



Higher Education Industry Experts

TNE Landscape and Opportunities Research for NEAS:

**AUSTRALIAN EDUCATION
PROVIDERS OPERATING INTERNATIONALLY**



Prepared for



by Edified



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Executive Summary

NEAS is the global leader in quality assurance for the English language teaching community. It promotes the recognition of quality in education and training for the benefit of students, parents, education agents, teachers and professional staff. NEAS is well-regarded by regulatory and government bodies for the important role and contribution it makes towards ensuring quality and standards across the industry.

Now, NEAS has the opportunity to expand the scope and reach of its quality assurance frameworks by expanding its engagement with transnational education (TNE) providers. Engaging with Australian and New Zealand TNE providers and their offshore English pathways complements the mission of NEAS in multiple ways. It advances global quality assurance in the recruitment of students who seek to improve their language acquisition prior to enrolling in an academic program abroad, it supports the achievement of quality outcomes for providers that offer offshore Academic and English language pathway programs, and it empowers end-to-end knowledge partnerships across critical TNE stakeholders such as Ministries of Education, local education bureaus, partner institutions, education agencies, as well as the in-country English language teaching community.

NEAS should seize the opportunity to implement cost-effective methods in order to undertake enhanced annual quality assurance (QA) reviews for education providers operating offshore, with a focus on the ASEAN region initially and extending this to locations where Australian TNE is strong (China, for example). Expanding into the TNE realm will present NEAS an opportunity to renew and reinvigorate its toolkit of QA activities to ensure reviews of TNE activities are fit-for-purpose. The activities of these QA reviews should include education provider benchmarking in market, peer review, documentation reviews as well as virtual visits to compliment site visits in-country.

Applying the well-regarded NEAS tick to Australian and New Zealand TNE providers via a robust and relevant quality assurance verification framework addresses several stated NEAS principles and goals. It improves industry capacity, encourages best practice, delivers greater customer (student, parent, agent) satisfaction, and enhances the service quality students experience from undertaking part or all of their academic qualifications overseas.

NEAS Principles & Goals

<p>Quality Assurance</p> <ul style="list-style-type: none">• Principle: Quality is at the heart of everything we do.• Goal: Build industry capacity through strategic interventions that foster growth, sustainability, innovation and best practice in English Language Teaching• Goal: Deliver a total customer satisfaction promise through a member oriented service culture• Goal: Enhance service quality to ensure competitive advantage and complementary positioning with other Quality Assurance organisations	<p>Scope and Recognition</p> <ul style="list-style-type: none">• Principle: We are the global leaders and innovators in quality assurance.• Goal: Grow and maintain membership globally• Goal: Grow and maintain the NEAS brand portfolio to encompass a depth and breadth of products and services, thereby increasing recognition, reputation and global awareness of NEAS• Goal: Take a global leadership role in the driving of quality in teaching and learning	<p>Partnerships</p> <ul style="list-style-type: none">• Principle: Strategic engagement underpins our services. We position for purpose.• Goal: Engage in complementary relationships with Commonwealth and other government regulators for the benefit of learners and providers• Goal: Achieve productive working relationships with complementary peak bodies• Goal: Lead global network of quality assurance organisations	<p>People and Culture</p> <ul style="list-style-type: none">• Principle: We strive for excellence, we listen, we learn. We are here to make a difference.• Goal: Ensure all assets and resources within NEAS are aligned and support NEAS mission• Goal: Empower stakeholders through professional development, continuous engagement, reflective practice and open communication• Goal: Communicate and demonstrate international leadership in a culture of quality
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NEAS is the Global Leader in Quality Assurance for the English Language Teaching Community.

NEAS seeks to provide value to existing partners. The success and satisfaction of partner institutions will lead to a greater profile for NEAS and assist in its efforts to garner further partners. NEAS has the opportunity to move away from a market or country-based model and move to a provider-based approach. A key account management style approach to partner institutions will provide greater value to long-standing partners. Moreover, by providing greater value and options, NEAS will improve partner retention and thus reduce risk.

Whilst this approach is firmly grounded and contained within the context of the international strategy, it has the potential to translate into and dovetail with the NEAS Australian strategy. There is an inherent weakness in the Australian strategy as NEAS does not partner with all of the education providers that are capturing the majority of student business (that is student weeks with Chinese students with the top four universities Monash, Melbourne, Sydney and UNSW) in Australia. The international strategy could provide an element of support and momentum that is fed back into the Australian strategy in order to further develop endorsement opportunities and a greater expansion of the partnership base.

Unequivocally, NEAS presents best practice in global quality assurance for English Language Teaching. It is innovating in quality assurance mechanisms for Welfare of Under 18s, Online Delivery, ELT Qualifications, Foundation Programs, High School, vocational education and Higher Education through the lens of the International Student experience. NEAS will be extending this experience to endorsing Education Agents in 2020, further supporting endorsed centres, students and parents to make the right choices in international education. NEAS has 30 years of success in defining and defending the quality of the education experience for international students. Increasingly, the first experience for international students with an overseas education is starting at home through TNE programs. Engaging with the quality of these TNE programs as well as the English language pathways to these offshore programs will enable NEAS to reorient QA reviews in order to provide a comprehensive and fit-for-purpose audit of VET and Higher Education TNE programs. Subsequently, this expansion into TNE will grow the brand of NEAS and open opportunities for further quality assurance projects at home and abroad.

Objectives of this Report

- Identify NEAS partner institutions and their TNE activities in ASEAN and beyond
- Identify non-NEAS institutions and their TNE activities in ASEAN and beyond
- Identify the primary feeders into identified TNE programs
- Identify English language entry standards and quality provision of identified TNE programs
- Clarify what NEAS can provide to institutions prior to TEQSA or ASQA audits

The objectives of this report dovetail with key goals outlined in the international chapter of the NEAS Operational Plan. Specifically, Goal 4: Increase NEAS brand traction in the ASEAN market for ELT endorsement and its 4 sub-goals are relevant as they provide context to this report.

NEAS OPERATIONAL PLAN (INTERNATIONAL)

Goal 4: Increase NEAS brand traction in the ASEAN market for ELT endorsement

- 4.1 Conduct research to determine extent of Australian university offshore partnerships and articulations
- 4.2 Partner with Australian Universities to quality assure their transnational and offshore operations.
- 4.3 Partner with UECA, Austrade, TEQSA and ASQA to offer quality assurance to international partners in ASEAN.
- 4.4 Partner with local peak bodies to conduct local quality assurance in ASEAN (with an initial focus on Malaysia, Philippines, Indonesia) to partners and articulators of Australian NEAS members.

To fulfil the aforementioned goals, this report initially breaks down Years 1, 2 and 3 of the NEAS Strategy against which institutions fit into this 3-year period. Key NEAS partners institutions feature in Years 1 and 2 for implementation. These key partners, such as UTS, UNSW and UoW will provide positive examples for the remainder of NEAS partner institutions which will subsequently occur in Years 2 and 3. A potential rhythm to implementation would see 3 partner institutions onboarded each year over 3 years, leading to 9 institutions heading at the end of Year 3. Non-NEAS partner institutions are more likely to fit across Years 4 and 5 of the Strategy, once sufficient momentum and success has been achieved across core NEAS partner institutions.

The vision for NEAS over the next three years is to continue to advance education through independent quality assurance in English Language Teaching. To achieve its mission of supporting the achievement of quality outcomes for international education and training globally, NEAS is investing in research to further map the ELT landscape in Australia and ASEAN. Over the course of the next three years, NEAS will continue to invest in promoting Australian International Education and Quality Assurance at international conferences and events, and professional development activities for English language teachers in the ASEAN region.



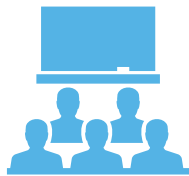
NEAS Quality Centres Offshore

As the Australian higher education sector pursued internationalisation strategies in the form of opening branch campuses and investing in offshore transnational education opportunities, NEAS was increasingly approached by Australian-owned and/or affiliated international English language centres in South East Asia needing internationally recognised independent accreditation or quality assurance. In 2006, NEAS commenced a pilot program with three Australian owned providers in Indonesia, Cambodia and Vietnam. Each of these providers were aware of the rigour of NEAS quality standards and processes and the strength of the NEAS brand.

Working collaboratively with each of the pilot providers, NEAS recognised the importance of maintaining its strengths and applied the same rigorous quality standards and processes it applies to its domestic member centres to the international centres. Maintaining consistency across Australian and international quality assurance standards and provision is vital in the efforts to protect the NEAS brand. NEAS recognises the importance of growing collaborative activities across these international centres so that quality standards can be applied consistently across the board.



Seven
countries



Ten
education providers



55
campuses / centres



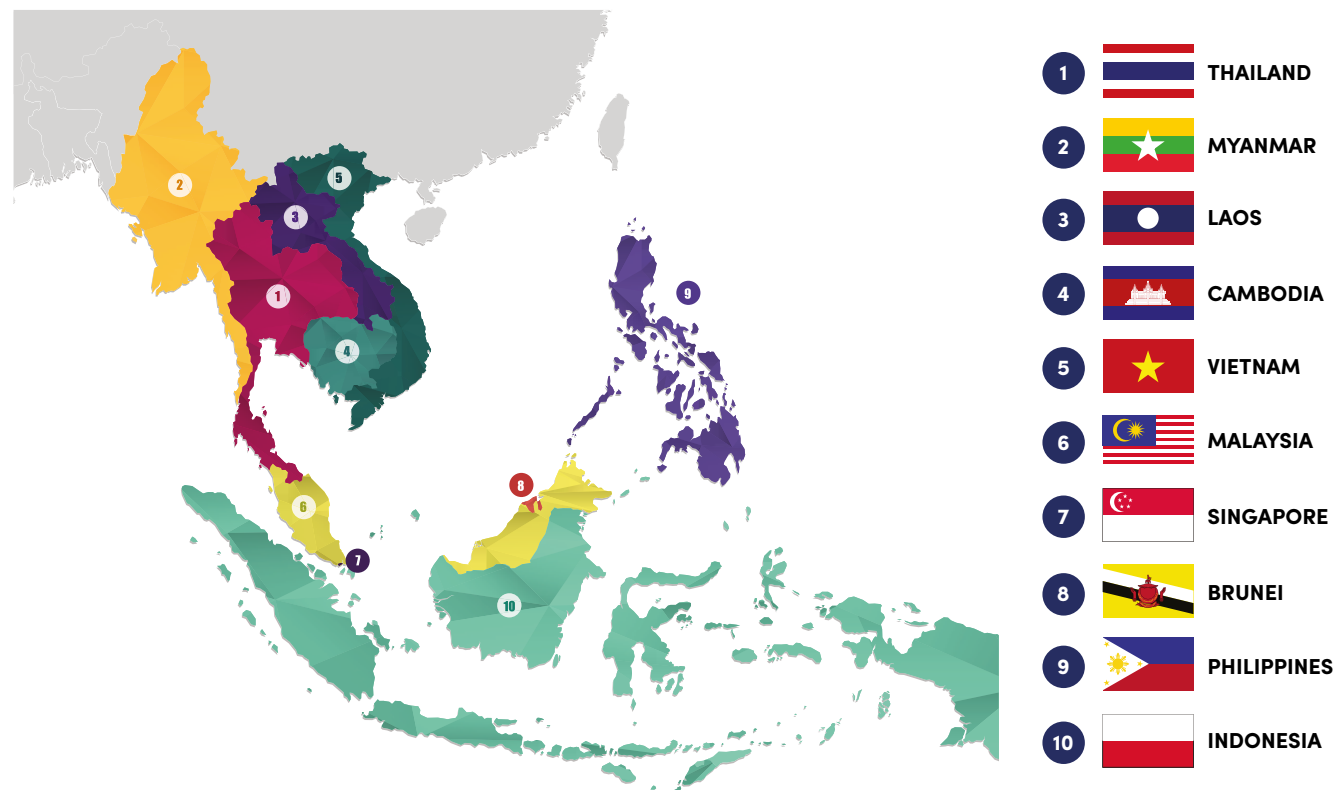
Over 45
unique courses



NEAS Activity across ASEAN

NEAS has been involved with transnational education (TNE) for over a decade. NEAS activity across the ASEAN region has been supported through the establishment of quality centres across six key ASEAN countries: Cambodia, Indonesia, Malaysia, Singapore, Thailand and Vietnam.

As outlined in the Operational Plan (International), NEAS has a strategy to initially focus on Malaysia, Philippines, Indonesia and then extend to key geographical locations that are clusters for Australian Transnational Education (for example, China).



CAMBODIA

NEAS has five quality endorsed sites in Cambodia, all of which are with Australian Centre for Education (ACE). Endorsed courses vary across the five centres and cover seven different programs offered at ACE Cambodia centres.



INDONESIA

NEAS has four quality endorsed sites in Indonesia, three of which are with IALF and one with UIG English. The bulk of quality endorsed subjects are with IALF. UIG English is the exclusive provider of UTS:Insearch Academic English programs in Indonesia. UIG English have campuses across Jakarta and within the Universitas Multimedia Nusantara (UMN)



MALAYSIA

NEAS has three quality endorsed sites in Malaysia, all of which are with ELS. Certified Intensive English Programme (CIEP) is the only endorsed course across the ELS campus network.



SINGAPORE

NEAS has one quality endorsed location in Singapore with James Cook University's local branch campus. There are three endorsed courses.



Mahidol University
International College

THAILAND

NEAS has one quality endorsed campus in Thailand with Mahidol University – International College (Preparation Centre for Languages and Mathematics). There are four endorsed courses.



VIETNAM

NEAS has 41 quality endorsed campuses in Vietnam across three education providers, ACET, RMIT Vietnam, and VUS English Centres. Two of these providers are transnational education programs for Australian Universities, one endorsed (UTS:INSEARCH co-owns ACET) and one with a non-NEAS endorsed Australian university RMIT.

NEAS Activity beyond ASEAN



UNITED ARAB EMIRATES (UAE)

NEAS has one quality endorsed site in UAE with the University of Wollongong Dubai campus.

Summary of NEAS Quality Centre Programs Offshore

Summary of NEAS Quality Centre Programs Offshore

Quality Centre – Location (Campuses)		
ACE – Cambodia (5)		
Children’s Program	Young Learner’s Program	General English Program
IELTS Preparation Program	IELTS Orientation Program	Business English Program
English for Academic Purposes		
IALF – Indonesia (3)		
Academic Pathway Program – Foundation English Language Training (FELT)	Academic Pathway Program – Basic English Language Training (BELT)	English for Academic Purposes (EAP)
General English	Young Learners Program	IELTS Intensive Preparation (IELTS Kursus Kilat)
English for Specific Purposes (Group)	IELTS Preparation	IELTS Preparation Plus
Intensive English Preparation	Intensive English Preparation for Overseas Study 1 & 2	Study Preparation 1 – 4 / 5- 8 / 9 – 12
IELTS Preparation (Semi-Intensive)	IELTS Preparation (Non-Intensive)	Advanced English A – D
IELTS Preparation (Modular)		
UIG English – Indonesia (1)		
UTS Insearch Academic English		
ELS – Malaysia (3)		
Certified Intensive English Programme (CIEP)		
James Cook University – Singapore (1)		
English Language Preparation Program (ELPP)	LS0410 – Level 4 (UG)	LS0411 – Level 4 (PG)
Mahidol University – Thailand (1)		
General English PC 1	General English PC 2	EAP P3
EAP P4		
ACET – Vietnam (5)		
Preparation for Academic English Levels 1-4 (PAE 1-4)	Academic English Level 1A-3B (AE 1A-3B)	First Steps Levels 1A-4B (FS 1A-4B)
SkillSet	IELTS Preparation	
RMIT – Vietnam (2)		
English for Academic Purposes	English for High School	
VUS English Centres – Vietnam (34)		
Smart Kids (4-6)	Super Kids (6-11)	Young Leaders (11-15)
International Test Preparation (EAP) IELTS/TOEFL/TOEIC	Interactive English (18-22)	Practical English Conversation ITalk (22+)
University of Wollongong – Dubai (1)		
English Language (part-time)	IELTS Intensive	IELTS Intensive Masterclass



NEAS Partners and TNE

It will likely be necessary that any TNE programs or their pathways that undergo a NEAS QA process will require feedback from staff and students in relation to actual program delivery. Additional support may be needed for teachers in sites where managers may not have access to staff with the same levels of experience as in Sydney.

For example, it is not always clear what qualifications are required of teachers at different offshore sites, whether a degree is required or what is considered an acceptable TESOL qualification. Where a TNE partner provider offers additional locally developed courses which are not subject to the Australian institution’s development and review processes, there may be discrepancies in quality standards, with the home institution possibly being vulnerable to association with the quality of its recognised English courses taught offshore. It will be worthwhile to consider a common review and evaluation process across TNE partner sites to identify discrepancies and facilitate comparison. In addition, matters such as management, governance and strategy could be considered in subsequent stages of the quality endorsement process if deemed necessary and appropriate.

It will be necessary to map out identified TNE programs against the established NEAS Quality Assurance Framework.

Quality Principle	Key Areas Underpinning QA
Teaching, Learning and Assessment	<p>Does the TNE course design supports quality learning outcomes?</p> <p>Do TNE teachers have appropriate training and experience for the courses they deliver and assess?</p> <p>Are TNE students enrolled in courses and levels that reflect their language proficiency and learning goals?</p> <p>Does TNE course delivery, assessment and teaching approaches optimise outcomes for students?</p> <p>Are TNE students encouraged to take control of their language learning?</p> <p>Is the evaluation of TNE courses regular and rigorous?</p>
The Student Experience	<p>Is the application and enrolment process is clear and easy to follow for students, parents and agents?</p> <p>Do TNE students have information and support needed to adjust to living and studying in Australia?</p> <p>Are TNE students provided with support to be actively involved in their learning program?</p> <p>Is stakeholder feedback routinely integrated into the TNE centre’s processes and are they designed to enhance the student experience?</p>
Resources and Facilities	<p>Do the TNE centre’s premises reflect a professional workplace?</p> <p>Do the TNE teaching and study spaces facilitate language learning?</p> <p>Do the TNE student facilities and services foster community?</p> <p>Does the TNE centre have resources for each course to meet a range of student learning needs, styles and preferences?</p> <p>Do TNE teachers have access to space and resources to create classroom learning materials to meet student needs?</p>
Administration, Management and Staffing	<p>Does the TNE centre have an organisational structure that effectively supports the provision of services to students?</p> <p>Does the TNE centre recruit staff to meet regulatory requirements as well as the identified needs of the home institution?</p> <p>Does the TNE centre utilise effective systems for the dissemination of information to stakeholders?</p> <p>Does the TNE centre support a performance and development culture for all staff?</p>
Promotion and Student Recruitment	<p>Is TNE promotional material ethical, accurate and consistent?</p> <p>Is essential information about the TNE centre readily accessible?</p> <p>Are staff involved in promoting the TNE centre?</p> <p>Does the TNE centre make explicit its quality assurance commitment?</p>

KEY TAKEAWAY

The Quality Principles outlined can be applied to UTS:INSEARCH as the initial pilot in Year 1, followed by UNSW, Wollongong, Curtin, Tasmania, Newcastle in Year 2 and 3.

UTS:INSEARCH was first endorsed by NEAS in 1987 and will receive an award for 30 years of continuous commitment to Quality Assurance in 2020.. According to 2018 Australian Department of Education figures, UTS:INSEARCH have significant TNE engagement. UTS:INSEARCH have nearly 1,900 students enrolled in pathway programs taught offshore. UTS:INSEARCH maintains programs in six countries overseas, of which three are in the ASEAN region. The vast majority of pathways are in the field of Management and Commerce.

**Table 1: UTS:INSEARCH overseas student enrolments and field of education
– Offshore by mode of attendance in 2018 (Australian Department of Education)**

Providers HE	Broad Fields of Education	Offshore			
		Distance	On campus	Multi-modal	Total
UTS:INSEARCH	Creative Arts				
	Engineering and Related Technologies	6			6
	Information Technology	10			10
	Management and Commerce	1,853			1,853
	Natural and Physical Sciences				
	Total	1,869			1,869

UTS:INSEARCH would be the first institution for NEAS to engage on a global quality assurance endeavour. They have expressed interest to collaborate with NEAS in holding an event in 2020 in Indonesia. UTS:INSEARCH is a member of TEFLIN (Association of Teaching English as a Foreign Language in Indonesia), and there's potential to do this in 1st semester of 2020.



Table 2: UTS:INSEARCH TNE


Providers HE	Broad Fields of Education	Total
Sri Lanka	UTS:Insearch Sri Lanka	Academic English for Foundation
		Academic English for Diploma
		Academic English for Bachelor / Masters
		Foundation Studies
		Diploma of Business
		Diploma of Engineering
		Diploma of Information Technology
China	EIC Academy SILC (Sydney Institute of Language and Commerce) with Shanghai University	Academic English (1 – 5)
		Academic English
		Diploma of Business
Indonesia	UIG English UIC College (UniSadhuGuna)	Academic English
		University English Preparation
		Diploma of Business
		Diploma of Engineering
		Diploma of Information Technology
Korea	IEN Institute	Academic English
		Diploma of Business
		Diploma of IT
Vietnam	ACET	Academic English
Myanmar	AEC English Centre	Academic English
		University English Preparation

UTS:INSEARCH PARTNER NOTES

In Sri Lanka, UTS:INSEARCH use the Versant English Placement Test (VEPT). It is provided for free to prospective students. Applicants for UTS Foundation Studies in Colombo are required to have a UTS:INSEARCH English of AE3, or an IELTS 5.5. For the UTS:INSEARCH Diploma course in Colombo, applicants are required to have a UTS:INSEARCH English of AE4 or IELTS of 6.

UIG English (Indonesia) promotes a UTS:INSEARCH downloadable English app.

UIC College (Indonesia) have 4 campuses. They require an SMU 3 with minimum 70% average for academic subjects OR successful completion of the UIC Foundation Program with minimum pass grade in all subjects + IELTS: 6.0 overall with 6.0 in writing or UTS:INSEARCH AE4 with pass grade.



Test your English
by downloading
the UTS Insearch
English app

Download on the
App Store

GET IT ON
Google Play

Get it from
Microsoft

ACET (Vietnam) publish equivalencies of UTS:INSEARCH English against proficiency levels and IELTS equivalencies.

AEC (Myanmar) was established in 2015 and is the exclusive provider of UTS:INSEARCH English in Myanmar.

	Entry Level	UTS: Insearch (100 hours)	IELTS classes (100 hours)	IELTS outcome Approximate	CEFR	First Steps (100 hours)
Advanced	6.5 +	6B 6A	IELTS Master	7.0	C1	FS6B (IFT) FS6A (IFT)
Pre - Advanced	6.0	5B 5A	IELTS Advanced	6.5	B2/C1	FS5B FS5A
Upper - Intermediate	5.5	4B 4A	IELTS Diploma	6.0	B2	FS4B FS4A
Intermediate (+)	5.0	3B 3A	IELTS Plus	5.5		
Intermediate	4.5	2B 2A	IELTS Foundation	5.0	B1	FS3B FS3A
Pre - Intermediate	4.0	1B 1A			A2	FS2B FS2A
Elementary		PAE 3 PAE 2			A1	FS1B FS1A
Beginner		PAE 1			Pre - A1	

Table 3: UTS:INSEARCH Academic English Entry Requirements

Entry requirements				Level	Topics studied	Further studies
	IELTS	TOEFL iBT	PTE	AE1	<ul style="list-style-type: none">• Our World• Lifestyle	Progress to level AE2
Overall	4.0	25	22			
Writing ≥	-	-	22			
All Skills ≥	3.5	-	-			
	IELTS	TOEFL iBT	PTE	AE2	<ul style="list-style-type: none">• People• Society	Progress to level AE3
Overall	4.5	35	32			
Writing ≥	-	-	-			
All Skills ≥	4.0	7	22			
	IELTS	TOEFL iBT	PTE	AE3	<ul style="list-style-type: none">• Business• Globalised World	Direct Entry to:
Overall	5.0	45	38			<ul style="list-style-type: none">• UTS Foundation Studies• UTS Insearch Extended diploma
Writing ≥	-	-	-			OR
All Skills ≥	4.5	9	32			Progress to level AE4
	IELTS	TOEFL iBT	PTE	AE4	<ul style="list-style-type: none">• The Internet Society• Cities	Direct Entry to:
Overall	5.5	55	46			<ul style="list-style-type: none">• UTS Insearch Accelerated or Standard diploma
Writing ≥	-	-	-			OR
All Skills ≥	5.0	12	38			Progress to level AE5
	IELTS	TOEFL iBT	PTE	AE5	<ul style="list-style-type: none">• Organisations• Leadership in a Globalised World	Direct Entry to:
Overall	6.0	75	54			<ul style="list-style-type: none">• UTS Undergraduate degree
Writing ≥	5.5	18	46			<ul style="list-style-type: none">• UTS Postgraduate degree
All Skills ≥	5.0	12	38			
	IELTS	TOEFL iBT	PTE	AE6	<ul style="list-style-type: none">• Research• Sustainability• Information	Direct Entry to:
Overall	6.5	85	60			<ul style="list-style-type: none">• UTS degrees requiring IELTS 7.0
Writing ≥	6.5	21	-			
All Skills ≥	6.0	21	-			



UTS PATHWAYS AND ARTICULATION PARTNERS – ASEAN REGION



According to 2018 Australian Department of Education figures, UTS has significant TNE engagement with 1,600 students undertaking part of their degrees offshore.

**Table 4: UTS overseas student enrolments and field of education
– Offshore by mode of attendance in 2018 (Australian Department of Education)**

Providers HE	Broad Fields of Education	Offshore			
		Distance	On campus	Multi-modal	Total
UTS	Architecture and Building		39		39
	Creative Arts		54	<5	56
	Education		10		10
	Engineering and Related Technologies	<5	362	37	400
	Health		44	<5	45
	Information Technology		146	<5	147
	Management and Commerce		922	7	929
	Mixed Field Programmes				
	Natural and Physical Sciences		51	<5	52
	Not a combined course		<5		<5
	Society and Culture	7	12	<5	20
	Total	7	1,552	42	1,601

The University maintains a variety of international pathways where students undertake a year or two of study overseas before transferring to UTS under prescribed articulation and credit transfer arrangement. Developing international pathways plays an integral role in meeting the aims and objectives of the UTS's internationalisation strategy by developing partnerships with overseas institutions to facilitate academic pathways to UTS.

Table 5: UTS Pathway and Articulation Partners in Malaysia

Institution	Course Name
Help University College	Diploma of Information Technology Bachelor of Business
Help College of the Arts and Technology (HELPCAT)	Diploma of Electrical and Electronic Engineering Diploma of Mechanical Engineering
Taylors University	Bachelor of Arts Bachelor of Business Bachelor of Mass Communication
Taylors University College	Diploma of Business Bachelor of Business Bachelor of Arts
Inti College Subang Jaya	Diploma of Information and Computer Technology
MARA High Skills College (KKTM)	Diploma in Advanced Manufacturing Engineering
Tunku Abdul Rahman University College (TAR)	Diploma in Business Studies Advanced Diploma in Business Studies
Universitas Multimedia Nusantara (UMN)	Bachelor of Computer Science
University of Kuala Lumpur	Diploma of Engineering Technology Bachelor of Engineering Technology

Table 6: UTS Pathway and Articulation Partners in Indonesia

Institution	Course Name
Unisadhu Guna International College*	Diploma of Business Diploma of Information Technology Diploma of Engineering
University of Brawijaya	Master of Civil Engineering Master of Water Resources Engineering

*Unisadhu Guna International College sits within the same umbrella organisation as UIC College, which is a NEAS Quality Centre in Indonesia.



Table 7: UTS Pathway and Articulation Partners in Thailand

Institution	Course Name
Assumption University	Bachelor of Business
Mahidol University	Bachelor of Materials Science

Table 8: UTS Pathway and Articulation Partners in Thailand

Institution	Course Name
Ho Chi Minh City University of Technology	Bachelor of Engineering
Vietnam University of Commerce	Bachelor of Accounting Bachelor of Finance and Banking



KEY TAKEAWAY

A large number of these education providers, particularly those in Malaysia and Indonesia work with a host of Australian universities and could be an additional pool of offshore institutions that might welcome endorsement by NEAS as several also offer English preparation and top up programs. Building on success with Transnational QA in ELT, NEAS would be in a strong position to extend this offering to QA Reviews and/or Audit to key pathway and articulation providers that have large enrolments of students targeting study in Australia.



UNSW GLOBAL



UNSW Global

UNSW Global is a long-standing partner of NEAS, initially endorsed in 1991 and re-endorsed in 2019 after ceasing in 2013. UNSW Global offer 11 TNE Foundation Studies programs across China and Indonesia. In previous years, programs were also offered in Laos and in Malaysia, but those campuses have subsequently closed. Approximately 700 students are enrolled in UNSW Global TNE Foundation programs.

Provider	Location
AOJI International Institute	Beijing, China
Jiangsu College for Int'l Ed	Nanjing, China
Nanjing Foreign Language School	Nanjing, China
Nanjing Normal University Affiliated High School	Nanjing, China
Shanghai Int'l Studies University	Shanghai, China
Suzhou #3 Middle School	Suzhou, China
Jiangsu Xishan Senior High School	Wuxi, China
Xi'an Jiaotong University Affiliated High School	Xi'an, China
Zhengzhou Foreign Language School	Zhengzhou, China
Hebei International Education Service Centre	Shijiazhuang, China
UNIPREP	Jakarta, Indonesia

UNSW Global's success in China are grounded by its strong relationships with three key government entities that are involved with its TNE endeavours.

Jiangsu Education Bureau (JESIE) is a very active provincial-level international education bureau which administers English language programs and Pathways to overseas institutions in high schools across the province. The bureau actively recruits foreign teachers through online portals. <https://www.opportunity-china.com/jesie-jiangsu/>

Hebei Education Bureau has a close working relationship with UNSW Global and acts as an education agent for a host of Australian institutions.

Dongfang International is an arm of the China Scholarship Council and have been cooperating with UNSW Global for over a decade with TNE in China.

AOJI International is a leading education agent in China with an academic campus in the suburbs of Beijing.

In Indonesia, UNSW Global has worked with UniPrep on delivering Foundation Studies pathways for over a decade. UniPrep is part of the Unisadhu Guna and UIC College group, which is a partner of NEAS.

The education centres identified above provide English preparation for students prior to entry into UNSW Global TNE Foundation programs.

Over the last two years, UNSW Global has been administering an assessment examination offshore known as the Scientia Test. This unique test is designed for offshore year 11 and 12 students and identifies those who excel at STEM subjects (Science, Technology, Engineering and Mathematics) and who show aptitude to be successful at university. Its intent is to hook prospective students into applying and accepting a UNSW Global Foundation studies program (on or offshore) at an earlier stage. Quality assurance mechanisms surrounding the Scienita Test may be an area for NEAS to explore further.

It is likely that UNSW will begin offering further TNE programs in Indonesia following positive momentum established through the Australia-Indonesia Free Trade Agreement (FTA). UNSW will potentially consider teaching part or all of a Diploma program in Indonesia in two to three years from now.



The University of Wollongong (UoW) is one of Australia's most active in TNE, with a particular focus in Malaysia and the UAE and a key member of NEAS, endorsed first in 1991 and recipient of a 25 years award for a continuous commitment to Quality Assurance in 2018. Over 7,600 students are undertaking UoW programs offshore. UOW College delivers Higher Education, academic pathway, English language and Vocational Education and Training (VET) programs from various University of Wollongong campuses.

Table 9: Wollongong Offshore Enrolments

Providers HE	Broad Fields of Education	Offshore			
		Distance	On campus	Multi-modal	Total
University of Wollongong	Agriculture, Environmental and Related Studies				
	Creative Arts		136		136
	Education	7	19		26
	Engineering and Related Technologies	<5	443		444
	Health	9	38		47
	Information Technology		2,086		2,086
	Management and Commerce	<5	4,462		4,463
	Natural and Physical Sciences	<5	22		25
	Not a combined course		41		41
	Society and Culture	5	414		419
	Total	26	7,659		7,685
UOW College	Information Technology		<5		<5
	Management and Commerce		5		5
	Total		8		8



UOW MALAYSIA

UOW Malaysia KDU is part of the University of Wollongong Australia's global network. In November 2018, KDU entered into a strategic partnership with UOW Global Enterprises, a wholly-owned subsidiary of University of Wollongong Australia. Subsequently, in November 2019, the name of the college and university colleges were changed to reflect the stewardship of the University of Wollongong and they are now known as UOW Malaysia KDU. The University of Wollongong is committed to becoming a pre-eminent provider of higher education in Malaysia.

For over 30 years, KDU College has had a long history of providing accessible, quality, tertiary education to Malaysia, and the surrounding regions. UOW plans to develop the UOW Malaysia KDU University Colleges at Glenmarie and Penang into universities within the next five to seven years. In addition, from January 2020 UOW Malaysia KDU will offer undergraduate and postgraduate programmes at the new Batu Kawan campus, to meet the emerging needs of that Malaysian region.

A wide variety of programs are offered at UoW Malaysia KDU, from Cambridge A-Levels to Foundation Studies, as well as core Undergraduate and Postgraduate programs in Arts, Business, Built Environment, Engineering, and Health Sciences.

UoW Malaysia KDU campus commitment to Learning and Teaching is outlined at <https://www.uowmkdu.edu.my/about-uow-kdu/teaching-learning/>



UOW ACROSS ASEAN

As well, the University of Wollongong has TNE programs in Singapore through the PSB Academy and Singapore Institute of Management (SIM). At the PSB Academy, half a dozen UoW Bachelor of Commerce programs are offered. Through SIM, which UoW has been in partnership with for over 10 years, undergraduate programs in Computer Science, Business Information Systems and Psychology are offered.



UOW ACROSS GREATER CHINA

Through the Community College of City University of Hong Kong, UOW offers top up programs for students to complete four undergraduate degrees across Business, Communication, Computer Science and Psychological Science. These programs are governed by the Hong Kong Council for Accreditation of Academic and Vocational Qualifications.



Through the Central China Normal University, UoW has established a joint institute offering a Master of Computer Science and a Master of Engineering.



UOW DUBAI

For 25 years, UoW has established a significant TNE presence in Dubai, United Arab Emirates (UAE). Foundation Studies, Undergraduate and Postgraduate programs are all offered in Dubai. This site is endorsed by NEAS.

A variety of English Language courses are on offer at UOWD College.

ENGLISH LANGUAGE COURSES

UOWD College offers a range of English language programs structured around our English Language Framework.

The framework consists of three main stages and is designed to be flexible while rigorous. Our English programs are mapped to the framework to ensure that students are correctly placed to maximise their language development.

All our language courses are delivered by native-speaking and highly qualified instructors.



All degree programs offered by UOWD are accredited by the Ministry of Education – Higher Education Affairs through the Commission for Academic Accreditation (CAA). This accreditation ensures that degrees received by UOWD graduates are recognised throughout the United Arab Emirates, the broader Gulf States region (GCC) and internationally for further education and employment in the private and public sectors.



The CAA accreditation validates UOWD's institutional standards in a number of key areas, including:

- Academic instruction and assessment
- Learning environment and resources
- Ongoing quality assurance
- Faculty and professional staff credentials
- Organisational governance
- Fiscal planning and responsibility.

The Office of Institutional Research leads UOWD's activities in relation to quality and accreditation. Further information on UOW Dubai quality and accreditation can be viewed at: <https://www.uowdubai.ac.ae/about-uowd/quality-and-accreditation>.



CURTIN UNIVERSITY



Curtin University

Curtin is a vibrant, global university with campuses in Perth, Singapore, Malaysia, Mauritius, and Dubai and partnerships with over 90 institutions worldwide. Over 7,500 students are enrolled in Curtin TNE programs overseas. Curtin English has been endorsed by NEAS since 1991.

Table 10: Curtin University Offshore Enrolments

Providers HE	Broad Fields of Education	Offshore			
		Distance	On campus	Multi-modal	Total
Curtin University of Technology	Agriculture, Environmental and Related Studies	<5	<5		<5
	Architecture and Building	<5	119		120
	Creative Arts	<5	319	<5	327
	Education	6	9	<5	16
	Engineering and Related Technologies	13	1,928	14	1,955
	Health	8	577	11	596
	Information Technology	<5	71		72
	Management and Commerce	82	3,725	108	3,915
	Natural and Physical Sciences	6	363	<5	372
	Not a combined course	5	90		95
	Society and Culture	7	248	<5	257
	Total	134	7,444	142	7,720



CURTIN MALAYSIA

Now in its 20th year, Curtin University was the first Australian university to establish a campus in Malaysia. It now enrolls 3,500 students from across the region at its East Malaysian campus in Sarawak. Programs are offered across Foundation Studies, Undergraduate and Postgraduate areas.

The Intensive English Program (IEP) at Curtin University Malaysia is delivered through their Department of Culture and Language Studies. Staff and their qualifications can be viewed at: <https://humanities.curtin.edu.my/departments/culturelanguagestudies/our-people/>

The IEP is designed to build practical English skills for general, academic or professional purposes. The mission of the IEP is to prepare students for university study in English by assisting students to:

- improve English proficiency in listening, reading, writing and speaking skills
- interact with English speakers in everyday and professional situations
- gain an awareness of the culture of Malaysian/Australian university life.

The IEP is committed to maintaining a professional teaching and administrative staff and to following ethical standards in all areas. The IEP is also dedicated to establishing supportive lecturer-student relationships, fostering an atmosphere of openness among cultures, and collaborating with the Curtin University Malaysia community to serve all students.

A Placement Test is administered to determine students' command of English. Based on the test results, students are placed at the appropriate IEP level.

There are four levels in the IEP, Level 1, Level 2, Level 3 and Level 4. The course consists of 20 contact hours per week. There are four intakes/terms a year. Each term comprises 10 weeks (9 teaching weeks + final week of exams).

CURTIN SINGAPORE

In Singapore, Curtin offers Diplomas, Undergraduate and Postgraduate programs across Business, Health Sciences and Communications. In addition, Curtin University offers English language preparation for entry into Curtin College and Curtin University through its Navitas English programs in Singapore. Curtin Singapore's website states that its international team of English teachers are experienced professionals with TESOL qualifications including CELTA, DELTA and Master qualifications.

CURTIN DUBAI

The Dubai campus of Curtin offers a wide range of Undergraduate programs across Communication, Business, Engineering, IT as well as an MBA at the Postgraduate level.



UNIVERSITY OF TASMANIA



University of Tasmania English Language Centre was first endorsed by NEAS in 1998 and rejoined NEAS in 2020 after ceasing in 2013. The University of Tasmania (UTAS) offers TNE programs in China (Hangzhou, Fuzhou and Shanghai), Indonesia, and Malaysia. Over 1,200 students are studying on a UTAS partner campus offshore.

Table 11: UTAS Offshore Enrolments

Providers HE	Broad Fields of Education	Offshore			
		Distance	On campus	Multi-modal	Total
University of Tasmania	Agriculture, Environmental and Related Studies	<5	<5		<5
	Architecture and Building		<5	<5	6
	Creative Arts	<5	<5	<5	9
	Education	<5	<5		<5
	Engineering and Related Technologies	17	27	22	66
	Health	25	20	<5	47
	Information Technology	<5	464	<5	469
	Management and Commerce	18	639	7	664
	Natural and Physical Sciences	<5	27	6	36
	Not a combined course	10	20	<5	34
	Society and Culture	10	6	6	22
	Total	91	1,211	57	1,359

UTAS TNE partners would likely be strong candidates for NEAS quality assurance endeavours. In 2019, an ABC Four Corners report highlighted that over 50% of international students admitted to UTAS in 2018 did not undertake formal testing of their English ability. Whilst the method by which those international students were admitted has been discontinued, quality control and governance concerns remain for students recruited on and offshore. UTAS are looking to implement specific English language courses and greater support for international students in areas of study where English language was integral to success.



Defining Transnational Education

The global education sector has witnessed a proliferation in transnational education endeavours and transnational higher education operates in a myriad of modes and forms around the world. Depending on the nature of the investment and programs involved, these international education endeavours can have a variety of different names, from international branch campuses (IBCs) to international joint venture institutions, from international study centres to satellite campuses, as well as offshore teaching centres. For the purposes of this report, the term ‘TNE’ will be used to broadly define academic content taught partially or wholly offshore, which acts as a pathway to a certificate, diploma, or degree recognised by the degree-granting institution that has made the investment. Where a source specifically refers to a TNE program as an international branch campus (IBC), an international study centre (ISC), or an international joint venture (JV), the appropriate terminology will be used for clarity.

An international/overseas branch campus is defined as “an entity that is owned, at least in part, by a foreign education provider; operated in the name of the foreign education provider; and provides an entire academic program, substantially on-site, leading to a degree awarded by the foreign education provider.”

Whereas an international study centre is defined as “an entity that is owned, at least in part, by a specific foreign higher education institution, which as some degree of responsibility for the overall strategy and quality assurance of the centre. The centre operates under the name of the foreign institution and offers programming and / or credentials that bear the name of the foreign institution. It is a relatively small-scale operation with fewer than 1,000 students. The centre may offer only a single discipline or program and may employ few or no full-time faculty.”

International joint-ventures are defined as “a higher education institution that is jointly owned by two or more institutions based in different countries. Each partner institution has some degree of responsibility for the overall strategy and quality assurance of the jointly owned entity, and the two parent institutions share profits and losses resulting from the joint venture.”

Collaborative provision is generally defined as joint or dual degrees, awarded under a franchised provision overseas. Registered at an Overseas Partner Organisation is defined as students studying for an award of the reporting provider, where the majority of teaching, validation and examination is delivered offshore.

This paper excludes TNE programs that may be classified as international study abroad centres, whose primary purpose is providing short-term study abroad and language immersion experience for students from the home campus (although at a later stage this might be included in the NEAS Transnational Quality Assurance in ELT strategy).



University of Newcastle Language Centre was first endorsed in 1992 by NEAS and received a 25 year ward for continuous commitment to Quality Assurance in 2018. UoN enrolls over 1200 students through its offshore programs in Singapore. Enrolments are concentrated in Business, Engineering, IT and Health Science disciplines.

Table 12: Newcastle Offshore Enrolments

Providers HE	Broad Fields of Education	Offshore			
		Distance	On campus	Multi-modal	Total
University of Newcastle	Agriculture, Environmental and Related Studies	<5			<5
	Architecture and Building	<5	205		208
	Creative Arts		55		55
	Education	9			9
	Engineering and Related Technologies	<5	319		322
	Health	26	234		260
	Information Technology	<5	78		79
	Management and Commerce	20	394	<5	418
	Natural and Physical Sciences	8	<5		9
	Not a combined course	6	<5		7
	Society and Culture	9			9
	Total	85	1,286	<5	1,375

Newcastle’s programs are offered through two local TNE providers, PSB Academy and BCA Academy. PSB Academy also runs the earlier mentioned Wollongong programs in Singapore. Whilst a dedicated Teaching and Learning support officer is available to all students, UoN Singapore do not list any English language pathway programs available.

¹ Garrett, Richard. International Branch Campuses: Success Factors. Journal of International Higher Education, Number 93, Spring 2018. Retrieved from <https://ejournals.bc.edu/index.php/ihe/article/view/10417/9001>
² Wilkins, Stephen. Definitions of Transnational Higher Education, Journal of International Higher Education, Number 95, Fall 2018. Retrieved from: <https://ejournals.bc.edu/index.php/ihe/article/view/10717/9190>
³ Wilkins, S.

National Strategy for International Education 2025

The Australia’s first National Strategy for International Education is a 10-year plan for developing Australia’s role as a global leader in education and training. The National Strategy has direct relevance to NEAS in relation to offshore TNE quality assurance, particularly Goals 3 and 8.

Goal 3 emphasises the need for Australia to provide effective quality assurance and regulation. Our education system will be supported with a robust quality assurance and regulatory environment with a focus on continual improvement.

Goal 8 stresses the need for Australia to promote its excellence as a world-class international education provider that builds trust and supports the growth and development of the education sector.

Pillar 1 Strengthening the fundamentals	Goal 1 Building on a world-class education, training and research system	Action 1.1: Developing Australia's role as a global leader in education, training and research Action 1.2: Setting nationally consistent approaches that support the Australian international education sector
	Goal 2 Delivering the best possible student experience	Action 2.1: Supporting students Action 2.2: Informing student choice Action 2.3: Preparing students for global engagement
	Goal 3 Providing effective quality assurance and regulation	Action 3.1: Maintaining strong quality assurance systems Action 3.2: Ensuring strong student protection
Pillar 2 Making transformative partnerships	Goal 4 Strengthening partnerships at home	Action 4.1: Engaging with the broader community Action 4.2: Encouraging better links with business and industry
	Goal 5 Strengthening partnerships abroad	Action 5.1: Building confidence through government-to-government engagement Action 5.2: Strengthening collaboration through institution-to-institution partnerships
	Goal 6 Enhancing mobility	Action 6.1: Supporting international mobility through practical visa settings and work arrangements Action 6.2: Expanding student, education and training professional and researcher mobility Action 6.3: Supporting graduates through qualifications recognition
	Goal 7 Building lasting connections with alumni	Action 7.1: Engaging alumni
Pillar 3 Competing globally	Goal 8 Promoting our excellence	Action 8.1: Promoting Australia as a high-quality international education provider
	Goal 9 Embracing opportunities to grow international education	Action 9.1: Building on innovative education and training services to meet student and employer needs Action 9.2: Promoting opportunities in regional Australia Action 9.3: Identifying and responding to new opportunities

GOAL 3 IN DEPTH – MAINTAINING STRONG QUALITY ASSURANCE SYSTEMS

Robust quality assurance is critical to delivering a high-quality student experience and maintaining Australia’s reputation in international education. Australia’s quality assurance system supports integrity and ensures confidence in Australian qualifications. Australian ELT has a unique system in place with strong interdependence between the peak bodies such as English Australia, university ELT symposia such as UECA and independent and rigorous quality assurance in NEAS. This is unique to Australia.

Australia has independent national regulators for vocational educational and training, higher education and English language education, as well as state and territory-led regulation in the schools sector. The system is underpinned by legislation and based on strong partnerships between regulators, governments, industry and providers. It covers all modes of delivery, including online, distance, onshore and offshore.

All education providers that offer courses to international students studying in Australia on a student visa are required to be on the Commonwealth Register of Institutions and Courses for Overseas Students. To register, a provider must demonstrate their compliance with the National Code of Practice for Providers of Education and Training to Overseas Students. The code is legally enforceable, further protecting the rights of international students.

Australia’s education quality will continue to be strengthened by our national regulators working with education providers, peak bodies and independent quality assurance specialists such as NEAS through internal and external quality assurance mechanisms.

Australia will continue to espouse the highest standards of quality in the delivery of education and training lead and promote world’s best practice quality assurance.

GOAL 8 IN DEPTH – PROMOTING OUR EXCELLENCE

Promoting Australia as a high-quality international education provider builds trust and supports the growth and development of our education sector.

Australia has a well-deserved reputation as one of the world’s most attractive places to study and live. Australia consistently performs well in surveys on education and research quality, liveability, student satisfaction and employment outcomes. Our education providers have become experts in international student service delivery over many years. Our education, training and research excellence has built our popularity as an international collaborator. Countries around the world look to our world-class systems and learning products.

Australian international education will continue to build on its strengths and move forward as a united sector. We will promote Australia as a high-quality international partner and destination in established and emerging markets. In particular, the Austrade market development roadmap, Australian International Education 2025, will ensure Australia is competitively marketed in the global international education arena. Without restricting individual brands, we will work together to promote our shared excellence to be regarded as the best.

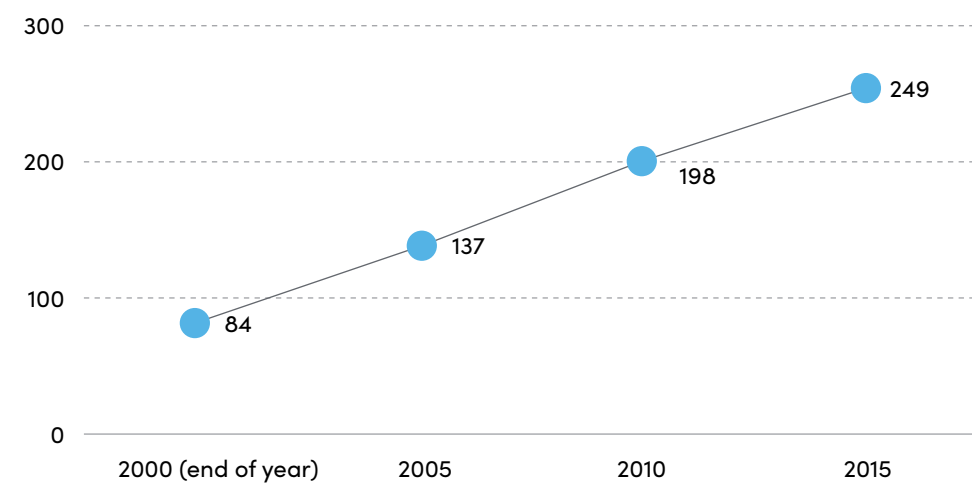
During the next 10 years, Australia will aim to significantly expand its market access, especially in new and emerging regions and promote itself as a high-quality international education destination.

Scale of Borderless and Transnational Education Opportunities

According to Deloitte Access Economics, the borderless market is one that is untapped and without precedent, and its characterisation a decade from now is likely to be far more dynamic. There are projected to be in excess of one billion ‘in scope’ learners for Australian education in 2025 and if Australia could reach just 1% of these learners, it would translate to over 11 million learners .

According to a 2017 OBHE audit on face to face/ campus-style TNE programs, there were approximately 263 well-established IBCs around the world, enrolling 180,000 students worldwide. Half of these IBCs (130) were at least 10 years old, with the other half (133) established more recently. The period from 2011-2015 witnessed the opening of 66 new offshore IBCs, representing growth of 26%.

Table 13: Number of IBCs established between 2000 – 2015



As of 2016, 76 countries hosted IBCs, up from 69 host countries in 2011. The most active host countries for TNE programs are China, UAE, Singapore, Malaysia and Qatar.

Table 14: Top 10 Host Countries for IBCs

Country	Number of IBCs
China	32
UAE	31
Singapore	12
Malaysia	12
Qatar	11
South Korea	5
Hong Kong	5
Mauritius	3
Vietnam	2
Sri Lanka	2

⁴ Deloitte 2015

⁵ ICEF Monitor. China now the leading host for international branch campuses, 22 November 2016. Retrieved from <https://monitor.icef.com/2016/11/china-now-leading-host-international-branch-campuses/>

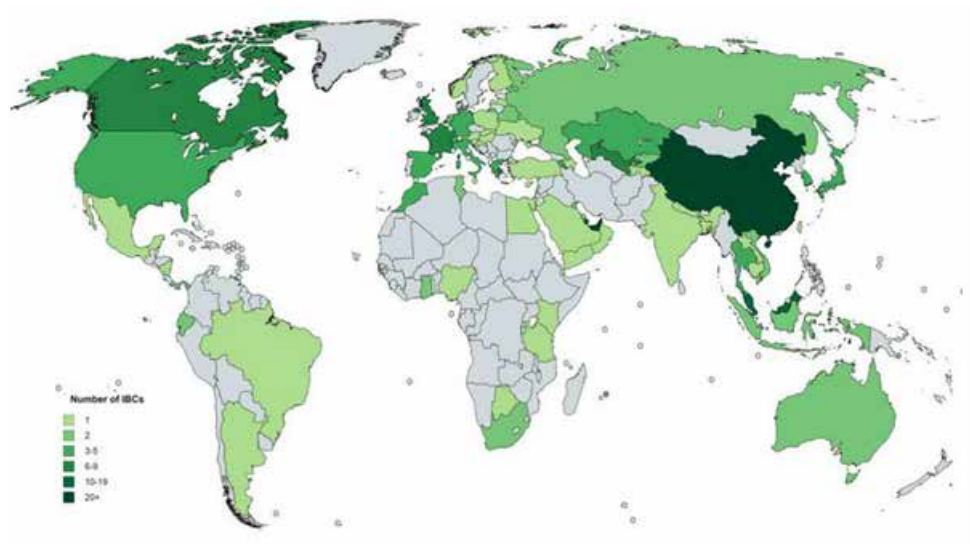
China has witnessed the strongest growth in the establishment of IBCs, up from 13 in 2010 to 32 in 2016. Nearly one-third of all new IBCs being established are occurring in China, and this number is expected to grow due to local demand and government support.



KEY TAKEAWAY

Malaysia is an educational hub in Asia for students from East Asia, Middle East, South East Asia and Africa and the Malaysian Government is aiming for 200,000 international students by 2020. Enrolling in Malaysia-based foreign university campuses and joint venture TNE programs in-country are becoming ever more popular as self-funding students seek to minimise the cost of study in an unstable economic environment.

Table 15: Number of IBCs by Host Country⁶



In a comprehensive survey of well-established IBCs, the Cross-Border Education Research Team (C-BERT) at the State University of New York Albany found that there are five models to IBCs.

- 28% of IBCs operate in facilities that are wholly-owned by the home campus
- 22% have adopted a government partnership model whereby the local or national government subsidises the cost of the branch campus.
- 20% are owned by a private partner or property developer that receives a stake in the campus revenues
- 18% rent their campus space from a private party, such as Dubai Knowledge Village, where multiple institutions may be present
- 12% operate within a campus owned by an academic partner and leverage facilities to offer stand-alone academic programs

33 countries are TNE exporters. Of the top export countries for IBCs, US institutions operate 78 IBCs around the globe, accounting for one third of all offshore campuses worldwide. The UK the next leading TNE exporter with 39 IBCs established. Russia, France and Australia round out the top 5 of export countries for IBCs.

⁶ ICEF Monitor. China now the leading host for international branch campuses, 22 November 2016. Retrieved from <https://monitor.icef.com/2016/11/china-now-leading-host-international-branch-campuses/>

Growth in Transnational Education

Significant growth trends in transnational education have been experienced by home countries (e.g. countries that export education). The following sections highlight the experiences of Australia and the UK.

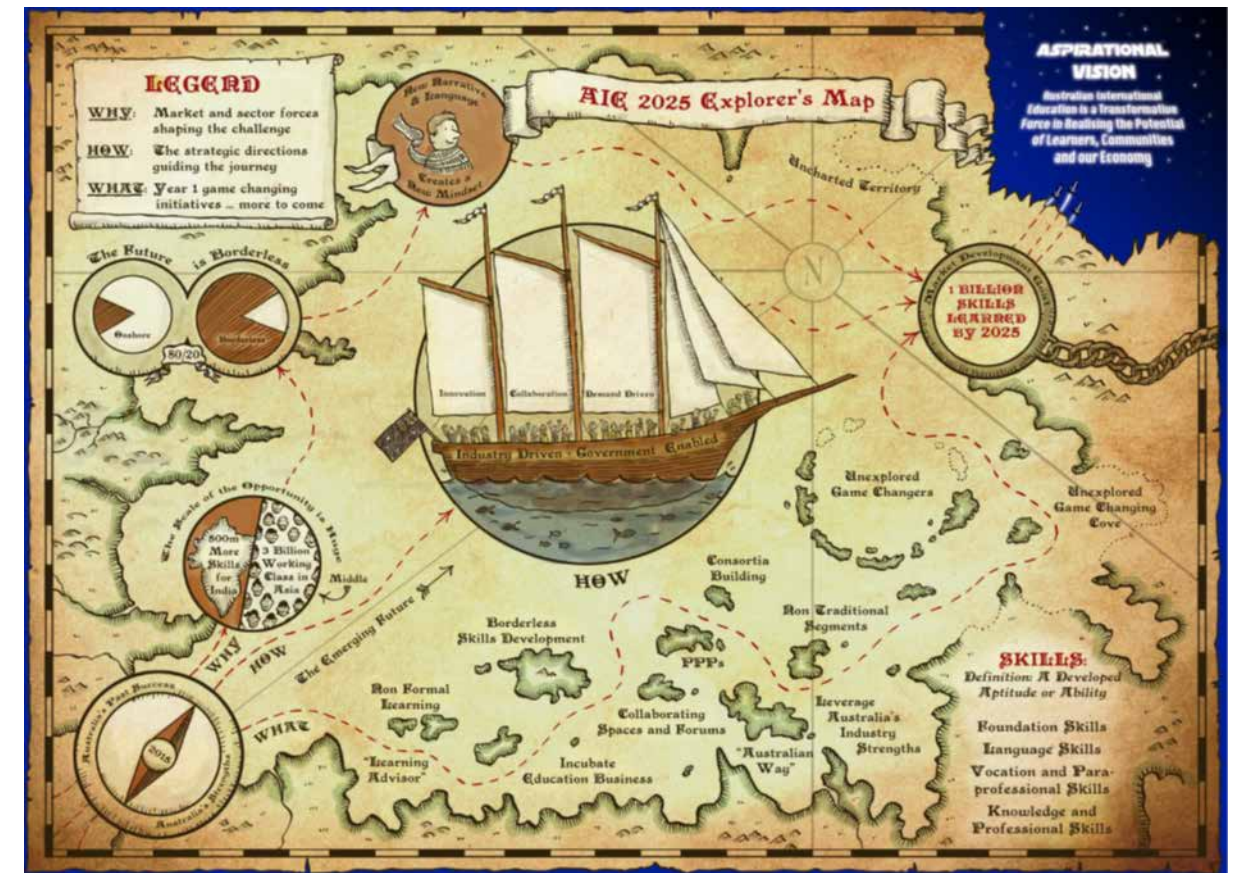


For two decades, Australian education providers have been involved in the delivery of transnational education (TNE). Increasingly, TNE is becoming a strategic component for a variety of Australian institutions. Whilst the intentions and goals of individual institutions may vary by market, there are ultimately strong commercial reasons for institutions to engage in establishing programs offshore, either through partnerships or by establishing wholly-owned and operated offshore programs. Brand and profile raising, offshore government relationship building, enrolment and program diversification, risk mitigation, onshore space constraints as well as tuition fee revenue raising are all factors which contribute to the establishment and growth of TNE.

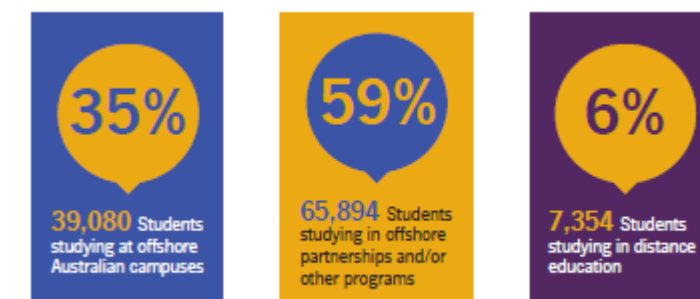
In 2015, former Minister for Trade and Investment Andrew Robb set a challenge for the education sector – double the number of students and study visitors onshore and reach up to 10 million people via borderless education, skills and services. At the time, the government expanded the definition for ‘borderless’ to include any accredited or non-accredited academic or training program delivered offshore/in-market either face to face or online.

Australia has an ambitious target of achieving one million international students onshore by 2025, up from the current 740,000 as at Q4 2019. To achieve this growth, a vital source of enrolments will come via TNE programs. The Australian Government’s National Strategy for International Education 2025 suggests “innovation, key partnership development and effective management” will be critical to unlocking growth potential from key source markets across Asia.

What is driving the Australian government’s vision to 2025 and beyond? A market development goal of 1 billion skills earned by 2025, underpinned by Foundation, Language, Vocational, Knowledge and Professional skills. The Australian government have an aspirational vision that is industry-driven and government enabled. Australian international education should be a transformative force in realising the potential of learners, the community and the economy. The Australian government is confident the Future is Borderless, with an 80/20 split favouring Borderless opportunities over Onshore enrolments. Only Borderless education will meet the needs of a three billion-strong workforce across Asia, with 600 million more skilled workers required in India alone.



In 2019, the Australian Government reported there were 480,000 international students studying Australian higher education courses, of which nearly a quarter (112,000) were classified as offshore enrolments. Of these offshore enrolments, over half were studying in offshore partnerships and just about one-third were studying at an offshore Australian campus.



Whilst overall international students receiving an Australian higher education increased in 2018, TNE enrolments declined overall by 4.2%

⁷ Deloitte Access Economics and EduWorld Growth (2015), Opportunity in Australian International Education Growth, A report prepared for Austrade (p.5), Retrieved from <http://www.austrade.gov.au/Australian/Education/Services/australian-international-education-2025/growth-and-opportunity>

⁸ Australian Government (2019), Monthly Statistics – October
<https://www.austrade.gov.au/australian/education/education-data/current-data/summaries-and-news/summaries-and-news>

⁹ Australian Government (2016), National Strategy for International Education 2025. ISBN 978-1-76028-692-7 (PDF), Retrieved from <https://nsie.education.gov.au>

¹⁰ Australian Department of Education 2019 Higher Education Statistics

Table 16: Onshore and Offshore Higher Education Breakdown 2018

Delivery Type	2017	2018	Growth on 2017
International students in AUS	312,087	364,518	16.8%
Students at Offshore campuses	39,262	39,080	-0.5%
Students in Offshore partnerships	70,653	65,894	-6.7%
Students in Offshore distance education	7,315	7,354	0.5%
Sub-total of all offshore students	117,230	112,328	-4.2%
Grand Totals (less N/A and unidentified)	431,438	479,987	11.3%

Offshore HE TNE enrolment breakdown by level:

- 63% Bachelors
- 24% PG Masters CWK
- 6% Advanced Diploma
- 3% HDR
- 4% Other

Singapore is the leading location for Australian TNE delivery, followed by China and Malaysia. China experienced the strongest year on year growth in 2018, whilst Singapore TNE enrolments declined and most other markets remained stable. It is worth noting that 20% of students undertaking Australian programs in Singapore come from a third country in the region.

Table 17: Top 10 Locations for Australian TNE HE Delivery 2018¹¹

Rank	Country	2018 v 2017
1	Singapore	down
2	China	up
3	Malaysia	flat
4	Vietnam	flat
5	India	down
6	UAE	flat
7	Hong Kong	down
8	South Africa	flat
9	Sri Lanka	flat
10	Indonesia	flat

The Australian Department of Education provides a comprehensive breakdown of onshore and offshore higher education enrolments by institution. This allows NEAS to understand the relative proportion of onshore international students to offshore TNE enrolments. The universities with the largest offshore enrolments are those with well-established campuses in Malaysia, Vietnam, Singapore and the UAE. These universities, such as Monash, Curtin, RMIT, Swinburne, Newcastle and Murdoch will be featured further along in this paper. The 112,238 total figure of ‘Offshore’ enrolments matches previously stated government TNE figures.

Table 18: Commencing and All Overseas Students by State, Higher Education Institution and Onshore/Offshore Status, Full Year 2018¹²

State/Institution	Commencing Students			All Students		
	Onshore	Offshore	TOTAL	Onshore	Offshore	TOTAL
New South Wales						
Charles Sturt University	3,455	1,192	4,647	8,920	1,880	10,800
Macquarie University	3,766	1,163	4,929	9,414	2,316	11,730
Southern Cross University	2,469	761	3,230	3,818	1,113	4,931
The University of New England	380	303	683	989	483	1,472
The University of Newcastle	2,131	508	2,639	4,450	1,375	5,825
The University of Sydney	11,671	172	11,843	25,532	510	26,042
University of New South Wales	6,118	4,216	10,334	15,741	7,407	23,148
University of Technology Sydney	6,261	821	7,082	13,672	1,601	15,273
University of Wollongong	3,555	2,646	6,201	7,411	7,685	15,096
Western Sydney University	2,890	689	3,579	5,608	1,551	7,159
Non-University Higher Education Institutions	11,239	2,395	13,634	20,460	5,114	25,574
Victoria						
Deakin University	6,329	538	6,867	13,044	1,282	14,326
Federation University Australia ⁽⁹⁾	5,532	681	6,213	7,458	1,482	8,940
La Trobe University	3,719	783	4,502	8,160	1,674	9,834
Monash University	11,201	4,282	15,483	25,690	12,646	38,336
RMIT University	7,406	6,094	13,500	16,667	14,864	31,531
Swinburne University of Technology	2,711	1,784	4,495	5,740	4,691	10,431
The University of Melbourne	8,133	2,900	11,033	21,858	4,748	26,606
University of Divinity	65	14	79	133	18	151
Victoria University	2,781	3,139	5,920	5,324	5,735	11,059
Non-University Higher Education Institutions	14,160	433	14,593	25,490	666	26,156
Queensland						
Bond University	1,899	141	2,040	3,038	308	3,346
CQUniversity	3,792	11	3,803	7,483	22	7,505
Griffith University	2,837	1,356	4,193	6,336	2,214	8,550
James Cook University	1,570	1,435	3,005	3,125	2,979	6,104
Queensland University of Technology	4,048	203	4,251	8,594	351	8,945
The University of Queensland	8,090	48	8,138	17,865	209	18,074
University of Southern Queensland	920	198	1,118	2,268	578	2,846
University of the Sunshine Coast	1,971	360	2,331	3,620	421	4,041
Non-University Higher Education Institutions	1,263	7	1,270	1,990	15	2,005
Western Australia						
Curtin University	1,783	2,521	4,304	5,443	7,720	13,163
Edith Cowan University	2,238	511	2,749	5,176	834	6,010
Murdoch University	1,220	2,693	3,913	2,216	6,865	9,081
The University of Notre Dame Australia	158	6	164	222	16	238
The University of Western Australia	1,443	585	2,028	3,953	1,445	5,398
Non-University Higher Education Institutions	970	905	1,875	1,679	1,615	3,294
South Australia						
Flinders University	1,378	1,094	2,472	3,150	2,161	5,311
The University of Adelaide	3,169	86	3,255	7,587	253	7,840
Torrens University Australia	3,344	39	3,383	5,983	97	6,080
University of South Australia	2,260	134	2,394	5,440	279	5,719
Private Universities (Table C) and Non-University Higher Education Institutions	1,177	212	1,389	2,417	1,739	4,156
Tasmania						
University of Tasmania	2,605	576	3,181	5,963	1,359	7,322
Northern Territory						
Charles Darwin University	610	66	676	1,876	96	1,972
Australian Capital Territory						
The Australian National University	4,624	350	4,974	9,782	814	10,596
University of Canberra	1,357	360	1,717	2,601	784	3,385
Non-University Higher Education Institutions	< 5	0	< 5	< 5	0	< 5
Multi-State						
Australian Catholic University	2,179	140	2,319	4,172	278	4,450
Non-University Higher Education Institutions	np	16	np	np	35	np
TOTAL						
Total 2017	151,669	51,044	202,713	314,208	117,230	431,438
% change on 2017	14.0%	-2.9%	9.8%	17.0%	-4.2%	11.3%

¹¹ Australian Department of Education 2019 Higher Education Statistics

¹² Australian Government Department of Education Higher Education Statistics 2018

An alternative view to onshore vs offshore enrolments by institution is to view Overseas Students by Temporary Entry Permit vs Other Overseas, which provides a different view of international enrolments that do not hold a temporary student visa. The total of 85,752 'Other Overseas' enrolments is less than the 112,283 TNE totals reported by the government, but individual institution TNE enrolments more closely match university reported enrolments.

State/Institution	Domestic Students			Overseas Students		TOTAL
	Australian citizen	New Zealand citizen	Other domestic	Temporary entry permit	Other overseas	
New South Wales						
Charles Sturt University	31,799	243	546	8,988	1,812	43,388
Macquarie University	31,239	304	1,272	11,459	271	44,545
Southern Cross University	13,247	172	264	4,143	788	18,614
The University of New England	21,320	164	431	1,277	195	23,387
The University of Newcastle	28,208	176	644	4,458	1,367	34,853
The University of Sydney	37,716	788	2,293	25,532	510	66,839
University of New South Wales	36,714	451	2,194	23,123	25	62,507
University of Technology Sydney	28,977	199	1,587	14,432	841	46,036
University of Wollongong	18,723	88	426	7,784	7,312	34,333
Western Sydney University	38,718	410	2,128	6,905	254	48,415
Non-University Higher Education Institutions	34,012	439	847	20,963	4,611	60,872
Victoria						
Deakin University	43,458	435	1,241	13,880	446	59,460
Federation University Australia ^(a)	8,301	66	286	7,619	1,321	17,593
La Trobe University	28,288	313	796	8,108	1,726	39,231
Monash University	42,427	663	2,134	26,242	12,094	83,560
RMIT University	35,155	517	2,079	16,667	14,864	69,282
Swinburne University of Technology	30,693	293	937	6,545	3,886	42,354
The University of Melbourne	37,838	952	2,778	26,370	236	68,174
University of Divinity	1,376	17	55	140	11	1,599
Victoria University	15,162	226	757	6,367	4,692	27,204
Non-University Higher Education Institutions	5,932	49	251	25,548	608	32,388
Queensland						
Bond University	2,780	73	113	3,115	231	6,312
CQUniversity	16,936	215	403	7,486	19	25,059
Griffith University	37,314	925	1,198	7,754	796	47,987
James Cook University	14,002	189	433	3,142	2,962	20,728
Queensland University of Technology	39,965	657	1,223	8,912	33	50,790
The University of Queensland	33,494	684	1,444	17,990	84	53,696
University of Southern Queensland	21,660	357	737	2,339	507	25,600
University of the Sunshine Coast	13,089	226	247	3,906	135	17,603
Non-University Higher Education Institutions	6,851	78	145	1,999	6	9,079
Western Australia						
Curtin University	33,205	427	1,864	6,345	6,818	48,659
Edith Cowan University	22,409	352	1,082	5,205	805	29,853
Murdoch University	14,056	226	731	2,863	6,218	24,094
The University of Notre Dame Australia	11,149	103	222	np	< 5	11,712
The University of Western Australia	17,727	215	1,129	5,225	173	24,469
Non-University Higher Education Institutions	1,171	7	109	1,681	1,613	4,581
South Australia						
Flinders University	19,566	104	821	3,651	1,660	25,802
The University of Adelaide	18,147	113	854	7,760	80	26,954
Torrens University Australia	7,138	50	109	5,999	81	13,377
University of South Australia	25,883	111	1,242	5,440	279	32,955
Private Universities (Table C) and Non-University Higher Education Institutions	5,090	69	204	2,431	1,725	9,519
Tasmania						
University of Tasmania	26,846	327	1,699	5,863	1,459	36,194
Northern Territory						
Batchelor Institute of Indigenous Tertiary Education	16	0	0	0	0	16
Charles Darwin University	8,545	np	722	1,944	np	11,389
Australian Capital Territory						
The Australian National University	14,874	276	702	10,313	283	26,448
University of Canberra	12,591	97	455	2,972	413	16,528
Non-University Higher Education Institutions	1,017	np	87	< 5	0	1,118
Multi-State						
Australian Catholic University	28,667	278	636	4,218	232	34,031
Non-University Higher Education Institutions	3,038	47	115	100	33	3,333
TOTAL	1,026,529	13,332	42,672	395,442	84,545	1,562,520
Total 2017	1,027,907	13,330	40,708	345,686	85,752	1,513,383
% change on 2017	-0.1%	0.0%	4.8%	14.4%	-1.4%	3.2%

Whilst not in the first tranche of institutions that NEAS will engage with as part of its drive to accredit TNE programs of partner institutions, the following institutions would likely feature in Years 4 and 5 of the NEAS Strategy for quality assurance engagement.



MURDOCH UNIVERSITY

Murdoch enrolls over 6,500 students across its TNE campuses in Singapore and Dubai. Quality assurance and risk management have become primary issues for Murdoch following the ABC Four Corners program in 2019.



VICTORIA UNIVERSITY

Victoria University has over 5,400 students enrolled in its programs offshore across China, Vietnam, Malaysia and Singapore.



SWINBURNE UNIVERSITY

Swinburne enrolls over 4,500 students across its TNE programs, with the largest offshore program in Malaysia.



RMIT UNIVERSITY

RMIT has close to 10,000 students enrolled in programs offshore, of which 6,500 are enrolled in its Ho Chi Minh City, Vietnam campus. RMIT has graduated over 12,500 Vietnamese students from its offshore campus, providing it with a rich and active alumni base and significant profile in Vietnam.



MONASH UNIVERSITY

Amongst Australian institutions, Monash has a distinct advantage due to its long-standing campus presence in Malaysia, which has cemented the university's brand across the region. Over 7,500 students are enrolled at Monash Malaysia's programs, two-thirds of whom are Malaysian, and a third of whom hail from across the SEA region, China and the Middle East. Embedded mobility structures allow for Malaysian-campus enrolled students to study at Monash campuses in Melbourne with ease.

English Proficiency in Key Source Markets

Every year, EF English produce a report on English language proficiency in key markets around the world. Singapore is the only ASEAN market in the ‘Very High Proficiency’ column, whilst Philippines and Malaysia are in the ‘High Proficiency’ column. China has made significant strides in recent years and is now in the ‘Moderate Proficiency’ column.

Very High Proficiency		High Proficiency		Moderate Proficiency	
01 Netherlands	70.27	15 Hungary	61.86	30 Costa Rica	57.38
02 Sweden	68.74	16 Romania	61.36	31 France	57.25
03 Norway	67.93	17 Serbia	61.30	32 Latvia	56.85
04 Denmark	67.87	18 Kenya	60.51	33 Hong Kong, China	55.63
05 Singapore	66.82	19 Switzerland	60.23	34 India	55.49
06 South Africa	65.38	20 Philippines	60.14	35 Spain	55.46
07 Finland	65.34	21 Lithuania	60.11	36 Italy	55.31
08 Austria	64.11	22 Greece	59.87	37 South Korea	55.04
09 Luxembourg	64.03	23 Czech Republic	59.30	38 Taiwan, China	54.18
10 Germany	63.77	24 Bulgaria	58.97		
11 Poland	63.76	25 Slovakia	58.82		
12 Portugal	63.14	26 Malaysia	58.55		
13 Belgium	63.09	27 Argentina	58.38		
14 Croatia	63.07	28 Estonia	58.29		
		29 Nigeria	58.26		

Source: EF EPI 2019

Of key ASEAN markets, Vietnam and Indonesia are in the ‘Low Proficiency’ column, whilst Thailand, Myanmar and Cambodia are labelled as ‘Very Low Proficiency’.

Low Proficiency		Very Low Proficiency	
47 Belarus	52.39	59 Brazil	50.10
48 Russia	52.14	60 El Salvador	50.09
49 Ukraine	52.13	61 Indonesia	50.06
50 Albania	51.99	62 Nicaragua	49.89
51 Bolivia	51.64	63 Ethiopia	49.64
52 Vietnam	51.57	64 Panama	49.60
53 Japan	51.51	65 Tunisia	49.04
54 Pakistan	51.41	66 Nepal	49.00
55 Bahrain	50.92	67 Mexico	48.99
56 Georgia	50.62	68 Colombia	48.75
57 Honduras	50.53	69 Iran	48.69
58 Peru	50.22		
		70 U.A.E.	48.19
		71 Bangladesh	48.11
		72 Maldives	48.02
		73 Venezuela	47.81
		74 Thailand	47.61
		75 Jordan	47.21
		76 Morocco	47.19
		77 Egypt	47.11
		78 Sri Lanka	47.10
		79 Turkey	46.81
		80 Qatar	46.79
		81 Ecuador	46.57
		82 Syria	46.36
		83 Cameroon	46.28
		84 Kuwait	46.22
		85 Azerbaijan	46.13
		86 Myanmar	46.00
		87 Sudan	45.94
		88 Mongolia	45.56
		89 Afghanistan	45.36
		90 Algeria	45.28
		91 Angola	44.54
		92 Oman	44.39
		93 Kazakhstan	43.83
		94 Cambodia	43.78
		95 Uzbekistan	43.18
		96 Ivory Coast	42.41
		97 Iraq	42.39
		98 Saudi Arabia	41.60
		99 Kyrgyzstan	41.51
		100 Libya	40.87

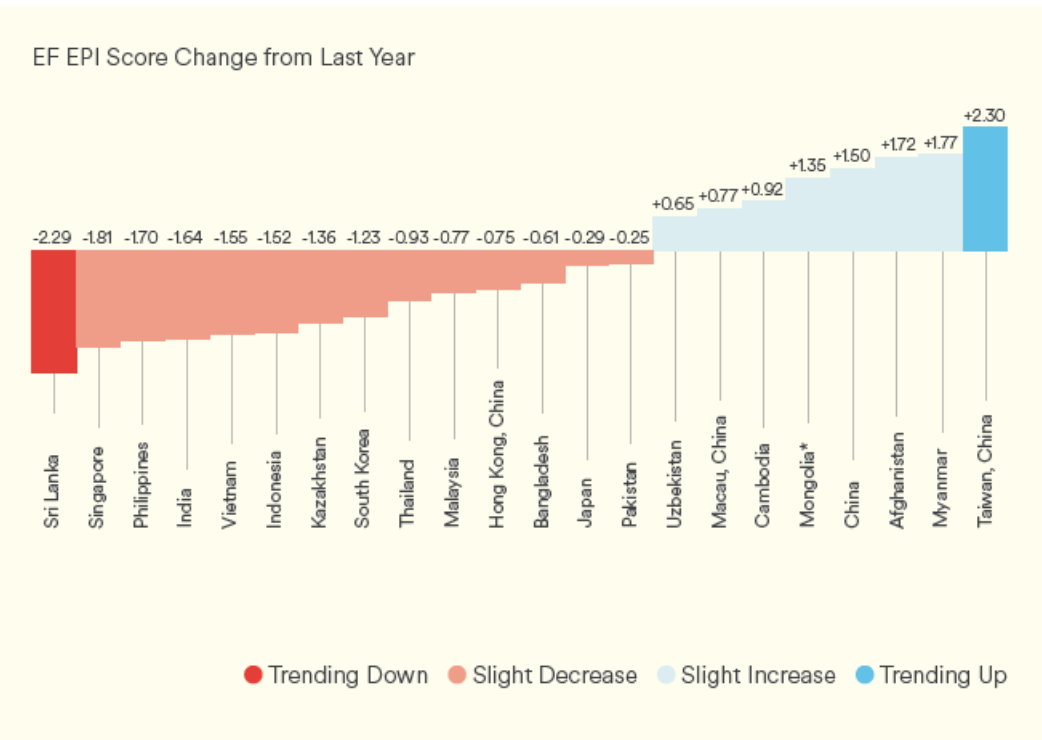
Source: EF EPI 2019

When viewing only Asian markets across the 2019 EF English Proficiency Index, a narrower view of English language proficiency variations can be seen.

EF EPI Rankings			
05 Singapore	66.82	52 Vietnam	51.57
20 Philippines	60.14	53 Japan	51.51
26 Malaysia	58.55	54 Pakistan	51.41
33 Hong Kong, China	55.63	61 Indonesia	50.06
34 India	55.49	66 Nepal	49.00
37 South Korea	55.04	71 Bangladesh	48.11
38 Taiwan, China	54.18	72 Maldives	48.02
40 China	53.44	74 Thailand	47.61
41 Macau, China	53.34	78 Sri Lanka	47.10
		86 Myanmar	46.00
		88 Mongolia	45.56
		89 Afghanistan	45.36
		93 Kazakhstan	43.83
		94 Cambodia	43.78
		95 Uzbekistan	43.18
		99 Kyrgyzstan	41.51

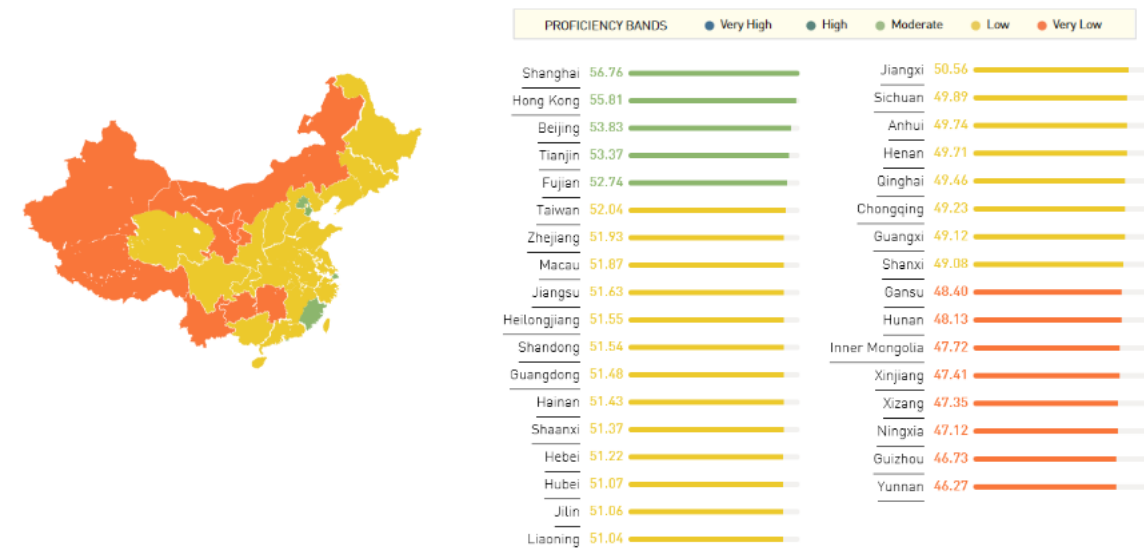
Source: EF EPI 2019

Looking at year on year trends, the EF report finds that of ASEAN markets, English proficiency in Myanmar has improved the most. Whereas more proficient markets, such as Singapore and Philippines have slid considerably year on year. Downward trends in Vietnam, Indonesia and Malaysia point to the need for intervention, quality control and measures to course correct English language proficiency declines.



Source: EF EPI 2019

Every year, EF English produce a report on English language proficiency in key markets around the world. Singapore is the only ASEAN market in the 'Very High Proficiency' column, whilst Philippines and Malaysia are in the 'High Proficiency' column. China has made significant strides in recent years and is now in the 'Moderate Proficiency' column.



Source: EF EPI China 2017

According to China's Ministry of Education, there are 300 million English language learners and an estimated 50,000 English language schools in China, growing on average by 12-15% per annum. EF is the leader in this space with over 200 English language schools in China. As well, there are over 566 English -medium international schools which fall into three main categories such as foreign joint ventures, bi-lingual private schools, and public schools operating on-campus bi-lingual extension programs . Nearly half of all English-medium international schools are located in Beijing and Shanghai.

English Australia have identified the 40 influential English language schools in China that offer either in-class or online English language training. This list is useful for NEAS as many of these institutions provide language training to students seeking to enter TNE programs in China or for study abroad purposes. It is also worth NEAS considering that China, with 50,000 English language schools, will have significant demand for teacher training and quality assurance for in-country and offshore pathways.

Table 19: Identified English language providers in China¹⁵

Language School	Established	Branches	Age focus	In-class training	Online
English First	1965	200+	All ages	X	X
New Oriental	1993	200+	All ages	X	X
Wall Street English	2000	200+	All ages	X	X
Hampson English	2002	200+	3-18	X	X
Meten	2006	200+	All ages	X	X
Youwin Education	1999	200+	6-18	X	X
Webi English	1998	200+	All ages	X	X
New channel	2004	200+	Adults	X	X
GEDU	1997	200+	All ages	X	X
Uncle Sam Education Group	2011	200+	3-12	X	
Happy Goal	1998	200+	3-12	X	X
Only College	2001	200+	6-18	X	X
One Smart	2008	200+	7-18	X	
E-blocks Education	2008	200+	3-12	X	
Field English	2009	200+	2-12	X	
MAMALOOK	2008	200+	K12	X	X
Best Learning	2009	100+	5-12	X	
Disney English	1998	100+	5-12	X	X
Longre Education	1999	100+	N/A	X	X
Dynamic English	2012	100+	2-12	X	X
Shinyway	1996	100+	K12 and adults	X	
First Leap	2009	100+	4-15	X	X
Sesame Street English	1969	100+	5-12	X	
RISE English Education	2007	50+	5-12	X	X
Gui Xue	2000	50+	K12	X	X
MaxEn Education	2011	50+	3-18		X
Thomas Education	2011	20+	5-12	X	X
LILY English	1997	20+	4-17	X	X
Gaosi Edu	2009	20+	6-18	X	
Better English	2013	15+	3-16	X	X
Cambridge Global Education	2010	15+	K12	X	
BAFF English	2009	10+	12-Adult	X	
Elan Education in English	2008	10+	5-15	X	
Sino WJ	2007	10+	Adults	X	X
Phinnie English	2009	10+	K12		
aceleader English	2009	5	Adults	X	X
Xiao Hou Education	1999	5	Adults	X	X
Beijing Foreign Language University	2010	4	12-20	X	
Mason Education Corporation	2000	3	3-12	X	
Boulder Education	2015	3	K12 and adults	X	
SinMang English	2016	3	Adults	X	
LearnOn	2001	3	K12	X	X

¹³ EF EPI 2017

¹⁴ English Australia 2017 report, 'Raising the profile in China of Australia's excellence in the delivery of English language training'

¹⁵ English Australia 2017 report

Quality Assurance and Professional Accreditation Bodies

Well-established International Branch Campuses boast of the professional accreditations of their schools, departments and programs. Accreditation and recognition from bodies such as the AACSB (Association to Advance Collegiate Schools of Business) and the RIBA (Royal Institute of British Architects) are highly sought-after credentials by prospective students and parents, pointing towards TNE international education industry demand for quality assurance.



CEA is a NEAS global competitor from the US and recognised by the US Secretary of Education. CEA accredits English language programs and independent English language schools outside the United States. The self-study, on-site review, and final accreditation decisions are all based on the CEA Standards for English Language Programs and Institutions. These standards were initially developed for the U.S. market and then expanded for overseas purpose in 2007. Through a project funded in conjunction with the TOEFL Board, the standards were revised to address the cultural environment of the program or school seeking accreditation outside the United States.

The standards review process of CEA looks closely at the following key indicators of English language institutions:

Mission	Recruiting
Curriculum	Length and Structure of Program Study
Faculty	Student Achievement
Facilities, Equipment and Supplies	Student Complaints
Administrative and Fiscal Capacity	Program Development, Planning and Review
Student Services	

The most up to date CEA standards can be found at:
https://cea-accredit.org/images/2019_doc_and_handbooks/2019_CEA_Standards.pdf

IALC is a global competitor of NEAS, albeit focused only on independently owned single site ELT. There are 162 member schools in the IALC network. IALC sets minimum standards in all areas of language school operation, as well as requiring continuous improvement. Their Quality Scheme is updated regularly to meet changing consumer expectations and current best practice in international language education. Its components are a four-yearly inspection and an annual online assessment.

An IALC language school must:

- Be legally constituted and conform to the laws of its country
- Be independent of a large chain or corporate group
- Teach the official language of the country as a main activity
- Offer courses at language levels that meet its clients' needs
- Have operated for at least three years
- Operate year-round with five or more classrooms
- Conform to the IALC Code of Ethics and IALC Accommodation Code
- Meet the standards of the IALC Quality Scheme



In the last year, IALC has started to provide a tick of quality assurance approval to education agencies of partner institutions. NEAS should closely monitor IALC activities in this space given it is an area of potential growth for NEAS. Further information on the IALC Approved Agency accreditation scheme can be found at: <https://www.ialc.org/agents/>

One identified quality assurance and professional accreditation body, Advance HE (until recently known as the Higher Education Academy), is a UK-based quality assurance entity that NEAS may seek further insights into regarding their operations, challenges and their success. Advance HE has a focus on accrediting continuous professional development programs at Universities against the UK Professional Standards Framework (UKPSF) as well as reviews of programs offered transnationally by education providers.

In the UK, Advance HE work with most universities, including elite providers such as Manchester, Bath, LSE, Kings College and Leeds. Transnationally, they have conducted reviews for Xian Jiaotong Liverpool University in China. Advance HE have also worked on tailored quality assurance initiatives for institutions here in Australia and New Zealand, including ANU, ACU, AUT, CQU, Deakin, Griffith, Macquarie, Monash, Murdoch, QUT RMIT, Tasmania, Wollongong universities. Navitas and Study Group are listed as members for 2019/20. The majority of Advance HE engagement with Australian institutions appears to be in relation to a 2018 Athena SWAN initiative on gender equity and diversity improvements.

Advance HE champions teaching excellence in higher education globally to improve student outcomes. They provide thought leadership to inform and influence teaching practice, strategies and policy, as well as promote professional teaching practice by accrediting courses. Advance HE claims to support institutions by improving university teaching, developing and inspiring staff, enhancing the student learning experience, reducing student attrition and provides international markers of teaching quality. Advance HE provides five key areas services to institutions:

- Accreditation of professional development programs to indicate quality assurance for students, parents, teachers and support staff
- Professional Development and Training programs for courses, schools and institutions that can be tailored to address particular disciplines and challenging areas
- Enhancement Services, such as bespoke consultancy service to support improvement in the student learning experience
- Expert groups, network and communities of practice for Advance HE subscribers, helping to support practice, showcase and drive innovation and address sector challenges through collaboration. Advance HE Connect now has over 14,000 users from 3100+ organisations across 100 countries
- Student Surveys, to provide valuable benchmarked insights into student academic experiences and allowing institutions identify opportunities and to accelerate change

Advance HE undertake tailored audit processes that align with their internal frameWORKS series. The audit process takes a diagnostic approach, analysing institutional or program performance against one or more of their identified thematic frameworks. The completed audit provides institutions with a view of their learning and teaching strengths, highlighting where they currently achieve best practice as well as a set of focussed recommendations.

The dimensions of the framework cover three interconnected core areas: Areas of Activity; Core Knowledge; and Professional Value.

Areas of Activity	Core Knowledge	Professional Values
A1 Design and plan learning activities and/or programmes of study	K1 The subject material	V1 Respect individual learners and diverse learning communities
A2 Teach and/or support learning	K2 Appropriate methods for teaching, learning and assessing in the subject area and at the level of the academic programme	V2 Promote participation in higher education and equality of opportunity for learners
A3 Assess and give feedback to learners	K3 How students learn, both generally and within their subject/ disciplinary area(s)	V3 Use evidence-informed approaches and the outcomes from research, scholarship and continuing professional development
A4 Develop effective learning environments and approaches to student support and guidance	K4 The use and value of appropriate learning technologies	V4 Acknowledge the wider context in which higher education operates recognising the implications for professional practice
A5 Engage in continuing professional development in subjects/disciplines and their pedagogy, incorporating research, scholarship and the evaluation of professional practices	K5 Methods for evaluating the effectiveness of teaching	
	K6 The implications of quality assurance and quality enhancement for academic and professional practice with a particular focus on teaching	

- Combined, the three interconnected dimensions support the following aims:
- Support initial and continuing professional development of staff engaged in teaching and learning support
 - Foster dynamic approaches to teaching and learning through creativity, innovation and continuous development
 - Demonstrate to students, parents and other key stakeholders the professionalism that staff and institutions bring to teaching and support for student learning
 - Acknowledge the variety and quality of teaching, learning and assessment practices that underpin student learning
 - Facilitate individuals and institutions to gain formal recognition for quality-enhanced approaches to teaching and supported learning management

Advance HE helps institutions achieve teaching and learning goals and to ensure their procedures are fully aligned to the aims of the UKPSF. Advance HE’s accreditation services are available to subscribing institutions.

Recommendations

NEAS has the opportunity to provide value to existing partners that engage in transnational education (TNE). A variety of NEAS partner institutions, from UTS to UNSW Global, Wollongong, Tasmania, Curtin and Newcastle all engage in TNE, with a strong focus on the ASEAN region. Moving forward, TEQSA will increasingly be shining a light on institutional TNE endeavours and NEAS have a unique opportunity to fill a gap in the market by providing continuous quality assurance to offshore teaching investments.

The vision for NEAS over the next three years is to continue to advance education through independent quality assurance in English Language Teaching. To achieve its mission of supporting the achievement of quality outcomes for international education and training globally, NEAS should continue to invest in research to further map the ELT landscape in Australia and ASEAN, while aiming to further understand developments in China and the Middle East.

One potential arena that NEAS should explore for further engagement and cooperation is the ASEAN University Network’s Quality Assurance (AUN-QA) program. Over 400 study programmes have been assessed at 7 institutions across Indonesia, Malaysia, Thailand, Vietnam and the Philippines. AUN-QA have 106 assessors.

Over the course of the next three years, NEAS should continue to invest in promoting Australian International Education and Quality Assurance at international conferences and events, and professional development activities for English language teachers in the ASEAN region.

To fulfil the aforementioned goals, this report provided an overview of Years 1, 2 and 3 of the NEAS Strategy against which institutions fit into this 3-year period. Key NEAS partners, such as UTS, UNSW and UoW feature in Years 1 and 2 for implementation, with UTS the first cab off the rank under a pilot model. These three key partners will provide positive examples for the remainder of NEAS partner institutions, such as Curtin, Tasmania and Newcastle, which will subsequently occur in Years 2 and 3. A potential rhythm to implementation would see 3 partner institutions onboarded each year over 3 years, leading to 9 institutions heading at the end of Year 3.

Non-NEAS partner institutions are more likely to fit across Years 4 and 5 of the Strategy, once sufficient momentum and success has been achieved across core NEAS partner institutions. Several institutions identified, such as Murdoch, Victoria, Swinburne, RMIT and Monash universities.

In doing so, NEAS should move away from a market-based approach and move towards a provider-based approach. A provider-based approach allows NEAS to more closely work with its existing partner institutions under a Key Account Management style. This will provide value-add to partners as NEAS starts to provide more than just quality assurance onshore. As well, a key account management strategy will assist with partner retention.

A robust and successful international strategy has the potential to translate into and dovetail with the NEAS Australian strategy. NEAS has yet to secure the providers in Australia that capture 80% of student business. A successful international strategy could push back into the Australia strategy to support and develop partnerships through greater endorsement opportunities, either through TNE endeavours or with education agents.

NEAS should consider how it can engage with Australian universities that are aligned with large private pathway providers such as Navitas, Study Group, UP and Kaplan. NEAS should consider how it can lobby and positively influent university international offices of its partners to provide positive pressure on their pathways to Australia. Are international offices aware of the potential risk and quality assurance gaps when their institutions are NEAS quality assured, but their pathways are not.

An additional area for growth would be to offer transnational quality assurance in ELT to New Zealand universities, building on close relationships in place with English New Zealand through QALEN.

Increasingly, NEAS partner institutions and potentially non-partner institutions will be looking for viable options in relation to quality assurance of their offshore operations as they prepare for upcoming TEQSA audits of their operations. NEAS should seize the opportunity to provide value to Australian institutions that engage in TNE and carve out a new and exciting quality assurance path that will allow for revenue growth and significant enhancements to its profile on and offshore.

Appendix A

2020 Events for NEAS in ASEAN

Thailand Events:

- International Schools Services Job Fair Bangkok 04 – 07 Jan 2020 – <https://10times.com/iss-bangkok>
- GRCF Thailand International Conference on Sustainable Business Practices Challenges & Opportunities in Engineering, Science, Humanities & Management In Global Context, 18 – 19 Jan 2020 – <https://10times.com/grcf-international-conference-in-bangkok-bangkok>
- International Conference on Social Science and Economics – 21 – 22 Jan 2020 – <https://10times.com/economics-and-social-sciences>
- Insight Elite Interview Exhibition – 25 Jan2020
- IDP Top Universities Exhibition –26 Jan 2020
- Thai School Counsellors Workshop organised by Austrade – 23 January 2020
- the 40th Thailand TESOL and PAC International Conference 2020 – 30 January -1 February 2020 – <https://tesol.conferences.in.th/>
- CETA World High School Fair – 15 February 2020
- Asia Expo 12 Mar 2020 – <https://10times.com/asia-expo-bangkok>
- IDP International Education Expo –14-15 March 2020

Laos Events:

- Education Agent Business Matching -16 March 2020

Malaysia Events:

- The Malaysian English Language Teaching Association Intl Conference, June 2020 <http://conference.melta.org.my/>
- International Conference on Teaching, Education & Learning, May 2020 <https://www.eventbrite.com/e/7th-ictel-2020-international-conference-on-teaching-education-learning-11-12-may-kuala-lumpur-tickets-70117484283>

Indonesia Events:

- ELTIC (English Language Teaching International Conference. ELTIC is held annually. For 2020, it will be held on 6-8 September 2020.) <https://10times.com/eltic-ujung-pandang>

Vietnam Events:

- Global Educators Network Association of Teachers of English as a Foreign Language International Conference: 1-2 May 2020
- OpenTESOL International Conference: 22-23 May 2020
- VUS TESOL Conference 2020: Dates TBC July 2020
- Annual Conference on TESOL: Dates TBC August 2020 / co-hosted by SEAMEO and Curtin University
- Viet TESOL: Dates TBC October 2020

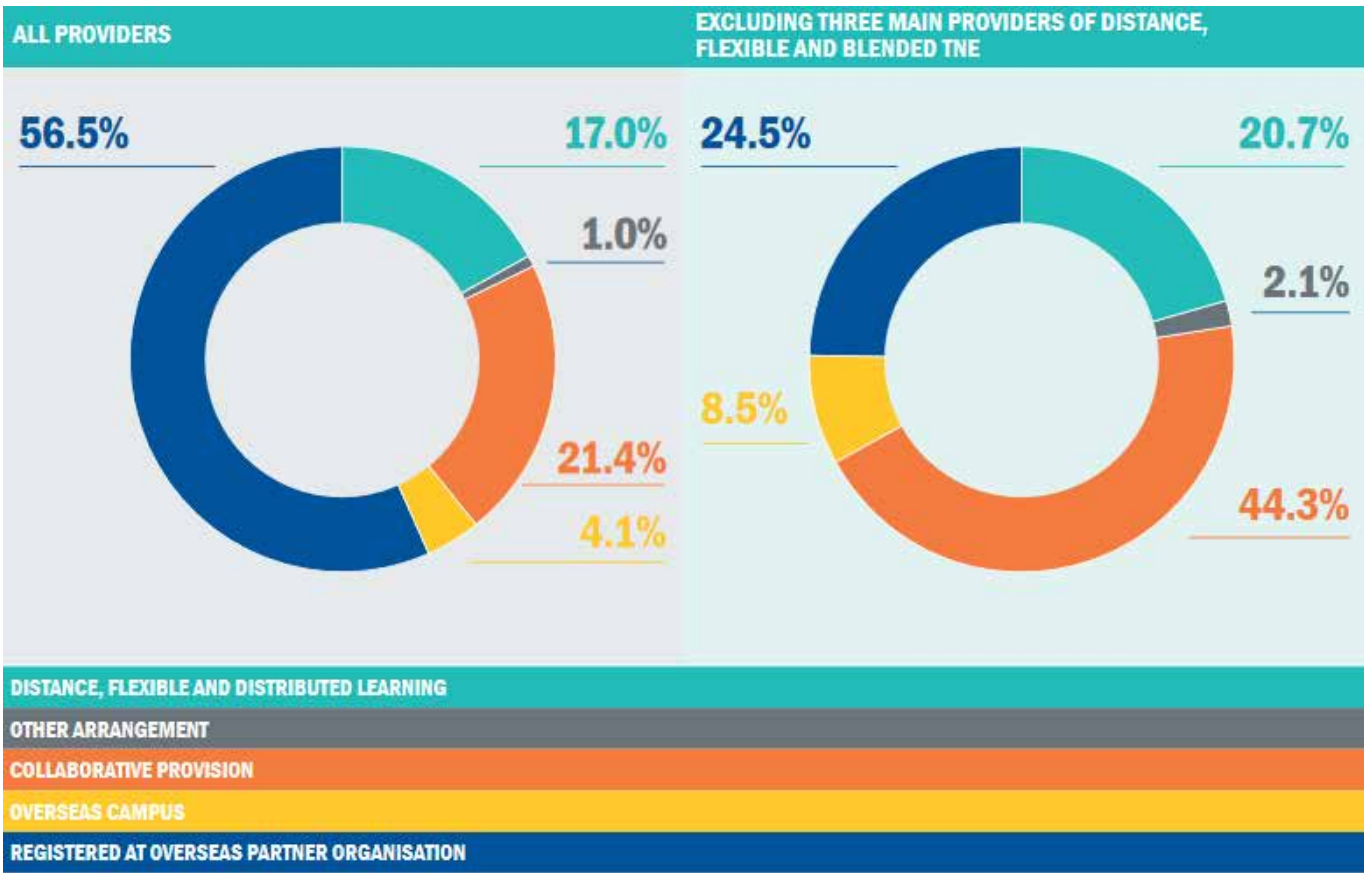
Appendix B

UK TNE

In 2017/18, nearly 700,000 international students were enrolled in some form of program with a TNE element, either studied wholly at a branch campus, completely online or through a hybrid/blended learning method. According to the UK Higher Education Standards Agency (HESA), there were 139 UK education providers engaged with TNE, with Asia accounting for 50% of all enrolments, followed by Africa (21%). China hosted 11% (75,000) UK TNE enrolments, followed by Malaysia with 10% (72,500) and Singapore with 6.5% (44,800) . Two-thirds of all TNE enrolments are undergraduate students and two-thirds of all UK branch campuses are located in Asia, with a further quarter located in the Middle East. Enrolments at branch campuses grew by 10.7% year on year.

The three largest UK providers of transnational education (including online distance education) are Oxford Brookes University, the Open University and the University of London, accounting for over 52% of total TNE enrolments. When excluding these three providers, 44% of UK TNE enrolments are through collaborative education, joint-ventures or study centres. Just over 20% of UK TNE enrolments are classified as distance, flexible or distributive learning. Given the disproportionate proportion of UK TNE students engaged with the three main providers, two different views are provided by Universities UK International (UKUi).

Table 20: Proportion of UK TNE Students by Type of Provision 2017-18¹⁶



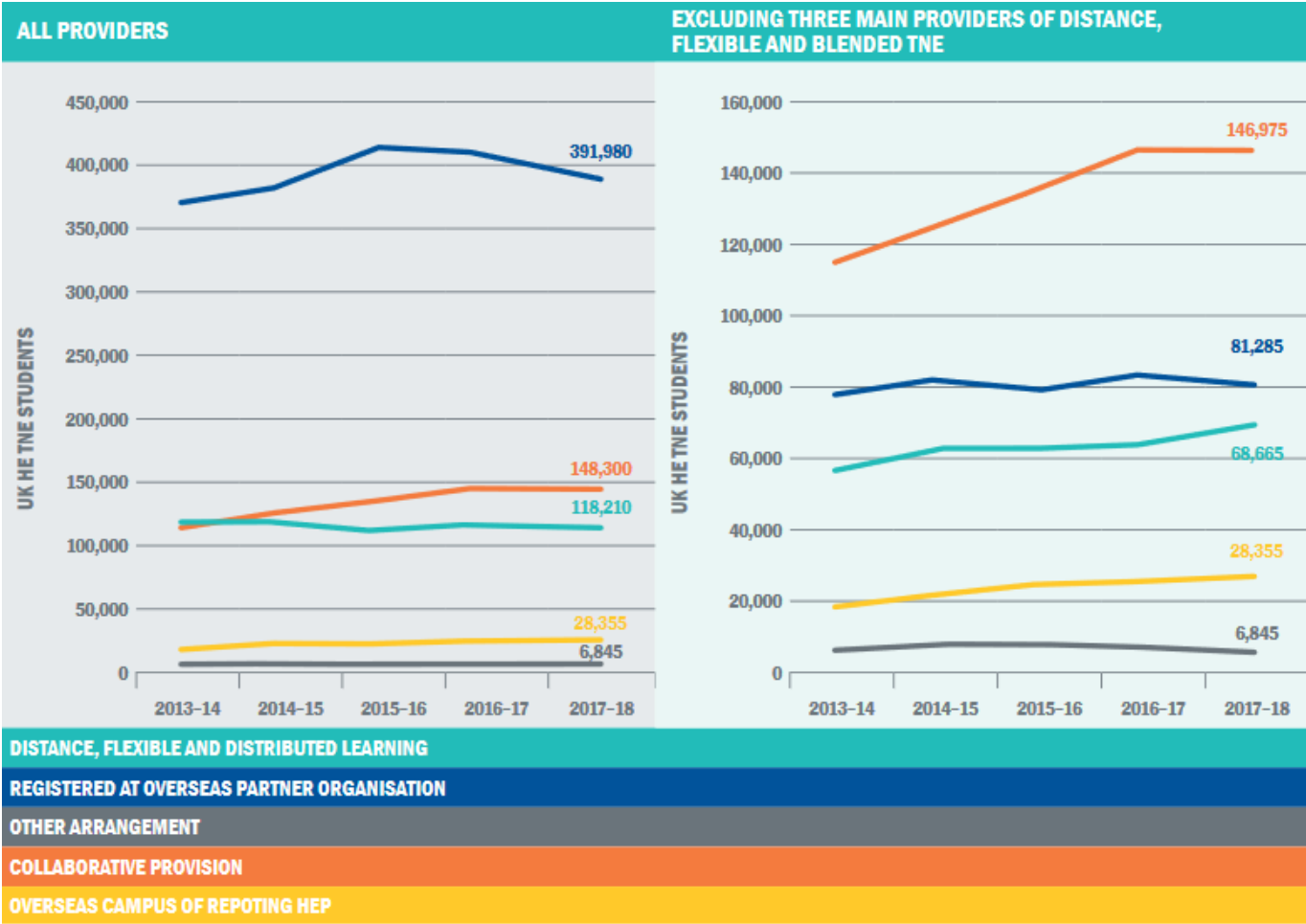
¹⁶ UKUi 2018 The Scale of UK HE TNE 2017-18. Retrieved from: <https://www.universitiesuk.ac.uk/policy-and-analysis/reports/Documents/2019/the-scale-of-uk-he-tne-2017-18.pdf>

¹⁷ HESA UK 2018. Retrieved from <https://www.hesa.ac.uk/data-and-analysis/students/where-from/transnational>

¹⁸ UKUi 2018

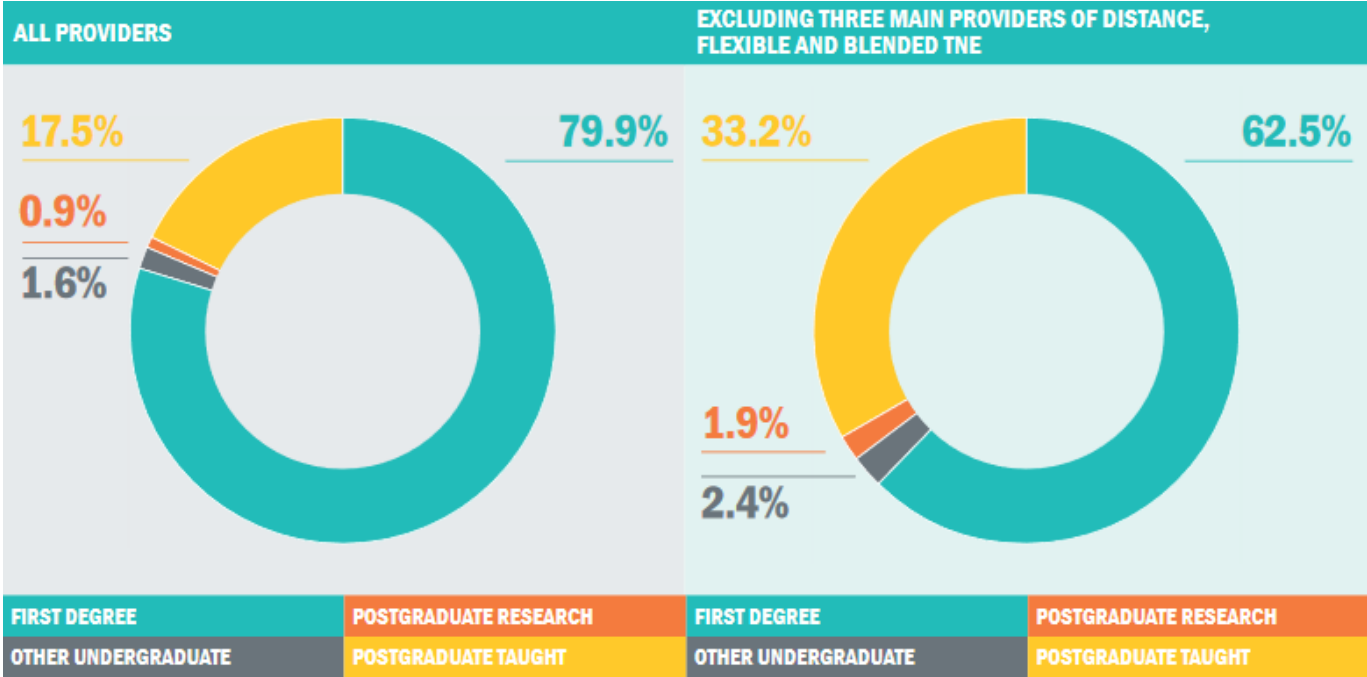
Between 2013/14 and 2017/18 academic years, the categories with the largest proportional growth were students at overseas campuses (47.5%) followed by those studying through collaborative provisions and study centres (27.8%). The table below highlights why analysis excluding the three main providers of TNE is important as the significance of study centres, collaborative provision and overseas campuses becomes more apparent.

Table 21: Number of UK TNE Students by Type of Provision, 2013-14 to 2017-18¹⁹



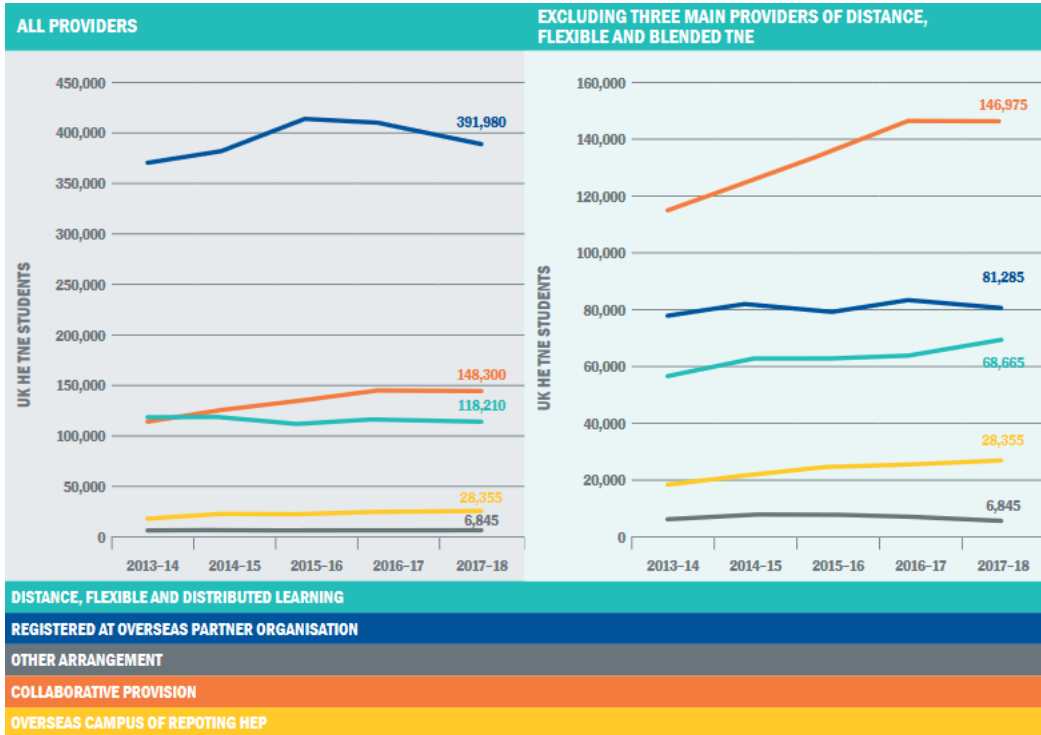
The vast majority of UK TNE enrolments are centred on Undergraduate programs, followed by Postgraduate Taught (PG Coursework) programs. Other Undergraduate and Postgraduate Research are a very small proportion of TNE program concentration.

Table 22: Proportion of UK TNE Students by Level of Study 2017-18²⁰



Excluding the three main providers of TNE and distance education, students in Asia accounted for the greatest regional source of enrolments between 2013/14 and 2017/18, with 52%. Whilst volumes are still small with only .5% of TNE enrolment totals, the greatest increase in TNE student enrolments were experienced in the South America region, which grew by nearly 50%. The Middle East grew by 28% over the same 5-year period and represents 11% of all TNE enrolments.

Table 23: Number of UK TNE Students by Source Region 2013/14 – 2017/18²¹



¹⁹ UKUi 2018

²⁰ UKUi 2018

²¹ UKUi 2018

Excluding the top three main providers of TNE and distance education, there is a diverse range of host countries for TNE students in the 2017/18 academic year, with Malaysia, China, Sri Lanka, Singapore and Hong Kong comprising 45% of all UK TNE enrolments. Year on year, China and Sri Lanka grew significantly at 15% each whilst Malaysian enrolments decreased slightly. The majority of UK TNE enrolments are Undergraduate, dominated by Malaysia and China.

Table 24: Top 20 Host Countries for UK TNE Enrolments 2017/18 by Level²²

RANKING	UNDERGRADUATE		POSTGRADUATE	
	COUNTRY	NO OF STUDENTS	COUNTRY	NO OF STUDENTS
1	 Malaysia	39,510	 Sri Lanka	9,380
2	 China	32,180	 United Arab Emirates	7,140
3	 Egypt	17,310	 Malaysia	6,980
4	 Singapore	16,695	 Cyprus (EU)	5,600
5	 Oman	15,595	 China	4,760
6	 Hong Kong	14,950	 Nigeria	4,425
7	 Sri Lanka	12,970	 Singapore	4,175
8	 Greece	9,175	 Greece	3,890
9	 United Arab Emirates	5,970	 United States	3,820
10	 India	5,595	 Hong Kong	3,780
11	 Uzbekistan	5,380	 Switzerland	3,265
12	 Germany	2,920	 Canada	3,005
13	 Spain	2,780	 South Africa	2,970
14	 Nepal	2,320	 Oman	2,600
15	 Switzerland	1,940	 Trinidad and Tobago	2,530
16	 Vietnam	1,795	 Ghana	2,435
17	 Trinidad and Tobago	1,705	 Ireland	2,405
18	 Cyprus (EU)	1,660	 Germany	2,300
19	 Ireland	1,650	 Austria	2,040
20	 Myanmar	1,500	 India	1,895

²² UKUi 2018

Excluding the three main providers of distance, flexible and blended TNE (e.g. Oxford Brookes, Open University, and the University of London), Malaysia remains the top host country for students studying at an overseas campus, with an overseas partner or through a collaborative study centre. The following tables provide views of the Top 10 host countries on type of TNE in-country.

Table 25: Top 10 Host Countries of Students Studying at a UK Overseas Campus 2017/18²³











COUNTRY	NO OF STUDENTS
 Malaysia	9,180
 China	8,255
 United Arab Emirates	6,960
 Hong Kong	1,060
 Mauritius	1,035
 Belgium	315
 Malta	235
 Qatar	230
 Singapore	195
 Greece	175

Table 26: Top 10 Host Countries of Students Studying via UK Overseas Partner 2017/18²⁴





















COUNTRY	NO OF STUDENTS
 Malaysia	14,375
 China	12,230
 Singapore	6,830
 Greece	5,735
 Hong Kong	4,305
 Oman	4,115
 Egypt	3,615
 Sri Lanka	3,440
 Ghana	2,355
 Germany	2,280

Table 27: Top 10 Host Countries of Students Studying via UK Collaboration 2017/18²⁵

COUNTRY	NO OF STUDENTS
 Malaysia	21,935
 Sri Lanka	16,160
 Egypt	14,315
 China	14,155
 Oman	13,485
 Singapore	11,885
 Hong Kong	11,240
 Greece	6,645
 Uzbekistan	3,235
 India	2,400

²³ UKUi 2018

²⁴ UKUi 2018













Focussing only on Asia and the top host countries by type of TNE program, Collaborative provision TNE has the highest volume of TNE enrolments, followed by overseas partner registration and overseas campus.

Table 28: UK TNE Students in Asia by Type of Provision 2017/18²⁶

RANK	TYPE OF PROVISION	NUMBER OF STUDENTS	NUMBER OF COUNTRIES REPRESENTED OUT OF 32 (%)	TOP COUNTRIES (% OF PROVISION TYPE)
1	Collaborative provision	90,400	27 (84%)	 Malaysia (24.3%)
				 Sri Lanka (17.9%)
				 China (15.7%)
2	Registered at overseas partner organisation	45,320	19 (59%)	 Malaysia (31.7%)
				 China (27.0%)
				 Singapore (15.1%)
3	Overseas campus	18,770	6 (19%)	 Malaysia (48.9%)
				 China (44.0%)
				 Hong Kong (5.6%)
4	Distance, flexible and distributed learning	14,600	32 (100%)	 Sri Lanka (18.8%)
				 China (15.8%)
				 Hong Kong (14.5%)
5	Other arrangement	4,490	6 (19%)	 India (60.8%)
				 Uzbekistan (27.0%)
				 Singapore (6.5%)

Focussing only on the Middle East and the top host countries by type of TNE program, Collaborative provision TNE has the highest volume of TNE enrolments, followed by distance learning and overseas campus. In late 2019, the Kingdom of Saudi Arabia announced that it will allow foreign universities to open branch campuses in a drive to modernise the country's education system in line with the national Vision 2030 plan. Phase one of the project will commence in 2020/21 with three foreign universities selected. Given the size of the population and prevailing youth demographics, TNE in Saudi Arabia will gain significant traction in the coming decade.

Table 29: UK TNE Students in the Middle East by Type of Provision 2017/18²⁷

RANK	TYPE OF PROVISION	NUMBER OF STUDENTS	NUMBER OF COUNTRIES REPRESENTED OUT OF 14 (%)	TOP COUNTRIES (% OF PROVISION TYPE)
1	Collaborative provision	16,250	13 (93%)	 Oman (83.0%)
				 United Arab Emirates (10.3%)
				 Qatar (2.0%)
2	Distance, flexible or distributed learning	7,830	14 (100%)	 United Arab Emirates (39.4%)
				 Saudi Arabia (20.9%)
				 Qatar (12.5%)
3	Overseas campus	7,485	5 (36%)	 United Arab Emirates (93.0%)
				 Qatar (3.1%)
				 Bahrain (2.2%)
4	Registered at overseas partner organisation	6,105	7 (50%)	 Oman (67.4%)
				 United Arab Emirates (22.7%)
				 Saudi Arabia (4.2%)
5	Other arrangement	205	1 (7%)	 Bahrain (100%)

²⁵ UKi 2018









²⁶ UKi 2018

²⁷ UKi 2018



Focussing only on South America and the top host countries by type of TNE program, Distance education has the highest volume of TNE enrolments, followed by collaborative provision and overseas partner registration. Overall volumes are small for UK TNE in South America, but the region has experienced strong growth over a 5-year period and will be a region to watch for the future.

Table 30: UK TNE Students in South America by Type of Provision 2017/18

RANK	TYPE OF PROVISION	NUMBER OF STUDENTS	NUMBER OF COUNTRIES REPRESENTED OUT OF 13 (%)	TOP COUNTRIES (% OF PROVISION TYPE)
1	Distance, flexible or distributed learning	1,010	13 (100%)	 Brazil (32.4%)
				 Guyana (18.7%)
				 Colombia (15.7%)
2	Collaborative provision	165	9 (69%)	 Guyana (35.2%)
				 Peru (27.3%)
				 Brazil (26.1%)
3	Registered at overseas partner organisation	40	2 (15%)	 Brazil (92.5%)
				 Argentina (7.5%)

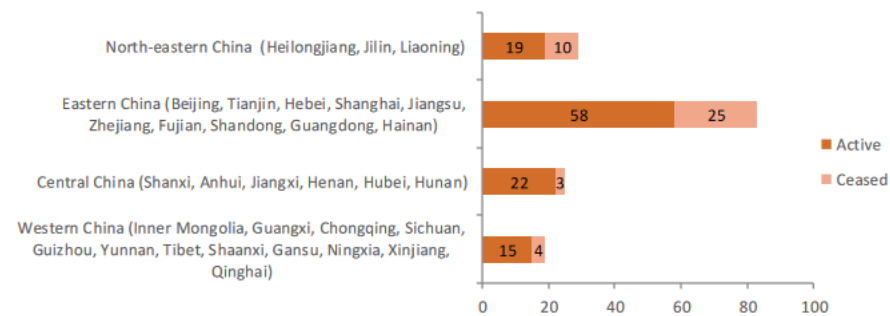
The success of UK TNE, with nearly 700,000 students around the world studying for a degree associated with a UK institution demonstrates the global demand for quality education opportunities and outcomes. The reputation of quality of UK institutions and their openness to innovation for cross border learning drives the success of UK TNE.

Appendix C

Successful TNE partnerships in China

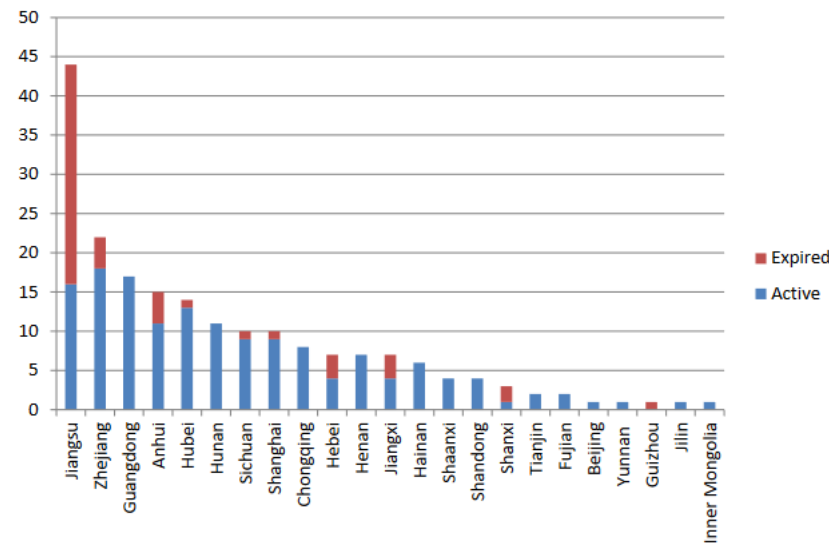
According to a 2018 report, there are 1,979 TNE programs in China, of which 577 out of 25000 total Chinese universities are involved with some form of TNE . 150 of these are Australian TNE joint ventures offered by 29 Australian universities. The majority of these programs (two-thirds) are at the Bachelor degree level and can be found in 21 Chinese provinces, with Beijing, Jiangsu, Shandong and Zhejiang accounting for close to half of all Australian TNE programs.

Table 31: Chinese Provincial Distribution of Australian TNE Programs²⁹



The Chinese Ministry of Education have taken steps to ensure there is greater quality, relevance and standards associated with TNE programs taught in-country. In February 2006 the 'Four One Thirds Rule' was implemented, with the intent to ensure that foreign education partners commit at least one-third of teaching and learning resources to the TNE joint venture. In 2011, the Ministry of Education doubled the frequency of TNE application reviews and approvals and in 2013 issued new quality assurance mechanisms to govern programs and protect students. Some of these mechanisms involved enrolment quotas, some related to the level of teacher education. whilst others related to the provision of targeted disciplines for delivery. This culminated in the 2018 closure of 10% of all TNE programs in country, including 62 British TNE and 44 Australian TEN programs. Many of these programs, however, were already teaching out or had not enrolled students in the previous academic year.

Table 32: Active and Expired Australian VET TNE Programs by Chinese Province (2017)³⁰



²⁸ JISC Transnational Education Data Report April 2018

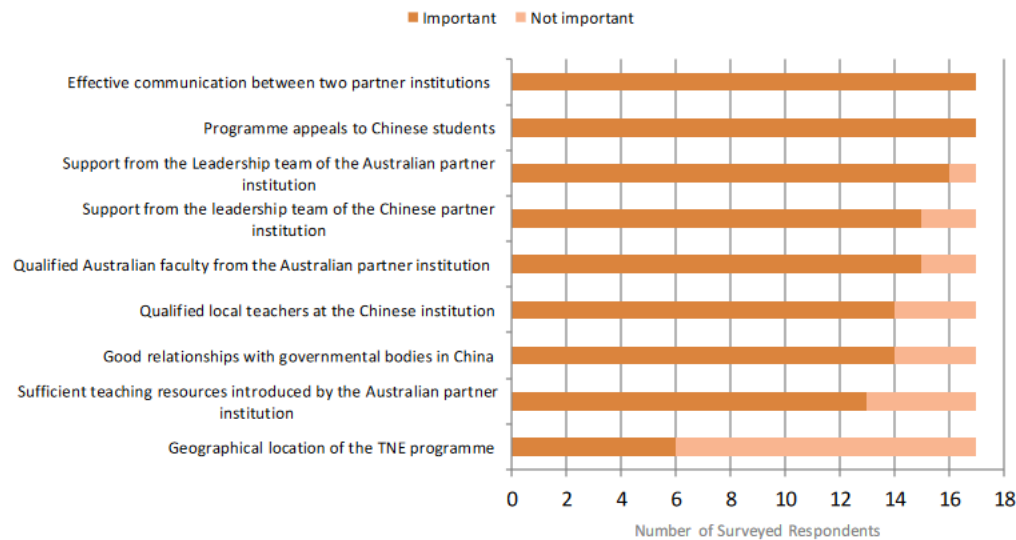
²⁹ Australian Embassy Beijing and China Ministry of Education Joint Report on Chinese-Australian Transnational Higher Education in China 2018

³⁰ Australian Embassy (2017) Sino-Australian Vocational Education Training and Cooperation <https://internationaleducation.gov.au/International-network/china/publications/Documents/Sino-Australian%20vocational%20education%20and%20training%20cooperation.pdf>

70% of Australian institutions surveyed by the Australian Embassy in Beijing in 2017 indicated that they use a third party for some aspects of their TNE program management. These third parties are leveraged to assist with student recruitment, partnership brokering, compliance and regulatory guidance, and policy advice. The Chinese MoE is currently reviewing the role of third parties and has a stated preference for direct relationship structures.

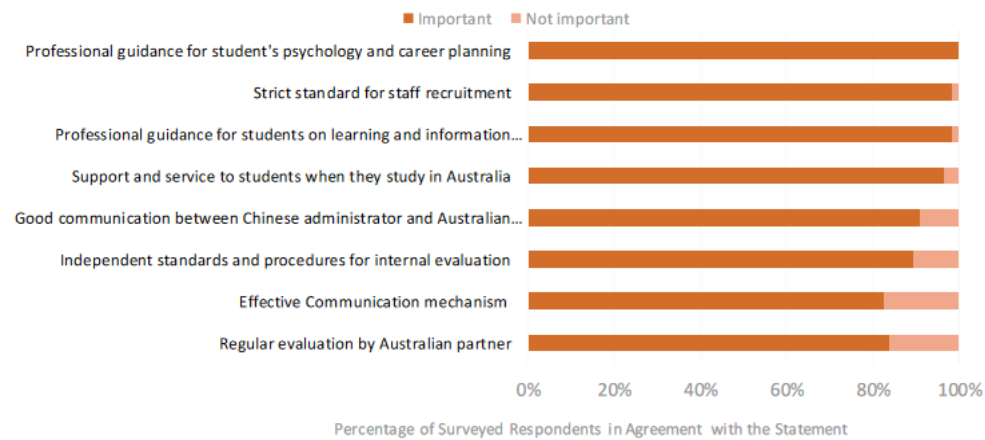
There are a variety of success factors that have been indicated by Australian institutions regarding their TNE endeavours in China. Effective communication between the two institutions, the appeal of the program to students, strong leadership and quality of instructors (both Australian and Chinese), are all deemed critical and key factors for success.

Table 33: Key Factors for Australian TNE Success in China (Australian p.o.v.)³¹



From the Chinese partner point of view, standards, guidance and quality control provisions are critical factors for successful TNE partnerships.


Table 34: Key Factors for TNE Success in China (Chinese p.o.v.)³²



³¹ Australian Embassy Beijing and China Ministry of Education Joint Report on Chinese-Australian Transnational Higher Education in China 2018. Retrieved from: <https://internationaleducation.gov.au/International-network/china/publications/Documents/Chinese-Australian%20Transnational%20Higher%20Education%20in%20China%20July%202018.pdf>

³² Australian Embassy 2018 report

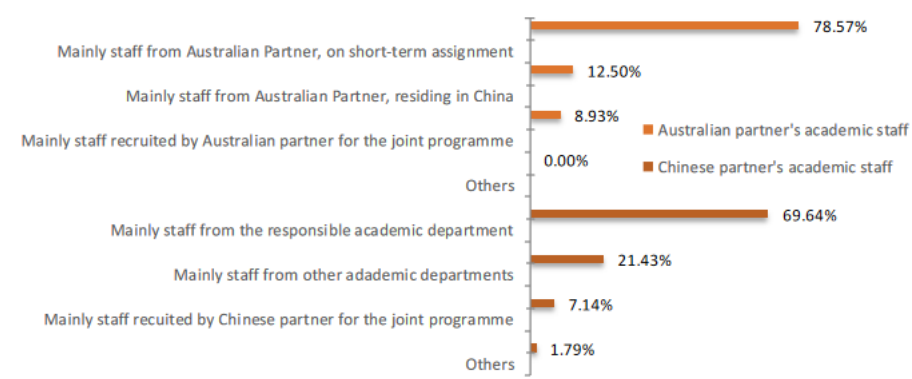
Human resource constraints have been highlighted by both Australian and Chinese education providers as a key difficulty encountered in the sound continued management of TNE programs. From difficulty in recruiting qualified teachers to ‘fly-in / fly-out’ models that create scheduling issues and discontinuity for students. Australian education providers have been criticised for over-reliance on casual teaching staff, with nearly 90% of academic staff on short-term assignments.




KEY TAKEAWAY

From the Chinese perspective, stricter standards for staff recruitment coupled with professional guidance for students across teaching and learning as well as mental health are critical.

Table 35: Staff Composition for Australian TNE Programs in China³³



Chinese government policy dictates enrolment and staffing quotas for all TNE delivered programs. The quota for TNE joint ventures are determined according to the level of qualified teaching staff allocated to a specific program and are set as an annual quota. These enrolment quotas create knock on effects for teaching arrangements, curriculum setting, academic policy, quality assurance and scheduling arrangements.

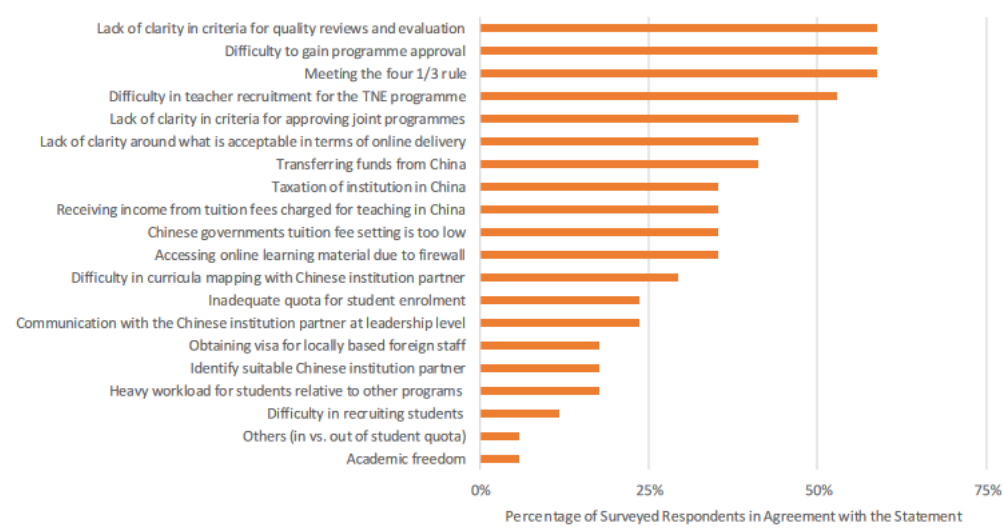


KEY TAKEAWAY

It is relevant for NEAS to note that ‘Lack of clarity in criteria for quality reviews and evaluation’ was tied for the top difficulty faced by Australian TNE providers in China.

³³ Australian Embassy 2018 report

Table 36: Difficulties Faced by Australian TNE Providers in China³⁴



Given that current Chinese Ministry of Education regulations state that foreign teachers should possess a Bachelors degree or above along with relevant occupational certificates and at least two years of teaching experience, there is an opportunity for NEAS to assist with teaching quality assurance to meet China MoE standards. The success of Australian TNE in China requires commitment from institutions to adhere to regulations for sustainability and future expansion.



NEW YORK UNIVERSITY (NYU) – SHANGHAI, CHINA



Over the past 15 years, NYU has implemented its ambitious Global Network initiative, comprising 11 TNE programs across all continents, including a program in Sydney. It has invested over \$1bn USD in its flagship campuses in Abu Dhabi and Shanghai.

In 2012, NYU Shanghai opened in the Pudong financial district. It was the first Sino-US research university established in China and is a joint-venture with East China Normal University. NYUSH currently enrolls 1,300 undergraduate and graduate students, half of whom are Chinese mainland students. Students may pursue 19 different majors in the arts and sciences, business and finance, engineering, as well as data and computer science. English is the language of instruction for all programs on campus. NYUSH accepts TOEFL and IELTS, but these exams are not required for admission. Admissions guidelines state competitive applicants have achieved TOEFL iBT: 100; IELTS Academic: 7.5; PTE Academic: 70; or Cambridge English: 191.



DUKE UNIVERSITY – KUNSHAN, CHINA



Duke University opened the first stage of a joint-campus initiative with Wuhan University five years ago. Duke Kunshan is one the largest private university joint-venture in China that has introduced an American-style liberal arts curriculum and merges classes of Chinese and international students to benefit cross-cultural communication. Duke accepts TOEFL and IELTS for entry but these are not required. English proficiency is evaluated through an on-campus interview and writing test. EAP is offered to all non-native English speakers as part of the program, with a strong focus on academic writing. These EAP programs are taken concurrently with first year courses, which Duke Kunshan acknowledges can be a challenge for some students.

³⁴ Australian Embassy 2018 report



Nottingham has established offshore campuses in both Malaysia and China. Nottingham was the first joint-venture campus established in China in 2004. The University of Nottingham China campus is based in Ningbo, two-hours south of Shanghai (known as UNNC) and enrolls over 7,000 students. It accepts either IELTS or PTE results for entry and has established a Centre for English Language Education. The Centre runs a wide-range of IELTS preparation, preliminary year, pre-sessional and academic literacy development courses which form an integral part of the student experience on campus. UNNC is widely viewed as having the most robust suite of English language preparation and support programs for a TNE provider. The Centre is staff by over 100 EAP Academics and Tutors.

The IELTS preparation program offered on campus is designed not only for students who seek entry to UNNC but to High School and University-level students who seek to study abroad as well. The on-campus IELTS program offered by the UNNC Centre for English Language Education focuses on writing and speaking tests, with writing tutorials that provide extensive feedback as well as mock speaking exams with individualised remedial assistance.

The Preliminary Year Program at UNNC is designed to equip Chinese students with the language, study skills and foundation-level content knowledge needed for future academic courses. Students concurrently study both EAP and introductory content courses related to their major. There are over 50 credit-bearing modules offered by the UNNC Centre for English Language Education, including:

Reading and Writing in Academic Contexts	English in Science & Engineering
Oral Communication Skills A	Oral Communication Skills B
Introduction to Analytical Thought	Language in Mind and Society
English in Arts & Social Sciences	English in Business and Economics
Introduction to Academic Skills	Reading and Writing in Academic Contexts
Essentials of Linguistics	Oral Communication Skills
Media and Texts: Society	Introduction to Academic Skills
Introduction to Politics and International Relations	Media and Texts: Culture

CAS

Coaching and Support

CAS is managed by a group of CELE tutors who aim to help preliminary year students adapt to university life and study, and to support the development of their language and study skills.

Nottingham China has established a Coaching and Support (CAS) unit for first year students, whose aim is to help students adapt to university life and study and to support their development of language and study skills. The Nottingham China CAS provides:

- One-to-one advising throughout the academic year which is individual and personalized. Students can book this in advance and can have a maximum of five advising sections per semester. Students can ask for advice on any academic or university life-skill topic.
- Academic workshops that are related to the learning objectives of the two major English for Academic Purposes courses that all students in the Preliminary Year take (RWAC and OCS).
- ‘@ UNNC’ discussion program which encourages the sharing of perspectives on topics related to studying and learning at UNNC.
- ZOOM digital age pen-pals for students interested in the chance to talk online with students from a range of different countries.
- Online paraphrasing practice so that students can practice changing original texts into their own versions and see tutor feedback.
- Self-study online support for students who wish to review or extend their knowledge and skills.

ALDC

Academic Literacy Development Centre

ALDC works to help UNNC students (Year 2 and above) develop their use of the English language for academic study, research, and publication.

For Year 2 continuing students and Postgraduate students, Nottingham China has established an Academic Literacy Development Centre (ALDC) which supports offshore students develop their use of English language for academic study, research and publication. The majority of ALDC work centres on student academic writing skills development. The ALDC offers workshops, lectures and individualised support that focuses on:

- Providing support for students to become better writers, not just their documents
- Support for key aspects in English communication – speaking, listening and reading
- Identifying features of English discourse in specific disciplines and contexts
- Building stronger discourse for student and academic communities across UNNC
- Fostering independent learning and thinking through the UNNC Library’s Learning Hub and online resources
- Developing reflective practices concerning language use

In 2016, UNNC established an affiliated High School with 250m RMB investment from the Ningbo Municipal Government. The private High School has a capacity to accommodate over 850 boarding students. All high school staff receive training from the UNNC School of Education to ensure alignment in education values and curriculum standards. Graduates of the UNNC affiliated high school can attend UNNC or continue to study abroad. A Pre-International Foundation Year in Business as well as Engineering commenced in September 2019 to better prepare students to attend universities around the world.



UNIVERSITY OF LIVERPOOL – SUZHOU, CHINA



Xi'an Jiaotong-Liverpool University
西交利物浦大學

In 2006, the University of Liverpool established a joint venture campus with Xi'an Jiaotong University in the city of Suzhou, China, known as Xi'an Jiaotong Liverpool University (XJTLU). It is considered the largest international joint-venture campus in China. The university enrolls 15,000 students and offers 90 degree programs ranging from Science and Engineering to Business, Finance and Architecture. All undergraduate and postgraduate programs are taught in English.

XJTLU has a Year 1 English entry requirement of IELTS 5.0 or TOEFL iBT 62. 60 credits of concurrent EAP modules are prescribed to most Year 1 students. Students who enter into Year 1 with an IELTS above 5 and below 6 will take 10 credits of EAP and students with IELTS 6.5 or above will take five credits of EAP. For Year 2 entry, the entry requirement is IELTS 6.5 or TOEFL iBT 90. Additionally, XJTLU have established a pathway to university by opening an affiliated high school in 2015. Both Chinese and international curriculums are taught in the high school as well as English language preparation.

A Language Centre has been established on campus since inception with a staff complement of over 100 administrative and teaching staff members. EAP courses are offered to Year 1 and Year 2 students and pre-session English courses are offered to Masters students. XJTLU has also established a Student Development Advice Centre was established to assist students and their skills development and resilience from pre-arrival to post-induction and continuing enrolment.

EAP classes are subject-focussed so that students gain the vocabulary and academic skills needed for their chosen discipline. In Year 1, credit-bearing English language modules are part of the first year of nearly all degree programs. First semester modules focus on communication with classes limited to 20 students each to ensure individualised attention. Second semester modules emphasise academic content related to the students' degree program, with essays, reports, group discussions and presentations centred on applying English language skills for relevant and authentic tasks. In Year 2, students undertake six year-long 10-credit EAP modules linked to their degree subject cluster. They are designed to raise their language skills to CEFR (Common European Framework of Reference for Languages) to a B2+ level, which is comparable to SEEC 9 Southern England Consortium for Credit Accumulation and Transfer) Level 4.

Students who demonstrate sufficiently high levels of English language ability before entry to Year 2 are allowed to move to advanced streams. These advanced streams increase the breadth and depth of students' academic skills. All students in the advanced stream undertake the Advanced Skills for Academic Success module with options to undertake modules in different academic departments.

Pre-Sessional English (PSE) programs are offered to XJTLU postgraduate offer holders who miss out on entry by .5 to 1.0 of an overall IELTS band. The published postgraduate English entry standards can vary by program, but the general standard is as follows:

GCSE	C grade or above
IELTS	6.5 (with a minimum of 5.5 in each component). This is the minimum requirement for admission to the University and many of our PhD programmes (for example, arts and humanities, business and management) will require higher scores than this, and may also require higher specific grades in each of the sub-tests. Please note the IELTS certificate is only valid for 2 years.
PEARSON TEST OF ENGLISH ACADEMIC (PTE ACADEMIC)	62 with minimum scores of 51 in each component
CAMBRIDGE ENGLISH: ADVANCED	58
CAMBRIDGE IGCSE AS A FIRST LANGUAGE	(Syllabus 0510 and 0511) Minimum - Reading grade E; Writing grade E; Speaking grade D (0522) or 2 (0500); Listening grade D (0522) or 2 (0500).
CAMBRIDGE IGCSE AS A SECOND LANGUAGE	(Syllabus 0510 and 0511) Minimum - Reading grade D; Writing grade D; Oral (Speaking) grade C (0511) or 2 (0510); Listening grade A.
TRINITY INTEGRATED SKILLS IN ENGLISH	ISEIII - Listening, reading, speaking and writing - PASS
UK - INTERNATIONAL BACCALAUREATE	Standard Level 5 or Higher Level Grade 4 in English B (Group 2). Please note Standard or Higher Level English A (Group 1) is not acceptable.
HONG KONG USE OF ENGLISH AS LEVEL	C grade or above.
INDIA STANDARD XII	70 percent or above from Central and Metro State Boards when education has been completed in English.
WAEC (FOR GAMBIA, GHANA, LIBERIA, NIGERIA AND SIERRA LEONE)	Grade C, Credit (4-6) or above.

As the longest established and largest international joint venture in China, XJTLU has secured the recognition of a host of professional accreditation bodies for over 50 academic programs.

Department/School	Accreditation Agency
Academic Enhancement Centre	Higher Education Academy (HEA)
Architecture	Royal Institute of British Architects (RIBA)
Biological Sciences	Royal Society of Biology (RBS)
Chemistry	Royal Society of Chemistry (RSC)
Civil Engineering	Joint Board of Moderators (JBM)
Electrical Engineering	Institute of Engineering and Technology (IET)
International Business School	Association of Chartered Certified Accountants (ACCA) Association to Advance Collegiate Schools of Business (AACSB) Chartered Institute of Management Accountants (CIMA) European Foundation – Quality Improvement System (EFMD-EQUIS) Institute of Chartered Accountants in England and Wales (ICAEW)

Company Profile

Edified is a specialist higher education consultancy dedicated to assisting Australian, New Zealand and UK education providers and promoters to significantly improve their ability to build their brands, acquire and retain students, and deliver outstanding student/graduate success.

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To dramatically improve our clients' ability to Build, Acquire, Retain and Deliver

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