Study UK

Exploring the outlook for UK-India Transnational Education partnerships

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This report was written by The Knowledge Partnership on behalf of the British Council.
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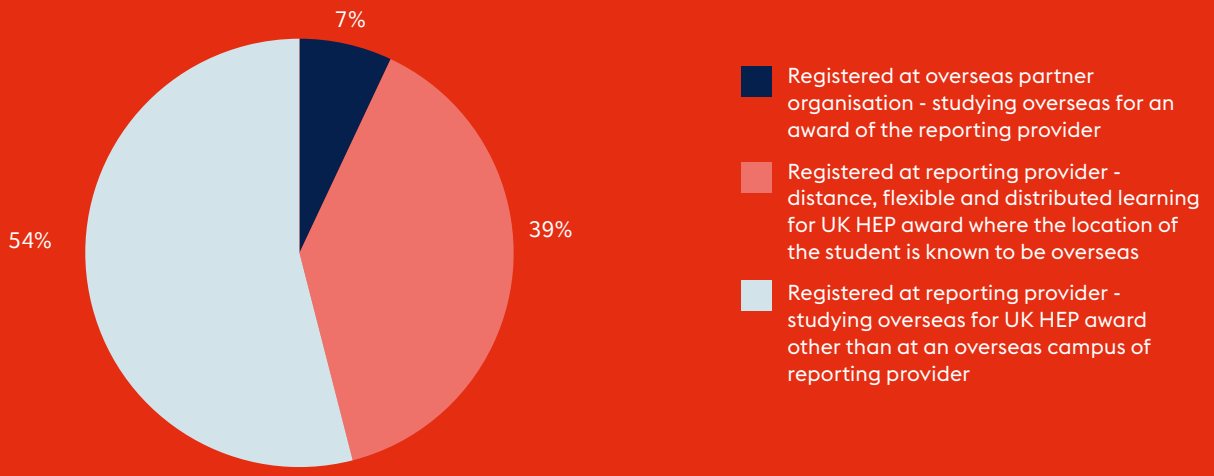
Executive summary

The research outlined in this report was commissioned by the British Council in India to evaluate the prospects and challenges for UK transnational education (TNE) in India, and how India's National Education Policy (NEP) has impacted opportunities for its development since 2020. By identifying potential TNE opportunities emerging as a result of NEP-inspired reforms and analysing existing challenges faced by UK universities in operating TNE in India, the report provides a series of recommendations for enhancing UK - India TNE in the future.

This report also provides an up to date (as of October 2022) analysis of key legislative changes and proposals to the Indian higher education regulatory framework which may enable further development of UK TNE in India. These changes are ongoing, and address some of the recommendations to transform the Indian regulatory system as proposed in the NEP.

In addition, this report provides a comprehensive catalogue of all UK higher education TNE in India, and a further catalogue of TNE in India from other countries' universities in partnership with Indian universities ranked in the National Institute Ranking Framework (NIRF) top 100. The listing indicates the scale and extent of TNE currently being delivered including the TNE models being delivered in each partnership, and where it can be further developed.

UK TNE Provision in India 2020-21



In 2020-21, the UK Higher Education Statistics Agency (HESA), captured three categories of UK TNE delivered in India. These categories reflect the broad range of teaching and partnership models involved in TNE, and universities may not necessarily use the same terms as HESA.

The blue category can include TNE where there is a validation model, with the majority of teaching delivered in India.

The grey category can include joint and dual degrees, and franchise provision

The pink category refers programmes that are delivered online.

Key Findings

- Regulatory conditions have been made easier for the development of joint and dual degree TNE partnerships in India, for universities in the top 1,000 as ranked in QS or THE World Rankings.
- The UK and Indian governments have signed a memorandum of understanding (MoU) on mutual recognition of academic qualifications, including bachelor's, master's and doctoral degrees. Indian upper secondary qualifications will be recognised as meeting entry requirements for the UK higher education institutions (HEIs).
- Joint or dual degrees in the 2+1 or 2+2 form for undergraduate degrees with a period of study in the UK, is the most desired form of TNE for UK and Indian university leaders, as well as Indian students, according to the research conducted for this report. However, new Indian regulations stipulate that for joint and dual degrees, at least 30 per cent of the course credit should be undertaken at the foreign institution (which would translate to slightly under one academic year for three-year programmes, or slightly more than an academic year for four-year courses).
- There are still more reforms to be undertaken for the proposals set out in the NEP to be realised. At present, UK universities continue to find overlapping regulatory conditions with three regulatory bodies in India, bureaucracy, and lack of information related to financial matters, the key challenges to operating and expanding TNE provision in India. The online learning degrees awarded by foreign universities remain unrecognised. Franchise arrangements will also not be recognised as per the latest UGC regulations.
- Indian universities feel that their faculty members can learn new skills from UK TNE relationships related to curriculum and assessment design, teaching and learning approaches, and imparting employability skills to students.
- UK universities see India as one of the priority markets for their internationalisation strategies, which can include TNE, student recruitment and research and knowledge exchange. New regulations governing joint and dual degrees, and mutual recognition of qualifications have generated a sense of purpose moving forward.
- Management of TNE partnerships between UK and Indian partners can sometimes have differences in expectations, ranging from the amount of academic support UK partners should provide, to due diligence in processes. The difference in administrative structures of universities in the UK and India can compound this.
- UK universities feel that there are financial challenges for initiating and maintaining TNE in India. This includes lower fee setting and taxation at national and state levels. There are different priorities depending on the type of UK institution involved; for example, post-92 institutions are more likely to scale TNE operations in India as TNE revenue is more central to

their internationalisation strategies. Research-intensive universities are less likely to do so, as they have less reliance on TNE income, and will only seek TNE opportunities where value is added to reputational and strategic goals.

- Mapping of TNE provision in India shows that there is significant potential for developing TNE in several states such as Madhya Pradesh, Uttar Pradesh, Bihar, Odisha, West Bengal and the seven states of Northeast India.[1] Currently, TNE provision is concentrated in the Delhi National Capital Region (NCR)[2], Greater Mumbai, Karnataka and Tamil Nadu.

Encouraging further UK TNE development in India is conditioned on a number of factors, including further liberalisation and transparency of the Indian HE regulatory system, as well as further market research by institutions to determine market demand by geographical area and subject. However, where the NEP has prioritised making conditions of collaboration easier for globally ranked top 1,000 universities, this covers a between 76 to 93 UK universities according to the 2022 world rankings of QS and THE respectively. Foreign universities will have to hold a top 1,000 ranking at the time of application to undertake joint, dual or twinning programmes.

Many additional UK universities are interested in developing TNE in India, and they may also offer greater technical and vocational education and training (TVET) expertise than higher ranked universities; many post-92 universities have roots in technical and vocational education. Similarly, Indian universities eligible under the new regulations must be ranked in the top 100 of the Indian National Institutional Ranking Framework (NIRF) or have a grade point average of above 3.1 from the Indian National Assessment and Accreditation Council (NAAC). Broadening out the parameters for eligibility would increase the number of Indian institutions being able to partner with foreign universities.

1. Arunachal Pradesh, Assam, Manipur, Meghalaya, Mizoram, Nagaland, Tripura and Sikkim
2. Whole of Delhi and some districts of Haryana, Rajasthan and Uttar Pradesh

Recommendations

Policy Level Recommendations:

- Explore the potential to widen the scope of ranking requirements to include subject-level excellence or other measures of programme quality, to allow participation of universities with niche areas of expertise. This would help to leverage the full potential of TNE by enabling a greater range of Indian and foreign universities that specialise in niche subject areas and TVET to participate.
- Consider recognition of online / distance learning degrees provided by foreign universities.
- Making available clear guidelines on taxation for foreign universities seeking to establish collaborations in India, at both national and state level.

UK and India HE Sector Recommendations:

- Establish mixed-departmental steering groups for TNE operations between UK and Indian universities.
- Consider establishing clear guidelines for due diligence processes including best practice guides.
- Create best practice guides for operating TNE, including creating Key Performance Indicators (KPIs) to monitor and evaluate success.
- Conduct more research on Indian market segmentation at socio-economic and geographical levels to establish realistic student demand levels for TNE, including assessment of local population's affordability for TNE programmes.
- Ensure that market research amongst student and parent is conducted to establish the most viable mode of TNE delivery.
- Map the economic skills needs of Indian states to public and private higher education provision in those states, enabling TNE partnerships to directly address local skills gaps.
- Work together to enable greater international mobility of Indian and UK students during TNE delivery, including work placements and post-study work opportunities.
- Enhance procedures for co-designing and delivering of joint / dual degree curricula, to enable the upskilling of faculty at both UK and Indian institutions.

1. Introduction

1.1 Background and aim of the report

This report explores the outlook for UK - India transnational education (TNE), assessing the challenges and opportunities for future growth. TNE is defined as 'education delivered in a country other than the country in which the awarding institution is based.'[3] UK HE TNE therefore refers to UK degree programmes which are delivered outside of the UK. There are multiple models of TNE delivery, ranging from validation agreements between UK universities and local providers, to international branch campuses (IBCs). UK online degrees (distance learning) undertaken by students outside of the UK are also considered to be TNE. TNE can help to improve a country's higher education provision[4], develop local skills, increase choice, enhance student mobility, and contribute to the United Nation's Sustainable Development Goals (SDGs).

UK TNE at undergraduate and postgraduate level was delivered to over 500,000 students worldwide in 2020/21[5], growing by 25 per cent from the previous five years. India is seen to be a major potential market for UK TNE, and the aim of this report is to understand what challenges and opportunities exist to ensure future growth of TNE in India.

1.2 Research objectives

The research for the report took place using a combination of desk research and primary research. Desk research techniques included analyses of: the Higher Education Statistics Agency (HESA) Aggregate Offshore Record (AOR) report; websites and reports of universities in the UK, India, and other relevant countries; multiple reports and notifications of key Indian HE regulatory authorities. Primary research involved interviews with senior UK and Indian stakeholders.

The research has been structured around the following objectives:

a) To map existing TNE activity in India.

This report provides a comprehensive catalogue of TNE activity, using UK and Australian datasets. Further research was conducted to establish TNE activity from higher education institutions (HEIs) from other countries in lieu of publicly available datasets. Section 3 addresses this objective.

3. Universities UK, August 2021 What is UK higher education transnational education?
4. Alam et al (2013). 'Transnational Education: Benefits, Threats and Challenges.' Procedia Engineering 5, page 870.
5. The Scale of UK Transnational Education (Interactive Website). Universities UK. www.universitiesuk.ac.uk/universities-uk-international/insights-and-publications/uuki-insights/scale-uk-transnational-education

The research for the report took place using a combination of desk research and primary research.

b) To review and interpret current policies related to TNE.

Relevant regulatory frameworks and policies have been analysed from the India University Grants Commission (UGC), All India Council for Technical Education (AICTE), and Association of Indian Universities (AIU). These bodies are the primary bodies for regulating HE in India and provide the framework and rules that govern how foreign HEIs can operate in India. This includes TNE, and issues pertaining to equivalency, recognition and credit transfer. All three bodies have responded to the release of the National Education Policy (NEP) with new guidelines, rules, and regulations (some in draft or consultation stage). These changes are also contextualised in their contributions to achieving the objectives of the NEP. Section 2 addresses this objective.

c) To gather stakeholder views on opportunities and barriers to TNE in India.

Stakeholder views on TNE in India provide the qualitative core of this report. Senior university leaders, policymakers, and researchers from the UK and India were interviewed to elicit their insight and opinion into the opportunities and barriers to TNE in India. A group of prospective, undergraduate, and postgraduate students were also engaged to understand their opinions and views on TNE, including barriers for them engaging in TNE in India.

2. The United Kingdom and India: Transnational Education Policy Context

2.1 Introduction

The Indian National Education Policy (2020), and the UK International Education Strategy (IES) (2019; updated in 2021) outlined each country's' ambitions of international engagement in the field of education. The India NEP advocates for greater internationalisation at home and increasing foreign university presence to facilitate an increase in quality and capacity for HE, which is required to fulfil a gross enrolment ratio (GER) of 50 per cent with a growing young population. The current GER is 29 per cent, ranging from 17 per cent in Assam in the Northeast of India, to 51 per cent in Tamil Nadu in the South. The UK IES targets specific financial value of TNE as an export good (UK HE TNE was worth over £650 million in 2018)[6], as well as acknowledging the cultural dimensions of increasing soft power through education in a post-Brexit world.[7] India is identified as one of the five priority markets for the growth of UK education exports.

India is an increasingly important part of the internationalisation strategies of UK universities. Broadly conceived, internationalisation strategies can include: a) international student recruitment and mobility, b) research and knowledge exchange, and c) transnational education. Other types of internationalisation activity can include commercial partnerships and professional exchanges to develop leadership and management. In terms of recruitment of Indian students directly to UK universities, there were 84,555 in 2020/21, representing a leap of 52.4 per cent from the previous year [8], demonstrating a real recovery of the Indian market after a fall during the mid-2010s. India is second after China as a major source of students for UK universities.

2.2 UK Higher Education TNE in India

The trend of UK HE TNE in India is less clear. Where UK TNE in India has remained above 8,000 enrolments over the past five academic years, the trend has been variable, with a decline between 2016-17 and 2018-19, followed by a resurgence towards 2020-21. With many students unable to travel abroad, the COVID-19 pandemic may have accelerated demand for TNE, with China witnessing +20 per cent growth overall, however, current UK TNE in India activity is still lower than in 2016/17.

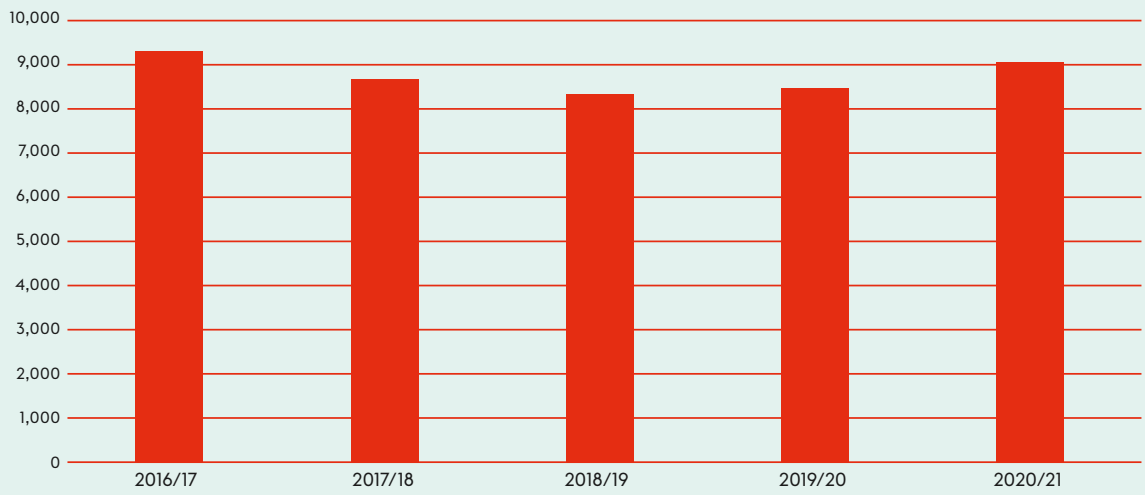
6. International Education Strategy: 2021 Update. Supporting recovery, driving growth. Page 14. https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/958990/International-Education-Strategy-_2021-Update.pdf

7. British Council (2021). Global Britain: the UK's soft power advantage. Page 11. www.britishcouncil.org/sites/default/files/global_britain_the_uks_soft_power_advantage_report.pdf

8. 'International student recruitment data.' Universities UK. https://www.universitiesuk.ac.uk/universities-uk-international/explore-uuki/international-student-recruitment/international-student-recruitment-data

The India NEP advocates for greater internationalisation at home and increasing foreign university presence to facilitate an increase in quality and capacity ...

Figure 1 UK TNE enrolments in India, 2016/17 to 2020/21



Source: The Scale of UK Transnational Education, Universities UK, 2022[9]

In the 2020-21 academic year, around 40 per cent of students studying UK TNE courses in India were enrolled on programmes described as 'distance, flexible and distributed learning'. This proportion is similar to that seen in 2019-20 but a substantial increase compared to their 26 per cent share in 2016-17.[10]

If data is broken down by level of study, roughly half of TNE students in India were studying master's degree courses, with most of the remaining students enrolled in bachelor's programmes. Only a small fraction of the TNE students were studying at other levels, including sub-degree courses and doctoral programmes.

9. Universities UK, 2022. Interactive Tool. Data reflects the Aggregate Offshore Record collected by the HESA, excluding Oxford Brookes University. The scale of UK Transnational Education
10. HESA, 2022. TNE Statistics do not include students registered on courses designed to be delivered as onshore programmes in the UK, even if these students were studying online due to the COVID-19 pandemic.

The relative strength of UK TNE in India can also be assessed by comparing enrolments with other countries. Even within the region of South Asia in 2020/21, there were fewer enrolments in India compared to its much smaller neighbours, Nepal, and Sri Lanka.

Figure 2 TNE enrolment in selected Asian countries, 2020/21

Asian country	TNE enrolments 2020/21
China	60,405
Malaysia	48,240
Sri Lanka	37,100
Singapore	27,730
Nepal	9,610
India	9,050

Source: The Scale of UK Transnational Education, Universities UK, 2022

If the Middle East region is included as well, Saudi Arabia, Oman, the United Arab Emirates and Kuwait all had over 10,000 UK TNE enrolments in 2020/21.

Finally, the rate of growth of TNE can be considered. Whereas UK TNE in India has declined by 3 per cent between 2016-17 and 2020-21, Sri Lanka's has grown by just over 75 per cent in the same period, and Nepal's by 277 per cent (albeit from a very low base). China's UK TNE enrolments have almost doubled since 2016-17, while Malaysia and Singapore have experienced significant declines.

These trends regarding UK TNE enrolments and the rate of growth in the last five years show India to be underperforming in comparison to neighbours and in the Asia region more specifically.

2.3 India's National Education Policy (NEP)

The NEP addresses a broad range of internal, structural issues in the Indian education system. For HE specifically, some challenges identified include: 'a severely fragmented HE ecosystem', 'less emphasis on the development of cognitive skills', 'sub-optimal governance and leadership of HEIs', and 'large affiliating universities resulting in low standards of education'. [11]

The vision of the NEP for HE is to re-energise the system structurally (e.g., through governance and regulation) and pedagogically (by including multi-disciplinarity and revamped assessment).[12] There is a focus on improving the quality of teaching and research, as well as creating a cohesive, unified system of accreditation for HEIs across the country.

One of the core proposals to manage this process is to create large, multidisciplinary universities, colleges, and HEI clusters of 3,000 or more students by 2040. Increasing access to HE through the development of more institutions as well as online programmes, is a key goal of the NEP.

Alongside the proposed internal changes to the Indian HE system is an acknowledgement of the importance of internationalisation. This is partially conceived of as increasing the flow of foreign students into India, as well as improving the prospects of Indian students going abroad for parts of their study. Creating attractive, world-class provision is seen as a way of achieving 'internationalisation at home' and evokes

11. National Education Policy 2020. Ministry of Human Resource Development, Government of India. Page 33, Section 9.2. A total of 10 'major problems currently faced by the higher education system in India' are identified.

12. Ibid. Page 34, Section 9.3. A total of 9 'key changes to the current system' are proposed.

India's historical role as a Vishwa Guru, a global centre of learning.[13]

The NEP advocates an ambitious strategy for internationalisation, including high performing Indian institutions to set up their own branch campuses abroad. Furthermore, ten public and ten private 'Institutions of Eminence' (IoE) have been designated since 2018 to spearhead India's global ascendancy in HE, including increasing the number of articles published in globally rated journals and establishing the presence of Indian universities in the top 100 rankings.[14]

Likewise, the NEP seeks to facilitate foreign universities drawn from the top 1,000 QS or THE world rankings to operate in India. This point is particularly important to the UK TNE interest in India, with 97 UK universities in total, eligible using the 2022 rankings. There is also possibility of universities setting up IBCs in India alongside other forms of TNE such as validated degrees delivered by Indian HEIs.

A survey conducted by the National Institute of Education Planning and Administration (NIEPA) revealed that only two universities in the Times Higher Education World University Rankings Top 1-100 category would 'definitely consider India as a potential destination for establishing their international branch campuses (IBCs)', compared to six universities showing the same interest in the 100-200 category.[15]

This survey also revealed some of the existing concerns about establishing overseas campuses in India, including the availability of financial and non-financial incentives, and the importance of a liberal regulatory framework for foreign universities. The COVID-19 pandemic was also cited as a reason for postponement of internationalisation strategies.

At present, legislation about internationalisation and the regulatory frameworks that will govern it, are still being drawn up. UGC legislation in 2021 allowed for each of the 20 designated IoEs to establish up to three IBCs, with strict oversight by the UGC and other government departments.[16]

For foreign universities wanting to set up IBCs in India, there are still ongoing proposals for models of engagement as well as rules and regulations. Recently, the government announced that the Gujarat International Finance Tec-City (GIFT) in Gandhinagar could function as a base for foreign universities in India, with autonomy from regulatory authorities such as UGC and AICTE.[17]

Other forms of TNE, such as joint degrees, dual degrees, and twinning programmes, are encouraged by the new UGC regulations.[18] An agreement between Cornell University in the US and Jindal Global Law School in NCR is one such example, with students being able to obtain both the Indian LLB and American Juris Doctor (JD) following completion. Though joint degrees are acknowledged to be

13. Ibid. Page 39, Section 12.8.
14. Institutions of Eminence
15. Eldho Mathews (July 2021). Establishing International Branch Campuses in India: A Survey Among 'Top 200' Universities. Unit for International Cooperation. National Institute of Educational Planning and Administration. Page 9.
16. Joyce Lau (January 2021). 'Indian 'institutes of eminence' allowed to open overseas campuses. Times Higher Education. www.timeshighereducation.com/news/indian-institutes-eminence-allowed-open-overseas-campuses
17. Rajlakshmi Ghosh (February 2022). 'Foreign campuses may boost 'Study in India' Times of India. timesofindia.indiatimes.com/home/education/news/foreign-campuses-may-boost-study-in-india/articleshow/89587516.cms
18. Yojana Sharma (February 2021). 'International dual and joint degrees to get the green light.' University World News. www.universityworldnews.com/post.php?story=20210226145106838

time-consuming due to the curriculum design and mapping process, 2+2 or 2+1 type arrangements that lead to dual awards could increase both the TNE activity in India as well as student recruitment.[19] The 2022 MoU between UK and India on the mutual recognition of qualification means that 1-year full-time master's programmes that are typical of the UK HE system will also now be recognised in India.

What is clear is that the COVID-19 pandemic has transformed thinking in the HE sector. For example, the use of digital technologies for teaching and learning, planning for flexible education models, and student-centric individualised learning pathways- referred to as Education 4.0[20] - were trends that were accelerated during the pandemic due to disruption of traditional teaching. There is also acknowledgement that influence from foreign providers can support this transition through governance, quality assurance, knowledge creation, and research efforts.[21]

Discussion on internationalisation since the NEP was released has mainly focused on incentivising Indian universities to become global standard institutions, to be measured by rankings performances and indices on internationalisation.

The UGC's 'Guidelines for Internationalisation of Higher Education' published in July 2021, for example, states five objectives and eight strategic initiatives to be developed at national and institutional level. The figure below maps how the different strategic initiatives can contribute to each of the five objectives.

The guidelines above indicate that the Indian government wants to pursue a proactive and mutually beneficial approach to internationalisation in collaboration with foreign institutions. Besides improving the brand of Indian HE, academic and research

Figure 3 UGC Guidelines for Internationalisation of Higher Education[22]

Objectives	Initiatives
To make India an attractive study destination for foreign students	• Internationalisation at home • Global citizenship approach • Brand building abroad
To foster international competencies in our faculty and students	• Credit recognition under twinning arrangement • Academic and research collaboration
To develop a global mindset of our learners and shape them as global citizens with deep rooted pride in being Indian	• Global citizenship approach • Alumni connect
To promote active linkage between Indian and Foreign Higher Education institutions	• Information and Communication Technology (ICT) based Internationalisation • Credit recognition under twinning arrangement • Academic and research collaboration • Office for international affairs
To improve global ranking in internationalisation indicators	• Academic and research collaboration • Brand building abroad

Source: UGC

19. Ibid.
20. Higher Education in India: Vision 2040 (Feb 2021). FICCI and EY (spell out). Page 5
21. Ibid, page 7.
22. Guidelines for Internationalisation of Higher Education, University Grants Commission, Ministry of Education, Government of India, July 2021 https://www.ugc.ac.in/e-book/IHE%20Guideline/mobile/index.html?_gl=1*korcry*_ga*MTUyNjg2ODAxOC4xNjU4OTA3NDAz*_ga_FGHYECNLXB*MTY2MzU2ODMxNy4xMC4wLjE2NjM1NjgzMTcuMC4wLjA.

collaborations can facilitate the co-production of knowledge and solutions to global issues and contribute to India's international soft power.

The 2022 Indian government's national education budget announced that approximately £40 million will be allocated for ICT in higher education, £21.8 million for research including a seven-fold increase for UK - India Education and Research Initiative (UKIERI), £20 million for the Global Initiative of Academic Networks (GIAN) to promote internationalisation and £2 million for technical education.

Alongside these allocations, there were confirmations to create a central Digital University, and GIFT city to open new opportunities for foreign institutions in finance and science, technology, engineering, and maths (STEM) subjects.

At a state level, it is harder to discern the potential consequences for TNE with responses from state governments focusing on overall reform of the structure of HE within their states and looking at ways of increasing the flow of international students into the state's public and private universities. However, some states have publicly expressed their intention to implement the NEP proposals.

Karnataka state, for example, became the first state (in August 2021) to 'issue orders' to start implementing the NEP[23], which included provision for multi-disciplinary undergraduate curriculum with a major / minor system.

However, the state also made the study of Kannada (the official state language) compulsory for undergraduate students even if they are from outside the state, due to guidelines in the NEP that promote 'Indian language and regional languages' through various measures.

Karnataka has embraced some of the loftier ideals of the NEP around the internationalisation agenda, with state universities now offering foreign languages as a part of degree study. Implementation of the NEP is ongoing in the state, with panels formed by government officials, educationalists and industry experts looking at ways to identify skill gaps.

Another state, Gujarat, was singled out as 'moving forward quickly to internationalise its education and trade.[24] With two of India's most rapidly growing cities, Ahmedabad and Surat, Gujarat has potentially attractive conditions for TNE, with an existing education hub in Ahmedabad and an embedded start-up ecosystem with support for entrepreneurship[25], as well as latent demand for HE through its young, growing population.

However, HE within Gujarat- aside from IIT Gandhinagar- is acknowledged to need improvement, with only three universities of the state ranked within India's NIRF rankings. The state education department in Gujarat has initiated planning of quality assurance as well as measures to enhance the internationalisation of universities.[26] In late February 2022, the Indian Finance Minister announced that foreign universities would be

23. 'Karnataka becomes the first state to issue order implementing National Education Policy' New Indian Express, 7th August 2021. www.newindianexpress.com/states/karnataka/2021/aug/07/karnataka-becomes-first-state-to-issue-order-implementingnational-education-policy-2341661.html

24. British Council (2014) 'Understanding India: The Future of Higher Education and Opportunities for International Cooperation.'

25. British Council (2016) 'City Insights: An introduction to characteristics and opportunities of six Indian cities.'

allowed to set up in the planned Gujarat International Finance Tec-City (GIFT) and potentially independent of the current regulatory framework of Indian HE.[27]

It is expected that GIFT City will contain an education hub, similar to the hub models for foreign universities existing in Malaysia and the United Arab Emirates, with multiple foreign university campuses present.

2.4 The UK International Education Strategy and TNE

The 2021 International Education strategy (IES) confirmed India as one of five priority countries to grow educational exports in, an endeavour to be supported by the appointment of the International Education Champion, Sir Steve Smith. A key deliverable from the original 2019 version, to introduce a new Graduate route that allows international students to stay and work for up to two years after graduation, was also introduced. Demand for employment in the UK has led to a sturdy growth in Indian student numbers, with visa statistics showing that the number of Indian citizens issued student visas increased significantly, almost quadrupling between 2018 and 2021.[28]

The main driver for UK TNE in India falls under the 'Building lasting global partnerships' priority, which specifically highlights online learning and research collaboration (through UKIERI) as areas of opportunity the Department for International Trade (DIT) is developing. Furthermore, India is one of five countries identified for UK colleges and providers to develop TVET partnerships with.

There is further support for TNE in India through the Global Wales programme that aims to provide strategic support to universities in India.

The IES also acknowledges that TNE is becoming increasingly competitive and whilst universities have a role to play in enhancing education exports, the role of Edtech, professional body accreditation and English language training (ELT) will also become important in maintaining UK advantages in the sphere. Action 9 of the IES is to address the market barriers to UK education exports, including the facilitation of TNE. It is clear throughout the IES that TNE delivered through online learning is a valued model to explore and prioritise.

India is consistently highlighted by the IES as a priority market; there are a few programmes, such as UKIERI (which has existed before the IES), and the British Council-managed Going Global Partnerships programme in India that are designed to directly enhance TNE.

2.5 Summary

Despite the COVID-19 pandemic, there has been increasing activity from both, the UK and India, to stimulate greater internationalisation. Student recruitment remains a core objective for the UK, and both UK and India are providing incentives for greater research collaboration.

Regarding TNE, there are emerging opportunities, including the potential creation of an international education hub for IBCs, and new regulations from the UGC governing

26. https://ahmedabadmirror.com/gujarat-prepares-ground-to-become-education-hub/81816537.html
27. www.timeshighereducation.com/news/indias-regulation-free-city-offers-blueprint-branch-campuseData refers to main applicants only – dependents are not included. 2018 was the last full year before the announcement of the Graduate Route.
28. Data refers to main applicants only – dependents are not included. 2018 was the last full year before the announcement of the Graduate Route.

joint and dual degrees. And though regulations have made it easier for Indian universities to run their own online learning programmes, foreign online degrees remain unrecognised.

It is important to contextualise TNE development within the wider developments of internationalisation, and the way TNE is strategically embedded in internationalisation.

Two years since the NEP release, and nearly three years since the first iteration of the UK IES, progress has been made to enhance the international HE relationship between the two countries. Although TNE is just one component of that broader project, recent national legislation and announcements in India point towards encouraging foreign universities to engage in further TNE, including new models such as IBCs.

The regulatory landscape in India remains key to unlocking this process, and issues around online modes of study still have to be ironed out. There is also further work to be done at an individual state level to manifest those UK HE TNE partnerships as a part of the state education strategies.

Figure 4 Summary of how UK TNE can contribute to the UK IES and India NEP goals

UK International Education Strategy 2021 Goal	UK TNE contribution
Recruitment of Indian students coming to study in the UK	Increase in 2+1 style agreements in India due to change in UGC regulations
Growth of Edtech driven TNE	Increase in university online degrees; increase in online professional certificates; increase in online CPD (Continuing Professional Development)
Global partnerships in research	UKIERI, British Council 'Going Global Partnerships'
India NEP 2020 Goal	**UK TNE contribution**
Improvement in global rankings	Further partnerships between UK and Indian institutions, improvement of Indian research faculty
Increase in quality and diversity of Indian HE curriculum	Joint / dual degree mapping exercises to align Indian HE programmes with UK standard
Increase access to HE through digital learning	Growth of online UK HE TNE programmes in partnership with Indian providers

Source: UGC

3. Rules and Regulations for TNE in India

3.1 Introduction

There are three main central bodies in India that govern the rules and regulations for TNE: the University Grants Commission (UGC), the All India Council for Technical Education (AICTE), and the Association of Indian Universities (AIU). Their regulatory frameworks can overlap; in some instances, TNE partnerships between Indian and foreign HEIs may be subject to all three bodies depending on mode of delivery, length of programme, subject area, and the status of the Indian institution. Since the release of the NEP, new rules have been drafted by all three bodies that could impact TNE.

In July 2022, the UK and India signed a MoU on the mutual recognition of qualifications. Undergraduate and postgraduate degrees (including doctoral awards) will now be recognised by institutions across both countries. This will have a positive impact, for example, UK master's degrees will be recognised as equivalent in India. Notably for TNE, the MoU also includes degrees from IBCs.

3.2 The University Grants Commission

The UGC undertook sector-wide consultations to review and reform the regulations governing academic collaborations between Indian universities and foreign HEIs. Final regulations and guidelines were released through formal notification on May 2nd, 2022. The regulations cover the following models related to TNE: joint degrees, dual degrees, twinning programmes. It also covers the substantial issue of credit recognition and transfer.[29]

It is questionable whether twinning programmes, according to the UGC definition, would fit under the category of TNE (as defined by UK agencies). Under twinning arrangements, a student enrolled at an India HEI can study partly in a foreign HEI. Credits from the foreign HEI can be counted towards a final Indian degree. Given that the final award is a degree issued by an Indian university, this could be seen as 'internationalisation' rather than TNE specifically.

The UGC guidelines applicable to TNE are therefore for joint degrees (where the curriculum is co-designed by Indian and foreign HEI and the student receives a single degree certificate with both institutions' logos), and dual degrees (where degrees are conferred separately and simultaneously by the Indian HEI and foreign HEI). For both joint and dual degrees, the student must gain at least 30 per cent credit of the degree from each institution.

29. www.ugc.ac.in/pdfnews/4258186_Draft-UGC-Academic-Collaboration-with-Foreign-HEIs-Regulations-2021.pdf.

There are three main central bodies in India that govern the rules and regulations for TNE: the University Grants Commission (UGC), the All India Council for Technical Education (AICTE), and the Association of Indian Universities (AIU).

In terms of eligibility, the Indian HEI seeking collaboration with a foreign HEI must be accredited by National Accreditation and Assessment Council (NAAC) with score of 3.01, or in the Top 100 of the Indian National Institute Ranking Framework (NIRF), or in the top 1,000 of THE or QS World University ranking at the time of application. The foreign HEI must be in the top 1,000 of the THE or QS World University ranking at the time of application.

In addition to these routes, the UGC has also issued instructions to all Indian HEIs to create an office for international affairs to coordinate all collaborative activities with foreign HEIs and undertake the necessary checks and applications for collaborations with the relevant Indian regulatory body. The intention behind this is to have a defined and centralised unit for the administrative processes for TNE collaboration, making those processes and regulations clearer and more transparent for involved parties.

Finally, the new UGC regulations state that franchise arrangements are not covered by these regulations. As such, the UGC does not address validated degrees where a UK degree is delivered in India through an Indian HEI in its entirety.

The UGC addressed online learning in 2018 regulations, with eligible Indian institutions needing to be ranked in the Top 100 NIRF for two out of the three previous years and accredited by the NAAC with a score of 3.26.[30] These regulations do not address the role of foreign universities in delivering online learning.

3.3 All India Council for Technical Education

New AICTE guidelines covering the regulations governing collaborations with foreign HEIs were updated in the Approval Process Handbook 2021-22, with no substantive changes for the 2022-23 version.[31] The new handbook has been designed with the objectives of the NEP in mind, particularly focusing on making Indian technical education a global standard. There is an emphasis on e-governance, and a series of 'quality initiatives' are outlined.

30. www.ugc.ac.in/pdfnews/7553683_Online-Courses-or-ProgrammesRegulations_2018.pdf

31. AICTE Approval Process Handbook 2022-23. https://www.aicte-india.org/sites/default/files/approval/2022-23/Approvalper cent20Processper cent20Handbook2022-23.pdf

The following subject categories are covered by the AICTE: Engineering and Technology; Pharmacy; Architecture; Design; Hotel Management and Catering Technology; MCA [32]; Management (MBA); Applied Arts and Crafts; Town Planning. Therefore, any TNE collaboration in programmes related to these subject categories, conducted fully or partially at an institution approved by the AICTE, would require approval from the AICTE. An Indian institution will come under the jurisdiction of AICTE if it is delivering any programme deemed to fall into the subject areas named above. They include a mixture of institutions with different nomenclature, including universities, technical colleges, institutes of technology and polytechnics, and include both government, public and private institutions. There are thousands of AICTE approved institutions across India.

The updated AICTE regulations cover academic collaborations and twinning programmes between foreign institutions and Indian universities / technical institutions and are applicable to programmes in the subject categories mentioned above. Participating Indian institutions must have valid accreditation from the National Board of Accreditation (NBA) and be ranked within the NIRF top 100 and participating foreign institutions should be authorised by the designated agency in their parent country or be ranked in the Top 500 of QS or THE World University rankings.

For approved academic collaborations between Indian and foreign institutions, the programme must entail students spending at least one semester (for a two-year programme) or two semesters (for a four-year programmes) at the foreign institution. No mention is made of three year-long programmes, potentially excluding 2+1 arrangements at undergraduate level.

There is a pre-approved nomenclature for courses[33] at diploma, undergraduate, and postgraduate level across all the AICTE subject categories that must be maintained for foreign collaborations.

Figure 5 Top 5 Indian states with AICTE approved institutions

State	Number of AICTE-approved institutions in 2021/22
Maharashtra	1,214
Tamil Nadu	1,203
Uttar Pradesh	926
Karnataka	736
Madhya Pradesh	617

Source: AICTE

3.4 The Association of Indian Universities

The AIU has set out guidelines for equivalence of foreign awarded degrees (including those undertaken as TNE in India). These regulations can impact the model of TNE.

The aforementioned MoU between UK and India has removed a key barrier to recognising UK Master's degrees, which previously were out of scope for eligibility as AIU regulations stipulated that duration had to be equivalent for recognition. This previously impacted on the recognition of one-year master's programmes that are typical of the UK HE system.

32. Master of Computer Applications- a postgraduate course that was reduced from 3 years to 2 years full time in 2020.

33. AICTE Approval Process Handbook 2022-23. www.aicte-india.org/sites/default/files/approval/2022-23/Approvalper cent20Processper cent20Handbook2022-23.pdf. Appendix 2, page 122

However, the AIU states that it is the UGC that has ultimate responsibility for specifying these eligibility and duration conditions.[34]

Foreign degrees that are delivered via online or distance modes are not recognised by the AIU.

Regarding foreign TNE delivered in India, the AIU states that the foreign institution must be recognised and accredited in its own country (for example, for UK institutions this would mean having degree awarding powers), and that the Indian host institution must likewise be recognised by the relevant agencies in India. It is also stated that the UGC / AICTE / Government of India must approve the Indian institute to award the degree of the foreign university.

3.5 Summary

The most notable change in the regulatory framework governing TNE is the creation of the approval route for collaborations between Indian Top 100 (NIRF) (as well as any other Indian HEIs with a National Assessment and Accreditation Council (NAAC) grade of over 3.01) and Global Top 1,000 (QS/THE) institutions under UGC guidelines. Currently, there are 97 UK universities that would be eligible for this route, including 76 listed in the QS Top 1,000 and 93 UK universities included in the THE Top 1,000 universities. The original UGC proposals were to include top 500 universities only; the resultant change means that over 30 additional UK universities will have access to the automatic approval route.

It is clear that dialogue about reforming TNE

34. 'Advisory to student seeking admissions to programmes of studies promising qualifications/degrees from foreign universities,' Evaluation Division Association of Indian Universities (AIU) www.aiu.ac.in/documents/evaluation/AIUper cent20Advisoryper cent20toper cent20Studentsper cent20Foreignper cent20Degree.pdf. Page 2.

rules has been taking place across the HE regulatory sphere, but the issue of over-lapping central bodies in the process of setting rules and granting approvals remains the same for the time being.

The NEP articulated a series of proposals to reduce the complexity of the regulatory landscape in India, including the creation of an over-arching umbrella institution to oversee higher education regulation - the Higher Education Commission of India (HECI) - and four 'verticals' covering regulation, accreditation, funding, and the qualification framework. It has been stated that this system will enact a 'light but tight' regulatory touch.

A final issue for TNE is online learning. Where the UK IES places great emphasis on increasing the value of TNE online learning, recent Indian regulation has re-affirmed the lack of recognition of online learning degrees awarded by foreign institutions. However, the UGC, AICTE and AIU have all taken steps to address approving and accrediting Indian HEIs for online learning programmes, creating a unified system of delivery through the Study Webs of Active Learning for Young Aspiring Minds (SWAYAM) process. Increasing the clarity of approvals and accreditation for domestic institutions could potentially lead to greater clarity over the rules and regulations for foreign providers in the near future.

Figure 6 Summary of relevant changes to regulations on TNE

TNE model	Previous status	NEP changes
Joint Degree	Requires approval by UGC through approval process	Top 1,000 QS / THE ranked foreign universities will be eligible to have academic collaborations with top 100 NIRF Indian institution, without UGC approval. (Only an MOU needs to be in place between the partnering institutions)
Dual Degree	Requires approval by UGC through approval process	Same as Joint Degree
International Branch Campus	Not recognised	GIFT City in Gandhinagar has been announced as a place where foreign universities may set up operations free from domestic regulations, and a UGC committee has been set up to explore possibilities.
Franchise Agreement	Not formally recognised	No plans to recognise
Online Learning	Not recognised	Not recognised

4. TNE in India

4.1 UK TNE in India

4.1.1 Methodology

Using the Higher Education Statistics Authority (HESA) Aggregate Offshore Record (AOR) 2020/21, there were 9,050 UK TNE enrolments in India. This refers specifically to the number of students registered for a UK degree but studying in India. Partnerships between UK universities and Indian institutions were researched and verified through a combination of desk research and direct contact with relevant institutions, though it is still possible that there are gaps in data due to varying definitions of TNE, inconsistency of terminology, lack of updated information on university websites, and failure to respond to verification questions.

An issue in the methodology for the TNE mapping is inconsistency of terminology used across the sector in the UK and India. The initial identification of the UK universities with Indian TNE partnerships was undertaken through the HESA AOR record, which is the most comprehensive set of data that approximated to the definition of TNE, taken to be HE awarded by a UK university delivered in another country.

The HESA data lists the following sub-categories for TNE:

1. Registered at overseas partner organisation - studying overseas for an award of the reporting provider
2. Registered at reporting provider - distance, flexible and distributed learning for UK Higher Education Provider (HEP) award where the location of the student is known to be overseas
3. Registered at reporting provider - studying overseas for UK HEP award other than at an overseas campus of reporting provider
4. Registered at reporting provider - studying overseas for UK HEP award at overseas campus of reporting provider

Of the above, there were no UK TNE registrations in category 4, as there are currently no UK IBCs in India.

For those registering in categories 1 and 3, there were multiple ways of defining the TNE relationship, or model of delivery. UK and India universities list multiple types of collaboration, some which are not considered TNE according to the HESA definition.

These include: 'Franchise', 'Articulation', 'Flying Faculty', 'Validation', 'Progression', 'Dual Degree', and 'Joint Degree'. Some were also described according to the type of institution where delivery took place, including 'Recognised Teaching Centre', 'Registered Centre', and 'Affiliate Centre'. Typically, these are used for institutions that are not UGC accredited, and some function as local partners providing face-to-face tuition support for UK universities delivering their online HE programmes in India. However, the usage of these terms is inconsistent amongst UK universities.

It is recommended that the HE sector in the UK, perhaps through the influence of an

organisation such as Universities UK, use an agreed upon and standardised set of descriptions for TNE partnerships, as the issue of inconsistent terminology is an issue for TNE in all countries. Sometimes, the same terms can be used to describe to very different modes of TNE delivery.[35] A joint British Council and a German Academic Exchange Service, Deutscher Akademischer Austauchdienst (DAAD) report partly addresses how the sector can move towards a more coherent and standardised set of definition for TNE models of delivery. [36]

A total of 67 formal UK TNE partnerships were verified, delivered through 58 Indian institutions (please see Annexure 1 for full list of partnerships, institutions, delivery modes, level of study and subjects delivered). Alongside this, approximately 35 per cent of all UK TNE in India is delivered through online learning. The highest number of UK TNE registrations for online learning (under category two of the HESA AOR) was for the University of London 'Worldwide' online programmes.

Regarding fees, there is significant variance depending on institution and model of TNE. For example, the 2+1 partnership between Kingston University and Shri Vile Parle Kelavani Mandal (SVKM) in Mumbai would cost a student INR 400,000 (approximately £4,050) for the two years of study in India followed by £13,500 in the UK for the final year. A validated degree from Cardiff Metropolitan University fully delivered over three years in India at Universal Business School in Mumbai costs INR 480,000 per year (approximately £4,820). At the lower end, a postgraduate degree in International and Commercial Law validated by the University of Buckingham and delivered at Lloyd Law College in Noida costs INR 126,200 for the year (approximately £1,300).

Subjects delivered through TNE were dominated by those in the Business and Management, Engineering and Computer Science areas. Biomedical Sciences and Fashion were the next best represented disciplinary areas.

There is concentration of UK TNE delivery around Maharashtra state in the West India, the Delhi NCR in North India, and the southern states.

4.2 Rest of the world TNE in India

4.2.1 Methodological considerations

To determine TNE partnerships in India from other countries around the world, national HE statistics datasets, similar to the HESA AOR, were sought to provide up to date and accurate information. However, most countries do not hold similar datasets that could specifically isolate their TNE activity.

One exception was the Australian Department of Education, Skills and Employment, who provide a record on Data on the Offshore Delivery of Australian Courses[37] with the latest datasets from 2019. However, unlike HESA AOR, the Australian data does not highlight the country where offshore delivery is taking place, so, manual research of all Australian universities that

35. Knight and McNamara (2017) Transnational Education: A Classification Framework and Data Collection Guidelines for International Programme and Provider Mobility, British Council and DAAD, pg. 1
36. Ibid, pg. 16
37. Data available at the Australian Government Department of Education, Skills and Employment 'International Education' webpage: https://internationaleducation.gov.au/research/offshoreeducationdata/Pages/Transnational-Education-Data.aspx

delivered TNE was conducted to find India-specific TNE partnerships. Nor did the dataset allow identification of number of students registered at a country level.

To overcome data deficiencies from the rest of the world, Indian universities in the NIRF Top 100 were researched to find out their TNE partnerships, and which countries provided them. There are key limitations to this approach, as the UK-TNE mapping exercise demonstrated that most partnerships were not with Indian institutions in the NIRF top 100. However, given that the UGC has proposed that automatic approvals for international academic collaborations will be given to NIRF top 100 Indian universities partnering with World top 1,000 universities, providing some contextualised information for existing TNE partnerships with NIRF top 100 institutions give an indication of the scale of TNE activity that will be increasingly relevant for the future. As such, the findings potentially do not present the total amount of TNE activity in India, as those countries outside the UK and Australia are represented only in their interactions with the Top 100 NIRF universities.

4.2.2 Results

A total of 97 TNE partnerships with 'Rest of the World' universities delivered through 74 Indian institutions were identified using this methodology, including the dataset from Australia and partnerships identified through publicly available information from NIRF top 100 universities in India. There is concentration of 'Rest of the World' TNE delivery around Maharashtra, the Delhi NCR, and the southern states (with a particular concentration in Tamil Nadu).

For countries outside Australia and the UK, the country with the largest amount of TNE activity in India is the United States. Most US - India partnerships would not be considered TNE by the UK definition, but there are many bilateral MoUs, credit transfer recognitions

and dual degree programmes. A prominent example of a dual degree partnership is Drexel University's 1+1 master's programmes with IIT Kanpur and Savithribai Phule Pune University in Biomedical Engineering and Biomedical Science. Due to the sheer diversity of institutions involved, the nomenclature for different TNE partnerships is neither standardised across countries nor within countries. The listing categorises the types of partnership, but not all of these may fall under the TNE definition in all countries.

4.3 Conclusion

There are some key challenges in comprehensively listing TNE in India, including access to accurate datasets that record registrations for degrees awarded in India by foreign institutions. There are also issues in the verification of partnerships, inconsistencies in terminology across the international HE sector, lack of updating of publicly available information, and different recording practices of registrations. Regarding this, the UK is leading on best practice in the sector; the HESA AOR provides the most information about TNE at a granular level.

TNE activity in India is concentrated in the major metropolises of Delhi and Mumbai and their surrounding environs. In the south of India, Karnataka and Tamil Nadu have the highest number of TNE partnerships and most amount of delivery sites. TNE is also growing in Telangana, though there are no UK universities operating TNE programmes there yet. However, given the scale of TNE activity in Delhi and Mumbai, it is surprising that there is not greater TNE presence in other major urban areas. India has over 40 cities with a population of over one million inhabitants, and even a large city such as Kolkata, with around 4.5 million, has only three formal TNE partnerships.

Many states have scant or no TNE presence at all. Uttar Pradesh, which borders Delhi, is the world's largest national sub-division with over 200 million people, but only has TNE presence through the IIT in Kanpur. Bihar, next to Uttar Pradesh, is India's poorest state with severe skills shortages and urgent economic development needs and has no TNE at all. The gaps in TNE activity in India point towards a need for greater co-ordination and mapping of HE requirements so that foreign institutions can be incentivised to provide TNE in those areas and contribute to building capacity and widening access to HE.

The cost of TNE to locals varies significantly, and there is a steep increase in cost if the programme is structured to include study in the UK. For study within India, TNE can cost between £1,500 and £7,000 per year, increasing to over £15,000 when studying partially in the UK. This is a significant amount of money given the average purchasing power within India, which also has great variation across different states and regions. As such where there is intention to increase TNE delivery in certain areas, the ability of locals to afford it must be taken into account if it is to grow.

5. Research Findings

5.1 Introduction

To understand the perspective of UK and Indian HE stakeholders on the prospects, opportunities, and challenges for TNE in India, semi-structured interviews were conducted with a total of 45 HE leaders, researchers, and policymakers from the UK and India. Participants represented universities, HE advocacy organisations, government ministries, and private sector representatives.

Participants were chosen for their seniority and experience in HE. Specialists included those with expertise in TNE partnerships, curriculum development, quality assurance and qualification equivalency, international student recruitment, and HE policy. For the UK, this included participants at Deputy or Pro Vice Chancellor level, Directors, and Senior Managers or policy leads. In the UK, most representatives were from universities that had existing TNE relationships, however, some were chosen that did not have current TNE partnerships in India, to gather insight from institutions on the prospects for entering the Indian HE market under present conditions.

Stakeholder research also included student views on UK - India TNE. 50 prospective undergraduate and postgraduate students were identified and selected for an online community forum over the duration of two weeks. A pre-selection questionnaire was distributed to ensure that recruited students were willing to consider different forms of TNE as a future study option. During the two-week forum, a series of questions were deployed about their views on TNE, as well as their own aspirations for education and how they thought TNE might benefit them. Two trained moderators initiated the discussion based on students' answers to elicit further insight.

5.2 Research Questions

The research conducted for this report answers a series of research questions about UK-India TNE relations, and the prospects and challenges for it moving forward. These questions were used to structure the interview questions with stakeholders and the questions and discussions in the student online community forum.

1. How is the TNE landscape evolving and what models of engagement and types of programmes are best suited to supporting growth in partnerships between India and the UK?
2. How can international education partnerships gained through TNE contribute towards India's national interests and ambitions? Similarly, how do TNE partnership contribute to UK IES ambitions?
3. How TNE partnership can support skills development in certain subjects / disciplines and at state level?
4. What are the key barriers restricting development of TNE in India and how can these be overcome, both from the UK and India side?
5. To what extent can TNE in India support student mobility, including to the UK, and

what are the factors that influence this?

6. Are there any lessons from the experience of other countries that can inform TNE policy development and practice in India?

5.3 Research Themes and Findings

Analysis of the interview scripts and online community discussions revealed a series of themes that can be categorised into opportunities and challenges for the future of UK-India TNE. Some of the themes identified have already been addressed by proposals from various Indian HE authorities, and the findings reflect that the reform processes initiated by the NEP are ongoing.

5.3.1 Opportunities for UK-India TNE

Research theme 1: The NEP is seen as positive step in the right direction

Most UK and Indian HEIs, as well as some policymakers, believe that the NEP was a step in the right direction for the future growth of UK TNE in India, though the pace of evolution is slower than they hoped, all acknowledge the COVID-19 pandemic as a mitigating factor. In concrete terms, the new UGC TNE regulations appear to prioritise joint and dual degree arrangements, and the system of approval for UK-India collaborations has been made easier provided the UK university is in the Top 1,000 World Rankings (QS or THE). At present, this would make 97 UK universities eligible for the 'automatic' route of approval from the UGC, which would require only the minimum eligibility criteria to be met and partnered with a Top 100 NIRF Indian institution.

There has been a slight numerical recovery in overall numbers of UK TNE enrolments in India since the pandemic, but the rate of increase is significantly less than in neighbouring Nepal and Sri Lanka. The key cited reason given by UK stakeholders for the lower growth rate of TNE in India is the perceived level of bureaucracy and complicated regulatory framework, as well as uncertainty over taxation and other financial obligations.

Nevertheless, UK universities continue to seek TNE opportunities in India, and await definitive regulations governing TNE operations. Though many universities that already have TNE in India are content with existing partner relations and are not seeking to expand their provision, most universities that have no current presence in India are scoping opportunities for TNE for a variety of inter-linking reasons. These reasons include:

- diversifying income streams through TNE provision in India,
- increasing brand and reputational presence in the Indian market,
- increasing opportunities for direct Indian student recruitment to the UK, and
- fostering research and knowledge exchange.

Other regulatory developments for TNE in India since the NEP was released include greater recognition of credits gained in overseas degrees, with equivalency becoming more transparent, and a system of banked credits being created to facilitate credit transfer. Recognition of credits will be important for Indian students who seek to engage in foreign HE programmes partly studied at home and partly abroad. A few other TNE concerns have not changed recently; foreign online degrees continue to be unrecognised, and the shift towards a unified system of regulation and quality assurance under a single umbrella organisation (HECI) that was proposed in the

NEP, has not happened yet, meaning that UK universities still have to negotiate up to three regulatory bodies (as well as individual state regulations) for their TNE activity, even though there are some signs of that becoming easier.

Research theme 2: Joint and Dual Degrees with a period of study in the UK is the most favoured TNE model

There is clear indication from the review of TNE policies and stakeholder research that joint or dual degree programmes are the preferred model of TNE: by Indian university faculty, Indian students, and as demonstrated by the latest UGC regulations, the Indian regulatory bodies. Now, the most common model of UK TNE is the validated UK degree provided through an Indian partner college (with no study in the UK), with 2+1 / 2+2 models, being the second most popular. 2+n refer to a TNE model where the first two years of study are undertaken at the student's home institution, and the 'n' (typically a final year or two years) is undertaken at the foreign awarding institution.

Not all 2+n models are necessarily joint or dual degrees; for example, Lancaster University offers a 'transfer programme' in Engineering with Sikkim Manipal University in 2+2 and 2+3 combinations (the latter leading to a MEng). In both cases the first two years of undergraduate study are undertaken in India, with the student then transferring for a final two years, with option of an extra year, for a master's degree. However, the final degree is awarded solely by Lancaster University.

From an Indian policymaker's and university's perspective, there is still space in the Indian HE market for the validated degree type model to exist and grow; driven largely by demographic need, there is an organic growth of smaller private institutes that will seek partnership with UK universities. However, to realise the ambitions of the NEP, which is based around prioritising the higher ranked Indian institutions to internationalise, the joint 2+1 / 2+2 models may become more prevalent than fully validated degree delivery. Higher ranked universities in India are confident about their own degrees, but would seek engagement on 2+2 programmes with higher ranked UK universities for the following reasons:

- it provides their students an opportunity to get a UK degree and study abroad,
- as joint degrees should be formally co-designed by each of the UK and Indian universities, there is value in sharing curriculum and assessment design experiences with UK colleagues and embracing new pedagogy and ideas,
- it can function as a way of improving the broader international outlook of the Indian university, including raising reputation with UK (or other foreign) universities.

There are very few current examples of 2+1 / 2+2 arrangements with higher ranked Indian universities (as listed by the NIRF); some of these are known as articulated partnerships rather than joint programmes. Vellore Institute of Technology is the highest ranked Indian university (28th in NIRF) to have significant UK TNE partnerships, with City University of London, and Queen Mary University of London.

Joint degree programmes in the 2+1 / 2+2 form are also the most popular, based on feedback from Indian students. Those students repeatedly expressed a desire to study abroad as their main goal (for a variety of reasons), and a joint programme was the most popular model of TNE offered. Without

at least partial study abroad, the prospect of a validated UK degree studied fully in India was less popular, with some students questioning the quality of programmes and believing that a local degree from a highly ranked Indian institution would be preferable to a validated degree from a lower ranked UK university in terms of reputability, as well as their employability prospects.

Finally, UK universities are, in principle, keen to explore the potential for IBCs in India but they have different perspectives on how an IBC is best operated, for example, through joint ownership with a local company, or on their own. The GIFT City in Gandhinagar seems like an enticing prospect for some universities, though is more popular as a potential TNE option for universities outside of the top 200 ranking, which is the very group likely to be excluded.

Research theme 3: UK TNE can help realise NEP ambitions, but it is just one dimension of a larger internationalisation programme

A combination of desk research, stakeholder engagement and policy review has shown that TNE plays a smaller part of the overall NEP ambition, though it is not insignificant, and there are still further developments awaiting the sector regarding TNE. As mentioned earlier, the pace of expected change to facilitate further TNE has been slowed by the pandemic, and whatever new rules and regulations have been enacted since the NEP by the UGC, AICTE, and AIU, they have not yet had the chance to see impact on UK-India TNE relations.

However, the UGC in particular, in the 'Guidelines for Internationalisation of Higher Education' has laid out some core objectives which include how TNE can support the fulfilment of India's NEP 2020 ambition. One of the five objectives of the UGC in this respect is 'to promote active linkage between Indian and Foreign Higher Education Institutes.' ICT-based Internationalisation, Credit Recognition under 'Twinning Arrangements' and Academic and Research collaboration are all initiatives that underpin these objectives, all of which could support further TNE development.

India's NEP 2020 ambition at the HE level is to improve curriculum and pedagogy in the system and across universities, as well as reform the overall structure, regulation, and quality assurance mechanisms. Internationalisation is seen as a conduit to these aims and TNE should be regarded as a sub-category of the internationalisation process. Stakeholders in India agree that where TNE can support greater internationalisation of Indian higher education, it will be important to the NEP as it can help transform curriculum, pedagogy, and ultimately the life chances of Indian students, and contribute to increasing the overall capacity of delivering quality education in India in the near future.

According to Indian HEI stakeholders and Indian students, TNE in India, provided it follows a model that allows some study abroad for the students, can benefit Indian society in the following ways:

- Increased exposure to different learning and teaching cultures that will positively impact on skills development. This will benefit both faculty and students.
- TNE partnerships may stimulate more research and collaboration, allowing faculty and PhD students to participate in impactful international projects.
- Greater exposure to the diverse cultures, enriching individual student mindsets and contributing to ideals of global citizenship

as defined by the UGC.

- Providing access to more UK degree opportunities for a wider range of the population, as UK TNE degrees will still be more affordable than going abroad for the full duration of the degree. Overall, TNE can assist the NEP ambition of increasing capacity in the HE sectors, though this can depend on the type of TNE offered; franchise or validation models are more likely to generate scale but are not prioritised by current changes compared to joint / dual programmes. Where possible 2+1 / 2+2 offers should be provided with greater funding and scholarship opportunities for students.
- Indian students felt that although higher ranked Indian institutions were as good or better than some of the existing UK TNE providers, higher ranked UK universities providing TNE would allow students greater international employability prospects.

If one of the key ambitions of the NEP is to improve the overall quality of HE provisions and enhance internationalisation, then TNE is recognised as being able to contribute to that process, though it is seen as just one component of that process.

The UK IES has clear ambition to increase TNE activity globally and India is a priority market. There are no preferred models of TNE set out by IES, but it does set out the potential for online learning and EdTech. Another part of the IES calls for greater research collaboration, and stakeholders at higher ranked universities in both India and UK believe that TNE relations can be wrapped within a larger package of international partnership including research collaboration, faculty exchange, and student mobility between institutions.

There are many universities in the UK that have research partnerships with Indian institutions but no TNE. Similarly, there are UK universities that only have TNE or student recruitment relationship with Indian universities and have no plans to increase research partnerships. However, higher ranked institutions in both countries identified further research collaboration as a key part of internationalisation strategy, and most are willing to consider developing 2+1 / 2+2 joint degree programme models as a part of this process. The growth of TNE between higher ranked institutions in India and the UK should therefore address both the TNE and research collaboration ambitions of the UK IES.

Online and digital TNE, however, remains limited, with issues around recognition of foreign online learning degrees. There are very few UK universities providing online degrees with registered students domiciled in India; the University of London's portfolio of online degrees is the largest provider of online learning from the UK. Coventry University also has a unique online postgraduate degree that is delivered to employees of KPIT Technologies, a private company, in two locations in India.

Whilst the UGC has provided regulations for Indian universities to deliver online degrees, they have not done so for foreign providers, and the AIU continues not to recognise foreign online degrees.

The UGC, addressing the NEP, have called for 'ICT-based internationalisation' and a diversification of online learning to include CPD as well as degrees. This provides some hope that in the near future, digital, and online forms of TNE, will become legitimised within the regulatory framework, allowing some of the IES ambition for UK EdTech, in partnership with UK universities, to be realised in India. Likewise, a Central Digital University

was proposed at the 2022 India budget announcement, underlining the Indian government's focus on ICT, and that may open avenues for partnerships in the future.

It is worth noting, however, that amongst prospective Indian undergraduate and postgraduate students, there was little interest in undertaking a UK degree online whilst staying in India, with many commenting on the poor experience of online learning they had during the COVID-19 pandemic. Online learning would only be considered if it were blended or hybrid learning with some opportunity to go abroad for part of the degree programme. On the other hand, many also commented that they had already undertaken short accredited online programmes, demonstrating that there is some appetite for online learning in India at a sub-degree level, connected to gaining new skills and knowledge, particularly focused around data science.

Research theme 4: UK TNE can help to address India's skills' needs through engagement with Indian faculty

Indian stakeholders outlined that a key area that needs development in India is inter-disciplinarity at universities. At present, disciplines are rigid, with little flexibility or choice for students. Outside of the top ranked universities such as the IITs, the curricula can be outdated, and assessment methods are archaic. There is frustration that the pedagogy underpinning most Indian HE is rote learning, rewarding memorisation and 'cramming' rather than critical thinking and problem-solving. And students do not develop good soft skills or intercultural competencies, leaving them ill-prepared for the job market and the global marketplace of industry and services.

Despite these issues being well known, and addressed as a priority area for development in the NEP, it was felt that there was a real lack of expertise within the Indian HE system to transform it. In short, there is recognition of a problem, but a lack of know-how to solve it. As such, Indian university stakeholders and students place a real premium on the UK HE system for being able to provide the knowledge and practice to enable skills development for both faculty and students, and inter-disciplinarity across degree programmes.

Joint degree programme development, for example, must (by UGC definition) involve co-design of the curriculum, so that the Indian faculty will gain exposure to UK expertise in practices such as embedding soft skills in learning outcomes or designing assessment strategies to reflect employability. Furthermore, where TNE arrangements include 'flying faculty' from the UK, Indian students will also benefit from different learning and teaching styles which engages them in critical thinking and problem-solving.

In terms of subject areas, Engineering, Computer Science, and Business are the most popular at both undergraduate and postgraduate level. Some Indian stakeholders felt that, in Engineering and Computer Science at top ranked Indian universities, there was lesser need to have input from TNE partnerships, as they felt the quality of the curriculum was already high and produced skilled students. However, students felt that even at the higher ranked universities, there was little critical thinking or soft skills development compared to UK universities because the faculty did not have those skills themselves - even if they were subject experts.

As such UK TNE contributions to skills development should be aimed primarily at

faculty so that they can transfer those skills to students. However, this requires a significant input of resources in the curriculum design stage as well as further training for Indian faculty. Indian partner colleges delivering UK degrees reported a lack of academic support, meaning that in some UK degrees were being taught in the traditional Indian HE style, and impacting students who would go abroad for a master's without having truly familiarised themselves with the UK style of HE, despite having a UK degree.

Other Indian university stakeholders and policymakers suggested that the improvement of Indian faculties' knowledge and practice of skills development takes place through exposure in research collaboration, rather than TNE. Research collaboration involved visits to the UK, a greater time spent with their counterpart faculties, and are more likely to understand the needs for soft skills development and critical thinking through this process. As such, UK universities can support their TNE partners in India by creating training and exchange schemes for faculty that can help to transform the skills development component in degrees in India.

Finally, Indian and UK stakeholders felt that skills development needed to cut across all subjects / disciplines to ensure that STEM students would learn the critical and soft skills inherent in humanities, and that humanities students would gain the organisational and employability-orientated project focus sometimes found in STEM disciplines. It was agreed that Business and Management was a highly variable field across India, with some questioning the value and quality of some MBA programmes (both locally and TNE delivered). Regarding this, having differentiation through enhancing employability and intercultural competencies in the programme, was seen as the key driver.

The broader skills development needs of the Indian national economy as well as the state economies are complicated and require national level co-ordination. Indian stakeholders recognise that technical and vocational education and training (TVET) is crucial for the Indian economy, especially for disciplines like Nursing and Agriculture which have been identified as very important. However, both UK and Indian stakeholders recognised that the very UK institutions that could support the skills development in these areas through TNE, are more likely to be discouraged from collaboration, as those universities tend to be lower ranked.

This presents a dilemma; the NEP advocates for increased exposure to top 1,000 universities that can undoubtedly impact the skills development needs in soft skills and critical thinking through TNE, but at the same time, also need the TVET expertise of lower ranked universities with high expertise in particular subjects or even further education (FE) colleges that offer degrees for skills development in areas of economic need, both nationally and in particular states. Enabling this will require co-ordination at national and state levels to identify specific economic areas of need and engage those UK universities that have specialist practice in disciplines that can address those needs.

5.3.2 Challenges for UK-India TNE

Several challenges to the development of TNE in India were identified, provided by both UK and Indian university and policymaker stakeholders during the research, as well as by Indian students. The following challenges to operating successful TNE in India are described below according to the frequency and importance of their mentions amongst UK and India stakeholders, that include

representatives from universities, private colleges, regulatory bodies, researchers, students, and consultants working in the Indian HE sectors. Solutions to overcoming these barriers, identified by stakeholders, are also presented.

Research theme 5: The India HE system is over-regulated

UK university and policymaker stakeholders overwhelmingly suggested that the main barrier to developing TNE in India was the regulatory system and the bureaucracy underpinning it. There is a perceived lack of transparency (referred to as 'unwritten rules') in the system and UK universities feel that they need 'on-the-ground' knowledge of overlapping rules of UGC, AICTE and AIU to negotiate and maintain working partnerships. Some universities have consequently maintained singular relationships with dependable local partners to deliver TNE over a period of time, as partnering with new institutions can be time-consuming and frustrating. At the same time, some stakeholders commented that smaller private colleges can provide a potentially easier (though riskier) route to establishing a TNE presence, with regulatory challenges set aside (for example, where a local college can recruit enough students to a UK validated degree that will not be recognised by the official bodies).

In addition to a lack of understanding of the national-level regulatory frameworks of Indian HE, state-level regulation (and its intersection with national legislation) was also a seen as challenge that required patience and assistance from local providers to negotiate. There were some positive experiences of working with states in the South of India, as well as Maharashtra, Haryana, West Bengal, and Delhi NCR, though it is evident that one of the frustrations is the lack of consistency in the experience, even within states. For some universities, the 'interface with complexities' has been devolved to partners in-country to negotiate challenges.

Indian stakeholders highlighted that the NEP has pushed the agenda of regulatory reform to the forefront, and there are gradual reforms being made to address the issue of 'over-regulation'. However, whilst the Indian government has made announcements to stimulate internationalisation and TNE (for example, with the announcement of the GIFT City venture in Gandhinagar for overseas campuses), the regulatory sphere is behind, meaning that there can be a mismatch of expectations between foreign universities, local HEIs, the government, and the various regulatory bodies.

Research theme 6: Recognition and equivalency issues are improving

Relatedly, the specific issue around lack of recognition for some programmes (due to duration, level, or format) was previously seen to hinder UK TNE growth in India.

Examples were provided where successful programmes were shut down due to sudden rule changes, and many universities rely on their Indian partners ensuring accreditation with a variety of subject-based bodies (e.g., for law). However, the MoU related to mutual recognition of qualifications between UK and India announced in July 2022 directly addresses this issue.

Nonetheless, online foreign degrees are unrecognised by the major regulatory bodies, which is a hindrance to developing further online TNE. An Indian edtech company,

upGrad, provides fully online degrees awarded by numerous universities in India as well as universities in the UK, Australia, the United States and Switzerland. The degrees from Indian universities are all recognised, but there is uncertainty about the foreign degrees.

Research theme 7: Operational management of TNE partnerships are difficult

Some UK universities highlighted that the very process of creating partnerships and working with Indian institutions was challenging.

"The speed at which people want to do things from both sides, expectations need to be set, otherwise time can kill the process; communicating expectations can be difficult."

It was observed that alongside requiring assistance to navigate the Indian market, there could sometimes be discordance between UK and India providers regarding expectations and roles, as well as what procedures were necessary to maintain a strong working relationship. For some UK providers, prospective Indian universities were protective of aspects that required urgent attention in the due diligence process.

It was noted by a Director of International Partnerships at a UK university that Indian universities do not often have equivalent offices dealing with the same issues as their UK counterparts. This meant that issues around quality assurance and due diligence were not centralised in the same way as in the UK or it involved multiple stakeholders without coming to a sense of resolution. Furthermore, it was noted that communications can be difficult, with senior officers and managers in India hard to gain access to. Broadly speaking it was felt by UK stakeholders that the structures of Indian HEIs were not conducive to facilitating TNE partnerships to meet UK due diligence expectations.

Compounded by what is felt to be a lack of readily available information about the national and state-level regulatory frameworks, individual institutions' own quality assurance and regulations in India can therefore be another challenge in growing UK TNE provision there. Two mitigations against this are: i) those institutions that have developed a high level of trust and understanding over a significant time so that due diligence and quality assurance are standardised procedures, and ii) those institutions where UK universities take the lead on due diligence and quality assurance procedures and are able to influence and guide the Indian institution through the processes.

From the Indian stakeholder's perspective, some challenges included dealing with new personnel or new departmental structures in the UK partner. This can not only jeopardise clear working practices, but also lead to misunderstanding over aspects of the partnership such as academic support, student progression, and even record-keeping. It was felt that where there was 'light touch' relationship, there was less academic support offered by the UK partner than the Indian partner would ideally like.

Where the UK university was happy to scale up operations and even use the TNE partnership to facilitate further student recruitment, some Indian stakeholders felt like unequal partners, despite potential financial rewards. In summary, power dynamics and issues around inter-cultural communication in some cases made the operational aspect of the partnership more difficult.

Research Theme 8: There are multiple financial challenges

Several UK university stakeholders commented that reputational and strategic benefits of having TNE in India outweighed the financial benefits. Simply put, the price point of the fees is too low for it to be profitable unless it can be significantly scaled up. This is particularly true for the TNE model where a validated degree is fully delivered in India through a local partner. For articulation agreements, joint programmes, and dual degrees, where the Indian student will undertake some study in the UK, the risks are mitigated by the full international fees received during the UK term of study. IBC models are also seen as high risk, requiring a significant investment in 'bricks and mortar,' and other input resources for an uncertain amount of financial gain. However, with the right conditions and incentives by the national and local governments, most UK universities were at least interested in scoping the possibility of an IBC in India.

For UK universities that are less research intensive (typically grouped under the 'post - 92' label), establishing scale of TNE enrolments is important, as well as enhancing brand reputation in India for student recruitment directly to the UK, which is where the financial benefits are mainly sought. For higher ranked universities - for example, the Russell Group - establishing TNE is seen as both a reputational risk (depending on the partner) and a financial risk (though there is an attraction is using TNE as a conduit to further student recruitment at master's level).

Alongside the revenue and profit issues in TNE, the national and local taxation regime, and lack of clarity on tax rules, regulations and rates was cited as a potential challenge for increasing TNE partnerships in India. Similar to the broader issue of regulation, stakeholders in both the UK and India desire a more liberal environment for conducting business.

All stakeholders felt that both the UK and Indian governments could do more to incentivise TNE, and many commented that increasing student mobility through the provision of scholarships to the UK would have the knock-on effect of generating more interest and scale in the TNE market. Some Indian stakeholders also felt that, since only a certain tranche of Indian fee-paying students could afford overseas education, there was still space in the market for more TNE with articulations to study a final year abroad.

Research theme 9: Limitations of the Indian HE market need to be better understood

"Conversations are generally over-optimistic; market research can reveal a lot of opportunities [in India] but in reality, there is not that much, especially for TNE. Lots of examples where satellites close after 2nd year"

The final challenge identified was understanding the overall potential limitations of TNE in the Indian market. The limitations stem from a) a general over-optimism about the market which is then deflated once confronted with the reality, and b) the universities' desire to grow direct student recruitment to the UK rather than resource TNE in India.

Some of the reasons regarding limitation (a) listed above have already been addressed; over-regulation, equivalency issues, intra-institutional operations and financial challenges are all challenges that universities face, but most of them are not insurmountable given the right set of

conditions and actors. However, over-optimism is, according to some UK and Indian stakeholders, rooted in India's sheer size and future demographic potential for HE. It appears to be a market rife for TNE growth, but there is a tendency to over-estimate market demand for TNE, and not enough research that balances perceived demand (that can be easily accessed through online metrics) with purchasing power data and other key economic factors that play a part in a student's ability to afford foreign education.

This 'gap' between expectations and reality impacts the UK universities' ability to strategically plan TNE in India, including which disciplines to pursue and what models of delivery to develop. For example, online data will reveal that Business and Engineering are the two most popular areas of study, but these are already well covered in the Indian market and further provision of those subjects will not address Indian skills' needs. It can also make it difficult to select where to deliver TNE; UK TNE is currently concentrated in Maharashtra centred around Mumbai, around the Delhi NCR, and the Southern states. Whilst major urban centres seem an obvious choice for TNE, the NEP wants to expand HE capacity across the country and even into rural regions; market research into geographical location would significantly contribute to UK universities' understanding of the potential for TNE.

It is also clear that Indian students who desire a UK degree, want to ideally travel to the UK for the cultural as well the academic experience. They are also looking specifically for post-study work in the UK (or indeed, other countries such as the US, Canada, and Australia), which presently would mean undertaking at least 12 months of full degree study in the UK to access the 'Graduate Route' work visa. Most Indian students did not want to study a validated UK degree in India unless there was the possibility for going abroad at some point. So, market research amongst students, and parents, is vital to establish what kind of TNE models will work for universities. This is particularly true of online degree provision; research for this project suggests that whilst Indian student do access online learning for short courses, there is less demand for full degrees.

5.3.3 Student's views on how TNE can contribute to their aspirations

Analysing responses from the student online community, student mobility is thought of as moving to another country for study, study and work, or work after studying in India. Other definitions included geographical mobility within India, particular to major urban centres such as Delhi, Mumbai, and Bengaluru (Bangalore), for work.

Finally, student mobility can also be thought of as the significant improvement in life chances and opportunities of individuals because of them undertaking HE. However, international mobility was the most important social mobility regarding TNE.

It should be noted that the student engaged for this research were drawn from a panel of students who had expressed interest in studying abroad for their undergraduate or postgraduate degrees, or at least gain a foreign degree. Students displayed a strong command of written English language, and some expressed their intention to apply for global top ten universities.

As a result, many Indian students lacked an understanding of the different TNE models, as their own research had focused on direct applications to foreign universities. However,

when presented with different models of TNE, they were able to articulate the following:

- A validated UK degree studied fully in India will only help their mobility if it allows automatic progression to a postgraduate programme in the UK. Even with guaranteed progression, this remained an unpopular choice, with some commenting that they would rather go to a high or mid-ranked Indian institution.
- Joint or dual degrees in the 2+1 or 2+2 model were popular as they would receive awards from both Indian and UK institutions, which would improve their employment prospects in both countries. For some students, this was additionally attractive as it was more affordable than studying for the full duration in the UK. General 2+1 articulations, with an award solely from the UK, were also felt to be a good option as many wanted to stay and work in the UK after graduation.
- Similarly, online UK degrees studied in India were only seen as useful if they allowed an eventual stay of study in the UK. For both undergraduate and postgraduate students, this was seen as an option of last resort, as many did not enjoy their online learning experiences online during the COVID-19 pandemic. The prospect of an IBC of a UK university in India is interesting and seen as a good thing for the Indian HE system more broadly. However, it would still only be a second or third choice option behind going abroad to study. Specifically, students would prefer to attend a UK university campus in a third country (e.g., in the Middle East or Singapore) before attending one in India.

Overall, students strongly felt that their own life chances would improve by studying abroad, with the UK and US being the two most popular destinations. The key factors in assessing this included:

- ability to find high paid work after graduation (the US was most popular for this),
- experiencing diverse cultures and improving their own global outlook (the UK was most popular for this), and
- studying a higher quality curriculum.

Whilst three above is considered as possible through TNE in India, 1 and 2 were considered more crucial factors.

However, students were favourable to 2+1 / 2+2 models (corroborating findings from UK and India university stakeholders), which provided a 'best of both worlds' scenario for them and could potentially make it more affordable for a greater number of families to send their children abroad to study under this model. It is also a model that seems favoured by the regulatory bodies in India.

Therefore, both students and sector stakeholders believe that some models of TNE can support student mobility, including to the UK, if there are built-in programme opportunities to study in the UK. Students remain keen on pursuing study in the UK for more than just academic experience and employability prospects, but also for the cultural experience.

This means that TNE models where students remain in India will have to target students who will not be able to study or move abroad for personal or financial reasons.

5.3.4 Lessons on TNE best practice from other countries

UK stakeholders typically cited Malaysia, Singapore, and Hong Kong as the countries that they had the most enduring and

successful TNE partnerships, as well as where they felt it was easiest to conduct TNE business. The Middle East and Europe were two regions that they also felt were conducive to TNE, with a few examples provided from the United Arab Emirates, Egypt, and Switzerland. From these experiences, there are some lessons that could inform TNE policy development and practice in India, which can be classified as internal and external conditions conducive to creating successful TNE.

Internal Conditions

Universities highlighted the need to have a defined strategy of internationalisation and set of KPIs that would drive market entry strategies for TNE. Whilst this can be resource-heavy (for example, using budget to conduct market research), it minimised risk, and provided a pro-active rather than reactive attitude towards internationalisation. Many commented that TNE was understood in terms of building brand awareness and reputation, whilst the long-term aim was to increase student recruitment and enhance research potential.

It is seen as crucial to 'stick to what you do best' in terms of subject areas, and not try to over-reach in terms of scope. Many universities began with small programmes before trying to build up scale. This process involved cultivating a trustworthy set of contacts (such as recruitment agents) in-country, usually through a local university office, as well as creating enduring relationships with relevant staff at the partner college. These relationships were built on an agreed set of operating principles and expectations, along with regular communications. Continuity of staff was cited as another reason for successful partnerships.

Finally, resourcing partnerships directorates or departments was identified as a key driver to successful partnerships. Only one UK university had a devolved model whereby individual faculties would seek to create TNE partnerships - all the others had a centralised approach with senior university leaders driving strategy and allocating suitable funds for TNE.

Some lessons from the ideal internal conditions for the development of TNE practice and policy in India include the following:

1. Creating centralised departments to co-ordinate with foreign universities that want to establish TNE and continue maintaining those relationships in India. (To an extent, this has been addressed with the UGC's directive for all universities to have an international office).
2. Having a 'hands-on' relationship with partners, with clear and regular communications between parties to identify challenges.
3. Ensuring that Indian institutions and their partners value their TNE and are able to evidence why it is important to them and how they are successful - this becomes important when allocating resources to TNE development.

External Conditions

Universities were able to highlight why some countries were more conducive for successful TNE than others. Respondents spoke of clarity of process and accountability in operations as being the key. For example, Singapore and Hong Kong were both cited as being successful for TNE, but both also have a lot of regulation. However, the rules governing TNE collaborations were transparent and clear, with consistent practices between institutions,

which chimes with the quality assurance and diligence culture of UK universities.

Alongside transparency in regulation, a strong vision for HE was cited as another reason for successful TNE. Malaysia, the UAE, and Qatar were all cited as countries where the governments had an ambitious strategy for HE development and internationalisation, opening 'Education Cities' as hubs for foreign IBCs and ensuring that the regulatory environment and financial incentives were conducive to attracting foreign universities to deliver TNE directly.

Many UK universities mentioned 'ease of doing business' in countries that had successful TNE operations, though this meant a number of things. It could mean, for example, ease of inter-cultural communications, which meant that there were less misunderstandings and more well-defined expectations from both parties (as was the case for Switzerland). It could also refer to the pace at which business was conducted, where some of the tasks involved setting up and maintaining TNE were completed efficiently, so that the TNE was always market ready. Finally, it could refer to the general environment of business regulations and knowing what to expect, for example, when building a brand-new campus abroad with all the investment that comes with it. This was the case with UAE and Qatar - whilst UK universities expected risks with such ventures, relative clarity over business regulations made investing in IBCs worthwhile.

Some lessons from the ideal external conditions for the development of TNE practice and policy in India include:

1. Having clearly accessible and understandable regulatory frameworks and rules for TNE collaborations. Even where there are lots of regulations, ensuring consistency in their application is vital. Universities must have confidence in the regulatory system, and both partners should 'speak the same language' when it comes to expectations of the collaborative arrangements.
2. Backing up a strong vision for HE with incentives for foreign TNE collaboration. This can come in the form of financial incentives for universities, or other incentives related to internationalisation. Turning the vision into practice at speed, and with buy-in from the multiple stakeholders is seen as vital, and this can include transforming the culture of the HE system more broadly to be receptive to change.
3. Making the conduct of business easier for both the foreign and Indian partner. This can again refer to clarity over business rules, but also ensuring that red-tape and other bureaucratic devices do not hinder collaborations. This is particularly important where foreign universities are making large investments into TNE such as through an IBC. Ensuring that there are systems in place to minimise misunderstanding and ensure expectations are understood and being met is important, though again, that requires a change in the culture of the system.

6. Recommendations

These recommendations are based on feedback from stakeholders in the UK and India, and analysis of TNE partnerships that have been deemed successful by participating institutions. Similar to the research themes outlined in section 5, some of these recommendations are related to 'macro' issues in the Indian HE system and have been highlighted and acknowledged in the NEP. These macro issues necessarily require government departments and agencies to legislate conditions that will enhance TNE opportunities for UK universities. Other recommendations put forward are related to the culture of working between UK and Indian institutions, and can be addressed through further research, more knowledge of systems, sharing of best practice, greater exposure, and operational management practices.

Recommendation 1: Regulation, recognition, and equivalency

The UGC, AICTE, and AIU have proposed, or are currently proposing, measures to improve the opportunities for TNE collaboration between UK and Indian universities. However, these do not address all the UK sector's concerns. Some solutions proposed by stakeholders include:

- A central agency to function as an information hub for all regulatory matters, which can easily be accessed by UK universities. This hub would be able to provide immediate and up to date information about the regulations governing modes of delivery, subject areas, level of qualification and other issues about forming partnerships with Indian institutions. Ideally this would also include localised state information.
- Recognition of online degree learning from foreign universities would benefit TNE, especially as the government has recognised online learning from Indian universities. Collaborative online learning with foreign institutions could help to uplift both synchronous and asynchronous learning and teaching, developing best practice, and benefitting both parties.

Recommendation 2: Operational management of TNE

A proposed solution to this issue, for all Indian universities to have an International Office, has emerged from the draft UGC proposals. The office is intended to spearhead not only each university's internationalisation efforts, but also function as a central point of contact and administration in dealing with approvals from the regulatory bodies for collaborations with foreign institutions. Presumably, if this office is resourced specifically to deal with internationalisation, it can also function as a mediator to address the challenges between UK and India partners around due diligence and quality assurance, as well as act as a regular, accessible point of contact to ensure clarity of information and expectations between the partners.

Other proposed solutions to overcoming the operational challenges include:

- Establishing continuity of communication in the UK - India TNE partnership, through

creation of mixed-departmental steering groups.

- Establishing clear guidelines for due diligence and quality assurance at the start of the partnership-building process.
- Where possible, for external agencies such as the British Council, to provide best-practice guides on operating TNE, including information on each stage of partnership building and establishing KPIs to track the effectiveness of the operations.

Recommendation 3: Financial challenges

Overall, the financial challenges in increasing UK TNE in India are hard to overcome with policy; the economic structure of India is such that for the next five to ten years at least, lower price points will remain, impacting the growth of validated degrees delivered solely in India. Targeting high income families with joint programme offers (delivered in partnership with high ranked Indian institutions) seems the more desirable way of increasing revenue generated TNE, even if the greater share of that will accrue through eventual onshore registrations at the UK university.

Further clarity of taxation and other charges for operating TNE, particularly investment-heavy ventures like an IBC, will also help to alleviate this challenge. Whilst individual universities are likely to source this information through their representative legal firms, having readily accessible information through the form of market intelligence reports will also allow a greater number of UK universities to understand the financial aspect of TNE in India better and contribute to more efficient decision-making and strategic planning.

Recommendation 4: Understanding the Indian HE market

Forging TNE partnerships in India, like any other country, can be time-consuming and resource heavy. However, for such a large, growing, diverse and ever-changing market, universities will need to conduct research to ensure that demand is understood by size, discipline, delivery model, student and parental preferences, geographical location and skills needs. Investing in this will lead to better understanding of the segmentation of the HE markets in India and allow some universities to gain 'first-mover' status in delivering TNE models and disciplines that fulfil the NEP's skills ambitions. Overall, this approach will make strategic planning of TNE in India more efficient, and more likely to facilitate UK universities working in partnership with local providers to address India's skills needs.

Market intelligence about the demand for HE in the states is of particular importance and so is creating an index of potential Indian partners (i.e., those that meet the eligibility criteria) with the skills needs of the economy in that area, so that relevant curriculum can be co-designed between the UK and India partners. With this kind of market information, UK universities, that almost universally remarked that India is high on their list of priority markets (if not number one), will be able to target the correct Indian institutions for TNE partnership.

Market intelligence efforts should also be co-ordinated with potential partners where possible. For example, local Indian partners

may have greater insight into the needs of the local or regional area, including issues around sustainability, employability and mobility, and how current efforts in the curriculum are designed to address those needs. This should lead to a more considered engagement between UK and Indian partners undertaking TNE collaboration.

Current UK TNE in India is delivered mainly in the south, in Maharashtra, and around the Delhi NCR. These three regions are also the areas with the highest numbers of Indian universities currently listed in the NIRF top 100, but overall, these top Indian HEIs are relatively more dispersed across the country compared to TNE partnerships.

These are the universities that the Indian government wants to encourage further collaboration with, and the regulatory environment is being prepared to make it easier to forge partnerships with them for certain TNE delivery models like joint or dual programmes. Based on the locations of these institutions, there could still be potential for further partnership development in the south of the country, as well as the central and eastern zones.

Recommendation 5: Enhance opportunities for UK and Indian faculty to co-design curriculum

TNE presents the opportunity for academics to liaise together and learn from each other. It can lead to long term relationships of sharing best practice, and even cultivate research collaborations. However, central to TNE is the delivery of education to students, who can benefit from the input of foreign expertise and creative pedagogy. TNE can add most value to the country where it is taking place when students graduate with skills that they would have otherwise not developed.

For UK - India TNE partnerships, there can be a mutual impact for faculty from both sides. This research demonstrated that Indian TNE partners sometimes felt academically supported, and that domestic faculty did not have the requisite skills to modernise curriculum and embed employability and soft skills into teaching, learning and assessment design. They felt they would benefit most through exposure to curriculum design alongside UK faculty.

For UK faculty, it is an opportunity to learn about knowledge generated within India, which can contribute to 'decolonisation' strategies in curriculum design and the wider process of challenging bias and prejudice in HE.

By actively participating in the co-production of curriculum for TNE, UK and Indian faculty can work together to address issues of sustainability, equality and inclusion embedded into the learning process.

Recommendation 6: Listen to the students

For this research, the Indian students engaged thought that TNE was most beneficial for them where it allowed a period of study abroad, or greater opportunity to progress to another degree abroad after completion. Some remarked that they would prefer to study at a top-ranked Indian institution rather than for a TNE degree that did not incorporate international mobility. Indian students were largely unaware of the different models of TNE and were generally 'rankings-sensitive' though amenable to learning more about individual institutions and their subject profile.

However, the Indian HE market is diverse, and there are other 'profiles' of students, including those who are more inclined to stay at home

due to personal or financial reasons. Understanding the needs of these students, including their study preferences, locational choices and purchasing power, is vital for enabling successful long-term TNE. Students have increasingly more forums to engage with, and use peer knowledge to make choices. UK institutions would benefit from gaining insight into Indian students' preferences and aspirations to strategically plan TNE engagement in India.

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Appendix 1: List of UK-India Partnerships

Validated Awards					
UK University	**Institute in India**	**Location of Indian Institute**	**Level of study**	**Discipline**	**Fees**
Birmingham City University	Indus Training and Research Institute, Indus Trust (ITARI)	Bengaluru, Karnataka	PG diploma and cert.	Education & Training	Birmingham City University
Birmingham City University	Indus Training and Research Institute, Indus Trust (ITARI)	Bengaluru, Karnataka	PG	Education and Training	
Cardiff Metropolitan University	Universal Business School	Mumbai, Maharashtra	UG PG	Business & Management	BBA 3 years - 4.48 Lacs per year; BBA 2+1 - INR 5.48 Lacs per year BBA + MBA - INR 5.48 Lacs per year; MBA - INR 10,98,000
Coventry University	KPIT Pune - tech company providing product engineering and IT consulting solutions and services to Automotive & Transportation, Manufacturing, Energy & Utilities, and Life Sciences industries	Pune, Maharashtra	PG	Engineering	
Coventry University	KPIT Bengaluru - tech company providing product engineering and IT consulting solutions and services to Automotive & Transportation, Manufacturing, Energy & Utilities, and Life Sciences industries	Bengaluru, Karnataka	PG	Engineering	
De Montfort University	Daly College	Indore, Madhya Pradesh	UG	Business & Management	
Glyndŵr University	Global Pathways Academy	Bengaluru, Karnataka	UG PG	Business & Management, Computer & IT	

UK University	Institute in India	Location of Indian Institute	Level of study	Discipline	Fees
Kingston University	Shri Vile Parle Kelavani Mandal (SVKM)	Mumbai, Maharashtra	2+1 UG	Business & Management	Rs 4,00,000 per annum for first two years £13,500 in UK
Kingston University	Indian Institute of Art & Design (IIAD)	New Delhi	UG/PG	Arts, Design & Architecture	UG: INR 4 to 5 Lakhs
Liverpool John Moores University	upGrad is an online higher education platform providing rigorous industry-relevant programs designed and delivered in collaboration with world-class faculty and industry.	Bengaluru, Karnataka	PG	Business & Management, Computer & IT	£5999
Middlesex University	KM College of Music & Technology	Chennai, Tamil Nadu	diploma and cert.	Performing Arts	INR 7,00,000/- pa
Open University	Amity Global Varsity (Exiting)	Noida, Uttar Pradesh	UG PG	Business & Management	
Queen Margaret University, Edinburgh	Institute for Technology and Management	Navi Mumbai, Maharashtra	UG	Hospitality	
Teesside University	Vishwaniketan	Khalapur, Maharashtra	UG	Arts, Design & Architecture	
University of Bolton	Apollo Med Skills	Uttarakhand	PG cert., diploma	Medicine & Health	
University of Bolton	Sri Vishnu Educational Society	Khalapur, Maharashtra	PG cert., diploma	Medicine & Health	
University of Buckingham	Lloyd Law College	Noida, Uttar Pradesh	PG	Law	General category students - INR 1,26,200/- pa
University of London (Institutes and activities)	Russell Square International College	Mumbai, Maharashtra		Business & Management	
University of London (Institutes and activities) LSE	Indian School of Business and Finance	New Delhi	UG	Business & Management	
University of London (Institutes and activities) - LSE	Podar World College - Powai	Mumbai, Maharashtra	UG	Business & Management	
University of London (Institutes and activities) - LSE	Podar World College – Juhu	Mumbai, Maharashtra	UG	Business & Management	

UK University	Institute in India	Location of Indian Institute	Level of study	Discipline	Fees
University of London (Institutes and activities) - Queen Mary University University College London	Amity University Mumbai City Campus	Mumbai, Maharashtra	PG	Business & Management	
University of London (Institutes and activities) - University College London	Amity University Gurugram	Gurgaon, Haryana	PG	Business & Management	
University of Nottingham	Aditya Birla academy	Mumbai, Maharashtra			
University of the West of Scotland	The International Skills Development Corporation -	Bengaluru, Karnataka	UG, PG	Business & Management	
University of Wolverhampton	Rustomjee Academy for Global Careers - no longer recruiting students	Thane, Maharashtra	UG	Engineering, Business and Management, Hospitality	
University of Wolverhampton	Podar World College	Mumbai, Maharashtra	UG, PG	Business & Management	BA - INR 14, 27,850/- with GST MBA – INR 6,00,000/- with GST

Articulated Partnerships

UK University	Institute in India	Location of Indian Institute	Level of study	Discipline
Aston University	Jindal Global Business School	Sonipat, Haryana	2+1	Business & Management
Brunel University London	Amity University	Noida, Uttar Pradesh		
City, University of London	Vellore Institute of Technology (VIT)	Vellore, Tamil Nadu	2+2 UG	Engineering
Coventry University	Karnavati University - United World Institute of Design	Ahmedabad, Gujarat		
Coventry University	Indian School of Design and Innovation Parsons	Mumbai, Maharashtra		

UK University	Institute in India	Location of Indian Institute	Level of study	Discipline
Lancaster University	Manipal University Mangalore	Mangaluru, Karnataka	2+2 or 2+3 Transfer Programme (engineering) 1+2 Transfer Programme (Biotechnology) 1+1 Double Masters	Engineering, Computer Science & IT, Natural Sciences & Mathematics
Lancaster University	Sikkim Manipal University	Gangtok, Sikkim	2+2 or 2+3 Transfer Programme (engineering)	Engineering
Lancaster University	SRM Chennai	Chennai, Tamil Nadu	3+2 Engineering / Computing Transfer Programme, 2+2 and 2+3 Engineering / Computing Transfer Programme, 1+1 Double Master's Engineering / Computing Programme	Engineering, Computer Science & IT
Lancaster University	Study World College of Engineering	Coimbatore, Tamil Nadu	2+2 Engineering Programme	Engineering
Leeds Beckett University	GLS University	Ahmedabad, Gujarat	UG, Integrated PG	Business & Management, Computer Science & IT
Leeds Beckett University	Indian School of Design and Innovation	Mumbai, Maharashtra	UG	Arts, Design and Architecture
Leeds Beckett University	PSG Institute of Advanced Studies	Coimbatore, Tamil Nadu	PG	Business & Management
Leeds Beckett University	Symbiosis International Deemed University	Pune, Maharashtra	PG	Business & Management
Leeds Beckett University	International School of Management Studies (ISMS) Education LTD	Pune, Maharashtra	UG, PG	Business & Management
Manchester Metropolitan University	Maharashtra institute of Technology	Pune, Maharashtra	UG (2+1)	Arts, Design and Architecture
Manchester Metropolitan University	Vedatya Institute	Gurgaon, Haryana	UG (2+1)	Business & Management
Manchester Metropolitan University	ARCH college of Design and Business	Jaipur, Rajasthan	UG (2+1)	Arts, Design and Architecture
Manchester Metropolitan University	Pearl Academy - Delhi	Delhi	UG (2+1)	Arts, Design and Architecture
Manchester Metropolitan University	Pearl Academy – Mumbai	Mumbai, Maharashtra	UG (2+1)	Arts, Design and Architecture

UK University	Institute in India	Location of Indian Institute	Level of study	Discipline
Manchester Metropolitan University	Presidency University (final year articulate)	Bengaluru, Karnataka	UG/PG	Engineering
Manchester Metropolitan University	PSG College of Technology	Coimbatore, Tamil Nadu	3+2	Arts, Design and Architecture
Nottingham Trent University	Lovely Professional University	Phagwara, Punjab	PG	
Queen Mary University of London	Amity University	Noida, Uttar Pradesh	1+2	Engineering
Queen Mary University of London	Manipal Academy of Higher Education	Manipal, Karnataka	2+2	Engineering
Queen Mary University of London	Vellore Institute of Technology	Vellore, Tamil Nadu	2+2	Engineering
Queen Mary University of London	Saveetha Institute of Medical and Technical Sciences	Chennai, Tamil Nadu		
Queen Mary University of London	Vellore Institute of Technology	Vellore, Tamil Nadu	1+1 and 4+1	Engineering
Queen Mary University of London	O.P. Jindal Global University	Sonipat, Haryana	1+1 (JGU students may apply for entry to agreed master's programmes)	Engineering
Robert Gordon University	Lovely Professional University	Phagwara, Punjab		
University of Aberdeen	Manipal University	Manipal, Karnataka		Medicine and Health
University of Aberdeen	University of Petroleum & Energy Studies	Dehradun, Uttarakhand		Business & Management
University of Huddersfield	Institute of Hotel Management Aurangabad (IHM-A)	Aurangabad, Maharashtra	UG	Hospitality
University of Leeds	Thapar Institute of Engineering and Technology	Patiala, Punjab	2+2 UG	Engineering
University of Leeds	Kumaraguru College of Technology	Coimbatore, Tamil Nadu	2+2 UG	Engineering
University of Leeds	O.P. Jindal Global University	Sonipat, Haryana	2+2 UG	Social Sciences
University of Leeds	Thapar Institute of Engineering and Technology	Patiala, Panjab	PGT	Engineering
University of Leeds	Hindustan University	Chennai, Tamil Nadu	PGT	Technology

UK University	Institute in India	Location of Indian Institute	Level of study	Discipline
University of Leeds	O.P Jindal Global University	Sonipat, Haryana	PGT	Social Sciences
University of Leeds	SVKM's Narsee Monjee Institute of Management Studies (NMIMS)	Mumbai, Maharashtra	PG	Business & Management
University of Leeds	Amrita University	Coimbatore, Tamil Nadu	PG	Business & Management
University of Northampton	Amity University	Noida, Uttar Pradesh	UG, PG	Business & Management, Engineering, Journalism, Arts, Design and Architecture
University of West London	Institute of Advanced Management/ International Institute of Hotel Management (Indismart Hotel Schools)	Kolkata, West Bengal	UG	Hospitality
University of Westminster	Jagannath Institute of Management Sciences (JIMS)	New Delhi		
University of Westminster	ILLM Undergraduate Business School	New Delhi		
York St John University	Indian School of Management and Entrepreneurship (ISME),	Mumbai, Maharashtra	UG, PG	Business & Management

Joint or Dual Awards

UK University	Institute in India	Location of Indian Institute	Level of study	Discipline
Brunel University London	O.P. Jindal Global University	Sonipat, Haryana	PG	Law
University of Manchester	IIT Kharagpur	Kharagpur, West Bengal	PHD	

Appendix 2: List of Rest of the World-India Partnerships

Australian Partnerships			
Australian Institute	**Indian Institute**	**Location of Indian Institute**	**Type of Partnership**
Charles Sturt University	Indian School of Business	Hyderabad, Telangana	Articulated Award
Charles Sturt University	Chandigarh University	Chandigarh, Punjab	Articulated Award
Charles Sturt University	Rajagiri College of Social Sciences	Kochi, Kerala	Articulated Award
International College of Management, Sydney	Manipal Academy of Higher Education	Manipal, Karnataka	Partnership agreement - not specified
Monash College	Times pro -Delhi	Delhi	Articulated Award
The University of Queensland	Shiv Nadar University	Noida, Uttar Pradesh	Joint or Dual Awards
The University of Queensland	Indian Institute of Technology Delhi (IITD)	Delhi	Joint or Dual Awards
The University of Sydney	Jindal Global Law School	Sonipat, Haryana	Joint or Dual Awards
The University of Western Australia	Amity University	Noida, Uttar Pradesh	Articulated Award
University of Canberra	SVKM's Institute of International Studies	Mumbai, Maharashtra	Articulated Award
Deakin College	Amrita Vishwa Vidyapeetham	Coimbatore, Tamil Nadu	Validated Award
Deakin College	Wildlife Conservation Society	Bengaluru, Karnataka	Validated Award
Deakin College	Dr. Mohan's Diabetes Specialities Centre	Chennai, Tamil Nadu	Validated Award
Deakin College	Manipal Academy of Higher Education	Manipal, Karnataka	Articulated Award
Deakin College	International Advanced Research Centre for Powder Metallurgy and New Materials	Balapur, Telangana	Validated Award
Deakin College	Chitkara University	Rajpura, Punjab	Articulated Award + HDR
Deakin College	Australia India Institute	Delhi	Articulated Award
Deakin College	O.P. Jindal University	Sonipat, Haryana	Articulated Award
Engineering Institute of Technology Pty Ltd	K. K. Wagh Institute of Engineering Education and Research, Nashik	Nashik, Maharashtra	Validated Award
Engineering Institute of Technology Pty Ltd	Bannari Amman Institute of Technology, Sathyamangalam	Sathyamangalam, Tamil Nadu	Validated Award

Australian Institute	Indian Institute	Location of Indian Institute	Type of Partnership
Engineering Institute of Technology Pty Ltd	Mody University of Science and Technology, Rajasthan	Lakshmangarh, Rajasthan	Validated Award
Engineering Institute of Technology Pty Ltd	Alliance University, Bengaluru	Bengaluru, Karnataka	Validated Award
Engineering Institute of Technology Pty Ltd	Vel Tech Rangarajan Dr Sagunthala R&D Institute of Science and Technology, Padi	Chennai, Tamil Nadu	Validated Award
Engineering Institute of Technology Pty Ltd	Manipal Academy of Higher Education, Udupi	Udupi, Karnataka	Validated Award
Engineering Institute of Technology Pty Ltd	Hindustan Institute of Technology and Science, Chennai	Chennai, Tamil Nadu	Validated Award
Engineering Institute of Technology Pty Ltd	KCG College of Technology, Chennai	Chennai, Tamil Nadu	Validated Award
Engineering Institute of Technology Pty Ltd	SRM University, Delhi - NCR Sonepat	Delhi	Validated Award
Engineering Institute of Technology Pty Ltd	Chitkara University, Punjab	Rajpura, Punjab	Validated Award
Engineering Institute of Technology Pty Ltd	Shree Guru Gobind Singh Tricentenary University, Gurugram	Gurgaon, Haryana	Validated Award
Engineering Institute of Technology Pty Ltd	St. Xavier's Catholic College of Engineering	Nagercoil, Tamil Nadu	Validated Award
Engineering Institute of Technology Pty Ltd	GLA University	Mathura, Uttar Pradesh	Validated Award
Engineering Institute of Technology Pty Ltd	JC Bose University of Science and Technology, YMCA	Faridabad, Uttar Pradesh	Validated Award
Engineering Institute of Technology Pty Ltd	Walchand College of Engineering, Sangli	Sangli, Maharashtra	Validated Award
Engineering Institute of Technology Pty Ltd	Kumaraguru College of Technology, Coimbatore	Coimbatore, Tamil Nadu	Validated Award
La Trobe University	Chandigarh University (CGU)	Chandigarh, Punjab	Articulated Award
La Trobe University	Lovely Professional University (LPU)	Phagwara Punjab	Articulated Award
La Trobe University	Vel Tech Rangarajan Dr. Sagunthala R&D Institute of Science and Technology	Chennai, Tamil Nadu	Articulated Award
Monash University	O.P Jindal University	Sonipat, Haryana	Articulated Award
Monash University	Amity University	Noida, Uttar Pradesh	Articulated Award

Australian Institute	Indian Institute	Location of Indian Institute	Type of Partnership
Monash University	Vidyalankar School of Information Technology (VSIT)	Mumbai, Maharashtra	Articulated Award
Monash University	Vellore Institute of Technology (VIT University)	Vellore, Tamil Nadu	Articulated Award
University of South Wales	Vellore Institute of Technology (VIT University)	Vellore, Tamil Nadu	Articulated Award
The University of Melbourne	Indian Institute of Science Bengaluru	Bengaluru, Karnataka	Joint or Dual Awards
The University of Melbourne	Indian Institute of Science Education and Research Pune	Pune, Maharashtra	Joint or Dual Awards
The University of Melbourne	Indian Institute of Science Education and Research, Tirupati	Tirupati, Andhra Pradesh	Joint or Dual Awards
The University of Melbourne	Indian Institute of Technology Kanpur	Kanpur, Uttar Pradesh	Joint or Dual Awards
The University of Melbourne	Indian Institute of Technology Kharagpur	Kharagpur, West Bengal	Joint or Dual Awards
The University of Melbourne	Indian Institute of Technology Madras	Chennai, Tamil Nadu	Joint or Dual Awards
The University of Melbourne	Manipal Academy of Higher Education	Manipal, Karnataka	Joint or Dual Awards
The University of Melbourne	Savitribai Phule Pune University	Pune, Maharashtra	Validated Award
The University of Melbourne	Modern College of Arts, Science and Commerce - Ganeshkhind	Pune, Maharashtra	Validated Award
The University of Melbourne	GITAM	Visakhapatnam, Andhra Pradesh	Validated Award
The University of Melbourne	Modern College of Arts, Science, and commerce -Shivajinagar	Pune, Maharashtra	Validated Award
The University of Newcastle	Lovely Professional University	Phagwara, Punjab	Articulated Award
The University of Newcastle	Manipal University Jaipur	Jaipur, Rajasthan	Articulated Award
The University of Newcastle	Nirma University	Ahmedabad, Gujarat	Articulated Award
The University of Newcastle	Poornima University	Jaipur, Rajasthan	Articulated Award
The University of Newcastle	PSG Institute of Advanced Studies	Coimbatore, Tamil Nadu	Articulated Award
The University of Newcastle	SRM Institute of Science & Technology	Chennai, Tamil Nadu	Articulated Award
The University of Newcastle	SRM Nagar	Chennai, Tamil Nadu	Articulated Award
The University of Newcastle	University of Mysore	Mysuru, Karnataka	Articulated Award
The University of Newcastle	Anna University	Coimbatore, Tamil Nadu	Articulated Award
The University of Newcastle	Chandigarh University	Chandigarh, Punjab	Articulated Award

Australian Institute	Indian Institute	Location of Indian Institute	Type of Partnership
The University of Newcastle	Gujarat Law Society University	Ahmedabad, Gujarat	Articulated Award
The University of Newcastle	Chitkara University	Rajpura, Punjab	Articulated Award
The University of Newcastle	Hindustan Institute of Technology and Science (Hindustan University)	Chennai, Tamil Nadu	Articulated Award
The University of Newcastle	Vellore Institute of Technology (VIT)	Vellore, Tamil Nadu	Articulated Award
The University of Newcastle	ICFAI Business School	Hyderabad, Telangana	Articulated Award
University of Technology Sydney	University of Madras	Chennai, Tamil Nadu	Joint or Dual Awards
University of Technology Sydney	Indian Statistical Institute	Kolkata, West Bengal	Joint or Dual Awards
Curtin University	University of Madras	Chennai, Tamil Nadu	Joint or Dual Awards
Swinburne University	Indian Institute of Technology Hyderabad	Hyderabad, Telangana	Joint or Dual Awards

American Partnerships

American Institute	Indian Institute	Location of Indian Institute	Type of Partnership
Drexel University	Indian Institute of Technology Kanpur	Kanpur, Uttar Pradesh	Joint or Dual Awards
Drexel University	Sri Sivasubramaniya Nadar College of Engineering	Kalavakkam, Tamil Nadu	Joint or Dual Awards
Drexel University			Joint or Dual Awards
Purdue University	SVKM's Narsee Monjee Institute of Management Studies	Mumbai, Maharashtra	Joint or Dual Awards
Southwestern Law School	Jindal Global Law School	Sonipat, Haryana	Joint or Dual Awards
State University of New York	Amrita Vishwa Vidyapeetham	Coimbatore, Tamil Nadu	Joint or Dual Awards
Temple University	Indian Institute of Science Education and Research Pune	Pune, Maharashtra	Joint or Dual Awards
Temple University	Indian Institute of Science Education & Research Kolkata	Kolkata, West Bengal	Joint or Dual Awards
University at Buffalo	Amrita Vishwa Vidyapeetham	Coimbatore, Tamil Nadu	Joint or Dual Awards
University at Buffalo	Indian Institute of Technology Kanpur	Kanpur, Uttar Pradesh	Joint or Dual Awards
University at Buffalo	Indian Institute of Technology		Joint or Dual Awards
Washington & Jefferson College	Pandit Deendayal Petroleum University	Ahmedabad, Gujarat	Articulated Award

Partnerships from other countries				
Foreign Institute	**Country of Foreign Institute**	**Indian Institute**	**Location of Indian Institute**	**Type of Partnership**
Asian Institute of Technology	Thailand	Indian Institute of Technology Roorkee	Roorkee, Uttarakhand	Joint or Dual Awards
Don Bosco International Media Academy (DBIMA)	France	St. Xavier's College, Mumbai	Mumbai, Maharashtra	Articulated Award
Geneva School of Diplomacy and International Relations	Switzerland	O.P. Jindal University	Sonipat, Haryana	Joint or Dual Awards
IESEG School of Management	France	Loyala College	Chennai, Tamil Nadu	Articulated Award
Institut de Physique du Globe de Paris (IPGP)	France	Indian Institute of Science Education and Research Pune	Pune, Maharashtra	Joint or Dual Awards
Institut de Physique du Globe de Paris (IPGP)	France	Indian Institute of Science Education & Research Kolkata	Kolkata, West Bengal	Joint or Dual Awards
National Taiwan University	Taiwan	Indian Institute of Technology Mumbai	Mumbai, Maharashtra	Joint or Dual Awards
Samara National Research University	Russia	Indian Institute of Technology Mumbai	Mumbai, Maharashtra	Joint or Dual Awards
Shizouka University	Japan	S.R.M. Institute of Science and Technology	Chennai, Tamil Nadu	Joint or Dual Awards
Trinity Western University, Canada	Canada	Stella Maris College for Women	Chennai, Tamil Nadu	Articulated Award
University of Alberta	Canada	Indian Institute of Technology Roorkee	Roorkee, Uttarakhand	Joint or Dual Awards
University of Malta	Malta	Thapar Institute of Engineering and Technology	Patiala Punjab	Joint or Dual Awards
University of Passau	Germany	University of Madras	Chennai, Tamil Nadu	Joint or Dual Awards
University of Strasbourg	France	Indian Institute of Technology Roorkee	Roorkee, Uttarakhand	Joint or Dual Awards
Zhejiang University of Law	China	Jindal Global Law School	Sonipat, Haryana	Joint or Dual Awards