foreign higher education providers, such as the one in place with CUG, as key to addressing the shortage of higher education provision in country.

UK qualifications are highly sought after by Sri Lankans and are held in high regard by local employers. Given the recent economic crisis in Sri Lanka, gaining an international degree has never been more attractive as more young people look to migrate for work. The collaboration with CUG is significant in this regard, allowing NIBM to deliver attractive UK degrees locally from a globally recognised institution. NIBM also benefits from the substantial TNE experience of CUG and from being part of the Group's growing TNE network. This includes hosting an annual Partner Symposium and the provision of regular online training and webinars to support staff development.

3.2. Host University: This collaboration is of significant strategic importance to CUG. Not only does it support the Group's ambition of widening participation in higher education, but it also opens up opportunities to students unable to study in

Table 5: Student demographics, Coventry University

Faculty	Student Gender		Student Age				
	Male	Female	18 - 20	21 - 23	24 - 26	27 - 29	30+
School of Computing and Engineering	62%	38%	2%	29%	59%	8%	2%
School of Business	34%	66%	2%	45%	32%	10%	11%
National Innovation Centre	32%	68%	3%	28%	25%	14%	30%
School of Language	6%	94%	17%	40%	21%	11%	11%
Productivity and Quality Center	60%	40%	3%	48%	44%	5%	0%
Total	43%	57%	3%	37%	40%	10%	10%

the UK. It is important to recognise that the target country for our TNE courses is markedly different to our international recruitment domestically. When it comes to TNE, CUG is actively looking to support students who may not have the finances to come to the UK; who are employed in Sri Lanka or who have family commitments in the country. CUG is committed to being a global education group that delivers education and training designed to address the most pressing societal, scientific and economic issues of our time. This vision is reflected in CUG 2030 Group Strategy and is clearly demonstrated in our collaboration with NIBM. Finally, in terms of quality assurance, the partners possess a good understanding of the required processes and follow these successfully to support the smooth management of these collaborative programmes.

4. Main Challenges and Lessons Learned:

The primary challenge has been the launch of courses outside NIBM's core subject areas of business and computing. The English undergraduate course, for example, was completely new for NIBM and enrolment numbers in years one and two were affected as a result. However, as brand reputation and general understanding have grown over the past five years, so too have student numbers. The challenge now facing CUG is to ensure that there is parity in the student experience as these courses grow in popularity and delivery across multiple campuses begins. To mitigate this, the Coventry Link Tutor visited both campuses in January 2024 to provide training and to work with the local course teams to share best practices. This approach will be replicated by the Group as we explore opportunities to deliver more courses at the Kandy campus as well as in Colombo.

5. Quality Assurance Mechanisms:

As mentioned above, NIBM has a good

understanding of our quality assurance processes and comply with CUG's requirements in terms of staff CV approvals, enrolment and student record keeping, exam board practices and moderation, as well as the annual monitoring of reports. A dedicated Registry Officer is also in place to support with this and to liaise with the Link Tutors. Courses undergo an interim review after their first cycle and a periodic review every five years, allowing an independent panel to evaluate and ensure the course's quality and approve necessary updates.

6. Gender and Diversity:

Coventry University UK is dedicated to fostering an inclusive and supportive learning environment where all students feel proud, confident, and valued. The university emphasises the importance of respect and integrity in creating a positive academic atmosphere. This commitment to inclusivity extends to Coventry's diverse faculties, each contributing uniquely to the university's vibrant community. Coventry University UK maintains a balanced and diverse student population across its various faculties. Coventry University's student demographics showcase a commitment to diversity and inclusivity across gender and age groups.

7. Future Plans:

CUG and NIBM are in the process of forming a progression agreement to enable Sri Lankan students to transfer to Coventry campuses in the UK, offering a flexible option for those who cannot afford to complete their entire degree in the UK.

CUG also have several new courses in the development stage. The Group aims to build on the past six years of success through continued collaboration, aspiring to help an increasing number of Sri Lankan students graduate and succeed professionally.

Conclusion

8.1. Public Policy Recommendations

The above study has identified three main areas for further policy considerations, to allow TNE stakeholders- Sri Lankan policymakers to make informed decisions in anticipation of TNE development. These main areas consist in partnership development, the quality assurance framework of Sri Lankan higher education, and the operation and administration of nation-wide TNE in Sri Lanka.

Recommendation 1: Public repository to document TNE activity in Sri Lanka

While there have been existing efforts to understand the quality of TNE in Sri Lanka, the quantity of TNE activity remains largely undocumented. As highlighted in Section 4.1, there is no current mechanism in place to monitor the establishment of these schools, nor is there any data available on these schools either with either the MoHE or the Registrar of Companies under which they are registered.⁹⁰ As mentioned in Section 6, there are some government universities with TNE arrangements, but there is also no official data available on this. For a robust TNE sector in Sri Lanka and to increase public confidence in it such that TNE becomes a more favourable option for Sri Lankan higher education, there should be a public repository to document such activity.

With a basic documentation of all TNE providers, there will be common knowledge about TNE in Sri Lanka. The database can also include more features such as: monitoring enrolment numbers; collecting course-level data of all TNE courses in their respective institutions; a measurable mechanism to evaluate success rates of TNE, etc. All these features will serve to offer the public a transparent picture of TNE activity in Sri Lanka, and for them to understand the economic and social significance TNE can bring to Sri Lanka.

Simultaneously, this database will also provide foreign universities keen on establishing TNE activity here, a landscape analysis of the TNE market. This will give them an assurance of what needs to be done, and how to introduce/design TNE programmes that are aligned with the current quality of TNE in Sri Lanka.

Furthermore, the publicity of this repository may introduce a competitive aspect between TNE providers in the market. TNE providers may be empowered by the information of other TNE providers, to offer high quality programmes that can outperform other TNE programmes. This thereby might increase the overall quality of TNE education in Sri Lanka.

It should also be noted that building this repository is relatively feasible. Presently, there are already concrete plans being made to regulate the establishment of TNE activity by stipulating potential TNE providers to submit applications to the newly proposed NHEC (see Section 6.3). Hence, the establishment of new TNE providers can be retrieved from there. The collection of course-level data can also build upon the data reflected in the TNE mapping exercises attached here in the Annex. What's most feasible at present is to first establish a dedicated working group within the NHEC to start building up a data collection mechanism for this repository.

Recommendation 2: Developing a unified, nation-wide system of quality assurance applicable to all higher education programmes in Sri Lanka

While the SLQF has the potential to inform the quality of TNE in an informal manner (Section 6.3), TNE programmes are not obliged to adhere to it. As mentioned above, quality assurance for TNE is enabled informally- the SLQF, being a public documentation, allows stakeholders to benchmark the learning outcomes of TNE programmes against the various qualification levels in the SLQF. This alone is not sufficient for TNE to ensure that they are equally comparable with the local higher education standards. To secure the quality assurance of TNE, it is still preferred to consider a local mechanism for evaluating the quality of TNE programmes nationwide. This is such that TNE providers are mandated to provide a quality of higher education in consistent with the general standard of Sri Lankan higher education.

This suggestion is also feasible given discussions to unify the qualification frameworks of higher education programmes in Sri Lanka.⁹¹ The SLQF is also not the only higher education qualification framework in Sri

90. Asian Development Bank, "Innovative Strategies for Accelerated Human Resource Development in South Asia", <https://www.adb.org/sites/default/files/publication/385661/ppp-education-sa.pdf> (2017), 108

91. Ministry of Higher Education, "National Education Policy Framework Sri Lanka", https://moe.gov.lk/wp-content/uploads/2024/02/09/NEPF_English_final.pdf (Sept 2023), 25-26

Lanka. There is also the National Vocational Qualifications (NVQ), a framework established by the Tertiary and Vocational Education Commission in Sri Lanka, to categorise the attainment of vocational skills in vocational institutions. At present, the NVQ has been integrated into the SLQF in this manner: the different levels of SLQF are mapped to their comparable NVQ levels, giving viewers the ability to benchmark an NVQ level against an SLQF level. The NVQ has seven levels in total, with the NVQ Level 7 being the equivalent of a bachelor's degree qualification in the SLQF.⁹² Similarly, the government can do the same of integrating TNE into the national qualifications framework, by mapping the TNE-specific qualification framework to the SLQF. As mentioned previously, TNE providers have also indicated a willingness to support in improving quality assurance processes.

The implementation of such a consideration will require that the government is aware of all TNE programmes available in Sri Lanka, which will build upon the database as suggested in Recommendation 1.

Recommendation 3: Encouraging public-private partnerships for TNE operations and expanding TNE-related services

A recurring trend in the Sri Lankan higher education sector is a willingness, on stakeholders' part, for more partnership opportunities. As outlined in Section 6, the support for the TNE sector falls predominantly on government intervention. While this is a reasonable strategy, a stronger support system for the higher education sector can also be derived from public-private partnerships within Sri Lanka. In the past, there have been instances where the operations of state universities are supported by public-private partnerships. For example, the graduate faculty in the University of Colombo conducts certain programmes in partnership with an IT service provider from the private sector. Similarly, the University of Moratuwa partners with a private IT service provider to deliver a degree in Information Technology. This frees up more time for state universities to address other higher education priorities, such as the development of quality research output and the revision of university curriculum to produce market-relevant students. Furthermore, public-private partnerships have also existed to support TNE operations. For instance, the University of Central Lancashire's was offered land at the Mirigama Export Processing Zone by the Board of Investment.⁹³ This was made possible by the private sector's declaration to invest approximately \$100 million.⁹⁴ This thus frees up the budget for higher

education, to address other pressing issues such as the quality assurance of Sri Lankan higher education. These examples also prove that such partnerships are realistic and have contributed to further the higher education sector's agenda. There is room for such partnerships today to facilitate more TNE partnerships and support TNE operations.

The other area for further consideration is the government's strategy for promoting TNE in Sri Lanka. As outlined in 6.3, there has been more provision of infrastructure and monetary incentives to encourage the establishment of IBCs and TNE programmes. It is clear that the government is pivoting its strategies towards improving the financial viability of establishing TNE. To further streamline the processes of establishing IBCs and TNE programmes through these initiatives, the government can optimise support from the private sector. This can manifest by way of conceiving a justification report for the private sector to invest in higher education. The report should highlight the benefits of investing in the higher education sector, which will incentivise the private sector to invest in it. This is a means for the government to facilitate the investment in TNE, without mandating it. Notably, this was a way in which the Malaysian government spearheaded the development of internationally known branch campuses within Malaysia. For instance, the Sixth Malaysia Plan noted the importance of the private sector's role in education and training.⁹⁵ The Ministry of Education facilitated the establishment of IBCs such as Monash, by partnering them with large Malaysian conglomerates. Monash University Malaysia was set up jointly with Sunway Berhad,⁹⁶ while the University of Nottingham Malaysia was set up jointly with Barlow-Boustead, the YTL Corporation and Lembaga Tabung Antara Tentera (LTAT).⁹⁷

8.2. Recommendations for UK TNE sector in Sri Lanka

The above study has also identified three main areas for UK universities and Sri Lankan TNE providers to work on in building capacity and resource, for the further development of TNE operations.

Recommendation 4: Expand geographical reach of UK TNE in Sri Lanka

Another point of consideration for UK TNE moving forward from this study is to expand its offering of TNE services in two ways. The first way is to expand the

92. Sri Lanka Qualifications Framework, https://www.eugc.ac.lk/qac/downloads/SLQF_2016_en.pdf (2016), 7

93. Note that this branch campus no longer exists today

94. Asian Development Bank, "Innovative Strategies for Accelerated Human Resource Development in South Asia", <https://www.adb.org/sites/default/files/publication/385661/ppp-education-sa.pdf> (2017), 108

95. Government of Malaysia. 1993. Mid-Term Review of the Sixth Malaysia Plan, 1991-1995. Kuala Lumpur: Government Printer, 181

96. Monash University Malaysia, <https://www.monash.edu/about/who/history#:~:text=In%201998%2C%20the%20Malaysian%20Ministry,%22foreign%22%20university%20in%20Malaysia>

97. University of Nottingham, <https://www.nottingham.edu.my/AboutUs/History/MalaysiaHistory.aspx>

geographical distribution of TNE beyond Colombo. As highlighted by current TNE students during the focus group discussion, most of TNE is in Colombo. This means that students located in other regions do not have convenient access to TNE (see Section 6.2). UK TNE can also learn from Australian TNE, which is also prevalent in less urban areas (see Section 4.4), which will increase more students' access to UK TNE. The second way is to establish more branch campuses within Sri Lanka. Currently, this TNE type is only made available to students by Australian universities. UK TNE can consider adding this type of TNE, to increase the variety of TNE delivery models students can choose from when they engage in UK TNE.

Recommendation 5: Improving both the academic and non-academic features of TNE provision

Apart from ensuring that course curriculum and pedagogy remains innovative and relevant to Sri Lankan students, UK TNE should also address the negative perception that some students have regarding the assessment criteria of business management courses. One possible way of attaining this is to diversify the assessment scheme to also include in-person examinations. This means that students are graded holistically from a slew of assessments, and their grades are not solely determined by written assessments. This can hence counter the perception that TNE degrees are not attained by students' own merit, but through firms that have offered assignment writing services to students.

Lastly, an equal consideration should also be paid to the non-academic features of TNE. UK TNE can consider an unconventional means of improving the quality of TNE in Sri Lanka. At present, recommendations to improve the quality of TNE only emphasises the academic aspect of it. This refers to the use of the SLQF to direct the types of programmes offered through TNE, and to design the learning outcomes of TNE programmes, with the projected outcome of increasing students' employability and improving the public's perception of TNE. However, there is also another way to measure the quality of TNE, and to address these desirable outcomes. This refers to improving the non-academic aspect of students' university experience. What this looks like is the formal implementation of a career counselling curriculum, where TNE providers help students find job/internship opportunities abroad and in the domestic space. This will allow UK TNE to stand out from the current TNE partners. Furthermore, this is an actual suggestion by students during the focus group discussion. When asked to share ways for TNE providers to improve the quality of TNE in Sri Lanka, they expressed satisfaction with the academic

experience, but asked for more non-academic features such as complimentary career counselling by the university.

The quality of TNE is not solely perceived through its academic provision, but what it can offer in the non-academic context as well. The stakeholder interviews conducted revealed that one Australian university established a working group to improve student experiences in their branch campuses- which went as far as implementing a parents' waiting area. The area was a designated space for parents who ferried their children to school and was designed to enable female students to feel safe whenever they came to campus. While this feature has no direct impact on students' academic experience, it demonstrates a sensitivity for students' welfare, which will have a bearing on the overall student experience with TNE. Such features also legitimise the TNE institution as a proper place of learning and development, shifting its image away from the publicly perceived "degree shops".⁹⁸

Other types of non-academic features that will be beneficial to include within a TNE education would be supporting student-led initiatives and startups through hackathons- regularly scheduled events for students to solve challenges and create novelty, and engaging students with local communities through service-learning activities. Implementing these strategies into TNE education will diversify the educational experience for students and cultivate their soft skills, thereby preparing them for the workforce. Hence, focusing on non-academic features might increase the employability prospects of students, increase public confidence in the legitimacy of TNE and increase student demand for TNE.

Recommendation 6: Exploring the relevance of interdisciplinary programmes through TNE

The baseline study above revealed that most TNE programmes are STEM-related and on business and management. Only a small proportion of TNE programmes pivoted from this convention and offered interesting programmes such as game design, fashion and the like. While it is understandable that TNE programmes aim to be market-relevant, the idea of interdisciplinary programmes should not be neglected. This is because interdisciplinary programmes offer many benefits. For one, it equips students with diverse skills and position them well to address today's pressing challenges- which are multi-faceted. Furthermore, this may open more employability opportunities for students as they are not restricted to a single field. Hence, it is worth conducting a study to explore the feasibility of providing interdisciplinary programmes through TNE and its relevance to the Sri Lankan economy.

Appendix

Annex A: UK TNE in Sri Lanka

UK University	Partner organisation	Partnership Type	Average Tuition Fees in GBP (per academia year unless otherwise specified*)	Level of study	Study Type	Duration	Programme				
Kingston University	ESOFT Metro Campus	Validated	1980	UG, PG, Doctorate	Part-Time (PT)	1	BSc (Hons) in Multimedia Technology (TOP UP) BSc (Hons) in Cyber Security & Digital Forensics (TOP UP)				
					Full-Time (FT)	3	BSc (Hons) Computing Science in Web & Mobile App Development (TOP UP) BSc (Hons) Computing Science in Network & Network Security (TOP UP) BSc (Hons) Computing Science in Software Engineering (TOP UP)				
					PT	1	MSc in Software Engineering Master of Science in Data Science – Kingston University Master of Science in IT & Strategic Innovation – Kingston University Master of Science in Network & Information Security – Kingston University Master of Science in Software Engineering – Kingston University				
						3	Doctor of Philosophy (PhD) – Kingston University (UK)				
					ESOFT College of Engineering and Technology	Validated	3900	UG,PG	FT	1	BEng (Hons) Civil and Infrastructure Engineering (top-up)
										3	BEng (Hons) Mechanical Engineering BEng (Hons) Electrical & Electronic Engineering BSc (Hons) Quantity Surveying (top-up)
									PT	1	MSc Structural Design and Construction Management MSc Management in Construction
					Asian Aviation Center	Double Degree	2250	UG	PT	2+1	BSc Hons in Aerospace Engineering

The University of Northampton	Human Resource Management Institute (HRMI)	Franchise 2370 ⁹⁹	UG, PG			10.5 months	BSc (Hons) Human Resource Management and Organisational Behaviour – Top-up BSc (Hons) Business Management and Strategy – Top-up BA (Hons) International Hospitality and Tourism Management – Top-up BA (Hons) International Logistics & Trade Finance – Top-up BSc (Hons) Project Management – Top-up BSc (Hons) International Accounting – Top-up BSc (Hons) International Banking and Finance – Top-up BSc (Hons) Psychology – Top-up
						1	Executive MBA MA Human Resource Management (Top-Up) MSc Accounting and Finance
						8 months	MSc Accounting and Finance – Research Stage Master Of Business Administration (Mba) – Direct Admission to Research Stage
						15 months	MBA
Liverpool John Moores University	International College of Business and Technology (ICBT)	Franchise	1700	UG, PG	FT	2	Higher Diploma Automotive Engineering Higher Diploma Biomedical Engineering Higher Diploma Civil Engineering Higher Diploma Mechanical Engineering Higher Diploma Mechatronics Engineering Professional Diploma Quantity Surveying Higher Diploma Quantity Surveying
						1.5	BSc (Hons) Quantity Surveying BEng (Hons) Mechatronics and Autonomous Systems BSc (Hons) Civil Engineering
						1	MSc Quantity Surveying and Commercial Management MSc Civil Engineering MSc Construction Project Management
					PT		

	Sri Lanka Institute of Information Technology (SLIIT)	Franchise		UG	FT	3	Bachelor of Science (Hons) Architecture Bachelor of Science (Hons) Quantity Surveying Bachelor of Business Administration (Hons) BSc (Hons) Psychology LLB (Hons) Law BSc (Hons) Nursing
London Metropolitan University	ESOFT College of Engineering and Technology	Franchise	1700	UG, PG	FT,PT	3	BSc (Hons) in Psychology BSc (Hons) in Psychology Including Foundation Year LLB (Hons) Law
						1	BSc (Hos) in Psychology (TOP UP) BSc (Hons) in Banking and Finance (TOP UP) BA (Hons) in Marketing (TOP UP)
					PT	1	Master of Business Administration (Marketing) Master of Business Administration (Travel&Tourism Management) Master of Business Administration (Fintech) Master of Business Administration (Fintech) Master of Business Administration (Finance) Master of Business Administration (Marketing) Master of Business Administration (Human Resources)

Staffordshire University	APIIT - Higher Education Institution in Sri Lanka	Franchise	2100	UG, PG	FT,PT	3	BA (Hons) Accounting and Finance BA (Hons) Business Innovation and Entrepreneurship BA (Hons) Business Innovation and Entrepreneurship (with a placement year) BA (Hons) Digital and Social Media Marketing BA (Hons) Finance and Business Enterprise BEng (Hons) Software Engineering BEng (Hons) Software Engineering (two-year accelerated) BEng (Hons) Software Engineering (with a placement year) BSc (Hons) AI and Robotics BSc (Hons) Computer Science BSc (Hons) Computer Science: Cyber Security BSc (Hons) Cyber Security BSc (Hons) International Business Management BSc (Hons) International Business Management (two-year accelerated) LLM International Business Law MBA Business Administration
					PT	2	MSc Computer Science (Business Computing) MSc Computer Science (Cyber Security) (accelerated) MSc Marketing Management Individual Modules APIIT Lanka
The University of West London	Imperial College of Business Studies (ICBS)		1500	UG.PG	FT	1	BA Global Business (Level 9) BA (Hons) International Business & Finance (Levels 8 – 10)
						1.5	MBA International Business
University of Plymouth	National School of Business Management	Validated	2200	UG	FT	2	LLB (Hons) Law BSc (Hons) Data Science BSc (Hons) Computer Networks
University of Bedfordshire	British School of Commerce	Validated		UG.PG	FT	3	LLB Hons
					PT	1.5	MBA Advance diploma in Business
						4 months	Foundation in Business

The University of Westminster	Informatics Institute of Technology (IIT)			UG.PG	FT	4	BA Business Management BEng Software Engineering BEng Software Engineering BSc Business Data Analytics BSc Business Information Systems BSc Computer Science
					PT	2	MSc Cyber Security and Forensics MSc Advanced Software Engineering MSc Information Technology MA Fashion Business Management
University of Northumbria at Newcastle	AOD (Academy of Design)	Franchise	Franchise	UG	FT	3	BA (Hons) Fashion & Textile Design Degree BA (Hons) Graphic Design Degree BA (Hons) Interior Design Degree BA (Hons) Fashion Design & Marketing Degree BA (Hons) Motion Graphics & Animation Design Degree
	BMS (Business Management School)	Franchise		UG.PG			BSc(Hons) Business and Management - Final Year BSc (Hons) Banking and Finance BSc (Hons) Biomedical Science BSc (Hons) Biotechnology BSc (Hons) Business with International Management BSc (Hons) Business with Financial Management BSc (Hons) Business with Human Resource Management MSc in Business & Management (New)
The University of Sunderland	International College of Business and Technology (ICBT)	Validated		UG.PG	FT,PT	1	BSc (Hons) in Nursing BEng (Hons) Mechanical Engineering BEng (Hons) Automotive Engineering BEng(Hons) Electronic & Electrical Engineering
					FT,PT PT	1 6 months	MSc in Project Management MBA
The University of Salford				UG.PG	FT,PT	2	HND in Architectural Technology HND in Civil Engineering HND in Quantity Surveying HND in Construction Management
						4 (3+1)	BSC Hons in Quantity Surveying
						1	MSc / PGDip Quantity Surveying

The University of Greenwich	Pioneer Institute of Business and Technology (PIBT)	Validation		UG.PG		3	BA Business Management (FYE) BSc (Hons) Computing (Cyber Security) (FYE) BSc (Hons) Computing (FYE) BSc (Hons) Computing (Information Systems) (FYE) BSc (Hons) Computing Systems / Network (FYE) LLB Law LLB Law (Senior Status)
						1	LLM International and Commercial Law
De Montfort University	Academy of Design (AOD)			PG	FT,PT		MA Design Innovation MA Design Management and Entrepreneurship MA Contour Fashion Innovation
	Skills College of Technology (SCOT)			UG		1.5-2	BEng (Hons) in Electrical and Electronic Engineering (Level 6) BEng (Hons) in Mechanical Engineering (Level 6) BEng (Hons) in Construction Project Management (Level 6) BEng (Hons) in Mechatronics Engineering (Level 6) BSc (Hons) Quantity Surveying and Construction (Level 6)
University of Suffolk	London School of Commerce		1252	PG	PT	1.5	MBA
University of the West of England, Bristol	Bristol Institute of Business Management			UG.PG			Bachelor of Arts (Hons) Accounting and Finance - 3 years BA (Hons) in Business Management BA (Hons) in Business Management: MSc Accounting and Finance - 1 year Master of Business Administration (MBA) Master of Law MSc in Nursing
Canterbury Christ Church University		Validation		UG.PG	FT	1	Bachelor of BSc. (Hons) Business Accounting and Finance (Top-Up) Bachelor of BSc. (Hons) Business Management(Top-Up)
					PT	1	MBA

Cardiff Metropolitan University	International College of Business and Technology (ICBT)	Validation Franchise		UG,PG	FT,PT	1.5-2	Higher Diploma in Business and Management (Validated) Higher Diploma in Network Technology and Cyber Security (Validated) Higher Diploma in Computing and Software Engineering (Validated) Higher Diploma in Biomedical Science (Validated) Higher Diploma in Psychology (Validated) Higher Diploma in English (Validated)
						1 3	BSc Hons in Business Management (Top Up) BSc (Hons) Business and Management (3 year Degree) BSc (Hons) Software Engineering (3 year Degree) BSc (Hons) Information Technology (3 year Degree) BSc (Hons) Business Information Systems (3 year Degree) BSc (Hons) in Biomedical Science
						1+dissertation	Master of Business Administration (MBA) MSc in Data Science MSc Strategic Marketing MSc Project Management MSc Psychology of Applied Behaviour Change Master of Laws in International Business (LLM)
Coventry University	National Institute of Business Management (NIBM)	Validation	2200	UG,PG	FT,PT	1	BSC (HONS) IN DIGITAL BANKING AND FINANCE
						2	BA (HONS) ENGLISH AND TESOL
						3	BA (HONS) ENGLISH STUDIES BA Human Resource Management BA Management and Leadership BA Professional Accounting BSc Hons Data Science BSc Psychology and Counselling
						4	BSc Ethical Hacking and Network Security BSc Information Technology for Business BSC (HONS) COMPUTING (SOFTWARE ENGINEERING PATHWAY)
					FT	3	BSc Global Logistics
					PT	1.5	MSc Applied Psychology MSc Data Science
	International Institute of Health Sciences (IIHS)	Validation		UG,PG	FT,PT	1 & 2	Bachelor of Science (Hons) Nursing Studies
					PT		MBA in Health Administration MSc Advancing Physiotherapy Practice

The University of Wolverhampton	CINEC Campus in Sri Lanka	Validation			PT	1	Automotive Engineering (Top Up) Automotive Engineering (Top Up) Business Information Systems (Top Up) Civil and Construction Engineering (Top Up) Computer Networks (Top Up) Civil and Construction Engineering (Top Up) Civil and Construction Engineering (Top Up) Electronics & Telecommunication Engineering (Top Up) Electronics & Telecommunication Engineering (Top Up) Mechanical Engineering (Top Up) Computer Science (Software Engineering) Mechatronics Engineering (MEng Hons)
					FT	3	Undergraduate Law (LLM) degree
Edinburgh Napier	Spectrum Institute of Science and Technology (SIST)	Franchise		UG	FT	4	BSC. (HONS) APPLIED MICROBIOLOGY AND BIOTECHNOLOGY BSC. (HONS) BIOMEDICAL SCIENCE

RMIT University	1. Brandix Corporate Campus (for undergraduate programmemes)	Offshore partnership / Franchised	Unknown	UG	FT	3	Bachelor of Applied Science (Textile Technology)
	2. Sri Lanka Technological Campus (for undergraduate programme ICBT Campus (for foundation studies programme) programme)			Diploma	FT	Unknown	Bachelor of Engineering (Hons) Mechanical Engineering Bachelor of Engineering (Hons) Advanced Manufacturing and Mechatronics Bachelor of Engineering (Hons) Civil and Infrastructure RMIT Foundation Studies at ICBT
Swinburne University of Technology	Nawaloka College of Higher Studies	Offshore partnership / Articulation agreement	Unknown	Diploma	FT	8 mths	Swinburne UniLink Diploma in Business/Engineering/IT/ Health Science
University of Technology Sydney	UTS College Sri Lanka	Offshore campus / Articulation agreement	Unknown	Diploma-Degree pathway	FT	8-12 mths	Degree pathway- Diploma programmes in Business, Engineering, Information Technology, Science
University of Southern Queensland	Institute of Chartered Accountants of Sri Lanka	Offshore partnership / Franchised programmeme	AUD 560 per subject (USQ fee) + LKR 22,500/- per subject (local admin fee)	PG	FT	1.5	MBA
Victoria University	National School of Business Management (NSBM) Sri Lanka	Offshore partnership / Joint award and Franchised programmeme	Semester-based flexible course fee structure; students advised to contact university for more information	UG	FT	3	Bachelor of Business: Double major in Management and Innovation & Supply Chain and Logistics Management Bachelor of Information Technology (Major in Cybersecurity)
Central Queensland University	Institute of Chartered Accountants of Sri Lanka	Offshore partnership / Franchised programmeme	AUD 795 per subject	PG	Unknown	Unknown	MBA
University of Queensland	Sri Lankan Institute of Information Technology (SLIIT)	Offshore partnership / Joint award	Rs 610,000 per semester	UG	FT	4	Bachelor of Engineering (Hons) Civil Bachelor of Engineering (Hons) Electrical Bachelor of Engineering (Hons) Mechanical Bachelor of Engineering (Hons) Mechatronic
			Rs 490,000 (for non-honours programmeme per semester)			3	Bachelor of Business Management Bachelor of Commerce Bachelor of Economics Bachelor of Computer Science Bachelor of Information Technology

Deakin University	1. Sri Lanka Technological Campus	Offshore partnership / Joint award	Unknown	UG	FT	4	Bachelor of Electrical and Electronics Engineering (Hons) Bachelor of Mechatronics Engineering (Hons) Bachelor of Civil Engineering (Hons)
	2. Sri Lankan Institute of Information Technology (SLIIT)	Articulation agreement	Unknown			3	Bachelor of Artificial Intelligence Bachelor of Cyber Security Bachelor of Civil Engineering (Hons) Bachelor of Electrical and Electronics Engineering (Hons) Bachelor of Mechanical Engineering (Hons) Bachelor of Mechatronics Engineering (Hons) Bachelor of Software Engineering (Hons) Bachelor of Computer Science Bachelor of Information Technology Bachelor of Cyber Security Bachelor of Nursing
	3. Asia Pacific Institute of Information Technology (APIIT)	Articulation agreement	Unknown			3	Bachelor of Commerce Bachelor of Business
	4. National Institute of Business Management (NIBM)	Articulation agreement	LKR 300,000 per year			1-2 2	Bachelor of Business Analytics Bachelor of Software Engineering (Hons)
	5. Royal Institute of Colombo (RIC)	Articulation agreement				Unknown 4	Bachelor of Information Technology Bachelor of Civil Engineering Bachelor of Electrical & Electronics Engineering (Hons) Bachelor of Mechanical Engineering Bachelor of Mechatronics Engineering Bachelor of Environmental Engineering

La Trobe University	Sri Lankan Institute of Information Technology (SLIIT)	Offshore partnership / Articulation agreement	Unknown	UG	FT	Unknown	Bachelor of Civil Engineering (Hons) Bachelor of Information Technology
University of Newcastle Australia	Sri Lankan Institute of Information Technology (SLIIT)	Offshore partnership / Articulation agreement	Unknown	UG	FT	Unknown	Bachelor of Information Technology
William Angliss Institute	Sri Lankan Institute of Information Technology (SLIIT)	Offshore partnership / Articulation agreement	Unknown	UG	FT	Unknown	Bachelor of Tourism and Hospitality
Macquarie University	Sri Lankan Institute of Information Technology (SLIIT)	Offshore partnership / Articulation agreement	Unknown	UG	FT	Unknown	BEng (Hons) in Electronic Engineering BEng (Hons) in Telecommunications Engineering BEng (Hons) in Mechatronics Engineering BEng (Hons) in Mechanical Engineering
James Cook University	Sri Lankan Institute of Information Technology (SLIIT)	Offshore partnership / Articulation agreement	Unknown	UG	FT	Unknown	BEng (Hons) Major- Civil Engineering BEng (Hons) Major- Mechanical Engineering BEng (Hons) Major- Electrical and Electronic Engineering BEng (Hons) Major- Electronic Systems and Internet of Things Engineering
University of Western Australia	Sri Lankan Institute of Information Technology (SLIIT)	Offshore partnership / Articulation agreement	Unknown	UG PG	FT	Unknown Unknown	Bachelor of Commerce Bachelor of Science (Computer Science) Bachelor of Science (Computer Science and Cyber Security) Bachelor of Environmental Design (Landscape Architecture or Architecture) Master of Architecture Master of Landscape Architecture
Western Sydney University	Sri Lankan Institute of Information Technology (SLIIT)	Offshore partnership / Articulation agreement	Unknown	UG	FT	Unknown	Bachelor of Construction Management Bachelor of Architectural Design and Master of Architecture (Urban Transformation) Bachelor of Accounting Bachelor of Business in Economics/Human Resource Management/Management/Marketing/Applied Finance and Sport Management

Griffith University	<p>1.Sri Lankan Institute of Information Technology (SLIIT)</p> <p>2.National Institute of Business Management (NIBM)</p>	<p>Offshore partnership / Articulation agreement</p> <p>LKR 225,000 per year</p>	Unknown	UG	FT	Unknown	<p>Bachelor of Information Technology</p> <p>Bachelor of Business</p> <p>Bachelor of Commerce (Accounting)</p> <p>Bachelor of Commerce (Economics)</p> <p>Bachelor of Commerce (Finance) Bachelor of International Business</p> <p>Bachelor of Intelligent Digital Technologies</p> <p>Bachelor of Engineering (Hons) – Civil Engineering</p>
University of South Australia	Colombo International Nautical and Engineering College (pvt) Ltd (CINEC)	Offshore partnership / Articulation Agreement	Unknown	UG	FT	4	<p>Bachelor of Engineering (Hons) – Civil/Civil and Construction Management/Civil and Structural</p> <p>Bachelor of Engineering (Hons) – Electrical and Electronic / Electrical and Mechatronic</p> <p>Bachelor of Engineering (Hons) – Mechanical/Mechanical and Mechatronic/Mechanical and Advanced Manufacturing</p>
Queensland University of Technology Australia)	<p>1.National Institute of Business Management (NIBM)</p> <p>2.Sri Lanka Institute of Information Technology</p>	Offshore partnership / Articulation Agreement	Unknown	UG	FT	Unknown	<p>Bachelor of Design (Fashion)</p> <p>Bachelor of Creative Industries (All majors)</p> <p>Bachelor of Fine Arts (Film, Screen & New Media)</p> <p>Bachelor of Communication (All majors)</p> <p>Bachelor of Business (Accountancy/Advertising/ Economics/Finance/HRM/ International Business/ Management/Marketing/Public Relations)</p> <p>Bachelor of Engineering (Hons) in (Civil/Computer and Software Systems/Electrical/ Electrical and Aerospace/ Mechanical/Mechatronics/ Medical/Process Engineering)</p> <p>Bachelor of Urban Development (Hons) Quantity Surveying and Cost Engineering</p> <p>Bachelor of Information Technology- Computer Science</p> <p>Bachelor of Information Technology- Information Systems</p>



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