Understanding the origins, current and future role of private pathways colleges in the UK public university system. In the University world but not of it?

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Julien Boville, MSc, MAUA, FRSA

School of Education

University of Nottingham

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Abstract

This study investigates a distinctive form of higher education provision in the UK, namely private international colleges operating within the campuses of UK universities, commonly referred to as 'Pathway colleges.' Despite having been established by major private companies through business partnerships with UK university partners for over a decade and a half, the emergence and evolution of Pathway Colleges have remained largely unnoticed and unexamined in education research.

The apparent lack of attention in the literature towards private international colleges is surprising given the considerable interest and coverage that privatisations of public services typically attract in academic research and the mainstream media, as evidenced by Stephen Ball's privatisation of education model. Furthermore, the emergence of private international colleges represents a redefinition of the traditional public university, effectively ushering in the privatisation of teaching, which is one of the core functions of a university.

As there is currently a dearth of literature on pathway colleges, this research occupies a unique position at the intersection of four distinct education debates: the origins and evolution of higher education in the UK, the ongoing public-private debate in UK universities, the internationalisation of UK higher education, and the future of higher education.

This study employs a mixed-method approach, guided by a pragmatic design and research questions rooted in both qualitative and quantitative paradigms. The data for this study was collected through a desk-based documentary analysis, a three-round Delphi method, and six semi-structured interviews conducted with high level professionals working in or with the sector.

Besides providing the inaugural definition of the ‘pathways sector’ this research also offers a comprehensive overview of the industry's landscape dominated by five main private providers. Additionally, it presents a detailed analysis of the academic and business frameworks supporting individual partnerships between universities and pathway providers.

While the model of privatisation of education developed by British sociologist Stephen Ball remains applicable in identifying various types of public-private partnerships, this study suggests two crucial evolutions to it. Firstly, it suggests the repositioning of universities towards the market-oriented extreme of Ball's marketisation continuum. Secondly, it advocates for the incorporation of a dynamic dimension that highlights the transitioning and evolving nature of organisations across various stages of privatisation over time.

Finally, these observations underscore the far-reaching implications of the emergence of pathways colleges in relation to the broader process of privatisation

within the higher education sector. It solidifies the perception of universities as moving away from their public mission of knowledge production, transmission, and dissemination for the common good, towards a model that increasingly serves private interests and personal gain.

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Abbreviation	Meaning
BAC	British Accreditation Council
CAS	Confirmation of Acceptance for Studies
ECREO	Embedded College Review for Educational Oversight
FE	Further Education
HE	Higher Education
HEI	Higher Education Institution
IFP(s)	International Foundation Programme(s)
NQF	National Qualifications Framework
OfS	Office for Students
OFSTED	Office for Standards in Education
PHE	Private Higher Education
QAA	Quality Assurance Agency
QCF	Qualifications and Credit Framework
RQF	Regulated Qualifications Framework
TNE	Transnational Education
UK	United Kingdom
UK HE	United Kingdom Higher Education
UUK	Universities UK

1 Introduction

> "Over the past decade, an almost entirely new for-profit industry has sprung up on campuses across the UK – but few outside the higher education sector will have noticed it".
>
> (Matthews, 2014a)

1.1 Context

Pathway Colleges are privately owned, for-profit, international colleges embedded on UK university campuses. They recruit exclusively international students and offer them a range of fee-paying access courses to prepare them for progression on traditional undergraduate or postgraduate degrees at their partner university. As a subset of a larger and more diverse group of Private Higher Education (PHE) providers, pathway colleges have experienced a recent rapid growth echoing the expansion of PHE across the globe (Altbach, 1999; Fielden *et al.*, 2010; Levy, 2012, 2013; Shah and Sid Nair, 2013). Appearing in the UK about fifteen years ago, this doctoral study estimated at about seventy the current number of pathway colleges in the UK alone. With similar colleges developing in the Americas, Australia, Middle East, Asia, and Africa, the sector is estimated to have a global value worth in excess of US$825 million per year (ICEF Monitor, 2016). Despite the size of the global financial impact of these colleges, and with an estimated 63% of all pathways courses being located in the UK (ibid), an exploration of the British education research literature did not return any peer reviewed publication on the topic.

This lack of literature is surprising for three main reasons. To begin with, because the emergence of private international colleges is redefining the so-called public university. It signals the part-privatisation of one of the core functions of the university – teaching – with full courses being run for profit by private providers at the heart of UK universities' campuses. Next, it is even more surprising because other forms of public services privatisations such as UK schools or the NHS, tend to receive considerable attention in both academic research and the mainstream media. Finally, because the UK HE sector is still going through a five year industrial action including a series of connected strikes motivated by fundamental questions associated with themes linked to privatisation such as pay, workload, job security or pensions and the future of HE (UCU, 2019).

What may therefore explain this lack of literature, academic and public debate on the privatisation of the teaching of access courses for international students, is not the lack of significance of the phenomenon, but the fact that it is described as “stealthy” and “under the radar” (Matthews, 2014a). To illustrate how much these colleges are developing largely unnoticed, it is worth sharing my experience as a pathways’ college employee. Despite not being a university staff member, I possess a university staff card; my work follows an academic calendar, but it is not aligned with the main university calendar. Although the courses my college delivers are quality assured, they are not university validated courses. In essence, I work "at" the university, but not "for" the university, and my college presence often goes unnoticed to the wider university community. Reimagining John 17:14-19 “In this world but not of it”(*King James Bible*, 1611), pathway colleges could be described as "In the university but not of it."

In addition to what may appear as insignificant operational peculiarities, profound inquiries have arisen regarding the privatisation of a fundamental university role: teaching. Furthermore, questions have emerged concerning the origins and essence of these international pathway colleges, their relationship with their partner universities, and the scope of their future in relation to the wider British higher education system.

1.2 The professional significance of the study – the three aims of the research

The main objective of this research is to address this knowledge gap and to contribute to new knowledge on the UK pathways sector by addressing a series of research questions. In the absence of literature on the topic of the pathways colleges, these research questions developed from literature on four debates associated with the field. These four debates were the origins and evolution of UK higher education, the public-private debate in UK universities, the internationalisation of UK higher education and finally, the developing research field dedicated to study of future in education referred to as ‘education futures’. These questions constructed a three-part research focusing chronologically on three aims: first, defining and mapping the pathways sector, then understanding the partnership between the university and pathways provider, and finally charting the future of the pathways sector in relation to the wider British higher education system.

The initial phase of the research focused on meticulously defining and charting the pathways sector. Given the lack of peer-reviewed academic literature on this subject, it became imperative to commence the research by establishing a clear understanding of what constitutes the UK pathways sector. Employing a Delphi method, which involves gathering feedback from a panel of experts through multiple rounds of surveys, and incorporating insights gleaned from a series of interviews, would be pivotal in generating a comprehensive definition. This approach would not only help establish the research's scope but also provide guidance for subsequent inquiries. The second component of this primary objective was a direct reaction to an extensive body of literature that explored how universities have evolved and adapted in response to environmental shifts since their inception and throughout their existence. In tandem with this research on the origins of UK higher education and its significant historical milestones, data obtained from both the Delphi method and the interviews were utilised to comprehensively document the establishment and initial development of the UK pathways sector, marking the first-ever account of its creation and early progression. Lastly, as a response to extensive published works exploring the contemporary university and its attributes, the final research question in this thematic area needed to concentrate on offering the reader a comprehensive understanding of the pathway sector mapping. By leveraging data from both interviews and documentary sources, this investigation aimed to generate novel insights about an uncharted sector. Specifically, it delved into how the sector portrays itself to external stakeholders, assessed its scale, examined the range of courses it provides, and scrutinised the regulatory framework it must adhere to.

The aim of the second segment of this study was to understand the university-pathway provider partnership. By using data provided by interviews and documentary sources, this section focused on the current relationships between universities and pathway providers. Doing so enabled their placement in two debates found in the literature: Firstly, the discourse on the conflict between public and private values in British education as illustrated by Stephen Ball's model of privatisation (Ball, 2007, 2012, 2013) , and secondly, the literature on both the internationalisation of higher education and the establishment of a business-oriented approach of university management.

Three research questions emerged as a result. To begin with, how does the university and pathway provider set up their relationship? In addition, how is the academic part of the relationship managed? Lastly, how is the business part of the relationship between a university and a private provider managed?

Finally, the third component of this study aimed to chart the futures of the pathways sector using data generated by interviews and the panel of experts involved in the Delphi method. The formulation of this third research aim arose from an emerging body of literature related to the study of education futures. Two research questions were included as a result. To begin with, what will the external forces and influences likely to impact the future of the pathways sector be? Furthermore, what possible internal changes – positive or negative – should pathway providers be mindful of?

As a result, the three aims and eight research questions could be summarised as follows:

A - Defining and mapping the UK pathways sector

> A.1 – How do UK pathways experts define their sector?
>
> A.2 – What were the key events leading up to the creation of the pathways sector and then contributing to the development of the sector?
>
> A.3 – What are the key components of the pathways' market?

B - Understanding the university-pathway provider partnership

> B.1 – How does the partnership get established?
>
> B.2 – How is the academic relationship managed?
>
> B.3 – How is the business relationship managed?

C - Charting the futures of the UK pathways sector

C1 – What are the external forces influencing the future of the pathways sector?

C.2 – What are the key internal changes within the pathways sector impacting the future of the pathways sector?

1.3 Overview of the methodology

As highlighted above, this research had three parts each guided by a research aim. Although the research had three main aims, and also three main instruments of data collection, each instrument was used across more than one aim to help answer the research questions. This integration of data collection methods across multiple aims, was a pragmatic influenced design. Despite the cross-overs, each of the three instruments of data collection used will be described in turn. The following paragraphs aim to clarify the process of data collection followed for each instrument.

The study commenced with a chronological documentary analysis, aiming to gain insights into the relationship between pathway providers and their university partners by utilising existing documents as a valuable data source; these included publicly available information from various sources such as company websites, Quality Assurance Agency (QAA) reports, and financial accounts published at Companies House. Further information about the documents and thematic analysis methodology can be found in the data analysis section.

The Delphi method was chosen as the second data collection approach, driven by three specific needs: combining insights from experts who could not meet in person, achieving consensus on defining the pathway sector and its model, and adopting a forward-looking approach to address the research's final objective on the sector's potential futures. Following Delphi method guidelines (Waggoner, Carline and Durning, 2016), a group of eleven experts participated in three rounds of questionnaires between June 2019 and February 2020, with me acting as the facilitator analysing previous responses and designing subsequent rounds.

The last data collection method employed in this research was a series of 6 semi-structured interviews. Designed to delve deeper into the results obtained from the documentary analysis and the Delphi method these one-hour long interviews aimed to get personal insights and first-hand accounts from the participants on the three areas covered by this research. They provided complementary qualitative data on the definition and mapping of the sector, the current pathways providers universities relationship, and the futures of the sector.

1.4 The structure of the thesis chapters

Chapter 2 comprises a comprehensive literature review where I examine the intersection of four major corpus of literature. Firstly, I provide an overview of the historical progression of British higher education, followed by an exploration of the primary debate of this research, which revolves around the tensions between public and private values in education. Additionally, I discuss the literature on the internationalisation of higher education and conclude the chapter by introducing the topic of futures research in general and its ontological implications in research.

In Chapter 3, I describe the methodology employed in this research. Firstly, I present my ontological and epistemological standpoint. Next, I outline the research questions that underpin this investigation. I then provide a detailed account of the procedures for data collection, sampling, and analysis. Subsequently, I examine the logistical and ethical dilemmas that emerged during the research and, finally, I explain the measures taken to ensure the trustworthiness and authenticity of the research.

Chapter 4 is dedicated to presenting and scrutinising the principal findings of the research. I address each research question in turn, with particular emphasis on the data obtained through all three methods.

In Chapter 5, I evaluate and elaborate on Stephen Ball's model of privatisation (Ball, 2007, 2012, 2013) in light of the findings presented in Chapter 4. Additionally, this chapter provides a preview of the current and future role of private pathways colleges in the UK public university system.

Chapter 6, finally, summarises my conclusions regarding the key findings of this research and its contribution to the field of knowledge. Furthermore, I also outline the limitations of this study and propose suggestions for future research.

2 Literature review

This literature review is centred around four themes and debates that intersect with the current research: the evolution of the UK higher education sector, the public-private debate concerning UK universities, the internationalisation of UK higher education, and the developing research field dedicated to study of future in education referred to as ‘education futures’. These four themes were selected for their direct relevance to the current research and their potential to shed light on the research questions at hand.

The literature review first explores the origin and evolution of higher education. Although the emergence of pathway colleges is a recent development, it is situated within a broader history of changes and adaptations in the higher education sector. To gain a comprehensive understanding of the pathways sector and its emergence, it is crucial to examine the major transformations that higher education has undergone and how it has responded to change in the past.

The central focus of this research is the second debate, which revolves around the tensions between public and private values in education. Given that universities are typically viewed as public institutions, while pathways providers are private businesses, it is important to assess the current state of privatisation in higher education worldwide through a review of global trends and regional differences, to gain a better understanding of pathways colleges in the UK. Stephen Ball's model of privatisation in education also offers a useful framework for this analysis.

The third debate informing this research is related to the internationalisation of higher education. As pathways colleges enrol international students, they play a crucial role in the internationalisation of UK higher education. Examining the historical perspective of internationalisation, we discover its deep roots tracing back to medieval times. Looking ahead, the concept of internationalisation can be viewed as a strategy employed by institutions to foster global connections through two distinct approaches: internationalisation abroad and internationalisation at home."

Finally, the fourth debate relevant to this research was informed by literature on the study of the future in the field of education. To gain a better understanding of the pathways sector's future, it was essential to outline the key features of future studies. This involved focusing on the origins of the discipline, elements of terminology, and some key ontological considerations.

The following sections will expand on each of these four themes and outline the key associated literature.

2.1 Higher education: understanding the context - The origins of the UK higher education

The introductory section of the literature review adopts a chronological approach to outline the various stages of growth that higher education and universities experienced in Europe and the United Kingdom. By providing a historical perspective from the medieval era to the 20th century, it offers significant contextual information essential for understanding the role and purpose of UK's higher education system. This understanding is a fundamental prerequisite for comprehending the emergence and advancement of the private for-profit pathways sector. By examining the changes of British higher education over time, this review demonstrates how the sector underwent a series of modifications that influenced its development.

2.1.1 From the Middle Ages to the development of the modern university

2.1.1.1 The first universities

The concept of the university is by no means new. It evolved from the medieval 'Great Schools' or 'Studia Generalia' which aimed to broaden the education model provided by legal, medical, and monastic schools (Oakley, 1992). Professionals, clerks, and monks traditionally received such education and were able to mix with scholars from foreign countries.

Various western institutions could claim the title of "first university". In Italy, two institutions could contend. First the medical school of Salerno which was created in the 9th century and attracted medical students from all over Europe. The second was Bologna created in the late 11th century – 1088 to be precise – and was a School of canon and civil law. In northern Europe, 'la Sorbonne' (the University of Paris), established in early twelfth century, was devoted primarily to the teaching of philosophy and theology. It served as a model for the British higher education system and the University of Oxford in particular. The French model, which has been referred to as a "university of masters" (Anderson, 2006, p. 1), had two distinct features. Firstly, it consisted of colleges that served as residential halls for scholars. Secondly, there was a constant exchange of students and teachers between the university and other institutions.

One feature to note is that from a very early stage, universities were heavily reliant on students' satisfaction, and ran the risk that dissatisfied students could just leave the institution and migrate to another city/centre of learning. Such migrations of disgruntled students were famously resulted in the creation of university of Cambridge in 1209 resulting from one of them (Anderson, 2006), and Oxford receiving large numbers of students from La Sorbonne a few decades later.

2.1.1.2 Exploration of the relationship between universities, religion, and power

Both Anderson (2006) and Nardi (1991), outline that whilst early universities were mainly self-governed and self-funded institutions with students and masters electing their leaders (rectors), and teachers charging fees, they were in fact corporations of students and masters, which typically received their charters from popes, emperors, and kings outlining a key feature: their relations with both power and religion. Although European universities were never purely religious bodies, they also depended on the protection of the state and served secular interests such as providing the state with administrators.

Despite close ties with religious institutions through the Papacy or local Bishops, universities departed from the thought that they were institutions charged with the defence of orthodoxy and quickly promoted the freedom of debate in the search for knowledge (Anderson, 2006).

This relative freedom was not total, and a degree of control was exercised by secular political powers. For example, Henry VIII tumultuous relationship with Rome (Marshall, 2017) triggered his interest for a tighter control on universities. He is reported to have sent commissioners to visit the two universities in existence at the time in his kingdom and impose changes. To this day third parties such as the OfS are still involved in the review of HE curriculum, and university policies to ensure a level of conformity with a central model.

Some universities also emerged in a space between 'Church' and 'State'; away from the control of religious figures, yet enjoying local powers/privileges such as owning properties/land and being exempted from the rules of the town they found themselves in. An act of the UK parliament in 1571 confirmed the universities corporate status and privileges which may in turn have participated to creating the traditional divide known to this day as between "town and gown".

From the thirteenth century, most large European cities had universities. In the fifteenth century the university shifted from a model where teaching was exclusively done by recent graduates studying towards higher degrees to salaried professors, readers or lecturers. This brought the British university system closer to what we know today. Universities did not escape the impact of the Protestant reformation and counter-reformation in European society (Loewe, 2009) with their affiliations to the Catholic or Protestant doctrine being impacted by their geographical and political context. The teaching of science and new learning was not encouraged and whilst new universities continued to appear in Europe (Edinburgh 1583; and Strasbourg, 1621), the sector went through a period of decline.

The late sixteenth century and early seventeenth century brought an 'education revolution' with a change in the student population. Non-religious students from aristocratic and gentry background flooded in universities which were then seen as a training ground for future leaders and state bureaucrats. Universities developed a vocational and utilitarian character specialising in the provision of highly educated lawyers and administrators to serve the state. This also coincided with the creation of the University of Halle in Germany, which was the first university to cut all ties with the religion to promote a rational and objective approach to research enquiry. The sixteenth century was therefore pivotal in setting a key feature of English universities as a place for general or 'liberal' education away from professional faculties which were then and are still seen as important in other European universities such as the legal profession.

What emerges from this section of the literature is a pragmatic university. A university adapting its model to the forces of religious or political power it encountered. An adaptive university changing its purpose to fit the needs of the society of its time. A university producing the graduates its environment requires and a university starting to free itself from previously controlling powers. This reform of the university also resulted in student numbers starting to increase from 2000 in 1400 to 3000 in 1450. By the 1630s there was around 6000 students in the UK.

2.1.2 The secularisation and academic freedom during the nineteenth and early twentieth centuries

2.1.2.1 Secularisation and the Humboldt's ideal of academic freedom

The concept of Frederick III of Brandenburg established the University of Halle in 1694, which pioneered a secular approach to higher education. This model was subsequently adopted by other German universities, including Gottingen in 1737. The University of Berlin, created by Wilhelm von Humboldt, the Prussian Minister of Education, further developed this approach, which is now known as the 'Humboldtian ideal' or 'Humboldtian tradition' (Stevenson, Clancy and Vega Castillo, 2022). Seen as highly influential international model until 1914 (Anderson, 2020) the Humboldtian model is still associated with, and used as a reference point for the modern research universities (Nybom, 2003; Bell, Stevenson and Neary, 2009)

The key principle of this model is centred on the notion of freedom; academic freedom for students and lecturers, and freedom/independence for higher education institutions. The academic freedom or 'Lehrfreihei' translated in the freedom of enquiry and teaching for lecturers away from the requirement to get any governmental or religious approval and without fear of reprimand. This concept of academic freedom was extended to the students who could elect what courses they wished to follow.

Most importantly for this research the concept of academic freedom also extended to the wider university governance with self determination being at the heart of university since medieval times. In the UK, Universities have always exercised a degree of statutory and financial independence from the State (de Ridder-Symoens, 1991). Financially this independence was reinforced in the UK by the Universities' refusal to accept government funding until after the First World War when they experienced a major financial crisis. This State support materialised by the newly created University Grants Committee also supported the expansion of universities after the Second World War.

2.1.3 The development of the 'modern university' since 1945

Although the 'Humboldtian ideal' still influences the modern university (Nybom, 2003; Bell, Stevenson and Neary, 2009) it remained precisely that, an 'ideal'. It was rarely implemented on a large scale and its key concepts and innovations "only ever had minority status" (Stevenson, Clancy and Vega Castillo, 2022, p. 10).

In its place other external forces emerged to shape the higher education sector such as 'mass education' (Trow, 1973; McCaffery, 2010; Whitchurch and Gordon, 2011), the 'marketisation of higher education' and the emergence of an 'entrepreneurial model of universities'(Clark, 1998).

2.1.3.1 Mass higher education in the United Kingdom

Since the Second World War, the demand for education in the UK has undergone a significant evolution, finding its roots outside of the university system in the political sphere, and more specifically in the emergence of the welfare state.

With the creation and rise of the Labour Party in the early 20th century political scene, the liberal welfare reforms passed by the British Liberal Party after the 1906 General Elections marked the emergence of modern welfare state ideas in the UK (Fraser, 2009). The guiding principle of the welfare state model was the distribution of state financial resources by the government towards the people to support income protection, health, employment, housing and education (Beveridge, 1942).

Successive waves of state interventions in higher education reinforced this idea of universities as being public institutions; it also generated social change in the way UK society interacts with and perceives education and universities. These successive interventions also shaped the UK education system and participated to its expansion.

Both Labour and Conservative governments agreed on the need to expand higher education (Fraser, 2009). These successive governments' interventions aiming to expand a public education system, paradoxically resulted in driving elements of private market economy in the higher education sphere. Described by Slaughter and Leslie as "the high point of expansion" (Slaughter and Leslie, 1999, p. 41) the 1963 Robbins Committee report recommended the expansion of UK HE provision and presented the principle that all those qualifying for entry to university should be granted a place (Robbins, 1963; Fraser, 2009). Followed three years later by a White Paper outlining "a plan for the creation of Polytechnics" (Crosland, 1966, p. 1) and in 1992 by the Further and Higher Education Act granting access to university status to former polytechnics (House of Parliament, 1992), the UK government developed what could be described in market terms as an 'offer', by creating more universities.

Echoing this 'offer', 'demand' orientated measures were also implemented in order to further expand the HE sector. The 1996 Dearing Report advocated low interest loans for students with the aim to improve affordability of university studies. Whist the Browne review launched in November 2009 and published in October 2010, recommended the removal of the cap on fees, additional loans and funding opportunities were also created to support access to higher education (Robbins 1963; Dearing 1997; Browne et al. 2010). These successive funding frameworks were put in place to increase the demand for HE through increased affordability and accessibility of HE.

The result of these successive government led reforms of higher education was an increase of the 'offer' by creating more institutions, combined with an increase of the 'demand' by increasing participation and widening its customer base. These successive changes of environment created "mass higher education" (Whitchurch and Gordon, 2011) or, more precisely, a "journey from elite to mass higher education" (Trow, 1973; McCaffery, 2010).

Whilst higher education started as an 'elite education' system it then shifted towards 'mass education' after the Second World War and with the development of the welfare state. The UK higher education system quadrupled in size between 1945 and 1970 and the UK numbers of enrolments in higher education increased from 5000 students graduating in 1920 to over 500 000 in 2011 (Bolton, 2012). More recently McCaffery (2010) described a tripling of student numbers over the past 25 years and it is also worth noting that in 2021-22 there were just over two million students studying at UK higher education providers with 31% international students originating from a country other than the UK (Universities UK, 2023). Such large numbers confirm what Trow described as "the Transition from Mass to Universal Higher Education" (1973, p. 1). In his discussion of the late 1960s and early 1970s US higher education model, Trow also quantified the different transition thresholds between each stage. According to him, when 15% of an eligible age group was enrolled, higher education transitioned from being elite to mass education. Once the enrolment level of the age group reached at least 50%, it moved from being mass education to universal higher education.

2.1.3.2 The marketisation of UK higher education

Before analysing what drove the marketisation of UK higher education, it is important to identify the basic features of marketised higher education. To do so, Brown and Carasso (2013) provide a useful overview of the six main features they identified:

● Universities and colleges are legally autonomous entities with considerable freedom to determine their mission, employ their own staff, and so on.
● Market entry barriers are low to enable the entry of new providers (and the exit of existing ones).
● There is significant competition for students, who have a real choice about what, where and how to study.
● Institutions receive all or some of the revenue for teaching in the form of a tuition fee, all or part of which students or graduates have to find from their own or their families' pockets.
● Institutions compete not only on quality but also on price.
● Quality assurance is focused on consumer information and support rather than on quality enhancement.

(Brown and Carasso, 2013, pp. 2–3)

Having been chief executive of the Higher Education Quality Council, Brown is particularly well placed to chart the tensions between higher education's market forces and regulatory framework. It is worth noting that while all six features are presented as equally valid, some may have more relevance than others. For instance, even though technically any provider can enter the higher education market due to what Brown and Carasso (2013) describe as low market entry barriers, in reality, the UK higher education sector is not witnessing the establishment of many entirely new universities. Instead, the additions to the OfS register (Office for Students, 2023b) each year primarily consist of statutory updates for existing institutions (e.g., Royal Holloway, University of London in 2022) or existing colleges being awarded the 'university' title (e.g., Leeds Arts University, formerly Leeds College of Art and Design until 2017).

Driving the marketisation of higher education the UK government contributed to the phenomenon. This research acknowledged the role played by governments in introducing or expending marketisation through various means. The Robbins Committee report in the early 1960s, which recommended the expansion of UK HE provision, the Dearing Report in 1997, which recommended the introduction of low interest loans for students and further expansion of HE, and the Browne review launched in November 2009 and published in October 2010, recommending the removal of the cap on fees (Robbins, 1963; Dearing, 1997; Browne *et al.*, 2010).

With a decline in government funding, universities have had to seek alternative ways to expand their financial base (Slaughter and Leslie, 1999; Slaughter and Rhoades, 2009; Ball, 2012). One such way has been to use international students as a source of revenue. Universities have been using advertising campaigns, international recruitment fairs and other marketing strategies to recruit these students. They also took advantage of the emerging middle class in developing countries and the development of higher education "demand from this segment of the market [which] offset lower demand among middle-class consumers in developed countries"(Kharas, 2017, p. 1). This shift towards marketisation has not been without controversy, with critics such as De Vita and Case (2003) arguing that it undermined the traditional values of education by treating the curriculum as a commodity, and raised concerns about the exploitation of international students. In particular, De Vita and Case (2003) critique the marketisation of the curriculum where Universities use techniques such as the "infusion approach" as a piecemeal way of adding elements to the curriculum. Designed to make the curriculum and therefore the courses more enticing to potential students, this marketing approach sprinkles topics perceived to be attractive and good selling points into the curriculum. Module titles might be changed to include key words such as "international" or "sustainability" and work placements or study exchanges with specific attributes might be in also get incorporated and/or retrofitted in the curriculum of existing courses to promote future employability prospects.

The second main trend towards marketisation has led to students being viewed as customers, which universities compete for as they "have a real choice about what, where and how to study" (Brown and Carasso, 2013, p. 2). This emphasis on 'choice' is a powerful element in a market, and is supported by league tables (Guardian, 2017; The Times Higher Education, 2017) or customer reviews inspired tools such as the trends linked to teachers' rating websites appearing in the early two thousands (RMT, 2023) .

Furthermore, this trend has led to a shift in how learning is perceived. With the curriculum seen as a commodity which can be changed thanks to techniques such as the "infusion approach" to fit the market and students treated as customers, what does that mean for the nature of education? These questions raise concerns about the implications of associating education with a commodity and the impact it may have on the quality of teaching and learning. While choice and consumerism have their benefits, they must be balanced with a recognition of the intrinsic value of education beyond its commodity status. Nonetheless, the trend is likely to continue as universities seek to secure their financial futures in an increasingly competitive global market (Slaughter and Leslie, 1999).

2.1.3.3 The shift to an entrepreneurial university

The previous sections described the move from a university originally exclusively focused on its missions of education and research, to a more independent mass higher education in touch with its market. This section will briefly outline the next stage of this evolution with the emergence of an 'entrepreneurial university' (Clark, 1998; Slaughter and Leslie, 1999; Slaughter and Rhoades, 2009). This terminology of 'entrepreneurial university' adopted by academics and policy makers to describe universities contributing to the economy, has also been described as the university 'third mission'. This term reportedly first coined by Etzkowitz and Leydesdorff (Etzkowitz & Leydesdorff, 2000, in Berghaeuser and Hoelscher, 2020) describes university activities which were not one of their first two missions, namely, teaching and research.

In what could be described as its most simplistic definition, the third mission only includes a university commercial activities and local cooperation with industry partners (Shattock, 2005). In this context Williams and Kitaev (2005) believed that "much entrepreneurial initiative is clearly shown in the recruitment of foreign students on to regular teaching programmes and recently in the establishment of offshore and partner campuses in other countries" (Ibid 2005, p. 127).

More nuanced definitions of the third mission vary, ranging from a dichotomic approach that distinguishes between 'commercialisation activities' and 'academic engagement' (Perkman and Walsh, 2008) to a three-dimensional approach that distinguishes between 'technology transfer and innovation', 'continuing education' and 'social engagement' (E3M, 2010 in (Glaser, O'Shea and Géry, 2014). Perkman and

Walsh’s (2008) definition divides the third mission into what appears to be commercial and non-commercial endeavours labelled as ‘academic engagement’, whilst Glaser et al. (2014) provide an even more nuanced categorisation of these non-commercial activities by differentiating between educational and other social engagements.

Independently of the definition adopted, three constants emerged. First was the inclusion in the third mission of all activities where the university engaged with the external environment whether it is for commercial, educational or social reasons. Then the clear overlaps between the third mission and the other two missions of teaching and research. Finally, the concept of an entrepreneurial university is closely linked to the integration of the third mission, emphasising the importance of well-established third mission activities for a university to be regarded as embracing entrepreneurial values.

Supporting the adoption of this entrepreneurial culture, is a conceptual framework proposed by Shepherd (2017) including three closely related yet discrete phenomena. At the top of this framework can be found the concept of ‘new public management’ which emphasises the notion of management as a tool to improve the quality and efficiency of public services (Hood, 2001).

Coined in the late 1980s mainly in the US but also found in other English-speaking countries to denote public service reforms, new public management appeared in the literature under different names including ‘new managerialism’ as described by Clark and Newman (1993). In the UK, in close proximity temporally, the concept of “deliverology” was developed by the educationalist Sir Michael Barber, then Head of the British Prime Minister's Delivery Unit under Tony Blair. Presented by Barber as a new management approach in public institutions, deliverology emphasised the need for clear goals, data-driven performance measurement, and strong leadership in achieving results (Barber, Kihn and Moffit, 2011). Although Barber had extensive involvement with the education sector, deliverology - as a soundbite - was also used across other departments of the UK government.

According to Shepherd (2017), there are two equally important pillars of new public management. The concept of marketisation already covered in the previous section and the concept of managerialism. The latter despite its significance remains loosely defined and different scholars attribute various interpretations to it. Deem (1998) for example, emphases the adoption of private sector thinking and methods, by focusing on 'efficiency', 'effectiveness' and 'excellence'.

There also appears to be an overlap between the concepts of 'managerialism' and 'neoliberalism' (Deem, 1998; Shepherd, 2017) which Gordon and Whitchurch (2009) summarised, and reconciled, in their definition of 'managerialism' in the context of higher education. The six primary characteristics of managerialism they listed included three closely aligned with managerialism and three with neoliberalism origins.

2.1.4 Conclusion

The picture emerging from the literature on the history of the higher education is one of adaptability and diversity. The adaptability of the university to its environment and to the requirements of the world it evolves in could either suggest 'agency' - it wants to change - but perhaps also suggests compliance – it is forced to change; either way, the result is this adaptability is the higher education's diversity and the various models of what it looks like, includes and how it functions and interacts with its environment (Wittrock, 2010; Barnett, 2016).

The expansion of the higher education sector from an elite system to a universal access, allied with the declining financial independence of UK universities put pressure on institutions to better manage their resources. Under pressure to demonstrate business efficiencies, an entrepreneurial model emerged supported by a class of new managers, in a more competitive education market. With this there is an accompanying shift away from the originally collegial model to more business-like management structures. One by-product of this evolution is a commodification of the curriculum at the expense of a reduction of academic staff's agency on the curriculum design. Another product of these changes is the emergence of a debate on the essence of higher education and whether it is a public good designed to benefit society at large, or a private good that benefits individuals. The upcoming section will explore this debate in more detail.

2.2 Universities – public and private tensions

The second key debate considered in this literature review is one focusing on public-private tensions. As illustrated in the previous section, with the demand for higher education growing, higher education became a more competitive education market and the university more entrepreneurial. Considering that universities are generally perceived as public institutions, whereas pathways providers operate as private businesses, it becomes imperative to evaluate the global trends and regional variations in the privatisation of higher education. This assessment will provide valuable insights into pathways colleges in the UK.

Beyond the shift from the original collegial university model to more business-like management structures, and the curriculum becoming commodified, tensions appeared. On one side of the argument, a view of higher education as a public good defined in the following paragraphs, and on the other side, the development of private higher education around the world. These tensions between a higher education system being either firmly settled in the public domain, or in the private sphere, gets transcended by Stephen Ball's framework which offers a systematic approach of the increasingly blurred boundary between the public and private domains.

2.2.1 Higher Education as a public good

The principle of education as a public good was first used by UNESCO in the 1990s to "reaffirm a humanistic vision of education in contrast to more utilitarian and economic approaches prevalent in the development discourse of the [time]" (Locatelli, 2018, p. 2).

Despite economic theory influenced discussions surrounding the applicability of the concept of public good to education (Menashy, 2009), education tend to be viewed as a public good due to its benefits and its ability to equip individuals with the knowledge and expertise required to make a contribution to society and the economy, and to generate new knowledge and leading to progress in various fields (Collini, 2012; McGettigan, 2013; Nussbaum, 2013; Willetts, 2017; Reich, 2018).

Underlying the notions of contribution to society and public benefit lies the role of the State and its intervention, with a varying level of state engagement in education policy and funding based on the educational levels (Locatelli, 2018). Whilst at compulsory education level the state traditionally plays a significant role in the creation, management, and funding of education systems (Ball, 2013), at post compulsory and higher education level "funding and function" (Locatelli, 2018, p. 4) are at the central issues.

Although he does not answer his own question of "What Are Universities For?", Collini (2012) argues that higher education should be protected from the market-driven policies that have been introduced in recent years. Reich (2018) in his call to revitalise civic society and restore the idea of common good in various areas of society, advocate for education to be accessible to everyone, regardless of their financial status.

Graduates of higher education institutions have the potential to generate favourable social and economic results, such as increased productivity, innovation, and social mobility. Furthermore, higher education can be considered a means of fostering social equity, democratic citizenship, and social justice by granting access to education and improving life prospects for people from various backgrounds (Nussbaum, 2013).

These views associating higher education and public good, do not resonate with all and, for some, higher education can also be viewed as a source of private gain. For those sharing these views, individuals who obtain degrees also get access to higher-paying jobs and increased earning potential. In this perspective, higher education is seen as a way for individuals to advance their own personal interests and achieve financial success. David Willetts, former UK Minister for Universities and Science from 2010 to 2014, presented the importance of the university, both as one of the great institutions of modern society and as a transformational experience for the individual

(Willetts, 2017). A transformational experience which with the cost of higher education increasing significantly in recent years in the UK burdens many students with significant debt upon graduation (McGettigan, 2013). From this perspective, higher education can be seen as a private investment that individuals make in their own future, a view aligned with Schultz "human capital" theory (Schultz, 1960) . Because it is seen as a private financial investment, private higher education provision developed around the world to answer this demand. The following section will outline the development of this private higher education at global level.

2.2.2 The development of private HE at global level and in the UK

Having explored the view that higher education is a public good belonging to the public spheres, the following section will explore the manifestations of the opposite view by presenting how private higher education has developed in various regions around the world.

Differences in growth of the for profit higher education sector are noticeable around the world and depending on national and regional contexts, the size of Private Higher Education (PHE), its market maturity and its types might differ. Reviewing successively the PHE sector at global, regional and then at national level in the UK, the following section aims to use a range of sources selected thanks to search terms to illustrate geographical variations.

This geographical division – roughly by continent - helped by geographically specific search terms such as "Asia" or "Africa" - highlighted a very limited number of key sources specifically studying the region (Gupta, 2008; Shah and Sid Nair, 2013). Region-specific searches returned usually one or less key article and, in some cases, no specific study was found. In such cases, information drawn from more generic studies intending to review PHE at a global level provided limited but useful information (Altbach, 1999).

2.2.2.1 Global development of private higher education

According to an empirical study carried out by 'The Program for Research on Private Higher Education' (2010, 2017) from 2000 to 2010 and partially updated between 2015 and 2017, private institutions enrol 32.9% of the world's higher education students. By 2010, private enrolment had reached 57millions. This study last updated six years ago, only reviewed 117 countries due to a lack of data availability at the time; nevertheless, it is an interesting starting point to estimate the size of the phenomenon studied. In a peer reviewed article published in the year following PROPHE's initial dataset, Levy also estimated this share at "about a third" (Levy, 2011) and two years later assessed it at more precisely 31.3% (Levy, 2013). The discrepancies in the exact count or percentage of enrolments should not detract from the essential point that a significant proportion of students worldwide are attending private higher education institutions. Despite the sources above disagreeing slightly on the exact share of enrolments, all sources encountered throughout this literature review agreed about the overall global trend: PHE has been growing for the past 50 years and is still expanding (Altbach, 1999; Fielden et al., 2010; Levy, 2012, 2013; Shah and Sid Nair, 2013).

Obtaining an accurate and current global estimate is proving to be difficult due to several factors such as the inconsistency in defining PHE, the vast differences in PHE across the world, and even within certain countries (Altbach, 1999; HESA, 2011b; Levy, 2011). To address the challenge of minimising contextual disparities, it may be beneficial to conduct a more country and region-specific analysis of the industry. Consequently, the subsequent phase of this review will concentrate on literature that illuminates regional distinctions with sources categorised according to geographic themes.

2.2.2.2 Regional differences in the development of private higher education

Asia is described in the literature as being the region where PHE is the most powerful and has the strongest presence (Altbach, 1999; Gupta, 2008; Levy, 2011). Even if the figures may vary slightly, the consensus is that in countries such as Japan, South Korea, Taiwan, the Philippines, and Indonesia, PHE has long dominated the education sector with 70 to 80% of students enrolled in private institutions (Altbach, 1999; Gupta, 2008). The main reason for this high proportion is the historically well-established PHE sector in these countries. Despite public universities still being the most prestigious in these countries, there is very close competition from PHE institutions which are also ranking very well. National differences are noticeable in the region and, for example, Korea imposes “rigid controls” on PHE (Altbach, 1999). The most noticeable trend is that, even in countries traditionally dominated by the public sector, such as Malaysia, PHE appears to be the fastest growing segment of HE. In communist countries, such as Vietnam and China, where private ownership and private capital would not be expected to fit with the country’s ideology, PHE is also growing fast. In China, over 2000 private schools were listed in 1999 (Altbach, 1999). In these countries, HE is in great demand due to the young population, the growth of a middle class, and the development of the economy driving the need for a skilled and educated workforce.

In South America, although the proportion of PHE is not as high as Asia, the trend is very similar. As in Asia, the balance between public HE and PHE has evolved, in a change described as a “dramatic shift” by Altbach (1999). Gupta helps us quantify the journey travelled by pointing out that PHE was only responsible for 3% of HE in the 1950s (Gupta, 2008). Brazil, Mexico, Columbia, Peru and Venezuela now have at least 50% of their students in PHE. PHE in South America has traditionally been dominated by the Catholic Church following the conquest and evangelisation of the continent then under Spanish and Portuguese influence. The result is that the oldest and most prestigious institutions remain catholic influenced, however in the past decades a secular PHE sector developed and outnumbered the catholic related institutions to the point that a majority of students in Brazil, Mexico and Columbia are now attending these centres. These institutions are a mix of multipurpose universities and specialised schools answered the need for a bigger HE sector and for specialised skills.

In India, private higher education has a long history dating back to the Gurukul system in 700 to 500 years BC. Private teachers – Guru – would teach a select group of individuals over a prolonged period of time in exchange for a dakshina – a returned favour (materialistic or not) due upon completion of their training (Gupta, 2008). By the time of the British occupation, and the creation of the first three public universities, missionaries followed by social reformers set up their own institutions promoting respectively Christian faith and western values on the one hand and Indian culture, religions and languages on the other. The prime objective behind such private initiatives was mainly social transformation and not economic gain. Nationalists and Muslim institutions were later started which resulted in the Home Rule Movement gaining momentum at the turn of the 20th century (Gupta, 2008). More recently, in the 1980s, the Indian private HE sector represented 57% of the total higher education system, and up to 75% in the 1990s in more than 2000 privately managed colleges, financed largely by public funds (Altbach, 1999; Gupta, 2008).

At European level, the literature on PHE is conflicting as authors fail to agree on a definition of "Europe". Levy, in his two articles focusing successively on the size of PHE and then on its distinctiveness, adopts a broad definition of Europe, including Israel, Turkey and other Eastern European countries (Levy, 2012). In contrast, Altbach adopts a more nuanced definition of Europe which distinguishes between western and eastern Europe justified by its report of different trends between the two blocks.

Most western Europe continues to be dominated by public universities with 95% of students attending public institutions and PHE only constituting "a tiny minority" (Altbach, 1999). The private sector in Western Europe includes a few religious universities and mainly specialised institutions such as private business schools.

On the contrary, countries in the former USSR block both in central and eastern Europe have one of the fastest-growing PHE sectors, resulting from a rejection of state control in a post-communist context, a deregulation of higher education and the states struggling to fund the expanding public HE (Altbach, 1999).

In North America, and more specifically in the USA, all the most famous universities are private but for the past 50 years roughly 80% of US students have been attending public institutions (Altbach, 1999). The US PHE sector can be split into four main groups of institutions. The top private universities and colleges include institutions such as Harvard or Amherst College, religiously affiliated universities such as Notre

Dame, secular private Colleges and finally a group of little known “proprietary” specialised institutions. Overall the sector represents 2000 private colleges in the US.

Africa is the only region for which no specific literature on PHE has been found and this is probably because, like western Europe , Sub-Saharan Africa is relying very heavily on public higher education (Altbach, 1999; Gupta, 2008). PHE is reported as being present and being a very fast growing share of higher education which Gupta estimated at about 10% (Gupta, 2008). It is reported that 1990s saw a development of PHE as sub-Saharan governments struggled to finance higher education. Religious organisations and private providers stepped in to fill the void, however the regional financial situation and the sometimes more limited financial resources of local students means that this market will mature more slowly than other part of the world.

2.2.2.3 Private higher education in the UK

Gupta’s (2008) review of Indian PHE only identified at the time nine academic papers globally covering the topic of the growth of PHE. Research about private higher education in the UK followed a similar pattern and returned very little literature on the topic. It confirmed Matthews’ (2014a) assessment, of for profit private sector growth as having “a stealthy rise” and being “below the radar”.

Between September 2017 and March 2023 – the period during which this literature review was initially compiled and then periodically updated – only four sources were found to comprehensively address the topic of the UK private higher education; Of these, three were pieces of grey literature (Fielden *et al.*, 2010; T Hughes *et al.*, 2013; Tristram Hughes *et al.*, 2013) and only one peer reviewed journal article (Hunt and Boliver, 2023) published on 29 March 2023.

The first element of grey literature considered in more detail is the 2010 Universities UK report on private HE providers (Fielden *et al.*, 2010). In this report, by the main advocacy organisation for universities in the United Kingdom, 22 recommendations are made following the identification of both opportunities and challenges in relation to the interactions between the UK universities and the private HE sector. The report, which involved the analysis of 71 responses to a questionnaire sent to a range of key sector stakeholders, represents only a "reasonable – albeit not exciting" 39% response rate (Fielden *et al.*, 2010, p. 8). The data collection for this report also includes interviews with over 30 policymakers, and a workshop to discuss the draft findings in May 2009, but excludes from the framework of the study non-teaching and learning private provisions. The key findings of this report – on top of the 22 recommendations aimed specifically at key stakeholders - include the first reported classification of PHE. This is the first systematic review and detailed picture of the private and for-profit higher education sector in the UK in 2010. Another key feature of the 2010 UUK report is the six scenarios it explores and details in its first appendix.

The second report considered is the 2011 HESA survey of private providers of higher education which aimed to capture information about the number and size of private and for-profit providers of higher education in the UK (HESA, 2011). In this quantitative study, the email questionnaire was sent to a list of institutional contacts made up of institutions listed with the Quality Assurance Agency, the British Accreditation Council and the Accreditation Service for International Colleges. This work builds on the Universities UK report of March 2010 (Fielden *et al.*, 2010) which examined the role of private and for-profit providers in the delivery of higher education in the UK and explored the different types of providers that fall into this category.

The survey was undertaken to provide information about the extent of private provision within the more extensive higher education landscape referenced in the Browne review (Browne *et al.*, 2010). It also aimed to provide data in anticipation of the Higher Education White Paper (BIS, 2011) which later addressed the issues of the "level playing field" for example in the access by students attending private HE providers to state student finance.

The survey responses showed a sector of privately funded providers that, in 2010, taught nearly 38,000 students on higher education courses and a further 18,000 on FE-level courses. It also highlighted the activity of providers that offer pathways into higher education programmes at publicly funded higher education institutions. However, it must be noted that this survey failed to compile a definitive list of HE providers.

In the absence of peer reviewed publications, the most relevant source identified is a piece of grey literature commissioned by the Department for Business, Innovation & Skills (BIS) in 2013 (Tristram Hughes *et al.*, 2013). This research constitutes the most complete overview found of the privately funded providers of HE in the UK. In this paper, an in-depth analysis of the sector was undertaken through a mix of questionnaires and interviews. Despite the depth of the research, and the project's contribution to knowledge of the private HE sector in the UK, a few elements still remain incomplete or methodologically flawed. First, on their own admission, the authors failed to provide a comprehensive overview of the providers as the lists they worked from were not exhaustive (T Hughes *et al.*, 2013). They also failed to sample students in a representative way as, by targeting only students receiving financial support, the sample is not representative of the UK student population. Finally, despite being a relatively recent and one of the most comprehensive study to date on the PHE sector in the UK, it is now 10 years old and therefore already out of date in a fast moving and ever changing private environment.

The fourth and final source considered is Hunt and Boliver's (2023) recently published peer reviewed journal article which aimed to inventory private providers of higher education in the UK. Their secondary motive was to test the UK government announced ambition of having "private HE providers to replace or enhance publicly funded HE provision" (Hunt and Boliver, 2023, p. 1) by achieving 'a greater choice of more innovative and better quality products and services at lower cost' (DBIS 2016a, p. 8 in Hunt and Boliver, 2023, p. 1)

As part of their research, Hunt and Boliver, confirmed the challenges faced by this research and were only able to locate the same three sources mentioned in this section. Describing these previous attempts, they also noted their main challenge which was the poor participation/response rates of these three reports with none reaching forty per cent coverage of providers. To remedy this, their research substituted the surveys for a comprehensive census. By changing the data collection tool and using publicly available information from providers' websites they were able to not only account for just over eight hundred private providers, but they were also able to break down the sector into various subgroup using different variables such as the age of the private HE provider, their legal status, their name, the type of courses offered etc. This information allowed them to better capture the scale of the sector and its key characteristics.

In this section, the gaps in understanding regarding the size and makeup of the private higher education sector in the UK were demonstrated. Beyond supporting the claim of originality made by this study, two of the four sources reviewed also provided valuable insight into elements of methodology to be used. Fielden's (2010) scenario writing exercise included in the annexes was noted for its impact, while Hunt and Boliver's (2023) emphasis on conducting a systematic census to gain a better understanding of the scale and characteristics of a sector was also noted.

2.2.3 The evolution of the public-private debate in UK Higher Education policy

This section seeks to build upon the conversation initiated with the examiners during the viva. Its objective is to enhance the critical analysis of three pivotal pieces of UK higher education (HE) policy, initially examined and cited in the literature review. Furthermore, it endeavours to broaden this analysis by incorporating more recent policy such as the Augar review (DfE, 2019), along with insights gained from the stimulating viva discussion, notably focusing on the work of Kogan & Hanney (2000), Tapper (2007), Shattock (2008, 2012) and Palfreyman and Tapper (2014).

2.2.3.1 The 1963 Robbins Report

Described by Slaughter and Leslie as "the high point of expansion" (Slaughter and Leslie, 1999, p. 41), the 1963 Robbins Committee report recommended the development of UK Higher Education provision and presented the principle that all those qualifying for entry to university should be granted a place (Robbins, 1963; Fraser, 2009). Whilst the Robbins report appears to be linked to a phase of growth of what was then a publicly funded system of higher education looking for a sustainable funding system, it also laid the foundation for the system of student support for the next thirty years. However, it must be noted that its success in forecasting demand, for example, was in line with projections already arrived at by the University Grants Committee (Shattock, 2012).

2.2.3.2 The 1997 Dearing Report

The National Committee of Inquiry into Higher Education, titled 'Higher Education in the Learning Society,' was initially established by the Conservative government under John Major, with the backing of the Labour Party. Its objective was to provide recommendations on the development of higher education in the United Kingdom, including its purposes, structure, size, funding, and support for students, to meet the country's needs over the next twenty years. (Dearing, 1997, p. 1).

The committee presented 93 recommendations, with its primary proposal advocating for the expansion of higher education provision to facilitate broader participation, especially among women, ethnic minorities, and students with disabilities. Additionally, the Dearing Committee significantly contributed to the introduction of charging fees for Higher Education with the introduction of partial fees of £1000 and endorsed low-interest loans for students, aiming to enhance the affordability of university studies. However, the committee fell short of fully realising its broader aspiration to transition to a lifelong system of higher education, as noted by Shattock (2012). He also observed that the document's title, 'HE in a learning society' is rarely discussed or even mentioned, indicating only a partial fulfilment of its original mission (Shattock, 1999).

2.2.3.3 The 2010 Browne Report

The Browne Review, officially known as the Independent Review of Higher Education and Student Finance, was initiated by Business Secretary Lord Mandelson in November 2009. It resulted in a report titled "Securing a Sustainable Future for Higher Education," published on 12 October 2010 (Browne *et al.*, 2010). This report was presented to the newly formed Conservative/Liberal Democrat coalition

Government, which was established after the general election earlier that year. The report outlined six key principles, advocating for increased investment in higher education, enhanced student choice, widened access to higher education for all individuals with potential, contingent fee repayments based on employment, affordable payment structures, and equal treatment of part-time students regarding fees. These principles culminated in 29 recommendations, including the elimination of a cap on undergraduate course fees for institutions and the implementation of an improved and simplified income-contingent loan system. The report also proposed that upfront loans should be made available to cover tuition fees and living costs, repayable on a contingent basis when income reaches £21,000, with means-tested grants available for students from lower income families. Additionally, the report proposed expanding university places and providing better-quality information, advice, and guidance to students.

Questions were raised at the time about the independence of this report due to allegations that Browne was a favourite of the Labour Party, that the two university existing Vice-Chancellors had a vested interest in seeing the tuition fees increase, and that the former Government advisor on Education had been an architect of the previous fee regime. Additionally, the group also included three private sector representatives but lacked any student representation (Paton, 2009 in Hickey, 2022) A white paper titled "Students at the Heart of the System" was then published in June 2011, followed by the adoption of a subsequent bill. However, the Coalition Government then in power deemed an unlimited fee cap unacceptable and introduced a cap of £9000 per annum from October 2012 (BIS, 2011) accompanied by "vague promises that 'not all universities will charge the full £9,000 fee'" (Porter, 2020). However, what was intended as an exception was then adopted by most universities resulting in a what was intended to be a price based competitive differentiation which failed to materialise.

2.2.3.4 The 2019 Augar Review

In February 2018, Theresa May's government announced a review concerning post-18 education and funding, with financial services expert Philip Augar leading the endeavour. The review aimed to address various aspects such as choice, access, skills provision, and value for money, including considerations on how future students would contribute to the cost of their studies. The Augar review's report was published on 30 May 2019, presenting a thorough analysis of the post-18 education sector and its funding challenges. The review suggests significant changes to the funding and structure of post-compulsory education in England. While much attention has been given to alterations in the student loan system within higher education and the reintroduction of maintenance grants, the report also includes over 50 recommendations on further education, skills provision, funding, and apprenticeships. (Augar, 2019)

Shattock in his critic of the Augar Review described the report as both "timid" and "not concerned about looking at the long term for HE at all" claiming that only a fees reduction to around £4500 and an increase of the state contribution to the same level resulting in an equal share would have been ambitious. (Shattock 2019 in The Centre for Global Higher Education (CGHE), 2019).

2.2.3.5 The driving forces behind these changes – market forces or state regulations?

As demonstrated in preceding paragraphs, the last 25 years have seen a significant transformation in Higher Education funding, largely influenced by key reports (Dearing, 1997; Browne *et al.*, 2010; Augar, 2019), and resulting in shifts in tuition fee policy. Successive government interventions resulted in the increasing marketisation of Higher Education. At first driven by the 1960s Robbins Report was the exploration of funding options and objectives of expansion. Then in the 1990s, influenced by the Further and Higher Education Act (1992) and the Dearing Report (1997) was a further growth and diversification phase. More recently, the Browne review (2010) and the Augar review (2019) were focused on increasing competitive differentiation and attempting to correct the market by introducing regulators such as the OfS or promoting the principles of choice, information and value for money (Augar, 2019). What emerges from the literature is a UK government agenda characterised by marketisation since the 1980s and drawing on neoliberal concepts (Lynch, 2006).

In parallel, the governance structures of UK higher education have undergone significant changes over the last 40 years, a transformation described by Shattock as “the balance has changed almost out of recognition” (Shattock, 2011, in The Council for the Defence of British Universities (CDBU), 2023) and which Tapper (2007) and Palfreyman and Tapper (2014) trace back precisely to the 1988 Education Reform Act. The pivotal transition they identified was the shift from the University Grants Committee to the funding council model of governance. Post-1988, the overall development of the higher education system became politically controlled, as described by them as a “quasi-state apparatus assuming responsibility for policy implementation and regulation.” (Palfreyman and Tapper, 2014, p. 1). Kogan and Hanney (2000) also argue that higher education reforms are government-induced. They contend that New Public Management principles of modernisation, marketisation, and minimisation are, in fact, the result of increased state control over the UK higher education sector through its civil servants as key policy influencers (Shattock, 2012). Palfreyman and Tapper (2014) nuanced this point as they present a state-regulated market that controls the development of English higher education and moving closer to a free-market model.

The emerging debate is whether British higher education institutions retained autonomous control over their development. A point which Tapper (2007) explored by reviewing systematically the interactions between universities and various institutional actors such as government departments and funding councils, the political context influencing higher education policy, and the wider process of policy making. The emerging picture is one of various external forces influencing the policy developing process. This view is confirmed by Hickey (2022) paper, utilising Critical Discourse Analysis to gain insights into the motivations behind policy setting. Hickey identified four themes that may have influenced higher education and tuition fee policymaking: national politics and political narrative; the marketisation and neo-liberalisation of HE; the link between the costs and benefits of education; and the pressures of the economic environment. This confirms that the UK higher education governance process is not solely driven by private entrepreneurialism but that other forces are at play. This view is also shared by Shattock (2008, 2012), who claims that policymaking was often reactive rather than proactive and influenced by external forces and events.

2.2.4 Stephen Ball's theoretical framework transcends the traditional dichotomic debate

In his book *Education Plc - Understanding private sector participation in public sector education* - Ball (2007) uses a framework first developed by Hatcher (1999) in his critique of the late 1990s' New Labour policy allowing businesses to invest in education and more specifically in Education Action Zones (EAZs). Described as "test-beds for future developments in education" EAZs were a specific initiative in the UK education system aiming to improve educational outcomes and opportunities in disadvantaged areas. These zones saw the UK government creating local interventions including collaborative initiatives involving local authorities and communities, schools and businesses. Amongst them, major international companies, including prominent information technology groups, were criticised by Ball as investing in schools with the aim to sell products, to take over management or to change teaching and learning by driving technological solutions.

In his model, Ball uses 'privatisation' as an umbrella term for a range of "private sector participations" (Ball, 2007, p. 13) in education and the broader public sector. These participations or "privatisation(s)" (Ibid) include various "financial arrangements and different relationships between funders, service providers and clients" (Ibid), however the constant is a repositioning of the State from being "the provider" and "the financer" of education to being "the guarantor" (Ibid). Ball describes private sector participations in education as not a new phenomenon and "the normal way of going about things […] for many years" (ibid) as well as affecting both 'hard' services such as books or buildings, and 'soft' services like "those services which require human interactions" (Boyles, 2000, p. 118, in Ball, 2007, p. 13).

To support the categorisation of these heterogenous incursions of the private sector in public education, Ball provided two useful definitions and a framework for this research to help navigate what he describes as the increasingly blurred boundary between public and private.

The first of these two categories is what Ball describes as ‘endogenous privatisation’ referring to internal “changes in the behaviour of public sector organisations themselves, where they act as though they were businesses, both in relation to clients and workers and in dealings with other public sector organisations” (Ball, 2007, p. 14); ‘Exogenous privatisation’ however “involves private companies entering education to take over directly responsibilities, services or programmes” (Ibid).

A year later, Ball further expanded on his categorisation of endogenous and exogenous privatisations. In the 2008 report published for Education International (Ball and Youdell, 2008) Ball used a worldwide focus on the issue of privatisation in education, and he further expanded on “Privatisation *In* Public Education” (Endogenous) and “Privatisation *of* Education” (Exogenous) (Ball and Youdell, 2008, p. 9). Further breaking down both categories he presented the following sub categories:

> “Schools being business-like or like-businesses: ‘endogenous’ privatisation
> • Quasi-markets
> • The manager and new public management – making the public sector more business-like
> • Performance management, accountability, and performance related pay
>
> Bringing the Private Sector into Public Schools: ‘exogenous’ privatisation
> • Public education for private profit
> • Private sector supply of education: contracting out services
> • Private sector supply of education: contracting out schools
> • Public private partnerships
> • International capital in public education
> • Commercialisation”
>
> (Ball and Youdell, 2008, pp. 18–39)

In schools, and at the time of writing their research, Hatcher and Ball (Hatcher, 1999; Ball, 2007) described privatisation as staying away from the core functions of teaching & learning. To illustrate this, both authors used examples of privatisation affecting ‘wrap around services’ from school building management and exam marking, to management support for failing schools. Ball (2012; 2013; 2007) explored at length this phenomenon in British schools. He highlighted the role played by Education Services Industry (ESIs) and how they benefited from the reform of UK education by interfering with - and at times replacing - policy networks thanks to their well-connected senior executives.

With successive governments reducing their funding, universities pragmatically explored alternative revenue sources and embraced an endogenous privatisation approach to support their research agenda (Lynch, 2006; Ball, 2007). Universities and researchers have developed entrepreneurial approaches described by Slaughter, Rhoades and Leslie as ‘academic capitalism’ (Slaughter and Leslie, 1999; Slaughter and Rhoades, 2009). Through shared projects with private sector companies and research funding received from private businesses, Universities have become extensions of corporations’ research and development departments. Also described as a new “entrepreneurial university” (Slaughter and Leslie, 1999) this new approach resulted in universities slowly moving towards this new function or “third mission” described in an earlier section of this research. Universities and researchers are now used to securing funding, and within a self-perpetuating system, public funding applications require researchers to demonstrate anticipated outcomes or ‘impact’, financial or otherwise. As a result, research, is less ‘curiosity-driven’ and marketability of research becomes key (Slaughter and Leslie, 1999). This is another illustration of the blurring of boundaries between HE, State and businesses. In an academic capitalism knowledge regime where the power resides in the interconnections, the public, the faculty & students, the corporations, and the State are all "actors" rather than passive bystanders of social changes. In this model the students’ role is one of “consumers” rather than “learners” engaged in their studies (Slaughter and Rhoades, 2009). One key point raised by Slaughter and Leslie (Slaughter and Leslie, 1999) is the need for governments to financially incentivise teaching if they want to re-direct universities efforts towards it and away from the financially rewarding research. It has to be noted that the UK government attempted to follow this recommendation and rebalance the relation between the two universities core functions by promoting a Teaching Excellence Framework mirroring the Research Excellence Framework already in place in universities.

Endogenous privatisation of higher education can further be illustrated by the underlying values that the UK knowledge society carries. In an education driven economy, where "if you don't learn, you won't earn" (McCaffery, 2010, p. 13), knowledge and degrees become means to an end: earning money. Higher education institutions (HEIs) are said to promote upward social mobility and enhance careers of those they educate (Marginson, 2016b). An academic degree becomes a "private good" benefiting the individual rather than a "public good" aiming to make society better (Marginson, 2016a). Universities and education ministers claim that higher education contributes to the 'common good', 'public interest' or 'public good', however these normative statements are hardly ever substantiated and public benefit is rarely referred to by HEIs' promotional materials. However, private earnings, prospects after graduation, or private rates of return and employment rates tend to be the unit of measure and comparison widely advertised by universities to prospective students (Marginson, 2016a). Nordensvärd (2011) sets out three different roles for students in a neo-liberal framework: a consumer, a manager and a commodity, staying away from any suggestions that students play a part in the 'common good'. Nordensvärd later argues that there is more benefit to adopting a citizenship perspective including elements of neoliberalism as it "opens up more roles that a student could take on within society" (Nordensvärd in Molesworth et al. 2011, p.167), however, of his own admission, this position remains wishful thinking. Alternative voices attempting to move away from this neoliberal model can be heard (De Vita and Case, 2003), but they remain isolated by the noise made by the marketisation of higher education. Universities are no longer seen as the only source of culture, knowledge and information (Gupta, 2008) as despite lacking a coherent identity, alternative providers have expanded in recent years

2.2.5 Conclusion

The picture emerging from the second key debate considered in this literature review is one of global tensions between public and private values in the education sector, and a blurring of the boundaries between what could initially appear as a rigid dichotomy.

On one side of the argument, driven by a humanistic vision, higher education is viewed as a public good. The principle of higher education as a public good emphasises its role in equipping individuals with knowledge and skills to contribute to society and the economy. State intervention and funding vary across educational levels, with the state traditionally playing a significant role in compulsory education. However, at the post-compulsory and higher education levels, funding and function become central issues. Some argue that higher education should be protected from market-driven policies and made accessible to all, promoting social equity and democratic citizenship. On the other hand, there are those who view higher education as a source of private gain, enabling individuals to advance their own interests and achieve financial success. This perspective sees higher education as a private investment, leading to the development of private higher education institutions globally. Because it is seen as a private financial investment, private higher education provision developed to answer this demand and the analysis of the literature evidenced that even if there are regional variations, this is a global trend which is very much present in the UK.

Transcending this dichotomic vision opposing public and private values, Stephen Ball's presents a more nuanced view of the various types of 'privatisation(s)' taking place in education. He defines a categorisation of these private sector participations in education including 'endogenous' and 'exogenous' privatisations. The former is used to describe changes internal to the education sector where organisations act as if they were businesses and adopt private values and behaviours. The latter includes private companies taking over directly responsibilities, services or programmes traditionally run by public institutions.

With the development of private higher education around the globe and challenging higher education funding choices made by governments, we've seen that universities pragmatically embraced an endogenous privatisation approach to support their research agenda to explore alternative revenue sources. Another area universities explored to address these funding challenges is the recruitment of international students and their internationalisation strategies. The following section will explore in more details the internationalisation of the UK higher education and in doing so will provide both an historical perspective on the phenomenon as well as a more recent overview of its use as a university strategy.

2.3 The internationalisation of UK higher education

The third debate influencing this research pertains to the internationalisation of higher education. Pathways colleges assume a vital responsibility in this process by enrolling international students, thereby contributing significantly to the internationalisation of UK higher education. An exploration of its historical context reveals that internationalisation dates back to medieval times, signifying its long-standing presence. Moving forward, internationalisation can be seen as a deliberate institutional strategy to cultivate global connections, characterised by two main approaches: internationalisation abroad and internationalisation at home.

2.3.1 Internationalisation – a historical prospective

2.3.1.1 Medieval roots

Migration for academic reasons is a longstanding tradition as illustrated by Ridder-Symoens (1991, pp. 280–304). In their quest for knowledge Middle-age scholars travelled across Europe between the various centres of knowledge. The mobility of scholars or 'academic pilgrimage' (peregrinatio academica) (de Ridder-Symoens 1991) meant precarious journeys took place. Politically, immigration policy and education were already closely linked as illustrated by De Ridder-Symoens remarking that even in time of political tensions or military operations, sovereigns protected migrant scholars. This tradition of travel and exchange contributed to the development of - amongst others disciplines - medical science and philosophy. The practice expanded during the Enlightenment in the mid-seventeenth century.

2.3.1.2 18th to early 20th century

Following the emergence of these medieval travelling scholars, European universities became more nationally focused in the 18th and 19th centuries. With the emergence of nation-state and associated political tensions, travels became more difficult, and the language of instruction shifted from Latin to local languages (de Wit and Merkx, 2012).

During the 20th century, especially between the two World Wars, there was an increased emphasis on international collaboration and exchange in higher education. This was exemplified by the creation of organisations like the Institute of International Education (IIE) in 1919 in the United States, the Deutscher Akademischer Austauschdienst (DAAD) in Germany in 1925, and the British Council in the UK in 1934. These institutions were established with the aim of promoting peace and mutual understanding, and were largely influenced by the League of Nations. This trend gained momentum after the Second World War, though primarily in the United States through the Fulbright Program, as Europe was still focused on rebuilding after two devastating wars.

2.3.1.3 Impact of the two World Wars

In the UK, consequences of the two World Wars were the end of the British Empire, the start of the Cold War and the emergence of the European Community.

Post war Britain was facing labour shortages whilst its economy was also booming. As a result, it turned to the Empire and Commonwealth as a source of immigration. There was very little legal challenges linked to immigration as the Imperial Act of 1914 and the Nationality Act of 1948 gave unrestricted access and residence in Britain to any British subject including those born in British colonies or Dominions. It was not until 1962 that legislation was introduced to control migrations. The influence of the Imperial model was so strong that no records were made of the number of immigrants from the Empire and Commonwealth countries as they were deemed British subjects and – theoretically – had the same rights as British peers (Kalekin-Fishman, Pitkanen and Verma, 2002).

In Europe the ideological and political rivalry between the USA and USSR gave way to the start of the Cold War; this rivalry also expended to higher education with the internationalisation used as a force by each opposite sphere of influence. Supported by their own academic exchange schemes supported by the Fulbright Commission (The US-UK Fulbright Commission, 2016) in the United States and the Communist Party in USSR, both blocks competed for industrial and scientific dominance, in a quest for national identity and claiming its own place on the global academic market (Deardorff et al., 2022).

With the strengthening of the European Community a group of nations joined forces to promote both their own and shared interests. As part of this process, "the expansion of higher education and its internationalisation within and beyond their borders" (Kerr, 1994, p. 50) became a priority and a strategy. European programmes for research and study exchanges were set up with Erasmus (European Commission, 2016) being the main one. It is worth noting that within Europe, the UK was an exception to this process because of the conflictual relationships between the British government and European institutions. Furthermore, seeing an opportunity to generate income, the Thatcher government opted to make international students pay full fees.

2.3.2 Internationalisation or internationalisations?

2.3.2.1 Internationalisation as a strategy

Knight's (2008b)defined internationalisation as "a term that is being used more and more to discuss the international dimension of higher education and, more widely, postsecondary education" (Knight, 2008b, p. 1). The internationalisation of UK higher education has been a significant trend in recent years, with universities in the UK actively seeking to attract international students and staff, engage in collaborative research projects with institutions around the world, and establish branch campuses and partnerships in other countries. Internationalisation has been adopted as a strategy both at the institutional and national levels.

One challenge briefly mentioned in a previous section of the literature review treating of the marketisation of higher education, is the level of commitment of the institution. De Vita and Case (2003) criticised the “infusion approach”, this piecemeal way of adding elements to the curriculum to make if more enticing to potential students. In response, Hudzik defined the concept of ‘comprehensive internationalisation’ (Hudzik, 2011, 2015) as:

> *“a commitment, confirmed through action, to infuse international and comparative perspectives throughout the teaching, research and service missions of higher education. It shapes institutional ethos and values and touches the entire higher education enterprise. It is essential that it be embraced by institutional leadership, governance, faculty, students, and all academic service and support units. It is an institutional imperative, not just a desirable possibility. Comprehensive internationalisation not only impacts all of campus life but the institution's external frames of reference, partnerships and relations. The global reconfiguration of economies, systems of trade, research and communication, and the impact of global forces on local life, dramatically expand the need for comprehensive internationalisation and the motivations and the purposes driving it” (Hudzik, 2011, p. 6).*

Using Knight's (2008a) two components’ approach of internationalisation as being internationalisation abroad and at home, the next section will review in turn elements of comprehensive internationalisation.

2.3.2.2 Internationalisation abroad

Understood as all forms of education taking place across borders (Knight, 2008a), internationalisation abroad includes components such as people and institutions moving from one country to another. The mobility of people involves both students and staff, whilst the cross-border education or transnational education includes branch and franchise campuses.

The student mobility can be divided into two main types depending on the intended outcome: temporary mobility linked to the partial completion of an academic qualification, or the mobility connected to the completion of a full qualification. Defined by the OECD (2022, p. 219) as either “credit mobile” or “degree mobile” students, the patterns of student flows can be influenced by many individual, institutional, national and global factors. This research acknowledges their influence but will not enter a detailed analysis of these variables.

In the example of credit related mobility, schemes such as the European flagship Erasmus programme or 'EuRopean Community Action Scheme for the Mobility of University Students' (European Commission, 2016) have helped facilitate the cross-border ambitions of over 10 million students since its creation in 1987 (European Commission, 2020). With a credit related mobility, students migrate from one country to another for a limited amount of time to complete specific modules or semesters allowing then to progress their studies in their home country thanks to the transferability of the credits.

Degree mobile students on the other hand, elect to move away from their country of origin, to study an entire qualification in a foreign country. Proportionally, the higher the level of academic qualification a student has, the more likely they are to cross borders to pursue their studies (OECD, 2022). Whilst for many countries the main forces driving international student recruitments are revenue generation and skilled migrants' attraction for others international student recruitment can be a form of global influence and soft power.

This global influence and soft power are also linked to the mobility of academic staff, through their involvements with other institutions. However, although funding is available through the Erasmus program for academic and administrative staff, European universities typically lack a systematic approach to promoting staff mobility, despite their policies that aim to encourage student exchange. Additionally, individuals who participate in academic mobility often discover that it is not commonly acknowledged as a means of advancing their careers (Racké, 2013).

The final element of Internationalisation abroad is the emerging trend of Transnational Education (TNE) through satellite campuses and programmes abroad at partner institutions.

2.3.2.3 Internationalisation at home

The concept of internationalisation at home was introduced in Europe in 1999 as a response to the emphasis which had been put on programmes like Erasmus. Whilst the definition of Internationalisation at home can be debated (Beelen and Jones, 2015) the aim was to target students not involved in the Erasmus scheme. The goal was to incorporate an international perspective into their curriculum, and any other activities susceptible to develop international or global understanding and intercultural skills fit for a 'Global citizen'.

Universities UK International (UUKi) (2021) describes various three types of activities supporting internationalisation at home. They include 'virtual online courses', 'internationalising the campus' and 'campus and civic engagement'.

Virtual online courses offer short collaborative online initiatives that span approximately a week, sometimes slightly longer. Some are subject specific and aligned to a specific academic course, whilst others encompass cross-programme initiatives to promote awareness of key cultural concepts.

Internationalising the campus, involves a variety of events and programmes held throughout the academic year and creating a global atmosphere for students and staff. On-campus activities like 'International Coffee Hour' and 'Conversation clubs' facilitate socialisation, whilst other initiatives might allow students to host international visitors during their campus visits.

Finally, 'campus and civic engagement' involves initiatives connecting the university community, including both international and home students, through internationalisation projects conducted on campus and in the surrounding community. The objective is to ensure that the benefits of the university's internationalisation extend to the local community.

2.3.3 Conclusion

Emerging from the literature is the third topic relevant to this research: the internationalisation of the UK higher education. This phenomenon is not new in higher education and - has evidenced - has medieval roots. Impacted by successive historical events across the 18th and 20th century outlined above, the internationalisation of higher education has evolved to become the model we know today. For a UK higher education institution, this model of internationalisation is now part of its strategy. It helps shape the institutional ethos and values, and it impacts all organisational levels and all area of the university both at home and abroad.

In that context, internationalisation can be seen as playing an essential role in the future success of the university, however with it also comes an element of uncertainty linked to the unpredictability of the future. To further explore how an organisation like a university could better leverage this unpredictability, and attempt to forecast or anticipate its future, it becomes important to review an emerging area of education research named ‘Future Studies’. The next section of this literature review will provide this overview.

2.4 Education futures

In this research, the fourth debate draws from educational literature that examines the study of the future. To enhance comprehension of the future of the pathways sector, it was crucial to explain the fundamental aspects of futures studies. This entails examining its origins, key terminology, and essential ontological considerations.

Futures Studies cover a very wide range of topics with over 40 listed in the literature including Education and business management (McHale *et al.*, 1977; Masini, 1993). According to the findings of a survey of 77 large companies carried out by Rohrbeck and Schwarz and reported by (Wilkinson and Kupers, 2013) , there are four main reasons for organisations such as universities and private higher education providers to focus on the futures. It enhances their capacity to perceive change, to analyse it and to respond to it. It allows organisations to gain influence on others and to enhance their own learning. The unifying factor among these four rationales for investigating the futures is the benefit they bring to an organisation.

2.4.1 Origins and development of the 'Futures' as a research discipline

The study of futures for the purpose of social action and public policy gained serious interest in Europe in the late 1940s and 1950s, with notable figures such as Bertrand de Jouvenel leading the way in France, Johan Galtung in Norway as well as John and Magda McHale in the UK and Hungary (Dator, 2011). In an interview recorded in 2015, Professor Eleonora Masini confirmed their significance on her own influential research endeavour in the field of Futures studies which started in the 1960s (Allievi, 2015). Beyond France, Norway and the UK, other states on both sides of the Iron Curtain, such as Germany, the Netherlands, Czechoslovakia or Romania, also had pioneers in the field (Dator, 2011). In an early attempt by McHales (1977) to compile a 'Futures Directory' all continents were represented whilst Masini (1993) identified a series of people and organisations doing futures studies across most continents with the noticeable exception of Africa.

The late sixties and early seventies saw the emergence of futures-oriented organisations such as the World Future Society in 1966 and the World Futures Studies Federation in Paris in 1973. The first futures conferences were held around this time, starting with one in Oslo in 1967, followed by another in Kyoto in 1970.

By the 1970s, the development of future-based academic courses also began to take shape with varying degrees of success. Two stood out and still run to this day at the University of Houston and the University of Hawaii, where the Research Centre for Futures Studies was created in 1971 (University of Hawaii, 2023; University of Houston, 2023). Around the same time, Toffler an American author associated with the field published two books – Future Shock in 1970 and The Third Wave in 1981 – which help establish the reflection on the future as a field of study (Toffler, 1970, 1981). One feature of the young ‘futures field’ was its perceived fragmentation because of the varied subjects it included and the diverse background of its practitioners which included a mix of engineers, creative writers, business managers, policy makers and an increasing proportion of social scientists (Bell, 1996).

By the 1980s the wider field of Future Studies which Motti (2017) describes as including “all the ways to study, think, and use the future – ranging from visionary and utopian futures to pop futures, from participatory, critical, or integral futures to the technicalities of simulations, formal modelling and forecasting” had become a fully-fledged discipline with researchers, dedicated academic courses and subject specific conferences (Bell, 1996).

In the last ten years, conferences dedicated to sub-fields of futures studies like the First international conference on Anticipation (University of Trento - Italy, 2015) started to be organised. Having now reached its 4th iteration this biennial conference also receives support from UNESCO. The range of topics covered during these conferences is wide and for example in the second conference on Anticipation led by Keri Facer in London included “highly diverse fields ranging from biology to psychology, cultural geography to critical theory, physics to design, history to mathematics, urban theory to engineering” (Unknown, 2022).

2.4.2 Future studies and terminology

Studies of the future appear in the literature under many different concepts, denominations and using various techniques (Poli, 2010). There's been many attempts to categorise the techniques employed in future-oriented research as highlighted by Dator (2003).

Dator (2011) offers a helpful overview and definitions of the terminology which can be encountered. He explains how 'Futurology' aims to put in place prognosis, prognostics, and prospective, how 'Futuristics' was once fashionable and has now fallen out of fashion, and finally how 'Futuribles', a portmanteau word merging 'future' and 'possible' showed that future is in the realm of the possible. However, the main elements retained from his brief listing are 'foresight' and 'futures'. With both being used to describe the entire field, Dator clarifies that governments use the term "foresight" to refer to their efforts to anticipate the future, while the plural term "futures" is commonly used in the field to indicate a departure from a limited and predictable view of the future and to convey the idea of multiple possibilities.

2.4.3 Futures studies and ontology

Beyond these initial definitions, Amsler, Facer and Poli (Poli, 2010; Amsler and Facer, 2017) clarify the differences between 'predictions', 'foresight' and 'anticipation', three elements of terminology found in futures studies' literature and offering a more nuanced approach to the field's ontology.

In these definitions, predicting or forecasting is seeking to eliminate risks and uncertainty. In this closed and structured framework, the future is at least partly governed by the past in a deterministic way. There is both a link and a predictability between past and future through research methods such as computer-based simulations, time series analysis or trend extrapolation.

"Foresight aims to equip actors with insight into multiple possibilities" (Amsler and Facer, 2017, p. 1), in a semi-closed framework. Foresight is more focused on the future per-se than forecasting. Although there is still an element of predictability, the aim is to prepare for the unforeseeable considering not just one likely path but different problem presented as scenarios. These scenarios are useful tools combining both qualitative and quantitative data by combining narrative and numbers to make a persuasive and powerful argument; Wilkinson and Kupers (2013) view scenarios as providing perspective and insights; they help organisational leaders engage with contents they would not otherwise necessarily pay attention. These can include planning for change, outlining possible negative outlooks or shining a light on signals otherwise not easy to perceive.

In this framework, both trends or scenarios are a means to an end, which is to arrive at some assumptions about the future. Whilst trends pertaining to a predictive tradition, are more focused on quantifying degrees of certainty, scenarios influenced by a foresight grounded ontology are centred on revealing a range of untold assumptions.

Finally, “anticipation assumes an active and critically reflective interaction with futures which are unknowable” (Amsler and Facer, 2017, p. 1). Of all three frameworks presented, it is the least predictive and the most open to unpredictability. By focusing on the human consciousness, it is very much based in the present.

Richard Slaughter's continuum of futures (Slaughter, 1984) provides a useful framework mirroring Amsler, Facer and Poli’s definitions of ‘predictions’, ‘foresight’ and ‘anticipation’ (Poli, 2010; Amsler and Facer, 2017). It offers a valuable lens for analysing a more extensive range of approaches within futures studies and their evolution in relation to one another. Dator (2003) also recognised the value of Slaughter's typology, noting it to be one of the most useful in the field.

Slaughter locates ‘Futures studies’ and the ‘Futures in education’ in the middle of a continuum between ‘Futures Research’ at one end and ‘Futures Movements’ at the other. On this continuum, ‘Futures research’ is influenced by quantitative methods such as – for example - trend extrapolations or forecasting models. At the other end of the continuum, ‘Futures movements’ calls for nuanced qualitative work which is change and values oriented. Futures movements call for action towards (or against) some specific future. Between ‘Futures research’ and ‘Futures movements’ is located

‘Futures studies’ which is more academic (e.g. policy analysis, ethnographic research etc.) and applied (e.g. Delphi surveys, Professional training and development, curriculum development etc.). What emerged from Slaughter’s continuum is an opposition between positivist and interpretivist traditions within the field of Futures studies.

Futures research (Major knowledge-seeking focus)	*Prediction* *Economic and technical forecasting*	Trend extrapolation Social indicators Social forecasting Technology assessment
	Systems analysis	Global and societal modelling Long cycle research Simulation of change processes
	Management science	Issues management Decision and risk/benefit analysis Policy analysis
	Scenario writing	Ethnographic futures research Cross impact analysis Delphi surveys
Future studies (Synthesis, criticism and communication)	*Comparative surveys and critique of futures issues*	Digests, indexes, overview of problems and dimensions of change
	Futures in education	Professional training and development Curriculum innovation and courses development Interdisciplinarity
	Speculative writing	Social imaging processes Creation and falsification of images Exploration of trans-rational
	Networking	Global communications Social innovations Green politics
	Theory and practice of alternative lifestyles	Alternative technology Reconstruction of community New age cultures and values
Futures movements (Stimulating, reconceptualizing, and possibly leading change)	*Humanistic and transpersonal psychology*	Future imaging workshops Despair and empowerment work Psychodrama Psychosynthesis

Figure 1. The Futures Field: Tools for Managing Change (in Slaughter 1984, p21)

Using this initial opposition found in Slaughter’s work and combining it with other models developed by Masini (1993) and Inayatullah (1990) helped Gidley’s build her own taxonomy (2013) which offers a more nuanced definition of the field. This model of futures studies includes not three but five subfields or traditions:

First, the ‘empirical-positivist’ tradition inspired by the US and UK quantifiable models and probabilities assisted by early computer being developed which emphasised trend analysis and forecasting. For example, in the UK, Royal Dutch Shell which had experimented with computer driven systems, and a model based ‘Unified Planning

Machinery (UPM)' (Wilkinson and Kupers, 2013). Shell quickly moved away from the probabilistic forecasts and normative statements which were being shown to get things wrong when trying to handle unexpected changes, to focus on plausible scenarios to better engage with an uncertain future.

A contrasting movement, the 'critical-normative' tradition, originated in Europe and emerged as a response to what was perceived as an excessively empirical approach to futures in the USA. This eventually led to the establishment of the World Futures Studies Federation (WFSF) in the early 1970s and work on plausibility by French researchers, in Gaston Berger and Bertrand de Jouvenel who were more focused on telling a story and what should happen.

Exploring a more humanistic and environmental futures 'cultural-interpretive' tradition arose from the work of the WFSF's members who sought to broaden the scope of futures studies by incorporating non-Western cultures.

In the 1990s, the 'empowerment-activist' prospective, linked to action research emerged in Europe and has since been adopted by some Australian scholars.

Lastly, the 'integral/transdisciplinary' futures approach is a recent development that shows promise in fostering genuine inclusion of both a multi-disciplinary and sustainable agenda.

2.4.4 Conclusion

What emerged from the literature is that the study of the futures is not a single homogeneous monolithic entity. It has an academic tradition which has been developing since the 1940s in a vibrant field of research. It also encompasses various perspectives and traditions routed in deeper ontological foundations.

The literature describes a shift in the field of futures "from prediction to forecast to foresight and eventually to anticipation and shaping the future" (Motti, 2017, p. 1720). This evolution also evidenced a progress from a positivist prediction based single future perspective, to a qualitative, vision based, alternative futures approach (Dator, 2003; Gidley, 2013; Wilkinson and Kupers, 2013; Motti, 2017). Poli (2010) insisted that both traditions he described, are useful, and can co-exist since they address the future from two different standpoints. Gidley (2013), concurs and explains that the approaches she described are not mutually exclusive. She goes further by stating that researchers could use any or all of them depending on the context of their study aligning herself with values shared by pragmatists. For Amsler, Facer (2017) and Poli, (2010) the foresight uses a mixed methods approach by merging both qualitative and quantitative data and presenting them as scenarios. In turn, Slaughter (1984) echoes the use of scenario in Future studies and associates the fields of Futures Studies and Educations Studies with the Delphi method which we will be presented in more details in the methodology section of this research.

3 Methodology and methods

After identifying a gap in the existing literature, the following section intends to give the reader a summary of the research project that was conducted. Research is a “heuristic endeavour”, “a kind of quest” (Su, Nixon and Adamson, 2010, pp. 85; 93), the outcome of which cannot be pre-specified. However in a structure inspired by the work of Hitchcock and Hughes (1995), which asserts a strong chain reaction link between ontological and epistemological beliefs, epistemological and methodological considerations, and ultimately, between instrumentation and data collection, this chapter will sequentially examine each of these elements.

In line with the approach proposed by Lincoln and Guba (1985, pp. 226–247) this section intends to provide an overview the focus of the study and its fit with the inquiry paradigm; where and from whom the data was collected as well as the various phases and instruments used in this research. It will also highlight plans for the successive phases of the inquiry, data collection and analysis procedures. Some ethical and logistical considerations will complete this chapter.

3.1 Research Paradigm and research context

3.1.1 What is research?

Research enquiry “is a search for understanding” (Su, Nixon and Adamson, 2010, p. 85), it is “open ended, exploratory, contributes something original to the substantive field and extends the frontiers of knowledge and theory”(Cohen, Manion and Morrison, 2007, p. 41).

According to these definitions, research is an investigation into sources and study materials in order to establish new conclusions. Research is therefore an attempt to establish new conclusions and therefore generate new knowledge based on data collection or as McKenzie et al. (1997, p. 9) point out in the field of education research, replacing old educational “certainties”.

The challenge for researchers is therefore to determine how we create new knowledge, about the world we live in. The answer to this question varies depending on the beliefs – implicit or explicit - or epistemological assumptions held by the researcher.

Grouped in paradigms, these sets of beliefs, traditionally “provide a unifying framework of understandings of knowledge, truth, values and the nature of being.” (Somekh and Lewin, 2005, p. 347). However, there is an open debate, on the number of these paradigms. For example, whilst Ritzer in his review of Kuhn’s “attractive metasystem” (1975, p. 156), suggests that three paradigms underpin research, Scott and Morrison (2006) believe there are four. Despite these differences, one constant trend emerges from the literature; that is of the opposition “frequently reduced to matters of ‘quantity’ and ‘quality’” (Morrison, 2012, p. 16). Within this perspective that contrasts "quantity" and "quality" in the world, two primary paradigms can be sequentially examined: positivism and interpretivism.

3.1.2 The knowledge debate

Influenced by my early academic scientific training in medical school, I initially developed a preference for research grounded in scientific principles, reproducible, and based on a singular version of reality. My natural scholastic inclination initially met those of August Comte’s ‘Philosophie positive’. Comte posited that society can be explained scientifically, according to laws of rational logics which “explain, predict and in some cases ultimately control the social world” (Gilbert, 1999, p. 7). Leaning naturally towards the use of value free, facts gathering, hypothesis supported methods borrowed from natural sciences (Bryman, 2001) these preferences initially guided this research towards a more positivist tradition of education research supported by quantitative methods.

However, after acquiring knowledge and engaging with a range of education researchers during the initial two years of the Professional Doctoral program, these ontological and epistemological standpoints were re-examined and refined. This resulted in the adoption of a more nuanced view, and developing an appreciation for a version of multifaceted reality grounded in people’s experience aligned with an interpretivist view of the world. However, far from embracing Weber’s “hypothetical constructs (or ‘Ideal types)” (Weber (1949) in Silverman, 2003, p. 350) this initial review of a possible relationship to reality and knowledge left an inverted clarification of what I believed in. It clarified what I did not believe in, and informed my journey by leaving me with gaps to fill in order to guide my research project.

These gaps were mainly created by what I identified as the flaws of respectively positivist and interpretivist views of the world and knowledge. I encountered difficulties with certain positivist features. One such element was my disagreement with the notion that individuals are passive subjects/objects in research. Additionally, I had reservations regarding the exclusion of emotions as a research object unless made quantifiable, as this limitation is linked to the requirement that only phenomena that can be observed by the researcher can be deemed as valid knowledge. Lastly, I took issue with the connection made between hypotheses and causal relationships, which implies that educational research is always deductive. I encountered difficulties with certain aspects of the interpretivist paradigm as well. While I acknowledge the potential for mutual influence between researchers and participants, I would not subscribe to the view that researchers are always part of the topic they investigate. Additionally, I struggled with the presentation of individual accounts as reality and I align with the perspective of Morrison (2012, p. 22) that "reality is multi-perspectival" and that humans construct meaning by offering accounts of their actions, which are influenced by context.

Guided by my analysis of the literature, research questions have emerged which do not appear to fit Burrell and Morgan (1979) binary worldview as an ‘either/or’, or as Gilbert puts it, “a coin with two faces which shows either heads or tails” (Gilbert 1999, p.7). Instead, these emerging research questions appear to straddle the classic divide between ‘quantity’ and ‘quality’ or between positivism and interpretivism. This would locate this research in a third space, in an “educational community including researchers who, for reasons that might be ideological, technical or pragmatic, engage in ‘mix-and-match’ [and] may not perceive, or indeed value, the need for a specific distinctiveness in paradigmatic approaches to research activities” (Morrison, 2012, p. 17).

3.1.3 Pragmatism

The review of literature and personal reflection described above, led to the adoption by this research of a philosophical system that goes beyond a traditional binary perspective of the world opposing positivism and interpretivism. Instead of focusing on the nature of truth, this system prioritises the outcomes of actions. This paradigm – Pragmatism – based on the work of John Dewey, and his book 'How we think' first published in 1910, and later revised in 1933 (Dewey, 1910, 1933) is "especially interested in the concept of inquiry as a form of experience that helps resolve uncertainty." (Morgan, 2017, p. 5). As a result of this definition, according to the pragmatist perspective, research is a form of action that aims to achieve specific goals framed as research questions. John Dewey's focus on inquiry is particularly valuable because it offers a direct link to research design.

Dewey's approach to inquiry begins with a problematic situation that requires action and continues with a decision-making process which involves reflecting on both the potential solutions to address this problematic and their outcomes.

In this research, the main problematic to address was the knowledge gap associated with pathway colleges and the decision making which followed involved reflecting on how to best address this knowledge gaps and what knowledge would be needed to achieve this.

With Dewey pragmatist's approach starting with a problem to be tackled by action, the research process effectively starts with designing a single - or set of - research questions to help address this problem. From these, a research design is adopted, which in turn requires a choice of methods to gather data. This last process is not only centred on combining the different strengths of both qualitative and quantitative methods - making it a mixed method approach - but most importantly from a pragmatic viewpoint, on also ensuring a purposeful integration of the results from the different methods. Adopting a pragmatic tenet, the next section of this chapter will therefore focus on presenting the research questions as a pre-requisite to describing the most appropriate methods to answer them later in this chapter.

3.1.4 Research questions

With the pragmatic approach initiating the research process by identifying the questions which serve as the driving force for the rest of the research, it is important to remind ourselves how these questions emerged from the literature review. Beyond being the starting point of this inquiry, the importance of the research questions should not be underplayed when it comes to completing the later stages of this research. They frame this systematic enquiry, but also guide the data collection and analysis, support the write up phase, and most importantly stop the researcher from "going off in unnecessary directions and tangents" (Bryman, 2008, p. 69)

The first part of the research aimed to define and map the pathway sector in direct response to the literature outlining the UK higher education sector, its origins and evolution. Three subsidiary questions followed:

In the absence of peered reviewed academic literature on this topic, it appeared important to start this research by defining, what is the UK pathway sector. Coming up with a comprehensive definition would be key to set the remit of this research and guide further questioning.

Having encountered a large body of literature relating to the origins of the university sector and its historical evolution, a second question emerged from the literature: What were the key events leading up to the creation of the pathways sector and then contributing to development of the sector? In a parallel approach to the literature on the UK higher education, its origins, and some key historical milestones of its development, it was important to attempt to document for the first time an account of the creation and early development of the UK pathway sector.

Finally, in response to extensive published works on the modern university and its characteristics, the last research question of this theme focused on providing the reader with an overview of the key components of the pathway's market. The gathering of key characteristics such the number of colleges and providers, the number of students enrolled and an overview of the courses being offered will contribute to the creation of new knowledge on a previously undocumented sector situated at the intersection of education and business research.

The objective of the second part of this study was to identify the relationships between universities and pathway providers, which would enable their placement in two existing discussions found in the literature: Firstly, the discourse on the conflict between public and private values in British universities, and secondly, the literature on internationalisation and the establishment of a business-oriented approach of university management.

Three subsidiary questions emerged as a result. To begin with, how does the relationship get set up between a university and pathway provider? In addition, how is the academic part of the relationship managed? Lastly, how is the business part of the relationship between a university and a private provider managed?

Finally, the third part of this study aimed to explore the future of the pathway sector. The formulation of this research question arose from an emerging body of literature related to the study of education futures. As an emerging discipline, it appeared important to include two subsidiary questions in this area. To begin with, what are the external forces and influences likely to impact the future of the pathways sector? Furthermore, what possible internal changes – positive or negative – should pathway providers be mindful of?

The three main themes and eight subsidiary research questions guiding my research project are very different in nature. The first theme aims to gather historical and statistical data to respectively help create the first historical account of the pathway sector and paint a picture of the sector key characteristics. This first question alone suggests the need for both qualitative and quantitative methods of data collection. The second research theme also intends to provide both qualitative and quantitative data to describe respectively the academic and business relations established, whilst the third and final theme is likely to rely mainly on qualitative data. To answer all three research questions in turn, the stance adopted by this research is therefore moving away from a world view being exclusively quantitative or qualitative. It is not an either/or world but a mixed world (Cohen, Manion and Morrison, 2007).

3.1.5 Mixed methods

As outlined in the previous section, some of the research questions required quantifiable responses; for example, the number of pathways colleges in existence, or the financial performance of pathways providers. Other questions, however, required more nuanced responses such as a well-crafted definition of the pathways sector, or a personal view about its possible futures. Given the nature of these research questions, the study aimed to combine evidence derived from both what are traditionally termed qualitative and quantitative methods to adopt “a third methodological movement” (Gorard and Taylor, 2004, p. 1), and thus, a mixed methods approach was chosen as the best fit for the research questions (Bryman, 2008, p. 624). As argued by Cohen et al. (2007), what this choice of mixed methods also implies is that, epistemologically, this research is aligned with sometimes more scientific or humanistic values, and ontologically, there may be both singular and multiple versions of the truth and reality.

Beyond this pragmatic choice guided by the nature of the research questions, there are also noteworthy advantages to using mixed methods research.

Adopting a mixed methods approach first helps overcome opposing quantitative and qualitative views of research. Sometimes set against each other in what was described as “paradigm wars of the 1980s” (Gorard and Taylor, 2004, p. 4), adopting mixed methods allowed to overcome this “naïve empiricism” (A. Brown & Dowling, 1998, p. 83) and addressed “a tendency to under-estimate the degree of overlap” between the traditions underpinning positivism and interpretivism and their respectively associated quantitative and qualitative methods (Morrison, 2012, p. 25). Another advantage of using mixed methods is the fact that the strengths of one research method can compensate for the weaknesses of the other (Plastow, 2016). Finally, mixing methods also allows for an added level of understanding of the topic covered (Toomela, 2008; Ponterotto, Mathew and Raughley, 2013; McKim, 2017) which could lead to “superior findings” (Bryman, 2008, p. 610) or “triangulation” (Gorard and Taylor, 2004, p. 1; Bryman, 2008, p. 611).

One aspect sometimes overlooked when mixed methods are only being presented as an alternative to other methods, is the details of the design and like mono-method research, mixed methods research ”must be competently designed an conducted” (Bryman, 2008, p. 624). As a result the sequencing of the various qualitative and quantitative components of the research is important and according to (Guest, 2013) timing is a crucial decision to consider when designing the study. For them timing has two components: simultaneity and dependence. The concept of simultaneity refers to whether the various elements of the study can be conducted at the same time or if one must be completed before an other can begin. On the other hand, dependence assesses whether the process of carrying out a study relies on the findings of another study. Baran and Jones (2016) went one step further and described how multi-layered studies with more than two qualitative or quantitative components “consider multiple viewpoints, perspectives, positions and standpoints”[and how] “today, the primary philosophy of mixed research is that of pragmatism” (Tran, 2016, p. 1).

In summary, the differences in the research questions, triggered the need to use different tools of data collection in what turned out to be a mixed method research. Each of the three different data collection tools were used independently from each other, however they were used in a chronological sequence related to the main area of study they referred to. The Delphi method was first as it initially intended to define the sector and explore the events leading to its development. The documentary analysis followed, to focus on sources illustrating how the relationship between universities and their pathways provider was managed. Finally, the interviews initial aim was to explore the futures of the sector with input from industry experts. The data each tool generated was also used across each of the three main research aims. The following section will better describe the different tools of data collection used in this mixed method research.

3.2 Instruments of data collection

As highlighted above, this research explored successively three areas guided by three main research questions and eight subsidiary research questions. Aligned with the pragmatic approach to research design, each main research question required purposeful integration of the different methods and associated data produced (Dewey, 1933). Although three main instruments of data collection were used, each instrument was used across more than one research question. This integration was a pragmatic influenced design. The table below helps evidence where each instrument was used across the various themes and research questions.

Aims	Research Questions	Principal Sources of Data
A – Defining and mapping the UK pathways sector	A.1 – How do UK pathways experts define their sector?	**Delphi** to generate a definition and **interviews** to sense check the definition.
	A.2 – What were the key events leading up to the creation of the pathways sector and then contributing to the development of the sector?	**Delphi and interviews** data used to produce a list of key events seen by experts has having played a key role in the creation of the pathways sector.
	A.3 – What are the key components of the pathways' market?	**Interviews and Documentary** research data used to create a census of pathways colleges, estimate the number of students and define the type of academic courses being offered
B – Understanding the university-pathway provider partnership	B.1 – How does the partnership get established?	**Interviews and Documentary** research data used to define key steps of a relationship being set up between a pathways provider and a university
	B.2 – How is the academic relationship managed?	**Interviews and Documentary** research data used to identify elements supporting the academic relationship between a pathways provider and a university
	B.3 – How is the business relationship managed?	**Interviews and Documentary** research data used to identify elements supporting the business relationship between a pathways provider and a university
C – Charting the futures of the UK pathways sector	C1 – What are the external forces influencing the future of the pathways sector?	**Delphi** used to create a list of key external forces, and **interviews** data used to further explore these possible forces influencing the future of the sector
	C.2 – What are the key internal changes within the pathways sector impacting the future of the pathways sector?	**Delphi** used to create a list of key internal forces, and **interviews** data used to further explore these possible forces influencing the future of the sector

Table 1. Themes, Subsidiary research questions and principal sources of data

Despite the crossovers, each of the three instruments of data collection used will be described in turn. The following paragraphs aim to clarify the process of data collection followed for each instrument.

3.2.1 The Delphi Method

3.2.1.1 Delphi method and academic research

Developed in the 1950s by Olaf Helmer for Rand corporation (Helmer-Hirschberg, 1967) and based on the principle of informed intuitive judgement, the method was named after the ancient Greek oracle of Delphi, who could predict the future. This proprietary method uses a panel of experts providing anonymous feedback on their subject of expertise in two to three successive rounds of questionnaires, separated by a phase of analysis by a facilitator. This technique which has the advantages of creating anonymity and distance between the panelists (Green, 2014) and does not require participants to meet in person, helped overcome logistical challenges whilst retaining the expertise of the panel and the element of collegiality (Cohen, Manion and Morrison, 2007).

Though the original Delphi Method was linked to the defence industry (Helmer-Hirschberg, 1967), the technique has spread to other research areas, including nursing (Barrett and Heale, 2020), medicine (Waggoner, Carline and Durning, 2016), engineering (Ameyaw *et al.*, 2016) and education research (Skulmoski, Hartman and Khrahn, 2007; Green, 2014) were Delphi studies used in mixed methodologies to corroborate the opinion of experts is presented as “most useful in an educational setting” (Green, 2014, p. 6). Although some of the challenges attached to researching powerful people also described as “researching up” (Cohen, Manion and Morrison, 2007, p. 127) remained, the Delphi method helped address some of the concerns I will explore later about participants’ anonymity and commercially sensitive data.

3.2.1.2 Delphi Method design

The design of the Delphi method itself followed Stewart and Shamdasami’s seven steps process as presented by Green (2014). They were:

1. Develop the initial Delphi probe or question;
2. Select the expert panel;
3. Distribute the first round questionnaire;
4. Collect and analyze Round 1 responses;
5. Provide feedback from Round 1 responses, formulate the second questionnaire based on Round 1 responses and distribute;
6. Repeat Steps 4 and 5 to form the questionnaire for Round 3;
7. Analyze final results;

Figure 2. Outline of the steps in the Delphi process by Stewart and Shamdasami (1980) in Green (2014)

The first round [Appendix A] aimed to "form issues" (Green, 2014, p. 3) by asking open questions on two aims of this research. As per the first aim of this research, the first two questions asked panellists about their view on the definition of the pathways sector. The next question teased out of panel members their thoughts on what they believed to be key milestones for the sector. Finally, the last four questions focused on opportunities and challenges associated with the future of the sector.

After circulating the first round the method typically also required to collect and summarise the input of the panel of experts before presenting it back to the panel for further input in a second-round questionnaire [Appendix B]. In this structured process, I reviewed and summarised the experts' opinion once after the second round and before submitting the third-round questionnaire [Appendix C]. This process and my input in the analysis of each round are presented as part of the 'Delphi method analysis' section.

3.2.1.3 Why choosing the Delphi Method?

Chronologically, the Delphi Method was chosen as the first method of data collection, with the research questions serving as a guide for this choice, and two specific reasons driving the decision. First, the Delphi offered an opportunity to reach a consensus on the first definition of pathway sector, and to construct the first account of the creation of the pathway sector. Next, the chance to adopt a future orientated method to attempt to answer the final research question on the potential future of the sector.

To fulfil the initial requirement of reaching a consensus, several methods were considered. A focus group could have helped and so would have Nominal Group Technique (NGT) (ASQ, 2023). Whilst a focus group would have offered an opportunity to gather opinions from a range of participants, there was a risk that some contributions might not get heard and be lost. Using NGT would have reduced the impact of more vocal group members and allow for quieter participants, by having all contributors write their answers to the questions, and then present them to the group for the group to then vote. To remove any challenges linked to negative group dynamics stopping participants to join in, and to accommodate anonymous contributions of participants evolving in the same competitive business sector, another method had to be found. As the research design evolved additional logistical factors had to be considered such as participants availability to travel and meet which upon reflection prevented face to face events to take place. The Delphi Method offered multiple advantages including: the opportunity for an expertly informed consensus to be reached; the anonymity of participants to be respected; asynchronism to allow required flexibility; and online - at distance – delivery.

The Delphi also allowed to satisfy the other requirement for a future orientated approach to the research questions. There is a wide range of future orientated tools designed to help organisations reflect on their future and the future of their environment. Some of these tools are presented in toolkits and three of these were considered when designing this study. The first one was the UK's Government futures toolkit for strategic future aimed at policy makers and analysts (HM Government, 2014); the second was the EU regional development toolkit which has informed several European higher education institutions (Interreg IIIC, 2007); the third was based on the UK Government's Foresight Horizon Scanning Centre's work on future thinking (Institute for Research and Innovation in Social Services (IRISS), 2011). Most of the tools presented across these three toolkits were similar in style, and shared common guiding principles about futures planning. However, they tended to differ in the suggestions for their practical implementation. Because of the multiple benefits illustrated above and its inclusion in all three toolkits considered, the Delphi Method was selected as the consensus and future orientated tool required for this study.

3.2.2 Documentary analysis

The second data collection method used was a documentary analysis using mainly archives or "mute evidence" (Denzin and Lincoln, 2003, p. 155) related to both the sector as a whole, and individual colleges.

This choice of method was guided by the research questions and in particular the requirement to better understand the key components of the pathways market and to assess its size. Accepting the general definition of a market as a place - physical or not - where a producer and a consumer meet to exchange a good or service in exchange for a fee, this study focused in turn on estimating the size of the pathways market's producers – the pathways providers -, the size of the pathways market's consumers – the students enrolled on pathway courses –, the good or services being exchanged – the type of pathways courses – and the possible fee associated – cost of the tuition fees. Additionally, various aspects of the establishment and management of the relationship between pathway providers and higher education institutions were also explored through this documentary analysis.

To help assess the size of the pathways colleges producing these courses for international students in the UK, this research created a census of pathways colleges in existence [Appendix J]. This census was achieved by combining two sources of data: reports produced by the Quality Assurance Agency as a result of reviews of Pathways Colleges (Quality Assurance Agency, 2017), and self-published data by each of the key providers. For each pathways companies the review of self-published data involved a review of company brochures available online, published marketing material and wider company websites contents. These were used as key sources to get the most recent and accurate information about the providers latest partnerships.

To assess the number of students enrolled on pathways courses, grey literature took prime place. In line with its definition compiled by the Third International Conference on Grey Literature, key sources used included "information produced on all levels of government, academia, business and industry in electronic and print formats not controlled by commercial publishing" (ICGL, 2004). For example, cross sector reports published by the UK Department of Business, Innovation and Skills (Tristram Hughes *et al.*, 2013), provided some data about sector wide enrolment numbers. These reports also provided data about key pathways providers.

Finally, data on the type of courses being offered and their costs was gathered using reports from the Quality Assurance Agency (Quality Assurance Agency, 2017). They offered data focused on individual pathway colleges including existing quality assurance processes and the type of academic courses they offered. Additional financial information was gathered by accessing pathways providers published accounts on ‘Companies house’ (UK Government, 2023). Despite not having an accounting background allowing me to fully appreciate the data encountered, going through these companies filing history and in particular the directors’ reports still offered insight into the results of these businesses and recent developments.

Press articles were also used as part of this desk-based exercise. With this research on private for-profit education providers being located at the intersection of education and business research, education and business press articles were considered. Whilst being mindful of the benefits and challenges of using trade journal or business press (Wilkinson and Merle, 2013), the education press would provide a higher education or wider education focused opinion on the topic, and the industry press a business take on the sector. Both types of sources provided complementary data not provided by either grey literature or self-published data such as – for example – news reports on possible merger of two providers.

In the absence of any central physical archives to consults, all the sources of data mentioned as used for this part of the research were soft electronic copies of documents.

3.2.3 Interviews

The last data collection method employed in this research sought to delve deeper into the results obtained from the documentary analysis and Delphi method. Additionally, it offered a chance to directly obtain the perspectives of pathway providers across all three research questions through a series of interviews with pathway leaders.

The interviews were semi structured and designed to last about one hour. They aimed to get personal insight and first-hand account, from the participants on the three areas covered by this research: the definition and origins of the pathways sector; the current relationship between pathways providers and universities; and the future of the sector.

To achieve this systematically, and following a methodology associated with structured interview an interview guide was designed [Appendix H]. This guide provided a "structured list of issues to be addressed or questions to be asked" (Bryman, 2008, p. 695) and included three main sections aligned with the three aims guiding this research. The first section of the interview focussed on general questions about the establishment of the pathway Colleges in the UK and the relationship between pathway providers. It included five questions. The section part of the interview explored three questions on the relationship between pathway providers and their university partners. Finally, the last three questions investigated the participants' views on the future of the pathway colleges. A copy of the interview guide is provided in the appendices section.

Due to Covid restrictions on travel and meetings between 2020 and 2022, video interviews were conducted through University or Nottingham Microsoft Teams software. Video calls were recorded through Teams and on a separate digital voice recorder. All digital recordings were stored securely on the University of Nottingham network for the duration of the research and to allow transcription and analysis. The voice digital recordings were only intended as back-up in case 'Teams' video recording had not worked. All video recordings worked, so each digital voice recording was deleted after the first viewing of the video interview.

The interviews were recorded and transcribed verbatim with the help of software integrated into the online call service Microsoft Teams. The accuracy of the transcriptions was verified against the voice and video recordings. Were required corrections were made. A total of six interviews took place. Each interviewee received a project information brief [Appendix D] prior to taking part. The document highlighted the aims of the study, the input and time commitment required from them and how the data would be used. It also included a copy of the consent form [Appendix E] to complete and return prior to the interview. Details of the sampling and analysis of the interviews is included in the following sections.

Obtaining informed consent from all interview participants in accordance with the university's ethical approval posed the primary challenge during these interviews. Given the research's particular requirements in this regard, I devoted a separate section to tackle this issue.

3.3 Sampling

3.3.1 Experts' selection for the Delphi Method

The Delphi method required a group of experts to provide their opinion on a topic being researched. As there were no exhaustive database of experts on the topic of pathways providers, and no academic literature to be used to identify possible subject experts with "years of research, teaching, publication experience" (Grisham, 2009, p. 121), I proceeded to follow Grisham's example when they defined their own criteria based on "years of practical experience working in" the field studied (Grisham, 2009, p. 121). Based on this definition I identified two potential groups of participants with skill, training, or special knowledge on this topic. Following a pragmatic approach to my research and using my previous definition of experts, I selected a panel of participants mixing both pathway and non-pathway staff with extensive experience of working for and/or with pathways providers. This list was compiled using a combination of industry insider knowledge, my LinkedIn network and Companies house information on senior company staff.

The first group included past and current employees of pathway providers. Potential participants approached included college directors, national directors and senior staff currently or previously employed by pathways providers. Note that I purposely excluded non-senior staff below directorship level. Although they would have met 'practical experience' criteria of an expert, their sector knowledge would probably have been limited and not extensive enough to match the definition of an expert as having 'years' of experience as set out above.

The second group targeted as potential participants were current or past employees of universities. Again, to ensure congruence with the definition above, I elected to focus on university staff in a senior role dealing with the recruitment of international students and/or the management of pathways partnerships and therefore with extensive experience of working with or alongside pathway providers. Some of the roles targeted included Directors of international office or head of international partnerships.

The ambition was to constitute a panel of about ten experts taking part in the Delphi exercise to comply with the ideal panel size recommended of 5 and 11 experts in a Delphi panel of experts (Waggoner, Carline and Durning, 2016). In the absence of an official register of experts, the online business focused social network LinkedIn allowed access to details of both senior universities and businesses leaders. The career overview the website includes allowed to identify and measure how much experience the potential participant had. This platform also allowed to directly contact potential participants whilst circumventing potential personal assistants acting as 'gatekeepers' (Cohen, Manion and Morrison, 2007, p. 123).

Forty-six potential participants were approached. Each received a personalised invitation to join the Delphi group and a description of the research explain their expected contribution. Invites were sent in batches between 27/05/19 and 09/06/19 as per the table below. Only one refusal was received declining politely the invitation to join and wishing me good success in my research. Most professionals (thirty four of the forty six) approached did not respond to the invite.

Date of invite being sent	Number of invites sent	Answer received	Accepted	Declined	No response
27-May	11	2	2	0	9
03-Jun	9	1	1	0	8
04-Jun	3	2	2	0	1
08-Jun	19	6	5	1	13
09-Jun	4	1	1	0	3
Total	**46**	**12**	**11**	**1**	**34**

Table 2. Delphi participants - invitations statistics

The Delphi Method is an iterative process aiming to reach an expertly informed consensus by making the panel reflect on the group's response after each round. In line with the Delphi guidelines, three rounds were designed in this research for which I acted as the facilitator analysing results between each round. The first round of the Delphi ran from 9 June 2019 to 26 June 2019, the second from 24 November 2019 to 16 December 2019, and the final one between 26 January 2020 and 19 February 2020.

3.3.2 Selection of documentary sources

Where a conventional research project might have included here a section outlining key terms used to conduct an archival search in a database, this study was unable to rely on established academic literature or consult any central physical official archives due to the lack of such resources available on the topic. Instead, the research required the gathering of "mute evidence" (Denzin and Lincoln, 2003, p. 155) categorised as 'archival materials' by Denzin and Webb in their classification of 'unobstructive measures' (Webb et al. 1966; Denzin 1970 in Bryman 2008). As described in an earlier section three main types of archival materials were used: grey literature; company self-published material; press articles.

To better understand the provenance of the grey literature used in this research it is important to note that since their creation pathway colleges have not been included in a single stable regulatory framework and sources even describing their existence are scarce. Quality Assurance Agency (Quality Assurance Agency, 2017) reports were preferred as they offered externality on the sector, by the review/auditing nature of the reports. The QAA self-published purpose is to "safeguard academic standards and ensure the quality and global reputation of UK higher education." (Quality Assurance Agency, 2020b). It works across the UK higher education sector to be "the trusted expert independent body supporting the enhancement and regulation of higher education across a diverse UK". For example, the QAA reports informed me of the date of creation for each college, the type of programmes being offered and significant changes affecting these colleges locally.

The choice to use reports from the QAA was also guided by a pragmatic motive: their accessibility and current data. Unlike the British Accreditation Council (British Accreditation Council, 2017) under which they were previously audited until 2012 and for which records were not available, QAA had a good freely accessible online archiving system. At the time of accessing the reports, there was 176 documents available for consultation across all five main private providers (Cambridge Education Group, INTO, Kaplan, Navitas, and Study Group) forming the base for this analysis. Unlike universities which are covered by Higher Education Reviews (HER) run by the QAA, pathway colleges were visited by QAA as part of Embedded College Review for Educational Oversight (ECREO). These freely available QAA ECREO review reports offered valuable historical and statistical insight into the most recent structure, size and academic offering of the UK pathways colleges. Since the creation of the Office for Students in 2017 (HM Government, 2017b) (HM Government, 2017a), pathway providers have started to register (Office for Students, 2020) however until 2023, the QAA remained the 'Designated Quality Body' appointed by the OfS and reports continued to be made through QAA which remained the most up to data sources.

The second source of data for this first part of the research came from the pathway providers themselves. Due to the ever changing nature of this dynamic private sector where new partnerships are regularly created, periodically published QAA reviews did not necessarily produce the very latest picture of the sector. Therefore another key part of this desk based research included a systematic analysis of self-published data by each of the key providers. Company brochures, published marketing material and company websites contents were used as key sources to get the most recent and accurate picture of these providers. This systematic review of the five biggest companies' website helped draw a more accurate picture of current partnerships for the top companies in the sector. In some cases, the companies published accounts on 'Companies house' (UK Government, 2023) were also accessed. Two main reasons directed this review; gathering key financial information or key actors in the sectors, and identifying registered company directors as a potential source of experts to contribute to the Delphi method or possible interviewees.

Finally, press articles were also used as part of this desk-based exercise. With this research on private for-profit education providers being located at the intersection of education and business research, both education and business press articles were considered. The main source of educational press used was the Times Higher Education magazine (Times Higher Education, 2023) the British news outlet focusing on higher education issues. The only industry specific press encountered came from 'The PIE', the self-proclaimed source of "News and business analysis for Professionals in International Education" (The PIE, 2023) used to provide a business take on the sector.

3.3.3 Interviews' participants

Because I am interested in understanding the experiences sector specialists have lived (Seidman, 2006) and to listen to what they perceive to be the challenges the sector faces, I have excluded the use of a quantitative questionnaire and have organised a set of interviews with key actors in the sector.

Having identified five main companies involved in the UK pathway sector, I first anticipated running five separate interviews in order to provide me with a good overview of the sector's perceived challenges. Each interview would have involved a senior leader from one of the five industry leaders. I had already identified and informally approached one of the five possible participants when initial feedback from this potential participant highlighted that the business sensitivity I had foreseen was in fact much stronger than anticipated. It quickly appeared that approaching senior staff in direct business competition, would not be possible.

Instead, 6 participants were approached because of their current role and past experiences with one or more main sector provider. The schedule below outlines interviewees details and the rational for their inclusion.

It should be noted that although there was no intention of having any overlap between the six interviewees and the group of experts participating in the Delphi, a subsequent cross-check of both lists revealed that one participant had been approached for both. However, due to the anonymous nature of the Delphi process, it was impossible to confirm whether or not they had indeed taken an active part in the Delphi despite agreeing to participate.

Participants	Current role	Current employer	Relevant previous employer	Date of the interview
Sue Edwards	Director of Compliance and Accreditations	Kaplan International Pathways	• Aspect world • Also involved in cross sector lobbying activities	25/01/2021
Pete Venables	Regional Director of Colleges	Kaplan International Pathways	• Navitas	13/05/22
Dr Elisabeth Claudia Grindel-Denby	Campus Director	University of Leipzig by Navitas Leipzig	• Kaplan International Pathways	15/05/22
Andy Quin	College Director	Kaplan International Pathways	• Bellerbys College part of Study Group • Embassy CES part of Study Group • Nord Anglia Education	25/05/22
Chris Hooper	Director of Global Study Centres	Cambridge Education Group	• Study Group	28/05/22
Olivia McLaughlin	Head of Planning and Analytics	University of Plymouth	• SAE – part of Navitas • Study Group • Kaplan International Pathways	30/05/22

Table 3. List of interviewees

At this stage it is essential to note that whilst the research draws on the perspective of these six participants, they were sharing their own experiences. They were speaking in a personal capacity as a sector expert and not on behalf of their respective employers. It is also noteworthy that certain individuals who were interviewed may have had a professional relationship with me either in their current role or in previous employment.

3.4 Data analysis

3.4.1 Delphi method analysis

The Delphi method analysis typically requires collecting data through a series of – usually three - questionnaires with a facilitator analysing and summarising the input of the panel of experts after each round before it is presented back to the panel for further input and feedback. In this structured process, the role of the facilitator remains the same throughout. It is to support the group of experts by analysing and summarising their answers after each questionnaire, and designing the next questionnaire. Through this process the aim is to support the group of experts to hopefully reach a consensus on the response to the initial problem considered. (Helmer-Hirschberg, 1967; Gordon, 1994; Linstone and Turoff, 2002; Skulmoski, Hartman and Khrahn, 2007; Green, 2014; Barrett and Heale, 2020).

As depicted in Section 3.2.1.2, which outlined the Delphi method design, the questionnaire comprised various questions serving distinct purposes. Consequently, the analysis of the responses varied accordingly.

To analyse the first two questions of the Delphi focusing on the establishment of a definition and milestones for the pathways sector, comments made by the experts and their feedback were incorporated in a revised version of the definition. This included nuancing existing statements by changing the vocabulary, adding or removing words or phrases to convey the meaning or nuances expressed by the experts answers. The revised definition was then presented back to the panel of experts in the next round. This process was completed between each round.

To establish the timeline of events related to the genesis of the sector, the panel was first encouraged to submit a list of events they considered to be milestones for the development of the sector. After gathering responses from the initial questionnaire described by Green as one designed to help "form issues" (Green, 2014, p. 3) a thematic analysis was conducted. It allowed similar events to be merged and some statements were summarised. Where precise dates were either provided by the experts, or were easily identifiable, they allowed for a chronological timeline to be compiled. Other less defined events not associated with a specific date, were not excluded, but had to be included in the separate section. The timeline compiled and the list of other events was then presented back to the group of experts for feedback. The feedback received after the second questionnaire informed the analysis and the final questionnaire.

The analysis of the next four questions teased out of panel members their thoughts on what they perceived as opportunities and challenges for the pathways sector. In a similar manner to the list of key milestones, the first-round questionnaire encouraged experts to provide an exhaustive list of opportunities and challenges and to highlight their top three in each category which they felt would have the most impact on the pathways sector. Between the first the second round, these lists of opportunities and challenges were reviewed using here again a thematic analysis allowing the identification of similarities and a summary to be produced. To help the group identify the most important opportunities and challenges, experts were invited to share their top three rankings and assess the impact and likelihood of all the other elements listed by scoring them. Between the second and final round questionnaire an overview of the group rankings was compiled and presented back to the group for feedback.

3.4.2 Documentary analysis

Due to the lack of previous research on the subject and the consequent absence of reference points to inform the data analysis design, an inductive approach was adopted. The objective was to facilitate an exploratory and unrestricted analysis of the data, utilising a qualitative research method that involved identifying themes and categories from the data itself rather than pre-determining them. It was anticipated that themes would surface during the exercise, enabling a thematic presentation of the data.

The QAA audit reports, and the UK Quality Code published by the agency, on behalf of the UK Standing Committee for Quality Assessment participated to this inductive approach. The Quality Code aims to “protect the public and student interest and championing UK higher education's world-leading reputation for quality" (Quality Assurance Agency, 2020a). Based on the indicators presented in the Quality Code, reviews are being carried on a regular basis. The standardised reports from these reviews were used to systematically gather and record data on pathway providers otherwise not easily accessible.

3.4.3 Interviews analysis

The overall analytical approach I adopted for analysing the interview transcripts was 'template analysis', whereby the researcher produces a template that represents themes identified in the data (King, 2012).

In template analysis, it is customary to pre-identify certain themes known as 'a priori' themes. This approach is often employed when a research project commences with the premise that specific aspects of the phenomena under investigation should be the primary focus. Four a priori themes were selected to align with the four themes emerging from the initial literature review. These included:

- the evolution of UK higher education,
- public-private relations,
- the internationalisation of UK higher education,
- and the future of higher education.

King (2023) describes the second stage of template analysis as including the transcription of interviews and the familiarisation with the data. In the overview of the method offered, he clarifies that template analysis does not necessitate the level of meticulous transcription seen in discourse analysis or conversation analysis, where detailed recordings of intonation, precise pauses down to partial seconds, and similar elements are used (King, 2023). Although King stated that template analysis "does not require full verbatim transcription at all" (Ibid), I nevertheless opted to record the interviews and transcribe them verbatim with the help of software integrated into the online call service Microsoft Teams. This choice was motivated by my concerns that it would be hard to determine the relevance of specific interview segments at such an early stage of the research and that key data could be lost as a result of not using full transcriptions.

The transcript of each interview was subsequently cross-checked with the audio and video recording to rectify any errors and validate the transcription. Appendix I provides an overview of the transcription, correction, and coding process. Some transcription errors were noticed and corrected. These were mostly linked to the software not recognising technical terms such as company names or acronyms and accents. Once accurate transcripts had been created for each interview, I gained more familiarity with them by once more listening to them. To then become thoroughly familiar with the data I followed Hammersley and Atkinson's advice (1983 pp. 177 178 in Cohen, Manion and Morrison, 2007) "to read and reread the data".

Silverman (2000) and Miles, Huberman and Saldana (2014), recommend starting the analysis as soon as possible after the transcripts were finalised, however I would contend that the analysis had started before full transcripts became available. I believe the analysis started during the data collection when I took very informal notes during the interviews, or then reflected on the data during the data accuracy and familiarisation stage. These notes were not substantive account of the interview, encompassing details like its location and timing, a methodological account, and preliminary elements of an analytic account. As such they did not resemble what Burgess (1981) described as the initial stage of data analysis, however they helped initiate the analysis during the data collection phase.

The next stage of the interview analysis included the initial organising of the data, its coding and developing the template. To achieve this, the data from each interview was first "delineated" and then "clustered" (Cohen, Manion and Morrison, 2007, p. 370) into categories based on the four a priori themes originally identified. This formed part of an initial analysis template which was then developed when applying it to the full data set (King, 2023). New themes were inserted using 'structural coding' based on the questions from the semi-structured questionnaire, meaning that I used a question-based code to classify all the answers to that question. The template supporting the analysis therefore included the following themes:

- Establishment and evolution of the pathway Colleges in the UK:
    - The emergence of the sector
    - Initial the growth of the sector
    - Key milestones in the development of the sector
    - Current evolution of the sector – slowing down
- Relationship between pathways provider and universities:
    - Definition of the relationship
    - Challenges in this relationship
    - Public/private tensions
- Future of the pathways sector:
    - Relationship between providers
    - What future for the sector
    - Tools/strategies used by pathways providers to help face the future.

I managed to code or "break down" (Scott and Morrison, 2006, p. 33) what was large qualitative data into smaller increments. Subsequently, data from various interviews pertaining to the same structural code, were analysed, contrasted, and interpreted to gain insights into the topic discussed with the various interviewees. This structured template approach then supported the writing phase of the research by providing an initial framework.

I considered using computer-assisted qualitative data analysis software (CAQDAS) to support the data analysis and coding system. Whilst I recognised the significant organisational potential of CAQDAS, I also subscribe to Bryman's view (2008) that the researcher as the analyst of the data must interpret and code the data. Additionally, I had reservations about the compatibility of a CAQDAS with my learning style. Finally, being based off-campus and studying part-time posed challenges in accessing further training and support at the University of Nottingham. I was apprehensive that dedicating substantial time to learning a software package might divert my attention from the analysis process and impede my progress. For these reasons I opted to complete this stage manually using a word processing software.

Having processed the data, the final stage of the template analysis was the interpretation and write up of findings (King, 2023). This involved evaluating the significance of specific themes to enhance my understanding of the topic investigated and construct a cohesive and meaningful account of the findings.

3.4.4 Anonymity

3.4.4.1 Anonymity and interviews

The primary ethical concern associated with this research centred on the participants' lack of anonymity, during the interview phase. In accordance with the guidelines set forth by The British Educational Research Association (BERA) and the ethics committee of the University of Nottingham, it was expected that responses would be anonymised. This involved removing any identifying details, such as names and locations of individual interviewees, from the interview transcripts. Additionally, organisation names were to be omitted, and instead, a description of the type of organisations involved could be provided, as referenced in Bryman's work (2008). Despite all these precautions, “deductive disclosure” (Boruch and Cecil 1979 in Cohen, Manion and Morrison, 2007, p. 126) was a genuine concern and a challenge I needed to address. In an environment with a small number of companies and a limited number of interviewees in senior roles, it would be very easy for any educated reader au fait with the current sector composition to deduce participants’ identity. Additionally, this anonymity might prove challenging to secure or as identified by Cohen et al. (2007, p.128) “confidentiality may not be able to be assured [for] academic educational research on the powerful”.

Instead of falsely promising absolute anonymity, I chose to be transparent with the participants, clearly stating that I would include identifiable quotes in my thesis.

Beyond the ethical challenges which a false claim guaranteeing anonymity may have caused, and the pragmatic response I provided to this challenge, the identity of the participant is in fact a key element of the research design. Not only does it confirm the interviewee status as expert in their field, but it also allows to link them to a specific context as either a university or a pathway staff member. Despite questions being raised by the Ethics Committee [Appendix F] ethical sign-off was secured [Appendix G] and I ensured all participants were fully briefed on that point prior to taking part in the study and therefore provided an informed consent. I included a specific paragraph about this point in both the project information document and the consent form which all participants received:

> *"Given your public profile in the industry and the small size of the sector, I am taking the approach of using real names of companies and participants throughout the research, its associated publications and conference presentations. "*
>
> [Extract from the Project information document]

> *"I understand that quotation attributed to the interviewee by name will be used in the thesis, its associated publication and in conference presentations. Yes/No"*
>
> [Extract from the consent form]

3.4.4.2 Anonymity and Delphi method

The Delphi part of the research allowed me to adhere to a more conventional approach to participants' anonymity management. Although I would have preferred to run a face-to-face focus group event instead, a more pragmatic approach was required. Gathering experts in the same location at the same time could have been done around a key sector conference, however participation and engagement with the project would have been impacted by a range of logistical challenges such as travel itineraries, personal commitments, professional requirements of said sector conference and later in the study Covid-19 travel and gathering restrictions.

Instead, I opted to run this part of the research online as a Delphi. Not only did it provide me with easier access to the experts, it also provided the participating experts with the added bonus of the online anonymity; it may also have alleviated some of the commercially sensitive related concerns raised by some potential participants.

3.4.5 Insider researcher

The second most challenging element of this research was to be an insider researcher (Mercer, 2007) and navigate my dual identity as both a senior manager working in the sector I was studying and a EdD student researcher.

Something as simple as contacting potential participants required careful planning. As an EdD student, contacting participants would not be too difficult provided I respected the University of Nottingham guidelines on the subject. However, as a pathway provider employee, contacting competitors did require additional steps on my part. At an early stage of my research project, I ensured my immediate line manager and our UK Managing Director were aware of my research. During the first meeting, I received full support from my line manager who himself had recently completed a professional doctorate. During my second meeting I found out that although I would receive support in principle from my employer, and that there was no resistance to my research taking place, active participation from the company leadership may have to be limited by the commercially sensitive nature of my research. A point I had considered in my initial research proposal, but not something I thought – maybe too naively at the time – would affect my project as much as it did. To reassure potential participants, I felt I needed to make it clear that my research interests were sector wide, not company specific. I also made it explicit that my study was only focusing on professional opinions and not on elements of the participants' personal lives. This was explicitly included in the project information document received by all participants.

For me it was very clear that I had two identities. The Head of College Services for a pathway provider and the Student researcher at the university of Nottingham. To reinforce this divide and avoid possible confusion, this translated in using my university email for research communications, even if I was contacting work colleagues I would have usually email from my work email. Additionally, I would not use my work email signature in any research communications, and would never mention my links to a pathway provider in any research documents. I would ensure I separate as visibly as possible these two different identities. Despite these efforts, elements such as LinkedIn – a professional social network – had to be used to communicate with some participants. Although my communications would remain centred on the research, it is highly likely that participants would have had sight of my professional profile. Despite the challenges carried by the blurring of boundaries between public and private life on social network, I did my upmost to limit any intentional overlap between my student and professional identities.

3.4.6 Commercially sensitive information

The study's market was restricted in terms of size, with only five major companies offering comparable products and a finite number of potential university partners. This limitation raised concerns regarding the relationship between information access and commercial success, as reflected in the adage 'knowledge is power' or 'scientia potestas est' first introduced by Francis Bacon in 1597 (Rodrígez García, 2001). In this competitive commercial landscape, information was deemed critical for gaining a commercial advantage over competitors, which had implications for this educational research as participants tended to be guarded about sharing information with interviewers or researchers.

Although commercially motivated concerns expressed by some participants, were appeased by the anonymous format of the Delphi, they might also have been exacerbated by my position as an insider researcher when interviewing them. To attempt to alleviate these concerns, I considered the publication status of this research during the design phase of my research. I explored the possibility of restricting the publication of this thesis in line with the BERA ethical guidelines for educational research which states:

> *"Researchers acting as consultants should be particularly aware of potential constraints upon publishing findings from projects which their institutions, sponsors, partners or publishers may consider to be commercially sensitive,*

and whose findings may, in whole or in part, need to remain confidential for that reason."

(British Educational Research Association-BERA, 2018)

After giving due consideration to my obligations regarding the publication and dissemination of my research, I chose not to restrict the publication of my research. Three main reasons motivated this choice. First, the limited risk linked to the data collected. Although some commercially sensitive information might be shared with me during the research, the focus of this project was not on individual companies but on the overall sector. Secondly, participants would all be working in senior roles either in universities or in pathways companies. They would therefore be used to journalistic or professional enquiries. I trusted that based on their professional profile and extensive experience they would be trained to handle this situation and only share the information they wanted to share. This would therefore limit the risk of participants unknowingly exposing commercially sensitive information or putting their own positions at risk. As Walford remarks, "those in power [...] are well able to deal with interviewers [...]. They are aware of what academic research involves, and are familiar with being interviewed and having their words tape recorded. In sum, [...] interviews pose little threat to their own position"(Walford, 1994). Finally, the added value of a doctoral research is in the dissemination of the research findings through publication of a thesis, articles or a report (Ghauri and Grønhaug, 2005; Cohen, Manion and Morrison, 2007; Bryman, 2008). I therefore felt that the combination of a sector wide enquiry, experienced interviewees and academic/professional value in dissemination of findings, would not warrant an embargo on the finalised research.

3.4.7 Other Challenges: Covid-19, Researching up and choice of resources

Three more challenges were considered as part of the research design. The first one was the impact of the Covid-19 pandemic on the overall research project, then the access to participants in senior roles and finally, the choice of the resources for the desk-based analysis.

Like many researches done in the last few years, this project was impacted by the recent global pandemic. For example, the travel restrictions imposed in the UK meant that interviews which would have otherwise been conducted face to face, had to be conducted online through visio-conference. Although this did not change drastically the overall design of the research project, the change of context would have had an impact on the interviewee's possible interruptions and distractions etc. (Cohen, Manion and Morrison, 2007).

Beyond the insider researcher challenges described above, the other main element to consider was researching more powerful figures in my professional environment. Described by Cohen et al. (2007, p. 127) as 'researching up" by opposition to 'research down' (e.g. researching students), this element required careful consideration on my part.

Researching powerful people and those in key positions can constitute sensitive research (Cohen, Manion and Morrison, 2007). As previously noted, according to Walford's work (1994), my research was unlikely to pose any risk to the interviewees. Therefore, my focus shifted to the potential impact on me as a student researcher, interviewer, and employee in the sector. Approaching and involving potential professional contacts was considered riskier. In a restricted environment with only 5 large providers, some participants to my academic research had already crossed my professional path, and it was highly likely that others could also be encountered in future. Given the potential risks to both myself and the research, approaching participants was not a decision I took lightly. A negative interaction with a participant could have far-reaching consequences for my professional reputation, future employment prospects, and overall career trajectory. For instance, if a participant were to be on a future interview panel, it could affect my chances of success.

Despite being mindful of the potential implications, I felt that approaching participants should not be a cause for concern, given my extensive experience of twelve years in the sector, prior involvements in sector-wide conferences, and confidence in my professional reputation.

While it may seem that using secondary data involves few or no ethical considerations, there are still challenges related to accessing and using data that has been previously published by others. As such, I took care to consider the exact nature of the final data set and to verify the type of consent obtained from participants in the original study in order to comply with the Data Protection Act (UK Government, 2018). While these were important considerations, they did not raise significant concerns, as I was utilising publicly available secondary sources of information such as reports and websites.

3.5 Reliability and validity or trustworthiness and authenticity

The measurement of reliability and validity of a research project were first conceptualised in a positivist tradition of research. Therefore, applying them to another research context would not be desirable. Combined with the challenge that the concept of measurement is not a major concern for qualitative researchers, these were received with scepticism by numerous critics. Critics from a predominantly positivist background, questioned the reliability of qualitative research, whilst researchers from an interpretivist tradition questioned the transferability of these concepts to their paradigm (Bryman, 2008).

To address this second critic interpretivists started to either adapt, or overhaul these criteria. The degree to which new frameworks were designed would broadly align with the researchers views on reality. Where a realist – closer to a positivist view of reality - would apply both concepts of reliability and validity without much changes, at the other end of the spectrum an anti-realist would not (Bryman, 2008).

Although this inquiry follows a pragmatic research approach that differs from the conventional positivist and interpretivist paradigms, it still places importance on what a positivist-oriented reader would know as 'reliability and validity' or what a naturalistic-inclined reader would recognise as 'trustworthiness and authenticity.'

To facilitate comprehension of these concepts, and present how they were operationalised as part of this research, the following section will outline each criterion, offer a brief summary, and demonstrate its application to the research context. It should be noted that, in line with the pragmatic approach adopted throughout this research, concepts that have multiple names will be presented using the terminology employed by the relevant authors being referenced for the purposes of this presentation. However, where parallels can be made between comparable ideas as viewed in different research traditions, these will be presented.

3.5.1 Trustworthiness

Having gained significant acceptance (Cohen, Manion and Morrison, 2007) the constructs developed by Lincoln and Guba (1985), offers a framework to review the concept to trustworthiness and its implementation to this research. For each of the four concepts namely 'credibility', 'confirmability', transferability, and 'dependability' presented by Lincoln and Guba in a qualitative framework, Bryman matched them with their equivalent concept in quantitative research. For ease, the table below presents the parallels made:

Qualitative	Quantitative
Credibility	Internal validity
Transferability	External validity
Dependability	Reliability
Confirmability	Objectivity

Table 4. Criteria for Evaluating Quantitative and Qualitative Research (Based on Bryman 2008)

The table below presents how each of these four concepts supporting trustworthiness were met during the research.

Components of trustworthiness	**Summary of the concept as presented by Lincoln and Guba**	**How it is demonstrated in the research**
Credibility / internal Validity	Ensuring that the research is carried out according to the canons of good practice. Submitting research findings to the member of the social world for respondent validation and/or using triangulation (i.e. using more than one method or source of data in the study)	Triangulation and respondent validation both played an important part in this research. One of the methods used – the Delphi method – relies on the facilitator submitting the panel findings back to the group for review and reflection. Respondents validation was sought for each section of this method. Additionally, triangulation was used throughout the study with three different methods used in the same research and multiple methods exploring similar themes. For example the compiling of events having participated to the emergence of the sector were highlighted by both the Delphi method and the interviews.
Transferability / external validity	Providing others with as much information as possible on the research to allow them to make judgement about the possible transferability of the findings to other milieux.	To allow transferability, detailed descriptions of the context of the fieldwork were provided at each step of the research. These should allow the reader to assess whether this research environment could be similar to theirs and whether findings may be transferable. Additionally using well-documented research methods, allows the reader to assess external validity by allowing better comparability between this research and other contexts.
Dependability / Reliability	Researchers should adopt an 'auditing' approach. This	As mentioned above, extensive descriptions of all the phases of

	entails ensuring that complete records are kept of all phases of the research process.	the research were provided to allow for external scrutiny of the research. Providing as much detail as possible for the various phases of the work should allow a future investigator to repeat the study and meet the dependability criteria. It is also worth noting that this research is also being assessed/audited as part of a doctoral research.
Confirmability / Objectivity	Whilst complete objectivity is impossible in social research, the research should show they acted in good faith. This aligns with the previous point about auditors contribution. E.g. researcher should evidence they've not overtly allowed personal values or theoretical inclinations to sway the conduct of the research or the findings deriving from it.	It is difficult to evidence the absence of bias if it is not there, however conflicting viewpoints included in the research to support academic debate. Steps were taken to demonstrate that findings emerged from the data and not personal opinions or predispositions. I trust the next part of this thesis which will present details of the findings will allow confirmability.

Table 5. The four components of trustworthiness applied to this research

3.5.2 Authenticity

According to Bryman (2008), three concepts contribute to demonstrating that a research is being authentic. The table below presents each of these concepts and how they were applied to this research.

Criteria of Authenticity	Summary of the concept as presented by Bryman	How it is demonstrated in the research
Fairness	Does the research present different viewpoints among members of the social setting?	The entire research is based on the premise of a possible difference and conflict between public and private values with no prior judgement made at any point on whether one view should be prioritised over the other.
Ontological authenticity	Does the research help members to arrive at a better understanding of their social milieu?	The research generated reflection from both interviewees and Delphi panel members. It will also have a post research impact through the publication of the research extracts and conference presentations which will follow.
Educational authenticity	Does the research help members to appreciate better the perspectives of other members of their social setting?	The Delphi is a method very much based on the concept of personal reflection on a group's feedback.
Catalytic authenticity	Has the research acted as an impetus for members to engage in action to change their circumstances?	It is hard to evidence or measure the impact of the research on its participants to the point where they may consider changing their circumstances, however it is undeniable that all involved in the research were influenced by it one way or another.
Tactical authenticity	Had the research empowered members to take the steps necessary for engaging in action?	Delphi panel members took action by accepting to participate and sharing their knowledge to develop a definition for their sector, as well as contributed to the creation of its first history. As organisation leaders, interviewees will reflect on their experience, and it will influence their actions whether consciously or not.

Table 6. The criteria of authenticity applied to this research

Having proceeded with the structure analysis of each criteria it is interesting to remark that some of these appear closely align to action research. The notions of doing research, critically reflecting and taking action comes quite strongly. As part of the ‘ontological authenticity’ participants are encouraged to reflect on their circumstances, whilst the ‘catalytic’ and ‘tactical’ criteria are more concerned about questioning whether participants were driven to ‘engaging in action’ as a result of their participation.

3.6 Conclusion

This methodology section attempted to provide the reader with an overview of the focus of the study and its fit with the pragmatic paradigm; detailed overviews were also provided on the origins of the data and the various phases of this mixed method enquiry being undertaken.

Importantly, this section elaborated on the three instruments used in this research; a desk-based documentary analysis, and field based Delphi and semi structured interviews. For each of them, it also highlighted plans for the successive phases of the inquiry, data sampling and analysis procedures.

Some ethical and logistical considerations were explored before considering what a positivist-oriented reader would know as 'reliability and validity' or what a naturalistic-inclined would recognise as 'trustworthiness and authenticity.'

Beyond the contents of the chapter, this section confirmed that research methods are much more than just a technical exercise, but a fundamental prerequisite used to define how we view the world and knowledge (Hitchcock and Hughes, 1995).

In order to answer all three research questions, the stance adopted moved away from a strictly normative paradigm and towards a third way offering a pragmatic epistemology and ontology. Synonymous of a mixed method approach to data collection, it also implied that “there may be both singular and multiple versions of the truth and reality, sometimes subjective and sometimes objective, sometimes scientific and sometimes humanistic” as argued by Cohen et al. (2007)”. As a result, there is value in the notion of “a choice” (Gorard and Taylor, 2004, p. 2) and through my work on my research questions, I came to discover that in fact my paradigm chose me and not the other way around.

4 Findings

4.1 Theme A – Definition and mapping of the UK pathways sector

The first aim of this research was to define and map the UK pathways sector and answer three associated research questions:

> A.1 – How do UK pathways experts define their sector?
>
> A.2 – What were the key events leading up to the creation of the pathways sector and then contributing to the development of the sector?
>
> A.3 – What are the key components of the pathways' market?

The starting point of this academic enquiry was therefore the definition of the pathways sector and the following sections present how thanks to an iterative process which was part of the Delphi method, a version of this definition was achieved.

4.1.1 Theme A.1 - How do UK pathways experts define their sector?

4.1.1.1 Introduction

From a very early stage in this research, it was identified that there was no existing definition of the pathways sector. Furthermore, as early as the first round of Delphi, it became obvious that the definition of the pathways sector was not something all participants could agree on. What was intended in that first questionnaire as a simple introductory question to situate the research for the participants, generated more feedback than anticipated.

Using the Delphi iterative approach, helped gather feedback from the panel of experts and identify elements of the definition they signalled they felt strongly about by commenting on them.

The following paragraphs present this iterative process, as well as the key components the experts explained, nuanced, insisted on and wanted to see prominently displayed in the definition.

4.1.1.2 First iteration of the definition

To start the Delphi exercise and to help "form issues" (Green, 2014, p. 3) I submitted to the group of experts a version of what the Pathways sector model definition could be. This basic definition was informed by my then ten years work experience as an industry insider.

The initial definition read as follows:

> "The UK Private Pathway Colleges business model could be defined as:
>
> *An industry of private for profit providers, engaged in the recruitment and preparation of international students for UK universities through a range of pathway courses mixing study skills, academic foundation and English competence, and offering access to an otherwise inaccessible HE partner thanks to a guaranteed university place upon successful completion of the programme of study."*

Four of the nine respondents indicated during the first round of the Delphi that the definition initially offered of the pathways sector, was not fit for purpose, and needed amendments.

Having analysed the comments provided, the feedback received focused on 3 key components of the pathway model which the next three sections explore in more details.

4.1.1.2.1 Guaranteed Progression

First of all, the notion of "guaranteed progression" to the partner university was questioned by two respondents. One rejected the notion altogether stating "no guaranteed progression" (Delphi, Round 1), whilst the other nuanced the point and conditioned the progression on "successful completion of their programmes on achieving specified grades" (Ibid). A nuance I integrated in my next iteration of the pathways sector's definition. Progression to the partner university is indeed a key feature of these providers' business model; an essential feature students and their parents look for when choosing their course, and essential part of the business agreement University partners rely on to secure a steady stream of international students to their institution.

4.1.1.2.2 For profit

The second noticeable element of feedback was also raised by two separate respondents and was connected to the "private for profit" status of these providers. The comments read as follows: "is it necessarily for profit?" (Delphi, Round 1), and "it isn't always private for profit providers, there also exists UK Pathway Colleges that are embedded into the UK HE system that are not for profit" (Ibid).

Whilst I noted the intended point made by these comments, I decided against amending my definition as a result of them. I therefore did not include this additional distinction. The "UK Pathway Colleges that are embedded into the UK HE system that are not for profit" referred to a category of foundation courses being offered by university departments. Examples of such courses include the University of Reading International Foundation Programme and the University of Nottingham Centre of English Language Education. These departments or centres, usually embedded in or linked to university language department appear to offer courses heavily focused on Pre-sessional English, English for Academic Purposes (EAP) and academic skills (CELE, 2023; University of Reading, 2023). Whilst I was aware before starting this research that some universities in the UK and abroad ran their own international foundation years or similar courses, seen as 'non-private' and therefore 'not for profit'; these were very much outside the scope of this research which was focusing exclusively on private for-profit providers embedded in British universities. I also decided against including any further nuance on this point in the definition as I felt that the sentence introducing it - The UK Private Pathway Colleges business model could be defined as: - also clearly set the remit of the research. Whilst I acknowledge the existence of such provision, I did not include it in the framework of this research.

Later in the research, one of the interviewees actually picked up on this exact point as he defined the pathway sector in his own words:

"I would say if I'm talking about the pathways sector now, that I would particularly be specifically talking about private providers who give these kind of access courses to university courses. […] I don't think universities, or colleagues I've worked with in universities, would particularly say that of their own [Foundation courses]" (Pete Venables)

4.1.1.2.3 Range of academic courses

A third element of feedback also needed to be addressed. It referred to the range of topics being covered during the pathways courses and was challenged by a request for a "possible modification […] to add "mathematics" to the subjects provided by the colleges [as] some of the pathways place quite a heavy emphasis on maths because of the future programme" (Delphi, Round 1).

Although the respondent acknowledged that the initial definition implicitly "include[d] maths within the 'academic' subjects grouping" (Ibid), I felt I ought to better convey the wide range of business, sciences, arts and humanities courses covered, and made this section more explicit in the next iteration of the definition.

4.1.1.3 Second iteration of the definition

Having reflected on the various points of detailed feedback I received from the panel following this first round, I reviewed the initial definition and came up with a second iteration:

An industry of private for-profit providers, engaged in the recruitment and preparation of international students for UK universities. The Pathway providers offer international students access to their HE partners and a guaranteed university place upon successful completion of their programmes of study. The pathway courses mix study skills, academic foundation (e.g. Business, Sciences, Art and Humanities) and English competence. Without pathway courses these students would not be able to enrol at the partner universities.

This second iteration of the definition was submitted to the panel as part of the second round of the Delphi. Despite including changes based on the feedback from the first round of Delphi, the feedback received first appeared very mixed with three of seven respondents disagreeing with the newest definition.

However, despite three of the seven panellists still disagreeing with latest definition shared, the accompanying qualitative feedback was much more positive. Two panel members acknowledged their comments as respectively "a minor amendment" and "only a minor detail" (Delphi, Round 2), and all three pieces of feedback were related to the same point: a better definition of the ability to "enrol at the partner universities" […] "upon successful completion" of the course was required (Ibid).

4.1.1.3.1 Successful completion of the programme and academic progression

Students enrolled on pathways courses are required to meet a series of requirements to pass their course.

> *"If accepted onto a College programme, students are sent a detailed offer letter that confirms the nature of the offer made and the requirements needed to progress to their preferred University programme." (QAA Report, Glasgow International College, June 2016, p16)*

These requirements can be linked to achieving a specific academic level in a specific subject module or related to a level of English proficiency.

The academic requirement is the first element considered when assessing a student's course outcome. QAA reports had multiple references to "grades they needed to obtain for progression" (QAA Report, Leeds International Study Centre, p7) also known as "threshold" (QAA Report, Glasgow International College, June 2016, P16) if the students are required to achieve a particular overall score above the minimum pass grade, or meet specific module or English Language requirements in order to progress to their chosen degree. For example, whilst a student enrolled on a Foundation Certificate in Law and Social Sciences may require a 40% pass grade to progress to a bachelor's in history, their classmate who's on a pathway to study law at the same partner university may require a 60% overall pass mark. These differentiations could at first glance be compared to the better known UCAS tariffs. One notable difference between the two systems was the level of transparency. Whilst the UCAS point system used in the UK higher education to set entry criteria in university courses is very accessible, with UCAS points required listed on university course web-pages and UCAS even offering an easily accessible tariff point calculator (UCAS, 2022), there was no way to systematically scrutinise an equivalent standardised, documented and transparent system for pathways providers.

The second requirement a student must meet, is a certain level of English proficiency. This level must be equal or higher to the entry requirement for their university degree. In most UK universities due to the immigration laws, this level is benchmarked against the Common European Framework of Reference for Languages (CEFR) (Council of Europe, 2022; UK Government, 2022a). The UK universities and the UKVI use this system as it defines and explains the different levels of oral and written expression and comprehension for languages such as English. The CEFR (2022)consists of 6 levels of reference: three blocks (A or basic user, B or independent user and C or proficient user), which are in turn divided into two sublevels, 1 and 2. In order to be eligible for university entry a degree level, a student must be able to demonstrate in an accredited test, a level equal or superior to a B2 level of competencies (UK Government, 2022a).

Finally, the level of attendance is constantly monitored to satisfy the student visa immigration regulations. In rare instances, failure to demonstrate engagement with the course through low recorded attendance (i.e. below 15 hours a week of organised daytime study), can result on the college/provider removing their sponsorship (UK Government, 2022b). This in turn would revoke a student’s visa. In other rare cases, the university partner may refuse to provide the student with the sponsorship letter they require to pursue their studies after completion of their foundation course if for the same reason they felt the student failed to engage with the course.

4.1.1.3.2 Progression to the partner and portability of the award

One distinction brought in this round was the progression to a possible alternative institution.

As mentioned above, the conditions of progression from a pathway course to a university course can be very specific. At times student will not get the grades required to secure progression to their first choice of course. Whilst there is currently no standardisation of the awards offered by the various pathway providers, there is broad acceptance of these qualifications between providers and with their partner universities.

There is no standardised credit point system, similar to the UK universities, or European Credit Transfer and Accumulation System (ECTS). However, there is a degree of portability for these awards which tend to be recognised across the sector. This allows students who may not get the grades to access alternative courses within the same institution or at another partner university. Some of the providers also developed a service to support these transfers (QAA report, Kaplan International Colleges, March 2012, p19). I ensured this this point of detail was reflected in the final definition.

4.1.1.4 Third iteration of the definition

Having analysed and reflected on the feedback received during the second round of the Delphi, a third version of the definition was produced and put to the panel for feedback as part of the third and final round. It read:

> *The UK Private Pathway Colleges business model could be defined as:*
>
> *An industry of private for-profit providers, engaged in the recruitment and preparation of international students for UK universities. Upon successful completion of their programmes of study which may require some students to achieve particular overall scores or meet specific module or English Language requirements, the Pathway providers offer international students a guaranteed university place and access to their HE partners. Students sometimes elect to progress*

> *to another HE institution as there is broad acceptance of qualifications. The pathway courses mix study skills, academic foundation (e.g. Business, Sciences, Art and Humanities) and English competence. Without pathway courses most of these students would not be eligible for direct enrolment at the partner universities.*

4.1.1.4.1 More than just a course – a campus experience

Four of the five experts agreed with this definition. One also "mostly agree but [thought the] definition could have greater emphasis on the purpose of the courses to prepare students effectively for UK higher education which requires more than simply the subject content." (Delphi, Round 3).

What could have been dismissed as a minor element of feedback in this third and final round of Delphi, highlighted a blatant gap present in all previous iterations of this definition: Preparing students effectively for university courses requires more than just the academic content of the pathways course. What transpired was the lack of reference to the environment where the pathway courses are delivered, and the non-academic value of the courses being offered.

This comment echoed a remark made later in the research during an interview when describing the creation of the first on-campus pathways colleges by off-campus operations transitioning to on-campus:

> "The student experience, on campus, was absolutely the right way to go. We were getting great progression for our students [off campus], however our students were not getting the same student experience. We could not begin to compete with the experience of being on campus in an embedded college". (Sue Edwards)

The key component of the Pathway model is to be delivered on the campus of the university partner. This not only allows students to experience campus life during their pathway course, it also helps prepare them for their future university course life by allowing them to access clubs, societies, libraries and everything else campus life has to offer (QAA report, Kaplan International Colleges, March 2012, p21)

4.1.1.5 Conclusion of theme A.1 - The UK pathways experts' definition of their sector.

Having integrated these last elements of feedback into the previous version of the definition, I would therefore conclude that the UK Private Pathway Colleges business model could be defined as:

> *An industry of private for-profit providers, engaged in the recruitment and preparation of international students for UK universities studies, through both academic and extra-curricular activities delivered on a university campus.*
>
> *Upon successful completion of their programmes of study which may require some students to comply with particular immigration requirements, and achieve particular overall scores or meet specific module or English Language requirements, the Pathway providers offer international students a guaranteed university place and access to their HE partners.*
>
> *Students sometimes elect to progress to another HE institution as there is broad acceptance of qualifications which mixes study skills, academic foundation (e.g. Business, Sciences, Art and Humanities) and English competence. Without pathway courses most of these students would not be eligible for direct enrolment at the partner universities.*

4.1.2 Theme A.2 - What were the key events leading up to the creation of the pathways sector and then contributing to the development of the sector?

4.1.2.1 Introduction

Having defined the pathways sector and some key features of its definition in the previous section, the next step of this research was to better understand the history the organisations fitting this definition. More specifically, when and how did the sector appear? What were the key actors and phases of its development.

4.1.2.2 The pre-pathway movement

4.1.2.2.1 Australian roots

In 1990s, Rod Jones, the founder and current chairman of Navitas, a pathways provider, spotted an opportunity. A lot of international students applying to Edith Cowan University Australia, were being turned away. Instead, his idea was to "no longer say no to them, but rather not yet" (Pete Venables).

Students who were not qualifying for direct entry at the university were being offered a course designed to bring them to the level required for entry at the university.

This model was "then replicated a couple of times" (Ibid) and it was about ten years later that it came to the UK.

4.1.2.2.2 The UK context in the 1990s – Emergence of a sector

"There was no consistency" (Sue Edwards)

The Delphi and several interviews (Sue Edwards, Andy Quin, Pete Venables) all corroborated that mid-nineties, a number of UK based English Language schools, independent Schools, Boarding Schools, some FE colleges were offering year 13 type courses, "quasi pre-university programmes and indeed English Language programmes" (Sue Edwards). Andy Quin also highlighted that "in the mid-nineties, […] universities had realised that students did not have to do A-levels" to access their courses and that – as he put it during the interview, "another qualification [...] would be suitable as a sort of bridging program for students who did not have a full two years A-levels".

This also contributed to what Sue Edwards retrospectively described as "a movement" then reported by the British Council and English UK, two organisations jointly managing English language teaching schools accreditations. She reported how in 2006-07, a joint census by both organisations showed that "there was well over 100+ pre-university courses then" (Sue Edwards).

She went on to describe how

> "some had validation, some had certification, some had recognition from a university, however there was no process to get quality assurance and they were called all type of things." (Sue Edwards)

Still according to her, the UK services managing "immigration did not know what they were. There was confusion" (Sue Edwards). In her interview Sue described how some concerted efforts were made at the time to attempt to bring some standardisation and quality assurance. However, despite initial commitments from English UK, the British Council, the QAA, UCAS and a number of universities, this did not come to fruition.

The disappearance of the 1990s small independent schools combined with the arrival of large companies signified the creation of a new space in the education sector. This new education space can be physically evidenced by new International Colleges being built on UK university campuses.

As Olivia McLaughlin puts it in her interview,

> "in the same way as there is a higher education sector with HE providers delivering a services to students as well as research, and a variety of other institutions, and an FE sector providing further education as a continuation to school education, I think the pathway sector bridges the two for international students." (Olivia McLaughlin)

4.1.2.3 The emergence of the name "pathways"

This study was unable to clearly identify the first use of the name "pathways". However, whilst investigating this point, a few elements came to light which indicated a few possible avenues for the origin of the name.

First Sue Edwards explained in her interview that as far back as the 1990s, some of the early partnerships may have used a combination of titles, some of which may have been using "pathway" as part of their name; "they were called all kind of things" she recalled. The naming convention of the university preparatory courses then in existence was very inconsistent and during our interview Sue made it very clear that – in her opinion – these could not be named "pathway" today as they would not meet the current standards associated with the name.

What could however be evidenced and precisely dated, was that, as far back as March 2012, Kaplan was embracing the name "pathway". The documentary analysis showed that Kaplan was using it to define its activities in QAA reports. The March 2012 QAA ECREO report for Kaplan stated that "KIC was established in 2005 with the aim of developing a network of international pathway colleges" (QAA Report, Kaplan International Colleges, March 2012, p4).

Whilst Kaplan was embracing the term, competitors such as Navitas and Cambridge Education Group were not refereeing to their organisation as a pathways providers, but still interchangeably referred to their "courses" as "pathways" in QAA reports between 2012 and 2016 (QAA Report, London International College of Business and Technology, May 2012, p1; QAA Report, University of Central Lancashire Foundation Campus, November 2013, p5; QAA Report, Sunderland Foundation Campus, October 2014, p1; QAA Report, Birmingham City University International College, April 2015, p1; QAA Report, CEG UFP Ltd, January 2016, p1).

In complete contrast with Kaplan, Study Group QAA reports for the same period did not include a single mention of the word "pathway", which in turn could only found in one of INTO report from 2014 (QAA Report, INTO Manchester Ltd, March 2014, p8).

The same year, a press article written by David Matthews and published in the Times Higher Education titled 'Pathways to profit' claimed that

> "over the past decade, an almost entirely new for-profit industry has sprung up on campuses across the UK – but few outside the higher education sector will have noticed it". (Matthews, 2014a)

In December 2015 a two-day conference organised by The Observatory on Borderless Higher Education, was dedicated to the subject of "The New Landscape of Higher Education: pathways; partnerships; performance" cementing the terminology beyond the realm of industry jargon and into the academic spheres (The Observatory on Borderless Higher Education, 2015).

Soon after, in 2016, Kaplan went on to change its name to include pathways. Then in its 11th year of existence and going through a website relaunch, 'Kaplan International Colleges' became 'Kaplan International Pathways' (Kaplan International Pathways, 2020).

The data collected points to the name "pathways" being first used by Kaplan and then spreading to other providers. It also showed that Kaplan then used it more than other providers. This was confirmed in his interview by Andy Quin who, after working for a branch of the 'Study Group' company Bellerbys College, joined Kaplan as a College Director for its flagship London College. He explained:

> "I don't remember hearing it being called the pathway sector until I came to Kaplan eight years ago [circa 2014]. I think that was a new term to me at that point. Now whether that was just because it was becoming a term or it had always been called that within Kaplan but not elsewhere, I'm not sure. Having said that, I don't know what it was called before that, and maybe it did not have a name; there were just a collection of entities without a name, just international education providers." (Andy Quin)

In conclusion, whilst the name "pathway" or "pathways" is central to defining the topic of this research, it was not possible to identify its exact origin. The data suggests it organically emerged from its use by one provider in particular – Kaplan – and then was adopted by other providers and also used by the QAA to refer to a collective of private education providers with a similar business model.

4.1.2.4 The emergence of the big 4, 5, 6 or 7

The pathway sector is led by a group of companies which – depending on the time or the interlocutor – appears to be referred to as "the Big 4", "the Big 5", "the Big 6" or even "the Big 7".

The following sections will show how this group emerged and which companies it included according to the data collected.

4.1.2.4.1 Small providers could not compete

As described in the earlier section titled, 'The UK context in the 1990s', the mid-nineties saw several UK based providers such as English Language schools, independent Schools, Boarding Schools, FE colleges and even some Universities offering pre-university courses to international students. These structures were described by Sue Edwards as being very small in size. In her interview she described them as having on average 30 to 50 students with the one of the largest providers at the time named 'Aspect' having 150 to 200 students a year.

Sue Edwards also remembered these early days as "very unsophisticated and very cut-throat" with "these language schools […] vying for the attention of the universities to get 'the' partnership" which would help them better sell their programmes. Having a big university name recognised abroad as a partner was the aim of these small independent schools, and "having that Russell group [partner] was the holy grail" (Sue Edwards). Describing to me a foreign recruitment trip in China around 2008, Sue Edwards recalled that students and their parents were mainly interested in the university destinations of the students who had taken the course; as she puts it, "you would only get traction if you had a Russell group".

Sue Edwards stated that

> "things started to change when the big bodies – like Kaplan- came along, and it got swept into the all model, which became pathway colleges, on campus";

An opinion shared by all interviewees and all experts during the Delphi as they all identified these large companies as a key stage of the sector evolution.

Has Sue Edwards puts it,

> "We could not begin to compete with the experience of being on Campus in an embedded college. The schools did not get a chance".

She went on to jokingly summarise the situation with

> "The mom-and-pop little foundation courses did not stand a chance".

She also when on to comment that – for her –

> "the student experience, on campus, was absolutely the right way to go. [Whilst these independent schools] were getting great progression for students, [they] were not getting the same student experience" by being off campus (Sue Edwards).

4.1.2.4.2 Who are the main pathway providers?

> "We always talked about the big Four. Now it's the big 5 […] with a possible extension to the Big 6". (Dr Elisabeth Claudia Grindel-Denby)

These large companies, identified by all interviewees and the panel of experts has having played a key role in the creation of the sector, started to appear in the early two thousands. The data collected through the QAA reports also suggested that a few companies have shared a large number of partnerships with various universities. The following paragraphs presents the data related to their entries in the pathways market and estimation of their respective market shares.

From 2003 to 2007, four companies started to open pathways colleges on UK campuses as evidenced by the analysis of QAA reports and companies own websites. In 2003, the Australian based company 'Navitas' opened the first ever UK pathways college on the campus of Brunel University London. Two years later, the US based 'Kaplan' and British owned 'Into Ltd', opened colleges on the campuses of respectively Nottingham Trent University and the University of East Anglia. Finally, the very next year, the first 'Study Group' College opened its door on the University of Sussex campus as confirmed by Andy Quin a former company employee. Described by Andy Quin in his interviewee as "the Big 4" these original 4 providers still exist today. Three of them, Kaplan, Study Group and Navitas, are still in the top three of the largest companies by number of UK Colleges as evidenced by a census of existing partnership carried out during the documentary analysis phase of the research.

During the interview Andy Quin pointed out that “Into was an offshoot of Study Group” in reference to Andrew Colin who founded Study Group in 1990 and then went on to set up INTO in 2005. Interestingly Colin devised the INTO business model with David Eastwood, who was then the vice-chancellor of the University of East Anglia and then went to become vice-chancellor of the University of Birmingham(Matthews, 2014a). The co-funding shows that from an early stage close links developed between Pathways providers and Universities. The relationship between Universities and Pathways providers will be explored further in a later section of this research.

In 2008, a new provider -Cambridge Education Group Ltd- was associated with the ‘Big 4’ as they opened 3 colleges the same year. “The Big 5” as Dr Elisabeth Claudia Grindel-Denby, Sue Edwards and Chris Hooper describe them were the result of the acquisition of Cambridge Education Group by the private equity firm Palamon Capital in 2007 which then went on to sell the business to another private investor fund – Bridgepoint – in 2013 for £185m (Palamon, 2013; The Pie News, 2023). The business is now rumoured to be once more for sale with Bridgepoint hoping to sell it for about £200m after having sold the CEG – high school division – CATS Colleges in July 2019 for £150m (Bridgepoint, 2019; The Pie News, 2023).

This notion of the ‘big 5’ still remain used in the sector as evidenced by 3 of the 6 interviewees still referring to it when describing the sector recently, however between 2011 and 2013, new providers started emerging to form “The Big 6” (Dr Elisabeth Claudia Grindel-Denby) or even “The big 7” (Chris Hooper). Newcomers such as ‘QA Higher Education’ a part of ‘QA Limited’ a tech and training organisation, and ‘Oxford International Education Group’, a diversified education company in existence since 1991 in the English courses and travel market started to open pathways colleges. As Chris Hooper mentioned in his interview, there are “probably about 7 companies that are quite active” in the sector.

Having analysed the data collected on the respective companies’ website and on the QAA website, a comprehensive list of 81 partnerships was compiled (Appendix J). Based on the number of partnerships, and as illustrated below, Study Group could be described as the largest company with about 30% of all partnerships, followed by

Navitas and Kaplan with respectively 16% and 15%. A more nuanced and detailed overview considering the size of these partnerships is provided in section 4.1.3.2.2.

4.1.2.5 What were the different development phases of the pathways sector?

4.1.2.5.1 Early landgrab

As described in the previous section, from 2003 pathways colleges started emerging on UK campuses. The desk-based research showed that in the first 5 years, at least 54 colleges were opened by the 'big 5', in a movement described by Pete Venables , Sue Edwards, and Andrew Colin (Matthews, 2014a) as "a land grab".

By this they meant that pathways providers were eager to sign partnerships with any university willing to enter in an agreement with them. At that point the key objectives of these companies appeared to be the growth of their portfolio of partnerships with a premium being put on Russell group universities (Sue Edwards).

The exact duration of this growth period could not be precisely defined. However, evidence suggested (Sue Edwards and Matthews, 2014) that a consensus could be reached by plotting this developmental phase between 2007 and 2013.

4.1.2.5.2 Plateauing of College openings – 3 possible reasons

After this initial rapid growth phase, the number of colleges to open slowed down from 2015 to less than 4 a year in a movement that Colin foresaw in 2014 as "a natural plateau that we're not a long way off" (Matthews, 2014a). This plateau situation could be explained by a combination of factors.

Upon careful consideration, the primary factor that caught my attention was the likely manifestation of the fundamental economic principle of 'supply and demand'. As per this principle, it would appear that a market equilibrium had been established between the universities' eagerness to establish pathways colleges on their campus and the increasing number of partnerships being formed to meet this growing demand.

The second possible explanation was a change in the development strategy of pathway providers. Ten years after the first colleges opened in the UK some interviewees (Sue Edwards, Chris Hooper) reported some providers such as Into and Study group investing strategically in other markets such as the US, Canada, Australia and New Zealand. As a result of this geographical diversification, the UK rate of college openings slowed down whilst at a global scale it was still going strong. Sue Edwards nuanced this by explaining that although Into and Study Group opened "loads of campuses [in the US they had] low numbers in each campus".

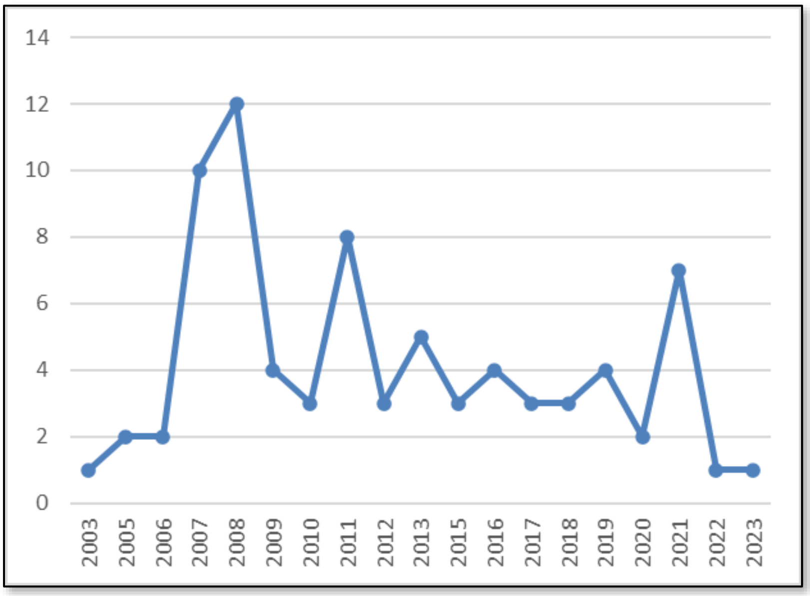

Figure 3. Total pathways colleges opened each year since 2003

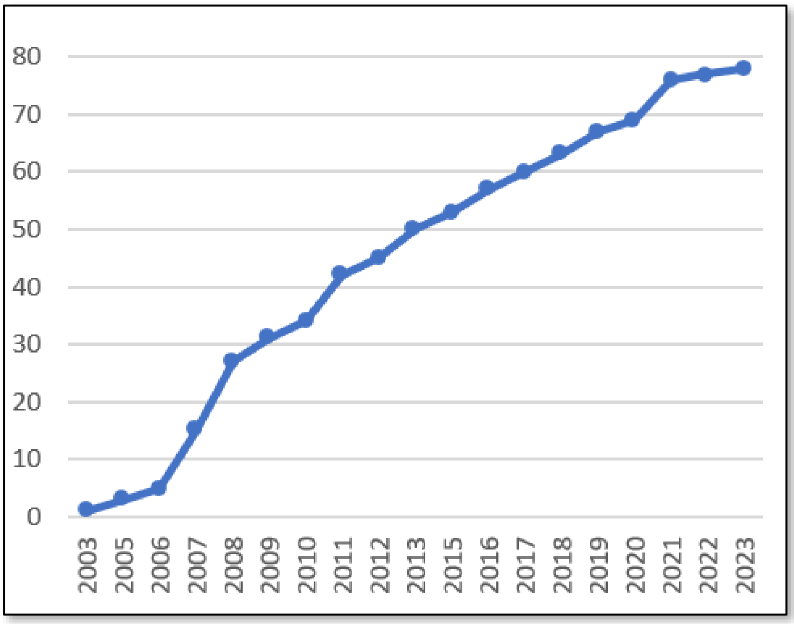

Figure 4. Cumulative total of pathways colleges opened since 2003

The third possible explanation was what several interviewees identified as the development of a portfolio management strategy. Pathways providers were reported to becoming "more discerning" (Sue Edwards) in their choice of partners. They manage their established partnerships like a brand would manage its various products to ensure they can satisfy the widest customer base possible. Sue Edwards for example explained that Kaplan "want to offer programmes for all types of students" and that it could not be achieved with only Russell group universities partners. She went on to describe how partnerships might fall into three categories. Some would be "historical", others are designed "to open the market to a wider range of ability of students (e.g. post 1992)", and some are aimed at having top ranking university – "the big names" as she called them. Purposefully excluding historical partnerships which appeared to be vestiges of the sector original landgrab, she further detailed that having a balance of the two main types of partners is very important. Although not explained in such direct terms, it must be understood that these two main groups could be described as 'prestigious universities', usually high ranking in league tables and part of the Russell Group of Universities, and 'more accessible universities' usually mid-ranking universities in league tables and institutions which became universities after 1992 and the Further and Education Act (House of Parliament, 1992).

4.1.2.5.3 Key milestones for the sector

The Delphi revealed a detailed timeline of events experts identified as significant in the development of the sector. Of the twenty-seven key milestones identified, seventeen were dated and an additional ten were more vaguely defined.

To help navigate the seventeen dated events, a timeline was constructed to represent them chronologically. A thematic analysis then followed with three main themes emerging from the data. These themes identified three groups of events. Events linked to UK immigration policy, events related to quality assurance management, and other events. These three themes were colour coded in the timeline presented below to help identify them.

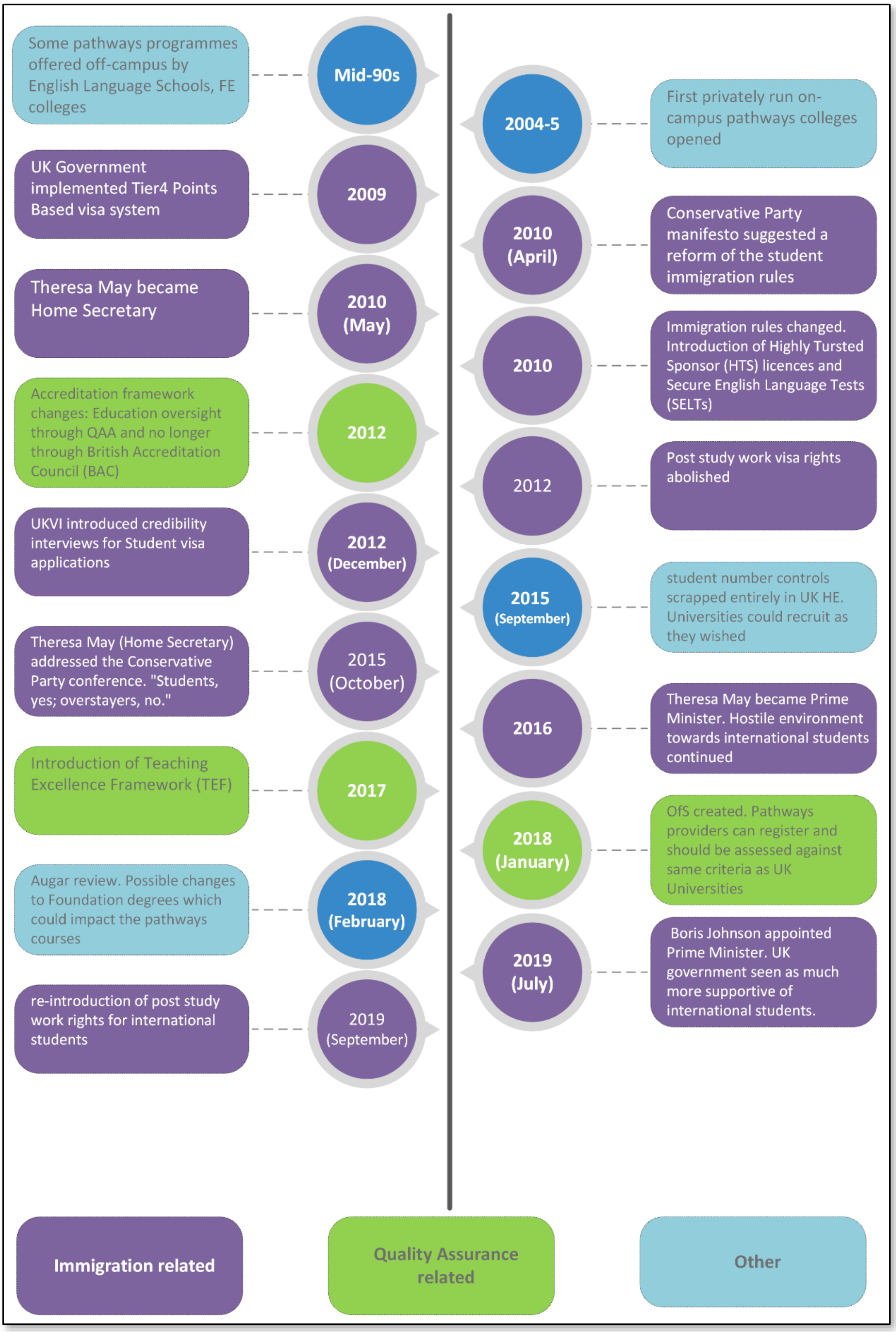

Figure 5. Timeline of key events for the sector

Of the seventeen events, ten were linked to the UK immigration, three were related to quality assurance management, and the other four were pathways or university sector specific.

Of the ten events which were not precisely linked to a date, two groups of statements could be identified. The first group of five statements referred to events internal to the British higher education sector such as for example “the increasing numbers of distance-learning programmes (usually at Postgraduate level)” (Delphi, Round 2). The second group of five statements however, referred to events external to the British higher education sector. They included references to foreign countries policies or geopolitical events potentially affecting the pathways sector such as “The China-US political tension possibly denting China-US student traffic” (Delphi, Round 2).

To help identify the most important of these twenty-seven events, a ranking exercise took place. During the first round of the Delphi the panel was invited to list events they felt were significant to the evolution of the pathways sector. In the second round, a list of the events listed as part of Round 1 was put to the panel. Experts were invited to identify “which 3 events [they] would pick as the 3 most significant/impactful for the sector?” (Delphi, Round 2). Amongst the top four milestones selected by the panel with three related to the British immigration policy and one was linked to quality assurance in higher education with the introduction of the Office for Students.

The three immigration milestones experts identified as the most significant in the history of the Pathways sector were all interlinked. In 2009 the implementation of the Tier 4 points based visa system set in motion a chain of challenges for this relatively new and developing sector. The rigorous immigration controls and restrictions put in place as a result had a major impact on the global market. The following year, further immigration rules changes were introduced. They included the Introduction of a ‘Highly Trusted Sponsor’ (HTS) accreditation scheme requiring education providers to satisfy UKVI inspections and the introduction of Secure English Language Tests (SELTs) to evidence language proficiency which coincided with the raising of the minimum level of English a student had to evidence prior to being made an offer for a course. Finally the element experts ranked as the most impactful was the abolition of post study work rights for international students introduced in April 2012 (UK Government, 2011). This included the restriction of work rights for international (Non-European) during their studies and the closure of the 'post study work route', which allowed students two years to seek employment after their course ended. Behind the official commitment by The Rt Hon Theresa May MP, to "re-focus the student route as a temporary one, available to only the brightest and best", experts felt these measures reduced the appeal of the UK for international students.

The final milestone experts wanted to focus on was the introduction of the Office for Students (OfS) in January 2018. The OfS allowed Pathways sector providers to register alongside traditional higher education institutions. This participated to the creation of a framework that as Sue Edwards described in section titled 'The UK context in the 1990s – Emergence of a sector' had been a failed early endeavour. A more detailed analysis of the evolution of the quality assurance framework for pathways providers will be provided in section 4.1.3 about the components of the pathways' market.

4.1.2.6 Conclusion of theme A.2 - The key events leading up to the creation of the pathways sector and then contributing to the development of the sector.

This section of the research identified a series of key events leading up, and contributing to, the creation of the pathways sector and its later development. The sector had very humble beginnings in the UK as a cottage industry in the 1990s. After the import of a new business model from Australia in 2003, the sector acquired its name organically following its early adoption by Kaplan. The sector first went through a phase of rapid growth which lasted about ten years. This initial "land grab" led by the "Big 5", was followed by the steadier growth of a maturing sector. Despite a more strategic portfolio-based management of their partnerships, the pathway sector providers were significantly impacted by what experts identified as environmental changes in both the immigration and quality assurance framework of the sector lead by the UK Government.

4.1.3 Theme A.3 – What are the key components of the pathways' market?

4.1.3.1 Introduction

Having compiled a definition of the pathways sector, and identified in previous sections both its origin and recent history, the following part will present the key components of the pathways' market and estimate its size.

To achieve this, the following paragraphs will present data associated with the key components of a market as a place - physical or not - where a producer and a consumer meet to exchange a good or service in exchange for a fee. They will focus in turn on estimating the size of the pathways market's producers – the pathways providers -, the size of the pathways market's consumers – the students enrolled on pathway courses –, the services being exchanged – the types of pathways courses – and the possible fee associated – the cost of the tuition fees.

4.1.3.2 The size of the market – the sector in numbers

When assessing the size of the sector numbers were difficult to find or access mostly because of the perceived commercial sensitivity associated with them. Private businesses tend to be reticent to communicate on data they are not required to share and with pathways providers being Private Limited Companies (LTD), they were only required to produce and publish publicly at Companies House a set of accounts a year (UK Government, 2023).

These accounts included a directors and an external auditors' report as well as various consolidated financial statements. Having reviewed recent accounts for the 'big 5', there was no useful data to help assess the size of these businesses and therefore of the pathways market. For example, there was no mention of the number of students enrolled on courses, or of the number of partners. When numbers were included in these reports, they appeared to be – probably purposefully - amalgamated across several business divisions making it impossible to discern the size of individual business components. Statements encountered were similar to the following:

Continuing operations

2018/19 continued the group's growth trajectory with continuing revenues growing by £9.8m (23.0%), following strong recruitment growth across a full portfolio of academic programmes. During 2018/19 the group recruited a record total of over 3,000 new students globally across its ONCAMPUS and Digital businesses.

Figure 6. Extract from the Cambridge Education Group Limited annual report and financial statements for the year ended 31 August 2019

In the absence of any indication of the respective sizes of "ONCAMPUS" and "Digital Businesses", there is no way of knowing how many students enrolled on the "ONCAMPUS" pathways colleges. However, despite these challenges, some key figures on the number of students enrolled and the number of pathways partnerships were gathered during the research.

4.1.3.2.1 The customers - Number of students enrolled on pathways courses

In 2009-10, 12,657 students entered higher education institutions from a privately run pathway course in a "clearly" increasing trend (Matthews, 2014a) reported by UUK. Four years later, the Big 5 were reported in the same article to have an additional 3000 students a year with "more than 15,400 pathway students in the UK" (ibid). Finally, during her interview Sue Edwards confirmed thanks to her connections with a sector-wide lobbying group that in 2019-20 over 25000 students went through one of the Big 5 Colleges.

In 10 years, the number of students using a pathways provider to access a UK university doubled.

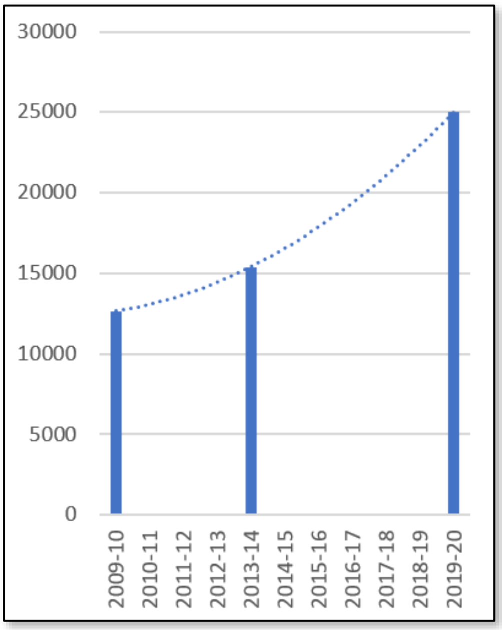

Figure 7. Number of students enrolled in UK pathways colleges between 2009 and 2020

In comparison, to the overall number of international students (non-EU) enrolled in the UK for these respective years, were as follows (HESA, 2011a, 2015, 2021).

Year	Number of students enrolled in UK pathways colleges	Number of Non-EU international students enrolled in UK universities (HESA, 2011a, 2015, 2021)	Percentage of Pathways students compared to international students in the UK
2009-10	12,657	280,760	4.5%
2013-14	15,400	310,195	5.0%
2019-20	25,000	408,825	6.1%

Figure 8. Number of Pathways students relative to International students enrolled in the UK

Beyond the increase in overall students enrolled in pathways colleges, the proportion of these compared to the overall population of international (non-EU) students was also significant. It could have indicated two things. First that the pathways providers are growing faster than the overall international population. Also, that pathways providers were supporting the growth of international students' recruitment by UK universities through their own student recruitment, as these students would not otherwise usually be eligible for direct entry to the University.

4.1.3.2.2 Number and types of partnerships and market shares

At the same time as the number of students enrolled in pathways college increased, the number of partnerships established between private pathways providers and UK universities also grew. Following the initial fast growth of the “land grab”phase, and the then steadier increase described in an earlier section, partnerships numbers evolved as follows:

Year	Number of University-pathways providers’ partnerships identified	Source
2014	45	(Matthews, 2014a)
2017	67	Census done as part of Confirmation of Research Status (Boville, CoRS 2017)
2023	80	2017 census updated with most up to date data from companies’ websites

Figure 9. Number of partnerships established between UK universities and pathways providers between 2014 and 2023

Three sources of data were used to compile this overview. The first one was a 2014 press article published in The Times Higher Education, which presented an overview of the pathways sector, including an exhaustive list of the partnerships that were in place at that time. The second was an exhaustive census I conducted in 2017 as part of the proposal for this research, which I submitted as part of my Confirmation of Research Status (CoRS) paper. Finally, the third data point was achieved by repeating the exhaustive census I had previously carried out in 2023.

In relation to the overall number of universities in the UK, which was estimated at 122 in 2022 and would have remained stable between 2014 and 2023, I calculated that the proportion of UK universities with an established pathways partnership increased significantly from just over a third in 2014 to about two thirds in 2023.

Year	Number of partnerships identified	Percentage of UK universities with an established partnership with a Pathways provider
2014	45	36.9%
2017	67	54.9%
2023	80	65.6%

Figure 10. Calculated percentage of UK universities with an established partnership with a Pathways provider

This shows that in 2014, after about ten years of the sector existing, one in three UK universities had established a partnership with a pathways provider. Nine years later this proportion had now nearly doubled with two in every three UK universities having established such partnership.

When it comes to the respective share of each of the main private providers the census done of all partnerships showed the following breakdown:

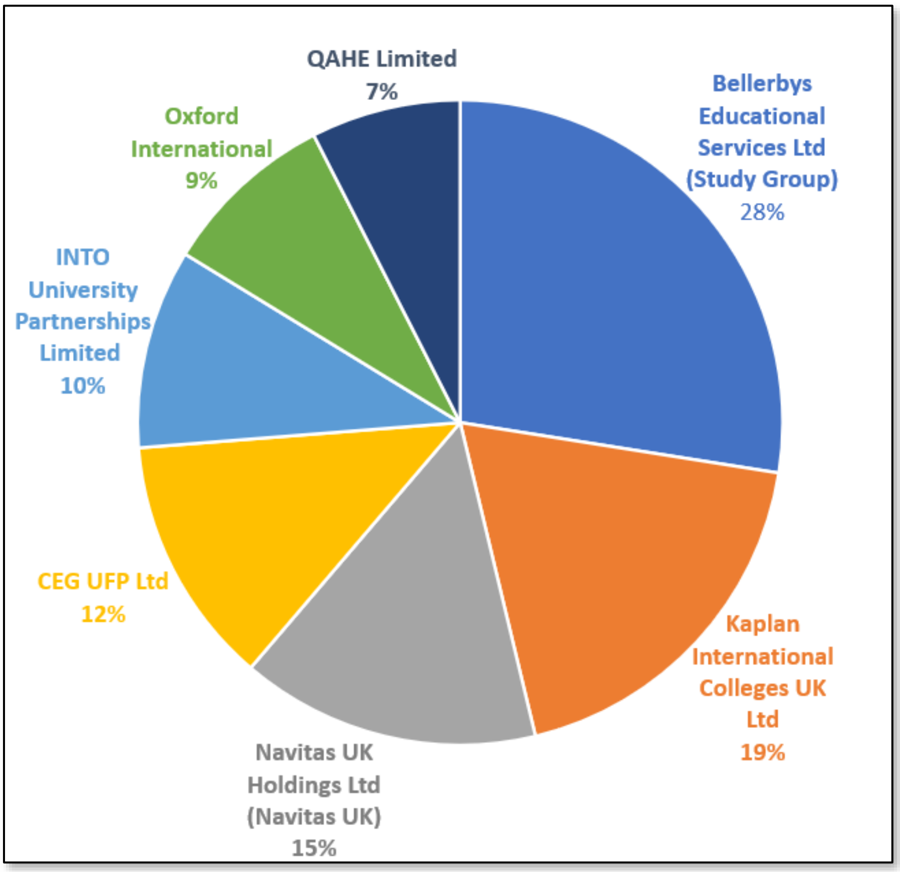

Figure 11. Pathway providers presented by number of partnerships established with UK universities.

Based on this data, Study Group, Kaplan and Navitas could be described as the three biggest pathways providers in respectively first, second and third place. However, ranking market leaders on this criterion alone would be an erroneous assessment. It would be assuming that all partnerships are equal in size and enrolment. It would therefore assume – wrongly – that all pathways' colleges would be the same size, when they are not. Unfortunately, it was impossible to systematically collect data on the size of all individual colleges.

As mentioned in the previous section, the lack of data on the numbers of student enrolled in pathways colleges was surprising as British universities are required to share their enrolment data publicly through regular data return submitted to the Higher Education Statistics Agency (HESA) or the Office for Students (OfS). This data was not available for pathways providers whom – as private businesses – saw this as proprietary information.

4.1.3.3 The product sold – the pathways courses

4.1.3.3.1 Levels of the courses

After analysing the main pathways providers' websites, the type of courses offered by pathway providers fell into five main categories, had different academic equivalencies and benchmarks. The table below provides an overview of these for each course level.

Course types	Equivalence	Course benchmark	Intended outcome
Pre-sessional English	Language course	Common European Framework of Reference for Languages (CEFRL)	Provides access to either University or Pathways college courses
Foundation courses	pre-degree level) (Year 13 equivalent)	RQF 3	Provides access to the first year of undergraduate courses
International Year One	Diploma equivalent	RQF 4	Provides access to the second year of undergraduate courses
Pre-masters or Graduate Diploma courses	Post graduate diploma	RQF 6 or Common European Framework of Reference for Languages (CEFRL)	Provides access to Masters courses
Pre-Doctorate	MRes	RQF 7	Provides access to Doctorate courses

Figure 12. Overview of the different types of pathways courses, their equivalence, benchmark and intended outcome

4.1.3.3.2 Entry points

Unlike university courses following a classic western academic calendar running from September to June, pathways courses tended to have multiple intakes throughout the year. This flexibility allowed for students in academic systems which do not articulate well with the classic UK Secondary or Further Education calendars of exam results and University applications to still have options to consider without having to wait one year. Based on the course outlines available from the big 5 providers, courses in pathways colleges tended to have between 3 and 6 intakes a year advertised for the academic part of the course and an additional 6 to 10 intakes a year for the Pre-sessional courses.

4.1.3.4 Branding strategy - White labelling

One key operational aspect of the Pathways sector business model was its lack of visibility to the untrained eye as the branding of these colleges was not always very transparent and obvious. Described as both “stealthy” and flying “under the radar” (Altbach and Forest, 2007; Matthews, 2014a), Chris Hooper in his interview also explained this white labelling strategy by “a lot of universities want[ing] to project their own brand” to parents and educational agents.

As a result the Colleges’ names did not always include the names of the companies managing them. A college like ‘Nottingham Trent International College’ is managed by Kaplan International Pathways, whilst ‘The University of Northampton International College’ is being managed by Navitas. For an industry outsider, there would be no obvious sign of branding and association with either of these providers. The only obvious associations were with the name of their partner universities.

The names of pathways colleges could appear quite generic and most tended to include a simple juxtaposition of the university name and a prefix (e.g. ONCAMPUS Loughborough), a suffix (e.g. University of Brighton International College) and/or a variant or truncated version of the University partner name (e.g. Glasgow International College).

To the neophyte, the lineage of these colleges would not be obvious, however some elements of standardisation in the pathways colleges’ name format could help identify the different companies behind these partnerships.

The table below provides some guidance on the naming trends identified.

Provider	College name model	Examples
Kaplan	[university name] international College	University of Brighton International College
Study Group	[university name] International Study Centre	University of Huddersfield International Study Centre
Navitas	[university name] international College *or* International College [truncated university name]	University of Northampton International College International College Portsmouth
Cambridge Education Group	ONCampus [truncated university name]	ONCampus Hull
Into	INTO [truncated university name] Study Centre *or* INTO [university name]	INTO Queen's Study Centre *or* INTO University of Stirling

Figure 13. Naming conventions adopted by pathways providers for pathways colleges

It must be noted that there are numerous outliers to these naming conventions. These appear to fall in two main categories.

The first one included partnerships set up using a different business model to the original model developed by the company. A good example of this would be the 'University of Birmingham foundation pathways' where Kaplan International Pathways works in partnership with University of Birmingham to provide application counselling and admissions support to international students. Unlike most pathways partnerships developed by Kaplan in the UK, the company here does not provide on campus teaching to the student recruited. This function remained provided by the University of Birmingham and this difference appears to have been captured in the name associated with the partnership.

The second category of outliers was linked to anomalies explained by local historical context. For example, 'The University of Sheffield international College' which was opened by Kaplan as, and is now run by Study Group, was never rebranded as 'The University of Sheffield International Study Centre' to match the Study Group colleges' naming style. It remained as originally branded by Kaplan.

4.1.3.5 Price strategy - Fees and overall cost of courses

Unlike a UK university which may receive some government funding, pathways providers' income rest solely on fees students are being charged. Because they are private for-profit businesses, these companies' business models rely on selling a service – an academic course – to their client, the international students and their families.

Reciprocally, students applying for pathways courses are not eligible for any UK government funding or student loans. The international students enrolling on these courses tend to be privately funded by relatives or sponsored by third party organisations such as government agencies from the sending country.

The table below presents an estimated average price for the main programmes run by the some of the main providers. For comparison purposes a UK university average provided by the British Council (British Council, 2023) is also included.

Course type	Kaplan	Navitas	Study Group	CEG	UK universities
Foudation Certificate course (2 Terms)	18000	14500	19500	11500	n/a
International Year One course (2 Terms)	15800	15500	21500	11500	22000
Pre-Master (2 Terms)	20550	14500	22200	11190	17109
Pre-doctorate course	5300	n/a	n/a	n/a	n/a
English course 1 semester	3290	7700	5500	5625	3950

Figure 14. Average cost of tuition fees in 2022-23 academic year per course and per pathways provider

It must be stressed that the tuition fees listed above are for short courses (one or two terms) and that tuition fees for courses running across three or four terms can double.

It is also interesting to note that different providers appear to have a very different pricing strategy than others as evidenced above, with one company, (CEG) charging for a Pre-Master's course nearly half the amount charged by their competitor Study Group. No evidence could be found to justify this price difference.

However, it must be noted that the three companies previously identified as having the largest market share by number of partnerships charge a premium price for their courses. These three companies also happen to have been amongst the 'big 4' original group of pathways providers and CEG as a recent market entrant has adopted a lower price strategy, most likely to compete and try to attract potential price conscious students and their parents.

Whilst the price of the tuition fees is likely to play a key role in the decision making process of the students and their parents thinking of applying, they also need to plan for other additional costs . Like a UK student, they would need to consider costs linked to accommodation, study material and general living cost (e.g. food, bills etc). However, unlike a UK student they would also need to plan for additional costs such as travel to the UK and immigration cost and cannot get access to the UK student loans system.

This last point tends to be the main stumbling block for most aspiring international students as on top of all the costs listed above they must also meet the UKVI 'financial requirement'. This financial requirement is a means tested assessment that a student has enough money to support themselves. For an average international student applying for a student visa, they would need to have available to them, somewhere between £1023 and £1334 per month of study up to 9 months. This means that for the average 8 to 10 months pathways course, a student would need to be able to demonstrate that they have an additional £9207 minimum available to them before applying for their visa.

Other immigration related cost should also be factored in. These include visa application fees and the Immigration Health Surcharge which combined would probably cost about £900.

Depending on the course and the provider the overall cost of a one year course (tuition fees, visa/immigration costs and cost of life included) could reach £25,000 to £30,000.

4.1.3.6 Conclusion of section A.3 - The key components of the pathways' market

Having previously defined the sector, its origins and recent history this section presented key findings related to essential operational components of the pathways business model. Whilst this list is not exhaustive, it focused on key attributes to help better define how the pathways colleges operate, how large the sector is, and present the courses being sold to international students.

4.1.4 Conclusion of theme A - Definition and mapping of the UK pathways sector

This chapter aimed to address the first theme of this research, and to help the reader better understand the Pathways sector. The three subsidiary research questions associated with this initial theme were used to structure the findings.

First a definition of the pathways sector was provided thanks to an iterative process supported by a Delphi method of communication with a panel of sector experts. Using the exchanges with the panel it was also possible to better define key components of the Pathways model.

Using a combination of data from both the Delphi and the interviews, the second research question helped produce a chronological overview of the Pathways sector's development. The product of this exercise is most likely the first documented written historical account of the birth and later development of the Pathways Sector.

Finally, using a mix of documentary sources gathered as part of the desk-based phase of the research, it was possible to present a series of key characteristics specific to the pathways market. These included an estimation of the market size, the number of private providers involved and their relative market share, and finally an overview of the courses being sold to prospective students.

A key finding of this first section is the confirmation through data that the Pathways sector truly exists and is not a fad. It is a movement which appeared and gathered momentum in the last 20 years. It is now defined, and physical manifestations of its existence were discussed throughout.

Having explored the sector wide, physical manifestations of the Big 5 companies, their colleges, and their students on UK campuses, this research will now focus on the exploration of more intangible individual relationships between pathways providers and their partner universities.

4.2 Theme B - Understanding the university-pathways provider partnership

4.2.1 Introduction

The previous section of this chapter presented sector wide characteristics. These sector wide characteristics included the definition of the pathways business model, the identification of the origins and recent history of the Pathways Sector, and finally the presentation of sector wide market characteristics. Having focused on the overall sector and reflected on the debate identified in the literature on tensions between public and private values, the next logical step was to review more specifically the relationship between a pathway provider and their university partner(s) in order to better understand it.

Three key themes arose from both the documentary analysis and the conducted interviews and helped gain a deeper understanding of the partnership between university and pathway providers.

First this analysis reviewed how partnerships are created between a private provider and a public university. Thanks to data mostly gathered during the interviews conducted, this first section analysed the early stages of the establishment of a partnership, from the initial strategic decision and the tensions which may accompany the process and some basic operational arrangements.

The second theme explored was linked to the to the academic relations between both partners. Using QAA reports for embedded pathways colleges ranging from 2012 to 2018, various quality assurance mechanisms used across the pathways sector to manage academic standards were identified and presented.

Finally, the third section examined the business relations between both partners. Using records from Companies House, it provided an overview of the commercial interests linking the pathways sector to UK universities by analysing the legal, financial and property investment links between the partners. Despite the difficulties linked to gathering commercially sensitive data, this section provided an original insight into a previously undocumented topic.

4.2.2 Theme B.1 – The establishment of the partnership between a pathways provider and a university

4.2.2.1 Introduction

Having previously analysed sector wide characteristics, this part focused on more individual elements linked to the establishment of a relationship between a pathway provider and a university. However, before exploring the complexity of the academic and business relationships, this first section will present the findings related to the establishment of the partnership between a pathways provider and a university; because there were eighty pathways colleges censused between as many universities and seven private providers, this section does not present an exhaustive and detailed analysis of each of these partnerships. Instead, the data analysis focused on the recurrent themes appearing in the interviews and on the tensions unanimously identified by the interviewees.

4.2.2.2 Initial stages of establishing a partnership between a pathways provider and a university

4.2.2.2.1 Step 1 of the partnership creation- The tendering process

With most UK universities being classed as public institutions, they are subject to an open procurement procedure called tendering. The aim of this process is to ensure fair competition. From the outset of a tender, universities would advertise publicly their intention to create a pathways college, and invite potential suppliers to bid for the contract. Publicly available documents would describe the university needs, and a series of assessment criteria they intend to measure competing suppliers against. After submission of a written bid, some of the most promising would be invited to meet with the university. About the process she was part of multiple times as a pathways representative, Olivia McLaughlin explained in her interview that “you would do a pitch to the university and they ask you questions and then you ask questions back to the university”. After careful evaluation of the various applications and sometimes further meetings, the contract would be awarded by the university to one provider.

During what we defined earlier in this chapter as a “landgrab”, Pete Venables when interviewed described that “there was a lot of competition around bids […] and a lot of people going for tenders”. In the early days of the sector this tendering process would therefore have been very competitive. Olivia McLaughlin described that

> “There was a bit of a smash and grab. Everybody on the road, everyone talking to everybody else, everyone for every university, without too much in the initial stages, consideration being given - and this is just my opinion too - for what are going to be the benefits of this partnership?”

4.2.2.2.2 Step 2 of the partnership creation - Goals’ alignment

Although some of the assessment criteria used by the universities during the tendering process appear to be objective and easily quantifiable (i.e. student recruitment targets, student progression rate to university courses, revenue generation etc) two interviewees confirmed that more subjective criteria related to the alignment in values, goals and shared understanding, were key to success. Chris Hooper described how “it's really important to understand what the university is trying to achieve”, whilst Pete Venables believed that “it comes down to personal relationships between people, common goals and the ability to deal with difficult things together in a constructive way”.

It is also worth noting that on both side of the partnership a business relation is established and when the initial contract is over, universities go through a re-tendering process. This process brings an opportunity for both parties involved in the partnership to reassess their position. For pathways providers this re-assessment can be part of their management of the portfolio of partnerships they’ve established as reported in an earlier section (Sue Edwards). For universities Olivia McLaughlin stated that “universities have got slightly savvier about the kinds of partnerships that they wanted”. Dr Elisabeth Claudia Grindel-Denby who also shared Sue Edwards’s and Olivia McLaughlin’s viewpoint on the opportunities offered by the re-tendering for both parts, was of the opinion that not all universities would be keen to change partners.

All interviews suggested that there is now be a more strategic approach to these partnerships that there was at first during the “landgrab” development of the sector. Pathways providers and universities were reported by all interviewees to now strategically decide on which partnerships get pursued. Dr Elisabeth Claudia Grindel-Denby believed that such decisions could be linked in part to the university rankings in national league tables. She explained that “aspiring lower to medium ranked universities” would be keener to use the opportunity presented by the re-tendering process as it could play a key part in the university internationalisation strategy. She also went on to explain that in contrast, “Russel group [Universities] would not need it”, suggesting that their existing rankings and their international strategies were not as reliant on which pathways provider they were partnering with.

This suggested that pathways partnerships played a more impactful role in aspiring lower to medium ranked universities’ international strategies that in Russel group universities. As a result, it also meant that private pathways providers by their decisions regarding these partnerships would have more influence on the lower to medium ranked universities internationalisation strategy and as a result of international students’ tuition fees generated, on these universities income.

4.2.2.2.3 Step 3 of the partnership creation - Operationalisation of the relationship

Once the tender process has been completed and the contract awarded, the establishment of a new pathways college moves to a project mobilisation phase.

This phase which mixes both planning, and resourcing activities is something I have experienced first-hand when helping the set-up of a pathway college. The project team responsible for the delivery of the project ends up working with both the partner university internal teams and teams from the pathways provider.

For example at the university, the project team would work with the estates and maintenance teams to prepare the college building, and kit up the space ready to welcome students and staff. With other university professional services team, they would set up IT access processes, liaise with student services to produce student cards etc. Within the pathways provider teams, the main task is the recruitment of teaching and support staff to create a college team.

It is worth noting that whilst the description above would probably resonate with most colleagues having been through a college set up phase, it would not be true for all. Olivia McLaughlin reminded me that there were “outliers”. Whilst the system above would cover most pathways colleges set up as ‘Joint Venture’ where both parties pool their resources, some providers – like “INTO – provide capital investment” to fund the College building on the University campuses as also illustrated by Matthews (2014b) in his article on a failed attempt to expand the model.

When evoking the two models Dr Elisabeth Claudia Grindel-Denby found a very nuanced way to present their key advantages and challenges. She light-heartedly stated that “it makes [her] smile” that for pathways colleges developed following the ‘Joint Venture’ model, “you come on campus and you look for the college, and you find it in the furthest corner of the campus in the only not done-up building”. She explained that investments might be more limited but that pathways providers get “a bigger share of the revenue”; however, for pathways colleges created using the capital investment from pathways providers, the college could end up having the “fancy shiny building in town” but less revenue.

4.2.2.3 Public/private values tensions - Symbiosis or parasitism

> *“How would you describe the relationship of a pathways provider with their partner universities?”*

“I think it varies. I think it probably varies quite a lot.” (Pete Venables)

“It varies. It really does vary.” (Olivia McLaughlin)

4.2.2.3.1 Establishing trust

When asked to describe the relationship of a pathways provider with their partner universities, a key word appeared in four of the six interviews: “trust”. Sue Edwards, Chris Hooper, Pete Venables and Andy Quin, all referred to “trust”, “Build trust” or “building confidence” as key elements of the relationship between a pathways provider and their university partner.

For Pete Venables, “mature partnerships are where there's trust at all level and clarity on who delivers exactly what”; he metaphorically described the relation as a nervous system with “lots of different dendrites across different levels of both organisations needing to work like synapses. They all need to fire for a partnership to be really, really strong.” This view on the strength of the relationship was shared by Chris Hooper who also expanded his answer to include the importance of a balanced power dynamic to ensure that “you don't get one partner that dominates too much”.

Finally, Andy Quin described how he felt this trust can be developed and built on. Referring to his professional experience with one particular partner, he explained how after a year of having only a reduced level of partnership with them “they now trust [his organisation] enough to outsource their marketing, admissions and recruitment” function. In another example he used, a university who “worked with [his organisation] as their off-campus provider for a year, were happy to [award] the contract for the on campus embedded college […] a year later.” In his opinion a direct response to the trust built in that time.

4.2.2.3.2 Tensions towards pathways

Whilst most interviewees noted ‘trust’ as a key element of a successful relationship between a university and their pathways provider, all six unanimously identified “tensions”, “nervousness”, “scepticism” and even “animosity” as something they encountered and had to navigate. The main reason for the nervousness directed at pathways provider, was identified by all interviewees as being a manifestation of a university own internal tensions between the different layers of its organisation. The next paragraphs will review in turn each of the three layers or groups, interviewees described from the more to the less resistant to the idea of a Pathways college.

The most resistance interviewees experienced was described as coming from a group of university staff they described as “academics” (Andy Quin; Chris Hooper). Andy Quin felt quite strongly that - in his opinion – academics showing resistance are “living in the past, or […] in a fantasy, but have not grasped that the university is a commercial entity, even if it calls the money it makes ‘surplus’ rather than ‘profit’ ”. What Andy Quin appeared to describe here was a likely disconnect between the university’s agenda and the values of these staff members. The disconnect was evidenced using words such as “fantasy” or “myth” and reinforced by the metaphor of universities being seen as “Non-commercial, uncommercial, unconstrained by commercial considerations, temples of learning [which] don’t get their hands dirty with money” (Andy Quin).

Beyond what Andy Quin described as a disconnected, and somehow idealistic viewpoint of education, he identified that this is also the result of a knowledge gap. As he puts it, “that's just people not working at the right level to realise what's going on”. Chris Hooper also identified this likely knowledge gap in the benefits associated with the creation of a Pathways college. He described a conversation he had with one of these staff members where “the first thing she said is that you're here to put us all out of our jobs”. Surprised by this statement he explained how he proceeded to outline the benefits of a Pathways college. Something he explained he had to do several times since, and that he summarised as:

> [the Pathways college] *“providing an extremely low cost solution that is going to bring a lot of students and therefore a lot of revenue through to the university, and [as a result] actually [help] securing jobs for its own staff and securing the ability to do some of the things that academics really love and care about [which would otherwise] be at risk if it weren't for a good stream of international fee income coming through.” (Chris Hooper)*

Reflecting on his experience, Chris Hooper identified instances where pathways providers had been described to him as “dodgy”, “lack[ing] integrity” and “just focused on making a quick buck”. Beyond the negativity directed at the organisation, he also described “a preconception”, or “a prejudice” from these university staff members towards the “people who work in the private sector”. Chris Hooper felt strongly about this point and talked with pride about his and his teams’ work:

> *"just because an organisation makes money out of doing something doesn't mean that they don't care about it. And it doesn't mean that they don't want to do it really well and have pride in what they do and focus on the students." (Chris Hooper)*

Pete Venables echoed this feeling of pride in doing a good job, stating:

> *"we do care about the same things that university care about, which is getting good students to succeed, and good numbers of good students to succeed" (Pete Venables).*

The second tier of staff described by interviewees were part of universities middle management – deans, head of schools. Academic staff with management responsibilities. They were described as having a more balanced and maybe pragmatic approach by Pete Venables. By their position in the organisation they would get natural exposure to both the strategic benefits of the partnership, whilst also experiencing the practical impact of the partnership relation on their school performance.

Despite describing this group as - overall – "mainly positive" towards pathways providers, Dr Elisabeth Claudia Grindel-Denby reminisced of university meetings where faculty leaders would question the preparedness of pathways students. They would compare their university degree results to international students who enrolled directly at the university. Dr Elisabeth Claudia Grindel-Denby described, an "unreal expectation" that pathways students should perform as well - if not better - than direct entrants on the premise that they benefited from what was perceived as an additional year of studies at the university. This flawed reasoning would be forgetting the essential fact that pathways students are enrolled on an A-levels replacement course or an intensive language course. They are therefore not eligible for direct entry to the university when they first join the pathways college. Aside from "completely misunderstanding the [pathways] sector" Dr Elisabeth Claudia Grindel-Denby felt that these students were not being celebrated and she identified a possible prejudice in the behaviour of some faculty leaders.

The last tier mentioned by interviewees comprise of university senior managers such as Director of International Offices, Vice-Chancellors, Registrars etc. For reasons covered in the previous paragraphs, and mostly linked the financial model of UK universities, interviewees reported that in their “experience […] senior management gets it” (Dr Elisabeth Claudia Grindel-Denby and Pete Venables). They understand the pathways model and Pete Venables who used exactly the same terminology as Dr Elisabeth Claudia Grindel-Denby on this point expanded that senior managers “see [both] the financial and strategic benefit” to their university.

4.2.2.3.3 Internal University tensions

The tiered staffing structure described in the previous section, also emerged from the research as a likely reason for the negativity being directed at the pathways provider.

Olivia McLaughlin presented a couple of examples linked to the tensions she witnessed within universities she worked with. In one of them, she explained that “the faculty and the senior executive group couldn't agree what their strategy was”. In another, “the senior group lay out the strategy, and the faculties fundamentally disagreed with it and rejected it”.

For Chris Hooper, the tension experienced by pathways providers was “just a result of existing tensions” within the university but was not directed at it should to the university senior managers.

> *“Often things that pathway providers are blamed for [are] not the decision of the pathways provider, [but] if somebody more junior in the organisation is really angry about it, they're probably going to take it out on the people employed by the pathway provider” (Chris Hooper)*

Olivia McLaughlin speculated on the reasons of these internal tension. On the one hand she experienced a certain lack of “transparency across the piece”. Within the university, senior executives would move forward with the establishment of a Pathways college without having discussed it with Deans or Head of Schools or having agreed on a strategy. As to why this would not be discussed internally, her hypothesis is that “those are difficult conversations to have in universities and typically people shy away from difficult conversations”.

The tension directed at the provider or their students, appeared to be a reflexion of the tensions internal to the university. Individuals discontent at the university’s overall strategy or at the way the senior management team managed this change, projected their frustration or anger. Behind the internal frustrations there was a fundamental opposition in approach and values between how grassroot teaching staff and university senior management saw education and its delivery.

4.2.2.4 Conclusion of theme B.1 – The establishment of the partnership between a pathways provider and a university

The competitive and strategic tendering process was only the starting point of a partnership between the University and their chosen pathways provider. As they ironed out details of the operational set up of the new college, the relationship deepened and with this, tensions appeared. This research evidenced that both the pathways provider as an organisation and their students experienced prejudice from two separate university organisational layers. Despite clear understanding from pathways providers that they benefit from a trustworthy relationship with their partner, pre-existing tensions internal to the university surfaced. These came from a lack of trust between the various layers of the university structure which interviewees identified as an essential pre-requisite of a successful partnership. The tensions perceived by pathways providers as directed at them, were in fact only a reflection of the university own internal tensions on the purpose of HE and best way to deliver it.

4.2.3 Theme B.2 - Academic relations

4.2.3.1 Introduction

Using copies of the QAA reports for embedded colleges ranging from 2012 to 2018, I initially hoped to find a single quality assurance model either shared by all providers, or specific to each provider.

One of the initial findings of this research was that the quality assurance framework of pathways colleges varied too much across time and locations to identify any set model. This variation not only showed between providers, but also within each company where there was inconsistencies between different colleges bespoke to each partnerships. It was impossible to identify, one model which could be presented in a manner suitable to doctorate level research.

Having failed to find one model shared across all providers, or even a homogeneous model within each company, I elected to group by themes the various quality assurance mechanism used across the sector to manage academic standards starting with an overview of the evolution of the quality assurance framework.

4.2.3.2 Evolution of the quality assurance framework

As described earlier, the sector started as a very heterogenous entity and failed in the 1990s to establish a coherent quality assurance model. However with the development of the Big 5, and the embedding of colleges in a university environment a quality assurance framework started to emerge.

Until 2012, the British Accreditation Council (BAC) which was monitoring language schools and private boarding schools was responsible for inspections of pathways providers. The framework use was similar in form to OFSTED inspections. It was running across several days and included a review of documentary evidence, visit of premisses and teaching observations.

From 2012, the Quality Assurance Agency (QAA) took over the supervision of pathways colleges. The Agency which was already monitoring universities through Higher Education Reviews (HER), developed a pathways' specific framework called Embedded College Review for Educational Oversight (ECREO).

The final milestone was the introduction of the Office for Students (OfS) in January 2018. The OfS allowed Pathways sector providers to register alongside traditional higher education institutions. The QAA still retained a role in the process as Designated Quality Body for Colleges situation in English.

It is also worth noting that this model of pathways colleges registered independently with OfS is not universal. In some instances, pathways colleges are not registered independently. Some because of how the partnership was established, are not independently validated. Their courses are linked to the University partner and therefore are linked to the university OfS registration (e.g. University of York International Pathways Centre)

4.2.3.3 Current quality assurance framework

4.2.3.3.1 Formal agreement

As presented in an earlier part of this section, Pathways providers successful in the tender process, set up a formal agreement with the university. Due to the commercially sensitive nature of these documents, I am not at liberty to disclose detailed information included in the agreement I may have seen as part of my role as a senior manager of an embedded international college. For the very same reason, I was also unable to access agreements linked to companies competing with my employer. However, despite these restrictions, I was able to glean publicly available information about them from the QAA reports published (Quality Assurance Agency, 2017).

The first element worth noting was the names of these formal agreement. These were not being referred to as ‘contracts’ despite their commercial nature. Whilst Navitas used a ‘Recognition and Articulation Agreement (RAA)’, Study Group had a ‘Collaborative Agreement’ , INTO a ‘partnership agreement’ and Kaplan a ‘written agreement’. The second key point mentioned in the QAA reports, was the duration of these agreements. They ranged from 5 to 10 years in duration and could be extended.

4.2.3.3.2 External reference points

Various reference points external to the Colleges were referred to in the QAA reports as being used in the quality assurance of academic programmes offered.

In some cases, externality was provided by a companywide reference framework such as Kaplan's "Academic Standards and Quality Manual". In others – such as Study Group - this initial framework tended to be provided by the partner university academic regulations.

The first impact of having these different systems is the lack of consistency between colleges from the same provider and also between providers. The degree of variability appeared higher in models where the pathways provider adopted their partner university academic regulations such as Navitas and Study Group.

The second consequence of these differences is the subsequent variation in accountability for the validation or revalidation of programmes. In Kaplan's example above, this validation was reported as being done independently from the university through centrally controlled mechanisms mimicking those usually found in a higher education institution. Whilst they included elements of externality provided by subject experts or external examiners, the audit trail would remain internal to the pathways provider. In the second example, Study Group's validation and revalidation processes were set out in the University's quality procedures. They were managed through central university channels in the same way as they would be for the various schools, faculties or departments within the university.

Despite these differences, all frameworks appeared to be informed by, and referred to, the UK Quality Code for Higher Education (Quality Code).

Programmes and modules specifications made references to 'Subject Benchmark Statements' or the 'Common European Framework for Languages (CEFR)' and 'International English Language Testing System (IELTS). They also included mapping of intended learning outcomes, schemes of work and details of assessments.

One important difference with a traditional university quality assurance framework was the absence of links with a 'credit transfer system' framework. By not having any link to frameworks such as the National Qualifications Framework (NQF), its successor the Qualifications and Credit Framework (QCF) or the latest 'Regulated Qualifications Framework' (RQF), the credits awarded to the students enrolled on pathways courses are not transferable. This means that their course and its credits are not systematically recognised by other educational institutions. Having said that, and despite being their own company award, pathways providers' awards tend to be widely accepted, and 'portable'. Using Kaplan's example, the Kaplan award is widely accepted by over 250 colleges and universities partners in the UK, USA, Canada and Ireland (Kaplan International Pathways, 2023).

4.2.3.3.3 Other quality assurance mechanisms in place

Beyond the formal agreement in place between a pathways provider and its partner university, and the shared external reference points, the quality assurance framework of pathways colleges also includes more bespoke, partnership-specific, quality assurance mechanisms.

The questions used by the QAA reviewers to guide their reviews and found in the QAA reports revealed the existence of a range of quality assurance processes one could expect to find in a university.

At module and course level, moderation mechanisms existed to assure academic standards. External examiners were involved in modules and course set up as well as annual reviews. University 'link tutors' were also referred to as part of the feedback colleges receive from their partners.

The colleges also regularly reported to their partners on students' performance and satisfaction. Whether they used a university provided template or their own, reports were presented termly and annually through joint academic and/or operational boards. Colleges also had annual 'action plans' to guide strategic development and capture progress made.

Whilst common themes were identified, operationally there were a lot of differences in the way quality assurance was managed and on the outcomes of the QAA reviews. One key point to note was the varying level of involvement of company central teams in the colleges' quality assurance process. Whilst it was not possible to evidence a direct link between the level of support provided by central teams and the outcome of the QAA reviews, Sue Edwards pointed out in her interview that some providers "had tremendous problems having their curriculum and quality assurance lead" staff changing. She continued: “They’ve chopped and changed, chopped and changed, and I don’t think it’s been helpful at all”. In comparison she believed the stability in senior staff within Kaplan – her employer – was a contributing factor to its success in these reviews.

4.2.3.4 Conclusion of Theme B.2 - Academic relations

This section evidenced that far from its deregulated start in the 1990s, pathways providers have embraced UK higher education systems to quality assure their courses. Far from reported recent accusations of being “dodgy” (Chris Hooper), lacking integrity, being “just focused on making a quick buck” (Ibid) or “all about money and bums on seats” (Pete Venables), the QAA reports consulted explicitly referred to this higher education institution having “confidence” in their “academic standards”, and in the “quality of learning opportunities” offered to their students and how prepared their students are for their university courses. In fact, as illustrated in the pervious paragraphs, there were very well-developed quality assurance processes specific to their partnership environment and integrating their university partners.

4.2.4 Theme B.3 - Business relations

4.2.4.1 Introduction

This section examines the other relations established between a pathway provider and its partner university. Unlike academic data covered in the previous section, data concerning other types of relations was challenging to obtain due to what transpired to be commercially sensitive in nature. Despite these challenges, this section provides original insights into a previously undocumented topic, thanks to data from Companies House and the conducted interviews. The collected data suggests that other relations, particularly the legal, financial, and property investment links between pathway providers and UK universities, play significant roles. By outlining these diverse business relations, this section offers a comprehensive overview of the commercial interests that connect the pathways sector to UK universities.

4.2.4.2 Legal status of pathways providers

4.2.4.2.1 Limited status

Having reviewed the pathways providers filing history and other information recorded at Companies house (UK Government, 2023), the first finding to note was that pathways providers were legally independent from the university they partner with. All the big 5 were registered as Limited companies whilst Universities for the vast majorities were registered charities. The main difference there was the way the money generated by their activity was managed. Whilst a limited company generate profit for the benefit of its owners, a charity would generate a surplus which would get re-invested in the charity.

4.2.4.2.2 Subsidiaries and holdings

The data also suggested that the various colleges linked to each pathways provider were also registered separately as limited companies. A search on companies' accounts shows that colleges appear to be managed as subsidiaries of the parent company which owns all, or a significant part, of the college company shares. The figure below illustrates the extent of the set up for two of these providers – Kaplan and Navitas - and similar arrangements were found for all five main providers.

Subsidiary undertaking	Country of incorporation	Principal activity	Percentage of ordinary shares held	Direct/indirect holding
Kaplan NT Limited	England & Wales	Higher Education	100%	Direct
Kaplan US Limited	England & Wales	Higher Education	100%	Direct
Kaplan Glasgow Limited	England & Wales	Higher Education	100%	Direct
Kaplan Liverpool Limited	England & Wales	Higher Education	100%	Direct
Kaplan International College London Limited	England & Wales	Higher Education	100%	Direct
Kaplan Brighton Limited	England & Wales	Higher Education	100%	Direct
Kaplan UWE Limited	England & Wales	Higher Education	100%	Direct
Kaplan Bournemouth Limited	England & Wales	Higher Education	100%	Direct
Kaplan Bath Limited	England & Wales	Dormant	100%	Direct
Kaplan York Limited	England & Wales	Higher Education	100%	Direct
Kaplan Colleges Private Limited	India	Higher Education	100%	Direct
Kaplan International Colleges (Private) Limited	Pakistan	Dormant	100%	Direct
2Kaplan International Colleges Limited	Nigeria	Higher Education	99%	Direct
Kaplan Qatar Limited	Qatar	Dormant	100%	Direct
Kaplan Nottingham Limited	England & Wales	Higher Education	100%	Direct
Kaplan Estates Limited	England & Wales	Property Management	100%	Direct
Kaplan Partner Services HK Limited	Hong Kong	Higher Education	100%	Direct
Kaplan Saudi LLC	Saudi Arabia	Higher Education	100%	Direct

Figure 15. Example of subsidiaries' overview - Extract from Kaplan Group of companies' accounts made up to 28 December 2019

Subsidiary Name	Companies House Registration Number
HIBT Limited	05163612
London Brunel International College Limited	05171106
Cambridge Ruskin International College Limited	06407773
International College Wales Limited	06412162
SC170551 Limited	SC170551
Employment Overseas Ltd.	SC241734
International College Portsmouth Ltd.	06770123
Plymouth Devon International College Ltd	06822402
Edinburgh International College Ltd	06822392
Birmingham City International College Ltd	07445570
Northampton IC Limited	09332824
Leicester Global Study Centre Limited	11669456
UA92 Global Limited	12985058
Keele University International College Limited	13631343
SC255447 Limited	SC255447

Figure 16. Example of subsidiaries' overview - Extract from the Navitas UK Holdings Limited Annual Report and Consolidated Financial Statements for the Year Ended 30 June 2022

The data also suggested complex relationships and parents holding companies involved in the financial set up of all providers. As presented in section 4.1.3.2.2, Study Group is the UK pathways provider with the most partnerships. The example of Study Group below was the most complex arrangement found with the data recorded by Companies House showing that a trail of at least 7 companies were listed as having a significant control one over the other.

Figure 17. Example of a chain of significant control – Study Group. Data compiled from Companies House records.

4.2.4.3 Control, ownership, and accountability

4.2.4.3.1 Control

What was interesting to note was that universities allowed private providers to trade under their name (or a variation of their name) and did not appear to have control over the legal entity associated with it. During my research I only encountered one university who – I believe – has retained some sort of link, and potentially control, over the College name. In what appears to be an exception Nottingham Trent University has registered a dormant company worth £1 (UK Government, 2023). NTU Director of Finance appears to be its only director, the registered address is at the university and accounts have been filed for it since 2004, when Kaplan NT Limited who operates Nottingham Trent International College was also created.

4.2.4.3.2 Ownership, and accountability

Whilst universities funding sources are widely documented, easily identifiable and broadly originating from three main sources - Endowments, funding councils and tuition fees - the funds supporting Pathways businesses are much harder to trace.

Some – like Kaplan – appear to have a simpler set up as a wholly owned subsidiary of a holding - Graham Holdings Company - acting as the ultimate owner of the group. For others such as Study Group or Cambridge Education Group however, the backing is provided by investment firms such as Ardian and Bridgepoint. Whilst Graham holding presents itself on its website as a "diversified education and media company whose operations include educational services", investment firms such as Bridgepoint describes its "purpose […] to grow the capital of our investors and their pension holders".

These different setups bring key challenges for the relation between the pathways provider and the university partner. The first is an obvious difference in values between an organisation who's advertised purpose aligns closely with a university and explicitly includes "education" twice whilst one who's main focus is its investors. The second challenge linked to ownership and accountability is the instability and uncertainty it can bring to a partnership when the company gets sold. Describing why she felt Kaplan partnerships were successful Sue Edwards highlighted that consistency in the relationship at senior and college levels has helped. Sue explained that Kaplan “had consistency in [its] senior management, whereas some of the others in the G5 have been bought and sold, bought and sold; that has meant that senior management has come and gone, come and gone, and that hasn’t not helped; that’s meant that [Kaplan has] been able to have a more continuous strategy than anybody else”.

4.2.4.4 Investment and profit sharing

4.2.4.4.1 Investment sharing and estates financing

The business model of having private, for profit colleges, on university campuses is such that the question of access to university owned resources must be considered.

In some partnerships, the pathways provider covers the cost related to creating the new college. This sometimes include the financing of space creation on campus to accommodate the college staff and new influx of students. For pathways providers this translates as covering new equipment cost, contributing to a building refurbishment, or in some cases, financing a large portion (if not all) of a new building through a joint venture. The fully funded model favoured by the company INTO “was all about buildings” said Olivia McLaughlin in her interview, with a pathways provider who “put[s] the capital up front” she added. In contrast, an illustration of a partially financed project can be found in Kaplan’s latest accounts. In it, is listed the 45% owned ‘University of York Kaplan Pathway College LLP’ which is a separate entity to ‘Kaplan York Limited’ the company responsible for running the Pathways college on the University of York Campus.

Associate	Country of incorporation	Principal activity	Percentage of ordinary shares held	Direct/indirect holding
University of York Kaplan Pathway College LLP	England & Wales	Higher Education	45%	Indirect

Figure 18. Extract from Kaplan Group of companies' accounts made up to 28 December 2019

As visible from the extract of its 2016 accounts below, the University of York Kaplan Pathway College LLP is in fact a shared partnership between the University of York and Kaplan International Pathways for the sole purpose of financing the construction of a new Piazza Building worth nearly £23m. This building far from only hosting the Pathways College offers, a range of resources for the university community including "a 350-seat restaurant with fantastic lake-views", "a large flat-floor learning space, available for student activities and societies" and much more (University of York, no date).

> At the year-end the partnership has total commitments, guarantees and contingencies of £22,802,407 relating to the Piazza Building project.

Figure 19. Extract from 'Report and Financial Statements of University of York Kaplan Pathway College LLP - 31/07/2016

In other partnerships, the university provides the facilities and gets compensated financially by the Pathways provider. For each student enrolled by the Pathways provider, the University receives a set percentage of the fees paid by the student. For Kaplan Colleges this is called the 'partnershare' and will be covered in next section about profit sharing.

4.2.4.4.2 Profit sharing

Pathways colleges through the collection of tuition fees generate sizeable incomes for the companies running them. In 2021 Kaplan's reported turnover was £133.0m, a result consistent with the previous year (£134.3m). The associated company profit was £12.0m against £12.3m in 2020. In the same period of 2020, competitor Study Group reported revenue was £148.2m with a £10.7m profit.

Whilst on paper the university and pathways providers are completely separate, there is a link between them. Aside from the obvious shared business interest by which most students successfully completing their Pathways course are eligible for enrolment at the university, the higher education provider can also benefit through a mechanism called the "partner's share" or "partnershare". This share of the pathways provider incomes is calculated as a percentage of fees paid by pathways students.

The rational behind this direct payment from the pathways colleges to their partner university accounts is to cover costs incurred by the university for the resources made available to the pathways college on its campus. For example, it would supposedly cover cost related to IT systems access (e.g. university emails and other IT systems), library resources, as well as general campus related costs (e.g. campus maintenance, utilities, heating, access to Students' Union etc).

The formulae supporting the calculation of the partnershare, is commercially sensitive information and it was impossible to source this data to include in this research. However, across the sector the calculation would usually include a set percentage of course fees informed by several variables related to the length of the course, the level of the course, or the type of course.

4.2.4.5 Conclusion of theme B.3 - Business relations

Pathways provider are limited companies with a complex holdings and subsidiaries model. Whilst some appear to be backed by businesses with educational interests, others are used as lucrative investments for pensions funds. This tension in the funding model of pathways providers, has revealed a variance in the level of stability they enjoyed as the result.

On campuses, the funding model of these private providers has had visible impact with some universities benefitting of their investment to create new buildings. Whether it is through international fees paying students they enrol, the share of the revenue they are sometimes entitled to, or the new buildings they get, it has become obvious that universities have a vested interest in the success of these colleges which goes far beyond the academic success of its students, and can have long term repercussions on the wider university financial strategy.

4.2.5 Conclusion of theme B - Understanding the university-pathways provider partnership

This section revealed that the competitive and strategic tendering process was only the starting point of a strategic and operational alignment between the University and their chosen pathways provider. As the relationship deepened, tensions appeared. Whilst at first glance these could be perceived as only being directed at the pathways providers, they were in fact a reflection of the university own internal tensions and directed at the university senior management. They revealed a deeper divergence of opinion within the university on the purpose of HE and the best way to deliver it.

Despite accusations by their university critics that pathways providers were only profit driven, the analysis of QAA reports painted a completely different picture. They presented well-developed quality assurance processes specific to their partnership environment, integrating university partners and focused on students' success.

Finally, despite the tensions and instability they may have experienced because of their financial set up, and contrary to the perception from their university critics, universities were benefiting heavily from setting up these partnerships. Beyond the revenue stream of international fee-paying students, and the partner's share of revenue generated, some universities also profited from capital investments on their campus in the form of new buildings.

4.3 Theme C – Charting the futures of the UK pathways sector

4.3.1 Introduction

Having first established the definition of the pathways sector and its recent history, and then analysed the current relationships between pathways providers and university, this next section will focus on charting the futures of the sector.

The structure used in this section is thematic and emerged organically from the data collected as part of both the Delphi exercise and the set of interviews. This data collection was guided by the last two research questions: What are the external forces influencing the future of the pathways sector?; and, what are the key internal changes within the pathways sector impacting the future of the pathways sector?

The first part of the data presented here focuses on environmental factors expected to impact on the future development of the sector, whilst the second concentrates on changes and trends internal to the pathways sector.

4.3.2 Theme C.1 - Influence of the wider environment on the future of the sector

When asked about elements they felt would impact positively or negatively on the pathways sector, a sizeable portion of Delphi and interviews responses referred to elements located beyond the sector's boundary and usually out of control.

These environmental factors included a range of social, economic, political, and technological influences which the following paragraph will review in turn. For some, the feedback from Delphi's experts and interviewees was very mixed, and it was therefore more difficult to interpret how much sway they would have. For others however, the feedback was much more consistent, and trends could be more easily identified.

4.3.2.1 Challenges related to socio economic related factors

The first set of factors identified as likely to impact the future of the sector included socio-economic influences. These included social changes both in the UK or abroad and their economic impact on the pathways market.

4.3.2.1.1 Socio economic factors linked to the UK

In the UK, the withdrawal of the United Kingdom from the European Union – also known as Brexit – was mentioned several times. Chris Hooper in his interview queried how the United Kingdom was now perceived because of Brexit and questioned whether "general attractiveness of the destination" had been impacted. This view on the impact of Brexit was shared by the group of experts during the Delphi. They acknowledged the long term impact of Brexit on the number of EU students being attracted to the study in the UK and “expected a growth in non-EU numbers to compensate for likely EU decline”. Because of their business model recruiting quasi-exclusively non-EU students, this could be seen as a positive outcome for pathways providers.

One of the challenges flagged up by Delphi experts, was the relative “strength of the pound” (Delphi, Round 1) against other currencies. Something corroborated by an interviewee stating that the “UK become less attractive because it's more expensive” to study here (Chris Hooper). However some providers are more impacted by these currency fluctuations than others based on where their businesses are located. For example, CEG which proportionally has more of its business in the UK, is more affected by changes to the UK currency, than Navitas which has a more countries represented in its portfolio. One possible impact of this is a variation in the level of attractiveness linked to the UK as a study destination compared to other countries. If the student’s currency is weaker than the pound, coming to the study in the UK is more expensive for them. However if the pound is not to strong, then the UK becomes a more attractive destination. The result is a direct competition for the UK pathways colleges from foreign destinations. Finally, this also means that pathways providers with a diversified multinational portfolio, can offer various study destinations and better serve their customers, the students and their parents.

4.3.2.1.2 Socio economic factors abroad

Beyond the UK borders socio-economic changes in the Chinese market came out strongly as a key to the pathways sector’s future.

A traditional pathways market, China has recently seen a key social policy change with the loosening of the one child policy. Combined with the overall slowdown of the Chinese economic growth, this will impact on the future recruitment of students from emerging middle class due to the decline in the wealth per child. Combined with a possible “decline of youth demographic in parts of Asia (e.g. Taiwan HK, Japan)” (Delphi, Round 1) as identified by the experts, this could reduce the pathways market size.

Reflecting specifically on China, Andy Quin and Sue Edwards both identified a market specific trend pathways providers should not underestimate: rankings and social appearances. Reminiscing of recruitments trips to China, Sue recalled the attraction for parents to send their child study in Europe and the associated social status it accompanied. She described how having a child studying in Europe was as much as a social status as a Ferrari. What appeared to be an opportunity for pathways providers enabling this process, was tempered by Andy Quin's take on social appearances in China. To him "Chinese students' attraction to [ranking and] top universities, […] is becoming sharper and sharper". With "the vast majority of Chinese students, employers and agents, […] only look[ing] at the top 200 institutions as ranked in the QS Global Rankings" there is an obvious challenge for most pathways providers who do not currently have such partnerships. Andy Quin also précised that "actually it's the top 100 that they're really interested in". The caveat was a point raised by the panel of expert during the Delphi and it was another challenge linked to these rankings where something as simple as a "bad TEF grading is making overseas recruitment more difficult" (Delphi, Round 2).

The final socio-economic element experts noted was not specific to the Chinese market. It is the "improvement of education standards from supply countries throughout the world" (Delphi, Round 1); meaning that with the raising education standards in country Pathways providers would usually recruit from, students can study in their home country and might not require a pathways course. A challenge associated with the rising level of education in sending countries is the level of employment for the young graduates returning home after studying expensive UK degrees. This factor alongside rising education standards were identified as future challenges by the Delphi panel.

4.3.2.2 Challenges related to external political and regulatory factors

Aside from socio-economic factors, political and regulatory elements also emerged from the data as playing a part in the sector future. Unlike on the previous topic where experts and interviewees could see both benefits and challenges to the various trends identified, 100% of the data collected in relation to political and regulatory frameworks of pathways providers was negative.

Echoing the reference made earlier to Brexit and "its uncertainty" (Delphi, round 1), changes linked to UK government changes came out strongly from the data. Whether it is the multiple governments and British Prime Minister's changes flagged up by Chris Hooper in his interview and the panel, or the overall "growth of nationalism and continued anti-immigration sentiment amongst voters" (Delphi, Round 2), the panel felt that a key challenge to the future of the pathways sector was the "perceived hostile environment [and overall] reputation of the UK for not being welcoming to International Students and recent reinforcement of this with Brexit" (Delphi, Round 2).

Associated with this political change, was the "on-going uncertainty of UK government immigration policy" (Delphi, Round 1) and the regulatory uncertainty linked to changes in "Home Office rules and UK visa restrictions" (Delphi, Round 2). Combined to a "shift in external regulatory requirements e.g. UKVI, OfS" (Delphi, Round 1) and recent questions surrounding "potential for further increase of international fees due to pressure put on the UK HE sector funding by the Augar review" (Delphi, Round 2), it is easy to envisage why the pathways providers are evolving in a very uncertain legislative environment.

4.3.2.3 Challenges related to the technological environment

The final environmental element emerging from the data collection was what Olivia McLaughlin referred to in her interview as the "4th [industrial] revolution or the third Renaissance" and the impact of cybernetworks and cloud-based technology supported machine learning on the future of the sector. Whilst the first and second industrial revolutions involved respectively the mechanisation supported by the power of steam, and mass production supported by electricity, the third started to introduce the power of IT systems and automated production through robots. The theme of the fourth industrial revolution emerged through, for example, elements related to online delivery of courses or the use of 'EdTech' referring to the use of technology to facilitate learning and improve performance. The views of the interviewees and expert was very diverse on the type of impact for the pathways sector.

The Delphi panel collectively felt strongly that “technology based offering [would] enhance pre and/or post pathways programmes” (Delphi, Round 2). Olivia McLaughlin subscribed to this assessment of complementarity between new technology and the traditional pathways courses. She even went a step further and saw this as an opportunity for providers to respond to “school shortages” (Olivia McLaughlin) in some countries, and an opportunity to offer “online courses that are not typical three year degrees” (Ibid). Alluding to the concept of micro credentials she also acknowledged that “some kind of accreditation system” (Ibid) would be required to help with transferability of credits and recognition of prior learning. She felt quite strongly that “a growth in the online Edtech space” (Ibid) was on the cards for the sector. She acknowledged that it would be a departure from the classic pathways model and would not be “similar to the provision that we offer face to face” (Ibid).

Reflecting on the recent Covid pandemic and the pragmatic associated developments of online learning models in education systems around the world, Chris Hooper felt that there would be an “expectation from students” who experienced this model. His view of the phenomenon was balanced and considered both the possible negative impact on the young learners’ “willingness to travel” (Chris Hooper) combined with a possible advantage of a “model […] cheaper and more digital enabled” (Ibid) for pathways providers.

Andy Quin’s concerns were mainly to do with the fast developing technology. He questioned the need to study in English in the UK or the future existence of “the linguistic side of a British education”, if “virtual reality” and artificial intelligence enabled earphones allow instant translation to their users. For him “in the next 10 years” the pathways sector model “could [be] potentially declining due to what he describes as “mind-blowing” and “endless” “technological possibilities”. However, he still optimistically “think[s] there'll be a number, a proportion, of students who want to come to UK for the whole experiential side of things.” This very point of the physical experience associated with a pathway course and its key concept to “enable settlement before it really matters" is something Dr Elisabeth Claudia Grindel-Denby felt made the pathways sector offer irreplaceable by an online model. She conceded that foundation courses can be, and had been done online, however it negated "the whole purpose of the foundation" model. She also nuanced her views by differentiating the learning experience of a young learner who may be used to using online systems to play games and socialise but might struggle with online learning, against the use of online learning for a "masters/premasters" level student who would have had previous experience of university studies to help them navigate this change.

What came out of the data collected on the possible challenges related to the technological environment of pathways colleges was in fact a mixed picture of positives and negatives. Technology could in part and in some places replace the courses offered by pathways providers. It could even compete with some aspects of the course offered. However, it was in mainly seen as an opportunity to lower costs and increase profitability for the pathways providers.

4.3.3 Theme C.2 - Changes within the pathways market

Apart from environmental considerations pathways providers cannot control and must navigate to the best of their ability, the Delphi and interviews' data also revealed that there were internal factors well within their control which they should carefully reflect on when considering their future.

Four central themes emerged from the data, and these were paired up as the two sides of a coin. The first two included the expansion of pathways providers beyond UK borders and the increased competition resulting from it. The second two were linked to the core product being offered by the pathways providers. It suggested both a possible need for amendments to the existing product, but also the expansion of the range of services being offered to universities.

4.3.3.1 Opportunities for expansion beyond the UK borders

A theme emerging from the data was the opportunity offered by a strategy of expansion of the Pathways providers beyond the UK borders. Whether it is with the same model they already use in the UK or through “the development of transnational pathway programmes with [a first] year in home country” (Delphi, Round2), geographical expansion is part of the future of the sector.

Whilst most of “these [companies] are global already” Dr Elisabeth Claudia Grindel-Denby explains that “new destinations will appear” (Ibid) as universities are starting to better understand the pathways model. Various countries or regions appeared mentioned in the data. Dr Elisabeth Claudia Grindel-Denby for example believed “Canada [had] a lot of potential”, whilst for Andy Quin “the Indian market [was] extremely buoyant” and offered opportunities. The Delphi experts were not as precise in their responses. They did not name countries and believed more broadly in “a rise of new markets in African or Asian Nations” (Delphi, Round 2) as well as the appeal of developing “pathway programmes in anglophone countries” (Ibid). Olivia McLaughlin offered additional insight by linking the potential predictability of market attractiveness to two elements. She thinks there “could be potential opportunities” (Ibid) where “populations that are growing, and at the same time are becoming increasingly middle class”. Despite “slight political instability” (Ibid) she believes “we will see a growth in areas with emerging economies” (Ibid) from Asia and Africa like Nigeria, India, Bangladesh, and Nepal.

Expansion in Europe was also mentioned with Delphi experts seeing opportunities for pathways providers with possible new UK universities developing “satellite campuses in Europe” (Delphi, Round 2). However for Olivia McLaughlin the “European market has always been tricky for the pathway sector” and Dr Elisabeth Claudia Grindel-Denby explained that it was most likely due to the absence of tuition fees in some European countries like Germany. She went on to explain that given that the pathways model is based on universities receiving a percentage of tuitions fees charged, there was no financial incentive for them starting a pathways partnership. For the students there was also very little attraction as pathways courses are expensive in comparison to local free higher education options.

For Dr Elisabeth Claudia Grindel-Denby however, the opportunity of European destinations rests in the creation of a possible new European market comprising of "aspiring universities" from the UK looking to improve their world ranking by increasing their level of internationalisation. By either building partnerships with existing European universities or developing satellite campuses in European cities, she explained these lower to middle ranked universities could increase their reach and their ranking as a result. She clarified that it was because rankings include elements of scoring linked to number of international students or staff.

4.3.3.2 The challenges of the increased competition

With a strategy of expansion and exploration of new markets explored in the previous section, came an increased level of competition from various origins. When expanding into new countries, competition from foreign study systems was identified as the number one challenge faced by pathways providers. The Delphi panel felt competition was not only coming from anglophone countries, but from any country offering to study in English and recruiting internationally. Dr Elisabeth Claudia Grindel-Denby and Pete Venables named Germany and Holland as two direct competitors, with Dr Elisabeth Claudia Grindel-Denby referring to the latter as "one of the winners of Brexit when it comes to students' recruitment".

The second area of competition identified from the data was the development of Trans-National Education or TNE. TNE could be summarised as the development of overseas campuses by UK higher education providers. These overseas university campuses are usually - but not always - developed in partnership with a local higher education provider, and would offer a qualification validated by the UK university. The Delphi experts, Pete Venables and Andy Quin all mentioned TNE as being a key challenge and a direct competitor for pathways providers due to the attraction of being able to do a UK degree at home at a much cheaper cost. However for Pete Venables "discussions " about TNE were "paused a little bit over the pandemic" but he was confident that they would not stop. He also highlighted how in his experience, the pathways provider he was previously employed by helped a UK university partner set up a TNE partnership and a joint degree by "putting people in touch" (Pete

Venables) with representatives from an Australian university where his company had another pathways college.

Finally, competition does not only come from foreign countries. Pathways providers' future could be impacted by the development of university run pathways courses. Already in existence in some universities and usually branded 'International Foundation Programmes' or IFPs, these 'in-house' pathways programmes are usually the descendants of English Language and Academic Skill courses developed by universities to support international students. These courses which sometimes now incorporate an element of subject discipline aimed at preparing the international students for their university course tend to be much smaller in size than pathway colleges are. With an offer similar to what the pathways sector was in the 1990s, these courses by themselves would in no way be able to compete directly with the recruitment reach of private providers using large networks on international recruiting agents on commissions. However, one area universities could influence their impact and their success, is by lowering their entry requirements. By allowing international students to join their courses with lower grades then currently required, universities would challenge the need for international students to undertake a pathways course and therefore the raison d'être of the pathways sector. Delphi experts, Pete Venables and Andy Quin all identified this challenge for the future of the sector which Andy Quin described as the "squeeze" (Andy Quin) of the traditional pathways' market. Andy Quin also made an interesting remark during his interview. He differentiated the strategy used by different types of universities. For him the risk of this 'squeeze' was much greater for pathways provider partnering with post-1992 universities. He further explained that these usually lower ranking universities, were more likely to be affected by a reduction of ranking conscious international students' enrolment. Lowering their course entry criteria, and removing the need for international students to pay for a pathway programme, could make them more attractive to some part of the international students' market.

4.3.3.3 Amending the existing core product

Having explored the challenges linked to a possible expansion of pathways providers beyond UK boarders, and discussed the associated increased competition they may face as a result, interviewees and Delphi experts also identified a need for pathways providers to ensure their product is clearly defined to stand out in the market. According to the data collected in both the Delphi and the interviews, this reflection on their product needed to consider two elements. First the possible adaptation of the existing core product and then the expansion of the range of services being offered to universities. The following paragraphs cover the range of adaptations pathways providers could consider make to their existing product.

The first and possibly easier strategy described in the data was the revision of the existing pathways offering. This was identified during the Delphi as the biggest opportunity for pathways providers. Elements such as increasing the product flexibility and tailoring it to the changing market demand were suggested by participants. The changes experts felt should be considered included the mode of delivery (online, face to face or hybrid), the location where the courses were run (in the student home country either partially or fully), their timeframes or their curriculum contents.

Dr Elisabeth Claudia Grindel-Denby during her interview also suggested a possible rebranding of the way pathway courses are presented and sold. She shared her experience acquired in Germany of no longer offering a one-year pathways course leading on to a three-year undergraduate course; but instead a four year undergraduate course aimed at international students with lower entry criteria. This slight change of the course 'packaging' also presented the added benefit – she felt – of removing "the stigma" or "perception" (Dr Elisabeth Claudia Grindel-Denby) that students "were not good enough" (ibid) for a traditional three-year degree. Instead, they were seen as being accepted on the main (yet one year longer) degree straight away. She also alluded to possible immigration and costs benefits associated with international students being able to apply for only one visa for their entire four-year course, instead of the two visa required for their two successive courses – pathways followed by main degree.

Access to postgraduate courses was the second area the data suggested should be considered for product amendment or (re)development. Dr Elisabeth Claudia Grindel-Denby suggested that a good opportunity for the providers would be to market very short pre-masters courses. These would be designed to compete directly with European Masters degree currently taking two years to complete on the continent in accordance with the European Qualification Framework. The second opportunity related to postgraduate courses was flagged up by the Delphi panel. It was the possible validation by universities of a new level 6 award (i.e. Advanced Diploma) as a pathway into their Post-Graduate programmes as this would effectively be a new product for pathways providers to offer in partnership with their university partners. The two combined - a shorter premaster's course – and a level 6 advanced diploma would offer some great opportunities for the sector.

Finally, Further Education (FE) was also looked at as a possible source of innovation or product reinvention for the sector. Two separate aspects of FE were considered in turn by the Delphi experts. First, the suggestion that pathways providers could be "expanding into FE and offering UK FE students with a more internationally focused curriculum" (Delphi, Round 2). The mixing of FE and pathways would not be new as Kaplan acquired Mander Portman Woodward (MPW) a sixth-form college with three sites in London, Birmingham and Cambridge, and until their recent closure Study Group was also running two similar colleges in Brighton and London under the brand 'Bellerbys'. What could bring something new is the FE colleges becoming degree-awarding institutions. The Delphi panel of expert felt this would lead to more potential partners and an increase in subjects being offered by pathways providers.

4.3.3.4 Expansion of the services offered to universities - an agile approach by pathways providers

Beyond tweaking their existing courses and current products, a second strategy emerged from the data. This was the creation of new services guided by the keenness of universities to raise revenue thanks to international students' fees. For the Delphi panel, pathways providers could become the main source of international students' recruitment for the higher education institutions thanks to closely aligned recruitment strategies (Delphi, Round 2). The panel also felt that in an environment of potential funding cuts and/or reduced fees guided by recommendations of the recent Augar review, pathways providers could simply replace international offices and offer university a cost-effective way of recruiting students (Delphi, Round 2).

For Pete Venables, Chris Hooper pathways providers could get involved in all aspect of the international student recruitment cycle. For Chris Hooper the key to success was to ensure that "these providers are not just pathway providers" anymore. A theme Pete Venables echoed in his interview; for him the aim is to "provide support to universities in as many ways as we possibly can in order to continue to add value and to have a place". His aim: "help universities solve their problems" (Pete Venables) and in particular "with their student journey internationally" (Ibid). But how did this vision translate in a university environment?

4.3.3.4.1 Leveraging their agents' network and other market intelligence

Pathways providers work with networks of hundreds of private educational agencies providing them with student recruitment leads. These agents act as subcontractors and in-country representatives counselling students on academic courses. All interviewees acknowledged their importance during their interviews. For Dr Elisabeth Claudia Grindel-Denby the importance of partnering with a pathways provider and their agents' network can be summarised as follows:

> *"buying into a huge agent network, which the university in itself would not be able to afford, so being able to market its own products and its own programs worldwide through the lens of a private public partnership" (Dr Elisabeth Claudia Grindel-Denby)*

However, beyond this recruitment and sales function, both Pete Venables and Chris Hooper agreed that Pathways providers could also provide universities with market intelligence thanks to their network of agents. Although universities had existing student recruitment networks, these tended to be much smaller than those of pathway providers. The networks of agents managed by pathways providers, also acted as sources of data reporting on students and market trends. By sharing market intelligence gathered thanks to their agents, pathways providers could help universities identify market trends they otherwise would not be able to notice. Pete Venables presented an illustration of this potential. He described instances where using such market intelligence, a pathways provider would be helping a university refining the name or content of a new degree being offered. Using their market knowledge and network, the pathways provider was able to provide feedback to the university on what degree name would "hit better" (Pete Venables) or degree contents would "land internationally" (Ibid) based on feedback from agents and their students. Although of his own admission, "the whole market insight piece [had not] been completely cracked yet" (Pete Venables) however it was something he felt was "a massive area that we could help our university partners" (Ibid).

4.3.3.4.2 Offering other specialised administrative functions

Beyond the recruitment of international students, Pete Venables pointed out in his interview that pathways providers could also help university process students' applications in a specialised administrative function. Something a company like Kaplan already did for some of its partners such the University of Birmingham and the University of Bristol where the students are taught by university academics, but the admissions process is managed by Kaplan.

With limited resources, and increasing numbers of applications the university stated on its website:

> *"to enable us to better support our applicants, we are partnered with Kaplan International Pathways to deliver our Admissions process. This partnership means that wherever in the world you are applying from, Kaplan staff will be on hand to help guide you through the application process, and help you to secure a place on one of our own foundation pathways. Kaplan has over 15 years of experience in helping students to study abroad on pathway courses, so you're in safe hands.* (University of Birmingham, 2023)

This service was in fact developing because of the recent exponential increase in applications being submitted by potential students and limited resources available to universities admissions team. This trend was also prompted by the recent explosion of ‘aggregator’ websites such as Adventus offering applicants all the functionalities of an online marketplace and a price comparison website for international education, and the chance to apply to multiple institutions at the click of a button (Adventus, 2023).

4.3.3.4.3 Expanding their footprint across the university

Finally, both Pete Venables and Chris Hooper felt that this support would not stop at supporting ‘back office’ type administrative services. They both believed it would expand into the student facing teaching and learning spheres with pathways providers expanding their current footprint across the university.

Pete Venables explained how pathways providers had develop extensive know-how around international student academic support which could quite easily be expended. It could be extended to academic support for international students directly entering their university courses. Alternatively, he did not exclude the idea of providing academic support to non-international students. He explained that UK students could quite easily benefit from the specialised support a pathways provider would offer.

For Chris Hooper, other add-on student facing services being currently offered by pathways providers to their students such careers and employability programmes could run for three years as a bolt on offer running alongside degree modules.

4.3.4 Conclusion of theme C – Charting the futures of the UK pathways sector

This section identified a range of external and internal factors which emerged from the data, and for which providers had a varied degree of control over. Whilst external socio-economic, political and technological factors were out of the providers’ reach, internal factors related to expansion strategy, competition and product design were much more influenceable.

The data also suggested that there was a need for a shift to take place in the sector. away from being in a vulnerable position of - as Andy Quin put it – being “the widget that helps […] those lesser qualified students, to get a place at the universities they want to go to”.

Instead, as they enter the 4th industrial revolution, the data suggested that the key to success for pathways providers was to adopt a strategy mixing the leveraging of their biggest assets – large networks of agents – and the adoption of an agile approach to change, and a strategy of diversified service provision.

5 Discussion

In addition to addressing the three primary research questions derived from the literature, this study prompts three broader discussions. The first discussion involves scrutinizing and further developing Stephen Ball's theoretical framework employed in this study. The second discussion aims to assess how far UK universities have progressed along the privatization spectrum presented by Ball and to identify potential future stages of development for the sector. The final discussion presents a scenario-based analysis inspired by the 'Futures' literature, the research data, and the application of Ball's model in the higher education context, particularly insights from interviews with pathways experts. This discussion challenges the views of Shattock (2008, 2012) and Kogan & Hanney (2000) regarding the university sector's primary governance by public policy and argues for a likely return to university autonomy, supported by the data collected.

5.1 Critique of Stephen Ball’s model

5.1.1 Introduction

Ball's book 'Education Plc - Understanding private sector involvement in public sector education' (2007) utilises a framework established by Hatcher (1999) during his critique of the late 1990s Labour policy which allowed businesses to invest in Education Action Zones (EAZs). These zones served as "test-beds for future developments in education" and attracted investments from international companies, including notable information technology groups, with the aim of selling products, assuming management control, or driving technological solutions to change teaching and learning.

Ball labels these private sector interventions as endogenous and exogenous privatisation of education, providing a convenient definition and framework for the present research. Although Ball and Hatcher focused on UK schools, their research and theoretical framework can be applied to the privatisation phenomenon observed in higher education, which this research examines.

Since the New Labour government came into power in 1997 and introduced academies, exogenous privatisation, which involves outsourcing education services to private companies, has become more prevalent. This trend has continued to this day. Examples of exogenous privatisation include the setting up of academies and more recently academic chains, the building and maintaining of school buildings through Private Finance Initiative (PFI) or running examination systems and rolling out programmes.

The model's primary advantage is its structured approach to systematically reviewing the now-blurred boundary between public and private. Endogenous privatisation refers to changes in the behaviour of public sector organisations, whereby they operate as businesses with regard to clients, employees, and interactions with other public sector organisations. In contrast, exogenous privatisation involves private firms entering education to directly assume responsibilities, services or programmes.

My research adheres to Stephen Ball's theoretical framework, with private pathway colleges illustrating exogenous privatisation in action, and senior university leaders clearly demonstrating that neoliberal ideologies are endogenously permeating British public universities.

During my research, I identified two potential refinements to Ball's model, indicating how the concept of privatisation has evolved since 2007. The first relates to a need to reassess the position of universities on Ball's marketisation continuum, while the second proposes an extension to Ball's existing framework.

5.1.2 Reassessment of the universities' location on Ball's continuum of marketisation.

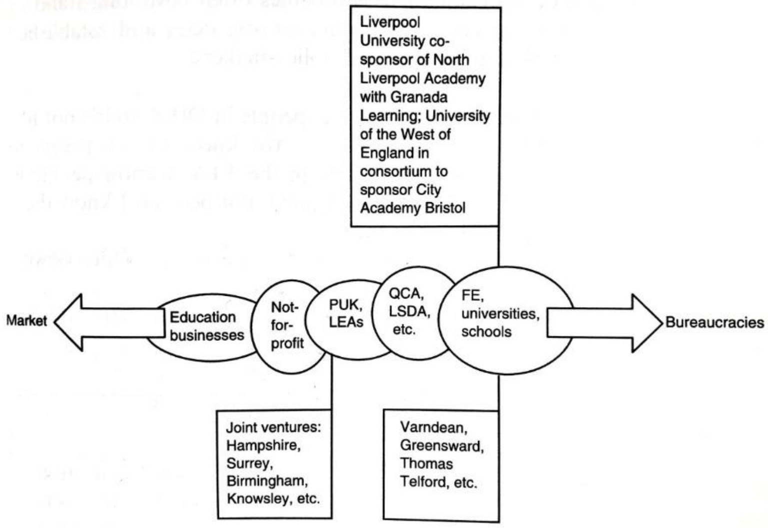

Figure 4.1 A continuum of marketisation.

Figure 20. Ball's Continuum of Marketisation

Ball (2007: 102) suggests about this continuum that it is an attempt at representing that far from being "binary […] market and bureaucracy can be rethought as a continuum and that different organisations can be positioned differently along it."

Whilst I appreciate Ball's comment that he made about his representation of 'The education services industry – a model' about representations of model quoting "Kay (2004:11) 'a good model is like a biblical parable and like parables, is neither true nor false, only illuminating or unilluminating'.

Although in his own design he included an element of flexibility, stating that "nonetheless, in some cases this positioning is unstable. The organisations are sometimes more market-like and sometimes less."

I believe my research establishes that the UK Universities are much more market orientated than Ball's continuum would suggest. Listing universities one step removed from "bureaucracies" and as far as the continuum allows from the "market" appears inconsistent with the results of the research clearly showing that universities are very much engaged in market-based activities, engaged with private contractors, and also involved in joint ventures (pathway colleges)

The revised continuum resulting from this rebalancing of the assessment of the University positioning would be as follows:

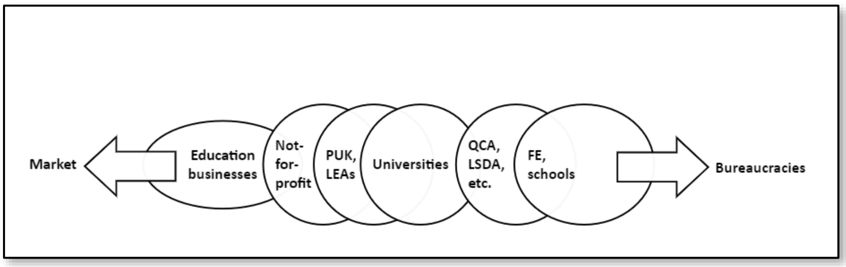

Figure 21. A revised continuum of marketisation

In this revised version of the continuum, universities are located between 'PUK, LEAs' and 'QCA, LSDA' as they appear to share characteristics from both groups.

In Ball's model Partnerships UK (PUK) and Local Education Authorities (LEAs), describe a series of joint ventures between public institutions (i.e. the Treasury and local councils) and private companies. In the example of PUK, it "also shares risks by investing its own capital in projects" (PUK website in Ball, 2007, p. 81). This is a very similar set up to pathways colleges which – as previously presented – are joint ventures with private capitals invested and therefore at risks.

On the other side of the Universities can be found the Qualifications and Curriculum Authority (QCA) and the Learning and Skills Development Agency (LSDA). They are described by Ball as "part of the time acting as businesses and competing for contracts or deriving income from other sources either working alone or in partnerships or joint ventures with private providers on which in many cases they rely heavily". This is a direct parallel with the universities approach to having diversified income sources, including research funding, Knowledge Transfer Partnerships, and pathways partnerships where they rely heavily on private providers to recruit international students.

5.1.3 Static and dynamic views - Ball’s model revised.

The second area of Ball’s framework which needs to be considered is the static description of his proposed model contrasting with the dynamic nature of the private sector.

Ball's nomenclature offers a relatively straightforward classification of organisations and partnerships by type. Although he acknowledges that this classification is not perfect, his nuance is motivated by the observation that some companies or partnerships do not fit precisely into his descriptions. If one were to view these categories as labelled boxes, Ball acknowledges that some organisations may not fit exactly into the neat boxes he provides. As the nature and characteristics of organisations and partnerships evolve over time, Ball acknowledges that some may need to be reclassified and moved from one box to another. However, this highlights a limitation of Ball's model, which appears to focus on a mostly static model based on series of snapshots and successive classifications, rather than focusing on the fluidity and the dynamic nature of these entities. Based on the nine components outlined in Balls' model (Ball and Youdell, 2008), the representation of the classification could take the form of separate boxes, under which organisations matching the relevant description of their level of privatisation at a specific point in time can be ordered. A possible depiction of Ball’s classification might be as follows:

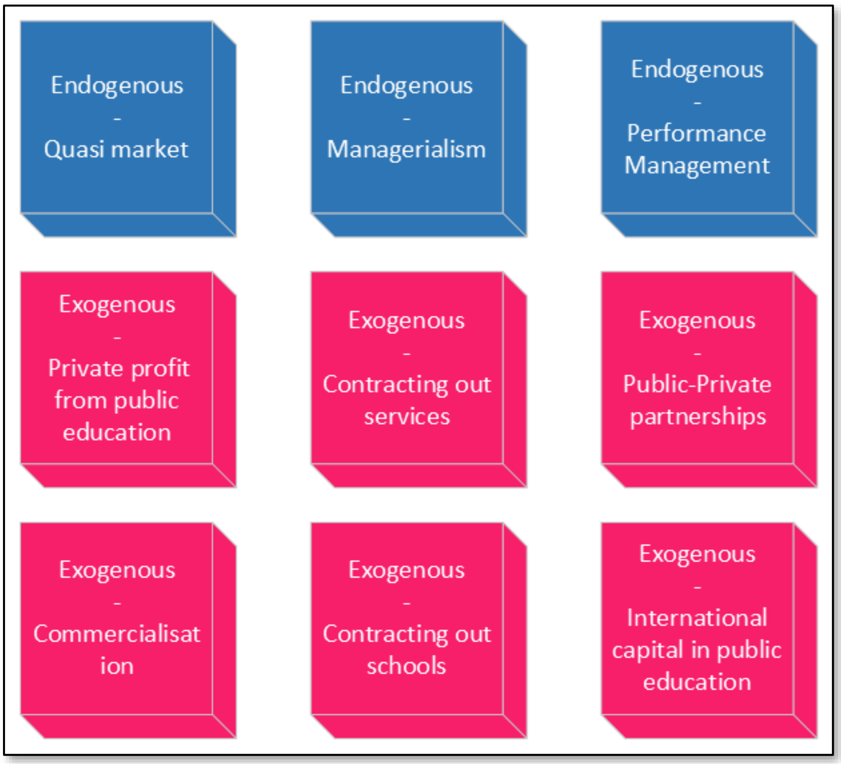

Figure 22. A representation of Ball's privatisation model

The findings of this research indicate that the process of privatisation in universities follows a distinct path and is much more dynamic than what is suggested by Ball's framework. Therefore, the emphasis should not solely be on the categorisation of partnerships between organisations as depicted by Ball. Instead, the focus should be on the continuously evolving nature of organisations' involvement in privatisation. Rather than viewing organisations and partnerships as fitting in neatly labelled static compartments, they should be considered as entities evolving along the various stages of a continuum of varying level of privatisation. In this revised perspective on Ball's model of privatisation, organisations are increasing or reducing their level of privatisation along the continuum.

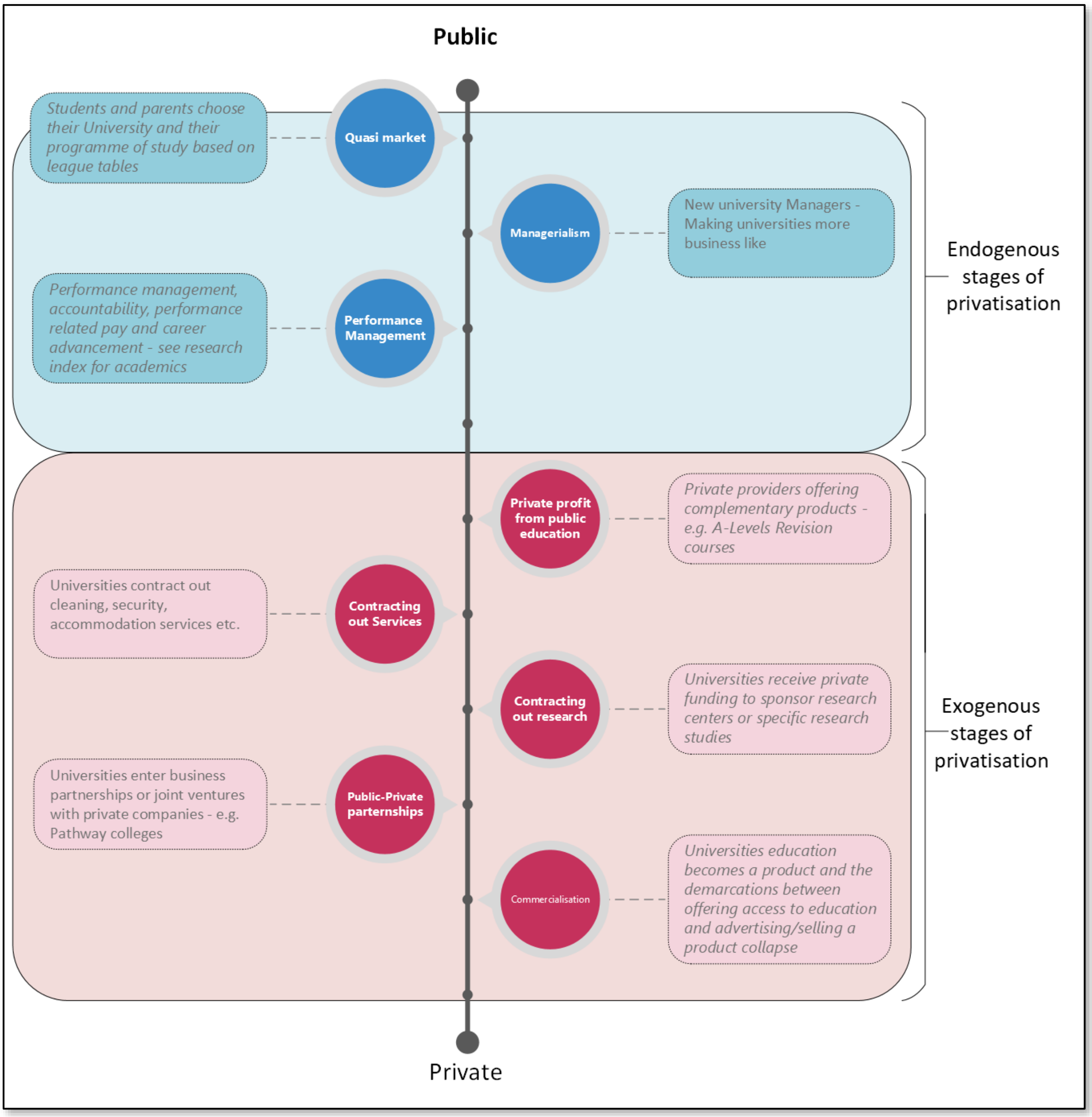

Figure 23. Proposed revision of Ball's privatisation model

In the revised model, organisations have the flexibility to begin their journey towards privatisation at various points along the continuum. However, it is important to note that the earlier stages of privatisation should not be overlooked, as each step serves as a foundation for the next. On the continuum presented, this natural dynamic from a more public to a more private stage of progression, also means that endogenous and exogenous forms of privatisation are interconnected and can coexist. In fact, in state education systems that are already well-established, exogenous privatisation is "often made possible by prior endogenous forms" (Ball and Youdell, 2008, p. 15).

Specifically, when private methods are introduced into public education, it transforms the system in a way that allows for more extensive privatisation and involvement of private sector providers. Furthermore, the utilisation of the private sector to introduce new education services also introduces endogenous privatisation measures to those systems simultaneously.

Failing to consider the impact of these earlier stages could result in tensions or resistance to change, as was observed during the research. For example, when universities entered partnerships with private pathway providers without adequately preparing their organisation, they faced internal resistance from trade union representatives, academics, and middle managers. This may be because gradual, incremental changes are typically easier to adapt to and implement than sudden and significant alterations to an organisation.

Although the revised model's continuum allows organisations to enter at various points, their progress can also be altered at any stage. Once an organisation reaches an equilibrium in terms of the type or quantity of services privatised, its progress can halt. There is no obligation for an organisation to pursue the entire privatisation journey along the continuum. An organisation may in fact stop progressing for two main reasons. Firstly, if it faces strong external resistance, in which case the decision to stop is imposed on the organisation by external forces. These could be described as exogenous forces and include factors such a governmental decisions or trade union campaigns. Alternatively, progress on the continuum can be halted by a university choice, if further progression would misalign with the organisation's strategy. In that case, these internal forces could be described as endogenous. Finally, in theory, an organisation could also move backward along the continuum by reverting privatised services back to public ownership and in such case, it may be the result of either endogenous or exogenous forces or both combined.

Although it cannot be completely ruled out, it is highly unlikely that the progression can be stopped or reversed. This is primarily because the observed trend is often towards increased privatisation rather than decreased. Additionally, if the various steps in the process have been followed, the organisation's structure and processes would have undergone fundamental changes due to endogenous and exogenous factors. It is improbable to suddenly revert such deeply ingrained changes in an organisation's thinking and practices.

5.2 Proposed new model applied to UK Universities

The following paragraphs endeavour to apply Ball's updated model presented in the previous section, to the UK university sector. The objective is to evaluate the extent to which UK universities have advanced along the privatisation continuum and determine the potential upcoming stages of progress for the sector.

5.2.1 Privatisation in higher education or 'endogenous' privatisation of higher education

In a quasi-market fashion, students have long chosen their university and course based on published marketing materials and previous users' reviews reflected by the National Student Survey. They are also now routinely using various league tables and data driven comparison tools to inform their decision in a 'quasi market' like approach.

New managerialism is a well-documented concept in the field of education research, as well as in the literature review chapter of this study (Clarke and Newman, 1993; Deem, 1998; Gordon and Whitchurch, 2009; Shepherd, 2017). It refers to a set of policies and practices that prioritise efficiency, accountability, and market-oriented solutions in the administration of public institutions. This approach is characterised by an emphasis on metrics, targets, and performance indicators, as well as an augmented reliance on external consultants and the use of business terminology and models. It first emerged in the 1980s and 1990s across numerous domains of public life, including education, and has since been widely adopted throughout the higher education sector.

Earlier in this chapter the widely used league tables were described as a tool used by potential students and their parents, to compare and contrast universities (Guardian, 2017; The Times Higher Education, 2017). These can also be looked at as performance measurement tools used by university managers to evidence performance and as target to work towards.

Beyond those quantitative measures of university performance, there has been a growing expectation on university researchers to measure qualitatively the research they produce. By ensuring that their work has "impact" and meets the requirements of the Research Excellence Framework research deemed "Ref-able" has become currency in universities. Likened to a performance-related pay assessment it has become a contributing factor to secure employment contracts, or promotions for academic staff. This point is developed later.

'Performance management' concludes the endogenous stage of the continuum evidencing that the UK HE sector has now moved on to exogenous forms of privatisation.

5.2.2 Privatisation of higher education or 'exogenous' privatisation of higher education

Private providers are not a new feature of in the university environment. As documented by the data collected, universities have already started to outsource various areas of activities they would have previously run directly. Services such as cleaning, maintenance, security, or accommodations are now routinely run by private companies contracted by universities. These private organisations are therefore profiting from public education.

Universities receive private funding to sponsor research centres or specific research studies. They advertise on their website to attract private research (Cranfield University, 2023) , actively encourage private funding options to their research community and facilitate the process through "faculty-based contract negotiators" (Imperial College London, 2023) . Aware of league table rankings and the reputational impact of research, universities use it as a recruitment tool. As a result, universities may engage in "REF poaching"; a headhunting exercise of academic staff with established "REF-able" research records. In a Premier League football team-like manner, such last-minute transfers can be done immediately before a REF assessment and provides the receiving institution with full credit for their publications at low cost and low risk. Although not all research in UK universities is privately funded, large portions of sciences, technology, and engineering research, already works very closely with the private sector.

As previously discussed, universities have three main functions: teaching, research and a third missions defined by Shattock (2005) as a university commercial activities and local cooperation with industry partners. As just highlighted, research is already closely linked to industry through privately funded research centres, access to private funding, and staffing strategies. The next significant development to consider is therefore the outsourcing of teaching activities. By collaborating with private pathway providers, universities delegate a crucial function that was never outsourced before - teaching. While one may argue that teaching in pathway colleges is limited to specific courses, for specific students, this research indicates that the scope of these agreements is expanding beyond current boundaries, with other types of students, courses, and services being explored. This signifies that UK universities have begun to leverage private resources to deliver their two core functions: teaching and research.

The research highlights that universities with a neoliberal inclination typically progress to the next stage of the curriculum by establishing business partnerships or collaborating on joint ventures with private enterprises, such as Pathway colleges. As sector the UK higher education has paused its progress at the current stage of the privatisation continuum, and several indications suggest that the sector is likely to move towards the final stage of the continuum: commercialisation. If this trajectory persists, education may become a product, which would blur the line between providing educational access and marketing or selling an educational product. As universities continue to privatise and push boundaries, the next pertinent question to consider is what their next step will be. The following section outlines some of the early indications or building blocks for this final stage.

5.3 Where next? Commercialisation

To gain a more comprehensive understanding of the potential path towards "Commercialisation" for the university sector, it is essential to consider four factors I identified as essential to their future business model: the universities' future relations with their regulator, their brand name as "universities", their unique selling point of degree awarding institutions and their future income generation model.

In this section, the scenario presented is based on data collected during the research, particularly insights gathered from interviews with pathways experts. Some readers might find the following paragraphs challenging as they diverge from the viewpoint advocated by Shattock (2008, 2012) and Kogan & Hanney (2000), who posit that the university sector is primarily governed by public policy concerning its relationship with the regulator and funding. However, I argue in the subsequent paragraphs that deviating from the current vision of UK higher education governance could benefit university autonomy and depart from the governance structure described by Shattock et al. This contention is shaped by the data collected from a specific cohort of participants I interviewed, all possessing extensive experience in the pathways sector and thus offering a distinct perspective. It is further supported by my utilisation of Ball's model in the higher education context, the significant criticism faced by the Office for Students (OfS) since its establishment, and universities questioning the unchanged funding model introduced previously, which has been eroded by inflation.

5.3.1 Future relations with the universities' regulator

Established in 2018 by merging Higher Education Funding Council for England (HEFCE) and the Office for Fair Access (OFFA), the Office for Students' (OfS) purpose is to provide light-touch regulation for higher education institutions and protect students' interests. It is today the main regulator for universities.

However, since its inception, the OfS has faced severe criticism. Trade unions have deemed the funding model it supports unsustainable, and a research report commissioned by the OfS reveals that its own members have expressed very negative feedback, citing excessive bureaucracy, unclear policies, and a lack of consultation with its membership.

In the last 12 months, additional tensions appeared as the Quality Assurance Agency (QAA), the Designated Quality Body (DQB) that universities respect and endorse, was required to relinquish its authority to the OfS, as an interim measure that is now expected to become permanent.

Universities seem reluctant to work with the OfS, and its regulations, which appear to be seen as a hindrance to their development. Could Universities consider their relationship with OfS as an obstacle to the next stage of their privatisation journey and reconsider their registration?

In a carefully managed decision, universities would need to consider the advantages and disadvantages linked to such decision. The following paragraphs offer a review of the three elements linked to the OfS registration which could be critical to consider in this decision: being a "university", their 'Degree awarding powers' and their funding.

5.3.2 The "university" brand

An essential aspect universities would need to consider if distancing themselves from OfS would be the possible impact on their brand, particularly the concept of being a "university". Is there a possibility that they may lose this status?

Traditionally, to be a "university", higher education institutions would first have been "granted the right to use 'university' in [their] name by an Act of Parliament" or by "virtue of having a Royal Charter" (Office for Students, 2023a). Starting from April 2019, the OfS has taken over from the Privy Council as one of only two methods to confer university status. Interestingly the second method still falls under the Companies Act 2006.

It seems that if an institution has been authorised to use the 'university' label, there is no requirement for it to register with OfS in the future. While OfS seems to have authority over designating which organisations may use this title in the future, there does not seem to be any apparent consequence on a university's branding if they were to dissociate themselves from OfS.

5.3.3 The university’s unique selling point: Degree awarding powers

To be authorised to confer their own degrees, universities or other organisations must have been granted "degree awarding powers." Importantly for this scenario, the OfS regulations state that “a provider that currently has these powers does not need to apply to the OfS to retain them. But they must be registered with the OfS”. Additionally, there is no specific status they need to register under.

It would therefore appear that a university that already has the authority to award degrees may be able to maintain that authority even if it is no longer registered under its current status, but instead registered under a less rigorous status. As some statuses are linked to the level of fees universities can charge, the university funding model must now be explored.

5.3.4 Private funding

Even though universities are unlikely to completely abandon the OfS at this point due to the need to maintain some existing benefits such as retaining degree awarding powers, or the UKVI Licence they require to enrol international students, some institutions may opt to downgrade their registration status, and gradually separate from the OfS. One final challenge they would need to consider is the impact of such decision on their funding.

Currently, for students to be eligible for funding through Student Finance, a university must be registered with the OfS. In exchange a university is limited in the amount of fees they can charge for their courses with the current maximum for home students (including EU students) set at £9,250. However, should an HE institution move away from OfS or change its registration status, it would lose access to Students finance for their students.

One possible solution would be for the private banking system to step in and offer loans to students. As an additional result of this decision, Universities could also set their tuition fees to a level they feel appropriate without any interference from the OfS.

There is no provision in place in the current HE sector to stop this from happening and - in fact – although for a domestic undergraduate student receiving funding through Student Finance is probably the norm, this is not the case for international students who have to find alternative ways of financing their studies. In this scenario a university could establish a partnership with a preferred bank offering low interest rates to their students.

The German and French higher education models demonstrated that banks could offer low-interest rates loans for students to pay their tuitions fees. In France students looking for higher employment rates and better salaries already turn to fee paying private school delivering business, design or engineering courses. In this model, banks recognise the value of a reputable institution and the limited non-repayment risk. The students are also willing to pay the price of the course plus interest, for the chance to gain a degree from a reputable organisation offering good academic knowledge and professional preparation. With students more focused on employability, and future private gains linked to their job prospects, education becomes an investment expected to produce a return in the form of a future well-paid job.

In this scenario the current link between OfS registration and access to the Student Finance system becomes obsolete. Students have the option to obtain loans to finance their degrees, and universities can ensure their revenue. Additionally, universities may be able to benefit from the system by having unrestricted control over setting their fees.

5.3.5 Conclusion:

What this brief scenario intends to demonstrate is that under the current circumstances a UK university could fairly easily push further the boundaries of privatisation. By changing its OfS registration to a less restrictive status, and through a carefully negotiated financial partnership a university could move one step closer to the ‘commercialisation’ stage of the continuum without losing its branding and its unique selling point – its degrees. Financially, this operation could also be lucrative due as a result of the possible increase in tuition fees revenue gained from a removal of the current cap.

5.4 Conclusion for this chapter

Throughout my research, I have employed Ball's privatisation model as a theoretical framework. I identified two potential updates to Ball's model reflecting how the concept of privatisation has – I believe - evolved since 2007.

Informed by the findings of my research I would suggest that the position of universities on Ball's marketisation continuum requires to be re-evaluated, reflecting a shift towards the market end of the scale.

The second revision of the model I would advocate for is the addition of a dynamic dimension to a model previously appearing mostly focused on a static classification of public private partnerships. Based on my research of the pathway colleges and their relationship with universities, I strongly believe that Ball’s model retains its validity by identifying the various types of partnerships organisation can engage in. However, I believe that by focusing on providing a series of snapshots, Ball’s model missed out on the essential dynamic and constantly changing aspect of the privatisation. I therefore suggest that an additional dimension - a dynamic continuum - should be added to the model by focusing on how organisations shift and evolve from one type of interaction to an other.

To test my proposed privatisation continuum model I applied it to the higher education sector in the UK. What emerged is the key role pathway colleges played in this privatisation continuum. Not only do they illustrate a new type of partnership, but they are also the first evidence of the privatisation of teaching on UK campuses. As a core university activity, teaching was never privatised before in UK higher education.

The dynamic continuum also allows to anticipate the next possible steps and to scan the environment for its indicators; In the context of universities, commercialisation would be the next step. Although no UK university has yet taken the final step towards complete privatisation, this research identified that several elements from the environment would allow this to happen if universities where that way inclined.

Should this change go ahead, it would constitute a major shift in the UK university landscape and a departure from Shattock's (2008) emphasis on public policy governance and funding models in the university sector. It would cement the view of universities as having moved away from a public mission of knowledge production, transmission and dissemination of education and knowledge for the common good, to a university serving private interests and personal gain.

6 Conclusion

6.1 Restatement of the research problem

This study aimed to explore the unchartered area of education research associated with UK Pathway Colleges. Unchartered because there was no academic literature focused on private higher education provider operating as privately owned, for-profit, international colleges located on UK university campuses. There was no definition for these colleges, no known mapping and history of this sector, and no analysis of the academic or business relations existing between these private international colleges and their partner universities. The possible futures of these colleges were also an unknown. Far from lacking significance, the “stealthy” and “under the radar” (Matthews, 2014a) creation of pathway colleges was surprising because other public service privatisations, such as UK schools and the NHS, have received more attention in academic research and the mainstream media. The emergence of private international colleges within UK universities has been redefining the public university's core function of teaching, and yet this phenomenon has been occurring without much public or academic attention.

In the absence of literature on UK pathway colleges, this research was situated at the intersection of four main themes: the evolution of UK higher education, the public-private debate surrounding UK universities, the internationalisation of UK higher education, and ‘education futures’.

While pathway colleges are a recent development, they were situated within a broader history of changes and adaptations in higher education. The literature review examined major transformations that higher education has undergone and how it had responded to change in the past. The main focus of the review was on the public-private debate concerning UK universities, using Stephen Ball's model of privatisation in education to analyse the current state of privatisation in UK higher education. The review also explored the role of pathway colleges in the internationalisation of higher education and their impact on the sector. Lastly, an exploration of the fields of futures studies and ‘education futures’, helped frame a reflection on the possible futures of the pathway colleges.

6.2 Restatement of the aims of the study.

This research aimed to fill a knowledge gap about the UK pathways sector by addressing a series of research questions. The questions were developed from literature on the four debates associated with the field. The research was divided into three parts, focusing chronologically on defining and mapping the pathways sector, understanding the university-pathway provider partnership, and charting the future of the pathways sector in relation to the wider British higher education system.

The first part of the research aimed to provide a detailed definition and mapping of the pathways sector. Using a Delphi Method including a panel of experts and feedback gathered during interviews, the research aimed to define what the UK pathways sector is, map its early development, and provide an overview of its present size, courses offered, and regulatory framework. The second part focused on understanding the university-pathway providers' partnerships using Ball's model of privatisation (Ball, 2007), and how they manage their relationships. The third and final part aimed to chart the futures of the pathways sector, identifying external forces likely to impact the sector and internal changes pathway providers should be mindful of.

The research aimed to answer eight research questions, with three focused on defining and mapping the pathways sector, three on understanding the university-pathway provider partnership, and two on charting the futures of the UK pathways sector.

6.3 Summary of key research findings – Answers to the research questions and contribution to knowledge

6.3.1 Summary of key research findings in relation to the research questions

A - Defining and mapping the UK pathways sector

A.1 – How do UK pathways experts define their sector?

The research established the first definition of the business model of the UK pathways colleges.

The pathways sector, is defined as “an industry of private for-profit providers, engaged in the recruitment and preparation of international students for UK universities studies, through both academic and extra-curricular activities delivered on a university campus.”

Furthermore, the study identified, that “upon successful completion of their programmes of study which may require some students to comply with particular immigration requirements, and achieve particular overall scores or meet specific module or English Language requirements, the Pathway providers offer international students a guaranteed university place and access to their HE partners.”

Finally, although the default model is for pathways colleges to facilitate access to a specific partner university, “students sometimes elect to progress to another HE institution as there is broad acceptance of qualifications which mixes study skills, academic foundation (e.g. Business, Sciences, Art and Humanities) and English competence. Without pathway courses most of these students would not be eligible for direct enrolment at the partner universities.”

A.2 – What were the key events leading up to the creation of the pathways sector and then contributing to the development of the sector?

A series of significant events paving the way for the emergence and subsequent growth of the pathways sector were identified. In the UK, the sector initially originated as a modest cottage industry during the 1990s. However, its evolution gained momentum when a new business model developed by the company Navitas in Australia was introduced to the UK in 2003. As the sector developed, it naturally adopted its name as ‘Pathways’, thanks to its early adoption by Kaplan International Colleges, now Kaplan International Pathways. Following this, the sector experienced a phase of rapid expansion, led by a group of five companies - the "Big 5"- which lasted approximately a decade. This initial period described as a ‘landgrab’ can be described as a competitive race to establish a foothold. Subsequently, the sector entered a more mature phase characterised by steady growth. Despite pathway sector providers implementing a more strategic portfolio-based approach to their partnerships with UK universities, they faced significant challenges due to changes in the immigration and quality assurance framework, initiated by the UK Government and recognised by industry experts.

A.3 – What are the key components of the pathways' market?

The key components of the pathways market identified by this study, included an estimation of the market size, the number of private providers involved, their relative market share, and finally an overview of the courses being sold to prospective students.

Despite having their accounts published in the public domain, pathways providers do not appear to publish the number of students enrolled on their courses, or their number of partners. Furthermore, there appears to be a secretive approach to numbers across the sector because of the perceive commercial sensitivity linked to business results. Despite these challenges to estimate the relative size of each pathway provider, this study estimated – based on sector wide numbers- that the overall number of students recruited by pathways colleges has been increasing significantly. In 10 years, the number of students using a pathways provider to access a UK university doubled to achieve 25,000 in 2019-20. At the same time, the proportion of pathways students is increasing faster than the overall international student population in the UK with 6.1% of the 408 825 international students enrolled in UK higher education being pathways students. Finally, the overall number of partnerships between universities and pathways providers has been increasing and nearly doubled in the last 10 years, with 3 main providers – Study Group, Kaplan, and Navitas holding about two thirds of all partnerships. Two thirds of the UK universities are now also engaged in partnerships with pathways providers.

The courses - or products - offered by pathways providers, – range from short English courses to Pre-doctorate level. They generally offer more flexibility on entry dates than traditional university courses, and are sold at premium prices averaging £15,000 to £22,000 in annual fees. Finally, one key operational aspect of the Pathways sector business model was its lack of visibility to the untrained eye as the branding of these colleges was not always very transparent and obvious. Described as both ‘stealthy’ and flying ‘under the radar’ this white labelling strategy was explained by universities wanting to project their own exiting brands to parents and educational agents, whilst pathways providers can also use the universities’ name as a quality brand.

B - Understanding the university-pathway provider partnership

B.1 – How does the partnership get established?

The research outlined a staged process for establishing of a partnership between the pathways provider and a UK university. This process starts with a competitive and strategic tendering process, followed by the establishment of an on-campus college. Details of the operational set may vary from partnership to partnership. As the relationship is first established and then deepens tensions appeared. This research evidenced that both the pathways provider as an organisation and their students experienced prejudice from two separate university organisational layers. Despite clear understanding from pathways providers that they benefit from a trustworthy relationship with their partner, pre-existing tensions internal to the university surfaced. These came from a lack of trust between the various layers of the university structure which interviewees identified as an essential pre-requisite of a successful partnership. The tensions perceived by pathways providers as directed at them, were in fact only a reflection of the university own internal tensions on the purpose of HE and best way to deliver it.

B.2 – How is the academic relationship managed?

Despite evidence of having been through a deregulated beginnings in the 1990s, pathways providers have embraced the UK higher education systems to quality assure their colleges and courses as the sector developed.

Far from the accusations of lacking integrity and only being motivated by their private business interests, the Quality Assurance Agency expressed repeatedly its confidence in pathways providers academic standards. The QAA was also satisfied with the quality of learning opportunities being offered to pathways students and their preparation for university courses. In fact, there were evidence of very well-developed quality assurance processes specific to their partnership environment and integrating their university partners.

B.3 – How is the business relationship managed?

The analysis of the business relationship between pathways providers and universities presented a Pathways provider as limited companies with a complex holdings and subsidiaries model. Whilst some appear to be backed by businesses with educational interests, others are used as lucrative investments for pensions funds. This tension in the funding model of pathways providers, has revealed a variance in the level of stability they enjoyed as the result. Despite these tensions and possible instabilities in their governance structures when companies are sold for example, universities were shown to benefit heavily from setting up these partnerships.

Contrary to the perception from their university critics, the funding model of these private providers has had positive visible impact on UK universities campuses with some universities benefitting of their investment to create new buildings. Whether it is through international fees paying students they enrol, the share of the revenue they are sometimes entitled to, or the new buildings they get as a result of establishing pathways colleges, universities were shown to have a vested interest in the success of these colleges. This goes far beyond the academic success of its students, and can have long term repercussions on the wider university financial and international strategy.

C - Charting the futures of the UK pathways sector

C.1 – What are the external forces influencing the future of the pathways sector?

The pathways sector and its future were influenced by external forces encompassing a range of social, economic, political, and technological factors, both within the UK and in their target markets overseas. In the UK, socio-economic forces centred around Brexit and the country's overall appeal as an economically and politically favourable study destination. Outside of the UK, socio-economic factors that emerged as influential were tied to specific key markets. Notably, in China, the demographic decline and challenges faced by the emerging middle class due to the country's economic slowdown were identified as significant forces.

Additionally, the political and regulatory landscape surrounding pathways providers and their partner universities presented notable challenges, primarily associated with the rise of nationalism and anti-migration sentiments in the UK. The evolving regulatory framework within the reformed higher education system, led by the newly established Office for Students, and the ever-changing UKVI Immigration framework were also identified as important factors.

Finally, new technologies presented opportunities for pathways providers to enhance their offerings. These technologies were seen as complementary to traditional pathways courses, enabling the exploration of alternative methods for delivering existing courses or the development of entirely new products, deviating from the established pathways model.

C.2 – What are the key internal changes within the pathways sector impacting the future of the pathways sector?

The pathways sector's future was found to be impacted by key internal changes, all of which were associated with an adaptation of the strategies employed by current pathways providers.

Firstly, there was a recognition of the need to explore opportunities for expanding beyond the borders of the UK and transitioning from a UK-centric model to a transnational approach, aligning with recent shifts in the broader higher education sector. Additionally, adjusting the product offering by introducing shorter courses was also considered.

The second internal change identified in the data highlighted the necessity for the sector to move away from a vulnerable position as a mere accessory to higher education. Instead, the data indicated the importance of establishing pathways providers as partners with extensive market knowledge of international higher education markets. According to the data, the key to success for pathways providers lies in adopting a strategy that combines leveraging their significant assets, such as extensive networks of agents, with their market intelligence. Additionally, an agile approach to change and a diversification strategy for the services provided to universities were deemed crucial elements in navigating the evolving landscape. This shift would enable them to thrive in the context of the ongoing fourth industrial revolution.

6.3.2 Contribution to knowledge

Throughout my research, I have utilised Ball's privatisation model as a theoretical framework. I have identified two potential updates to Ball's model that reflect the evolving nature of privatisation in education since its publication in 2007. These updates contribute to our understanding of privatisation in higher education and its implications.

Based on the findings of my research, I propose that the position of universities on Ball's marketisation continuum needs to be reassessed to reflect a shift towards the market-oriented end of the scale. This revision highlights the changing dynamics of privatisation in the university context and adds to the knowledge regarding the evolving relationship between universities and the market.

Another modification I advocate for in Ball's model is the inclusion of a dynamic dimension, which expands its focus beyond a static classification of public-private partnerships. Through my investigation of pathway colleges and their association with universities, I firmly believe that Ball's model remains relevant in identifying various partnership types. However, by solely providing snapshots, the model overlooks the crucial dynamic and constantly evolving aspect of privatisation. Therefore, I suggest the addition of a dynamic continuum to the model, emphasising how organisations transition and evolve between different stages of privatisation over time.

To validate my proposed privatisation continuum model, I applied it to the higher education sector in the UK. The analysis revealed the significant role played by pathway colleges within this privatisation continuum. Not only do they exemplify a new form of partnership, but they also represent the first evidence of privatised teaching on UK campuses. This marks a notable departure from the previous absence of privatisation in teaching within UK higher education.

Furthermore, the dynamic continuum enables us to anticipate potential future developments and identify indicators within the environment. In the context of universities, the next possible step indicated by this continuum is one of commercialisation. While no UK university has fully embraced complete privatisation thus far, this research has identified several environmental factors that could facilitate such a transition if universities were inclined to do so.

If this change were to occur, it would signify a significant transformation in the UK university landscape. It would solidify the perception of universities as moving away from their public mission of knowledge production, transmission, and dissemination for the common good, towards a model that primarily serves private interests and personal gain.

These observations underscore the far-reaching implications of the emergence of pathways colleges in relation to the broader process of privatisation within the higher education sector.

6.4 Reflection on the research process

6.4.1 Being an inside researcher

Being an insider researcher came with both benefits and challenges to navigate. These should not be underestimated in any future research associated with pathway colleges. Although my employer supported my academic pursuit, and I made it clear that my research focused on the broader sector rather than any specific company, I found it difficult to navigate my dual identity as a senior manager in the pathways sector under study and an EdD student researcher. This undoubtedly affected the data collection phase of the study.

All three phases of data collection were impacted by this dual identity. First, the documentary analysis benefitted from having insider knowledge of where data could be found. This allowed for a better use of time and research resources. Then, despite the Delphi method offering by design complete anonymity to the panel of experts participating, a challenge associated with this dual identity might have been a lack of engagement from some participants. However, because of the anonymous nature of the Delphi design, there is no way of assessing accurately any possible impact on the level of participation or the content of their answers. Finally, where I believe this dual identity has most likely been impactful during the interviews phase of the research. As discussed in an earlier section of the research, approaching and recruiting participants working for business competitors to my company was challenging. It felt very unnatural and personally challenging for two reasons. First a fear of rejection probably shared with other new researchers; but most importantly the fear to negatively impact whatever professional reputation I may have built in the last twelve years working in the sector. Reflecting on the importance of "deciding on how to present oneself" (Denzin and Lincoln, 2003, p. 77) I opted for presenting myself and my study as the genuine research exercise that it was. The "presentational self [I] cast" (ibid) in the process was linked to genuine curiosity about the sector I had worked in for a while, but may not know as well as the research participants.

6.4.2 The methods used

The research design adopted included three main aims, eight research questions and three methods of data collection, each contributing to address all three aims and multiple research questions. This mixed method approach was therefore more complex in design, than other mono-method researches. As the research developed and its complexity emerged, an element of doubt arose in my mind as to the overall feasibility of the project. Aligned with the possible limitations listed by Bryman, I was concerned by a possible dilution of the research efforts "since resources [- mainly me-] would need to be spread" (Bryman, 2008, p. 624) across three separate methods of data collection.

Having considered the challenge associated with the choice of mixed method, I did not change the design of the research as this would have affected the congruence between the research questions generated by the literature and the pragmatic choice of the methods required to access the data required to answer these questions. One possible option could have been to refocus the overall research and reduce the number of aims and methods used. This solution was quickly put aside as the research would have lost the benefit of a mixed method strategy which is that the results generated by the various methods are “more than the sum of its parts” (Bryman, 2008, p. 624). It would not have allowed for the data generated by all three methods to interact and completement each other.

6.4.3 Limitations of the study

Finally, it is important to note that the study had limitations that must be considered. Although examples from other regions and countries such as Europe, America, and Australia were drawn upon, the research's primary focus and generalisations were solidly anchored in the UK context. Furthermore, the study did not cover two types of foundation years run by universities directly. Although references to them can be found, both the university foundation courses available to British students and the International Foundation Programmes (IFPs) run by UK universities on their campuses for the benefits of international students were beyond the boundaries of this research. Like pathways courses, these types of foundation years prepare students for undergraduate study by providing them with subject-specific knowledge and skills they need to succeed if they are not eligible for direct entry to an undergraduate course. However, traditionally, these types of foundation years have been run by the university usually through staff employed by the university.

6.5 Recommendation for future work on the topic

This research provides a very good overview of a previously undocumented education sector at the heart of several education debates centred on a core debate between public and private values. However, it remains an initial research and acknowledges that more detailed enquiries are now required in relation to each of the three research aims.

For example, whilst this research offered a good outline of the sector emergence, and purposefully took an approach at sector level, more work could be done on identifying in depth data for each of the large companies involved and their respective contributions. More research could be completed on the role played by key individuals, or internal company specific events on shaping the sector.

Having identified from QAA reports the various mechanisms supporting the business and academic partnerships between pathway colleges and their partner universities, several models appeared to be coexisting. With variations existing between the different providers, and also between partnerships within the same provider, there would be value in a follow-up research focusing exclusively on a comparison and an assessment of these models.

Finally, echoing the literature on 'education futures' and possibly using a scenario planning approach, work could be carried out on exploring the possible futures of the pathway colleges. Scenarios could be produced and refined in light of latest governmental and higher education sector policies as well as environmental trends.

Additionally, with the focus of the study having been on the pathways providers, the university partners working with them could be further explored. Approaching a selection of senior university leaders involved in the management of pathways partnerships could allow for an extension of this research in the more traditionally researched field of Higher Education governance.

In summary, each of the three research aims has the potential to be the topic of separate and more specialised studies, with the goal of contributing to the creation of a body of literature on pathways providers, and the university side of the pathways-university relationship could be developed.

6.6 Final thought

When I commenced this research, my initial perception of Pathway colleges was that they belonged to a sector that was closely associated with UK universities, yet remained somewhat distinct, and as such were very much ‘in the university world but not of it’. This assessment as being ‘stealth’ and ‘under the radar’ was confirmed by the overall lack of research literature directly related to pathways sector and the need to build a literature review on associated topics instead.

However, thanks to my proposed continuum based on Ball’s privatisation model, pathways colleges emerge as playing a much more significant role than I originally anticipated in the relation to the wider UK higher education sector. Their pioneering role in the privatisation of teaching on university campuses, mixed with their strategic place in the university internationalisation and income generation strategies, make them an integral part of the broarder evolution of UK higher education. Having reviewed the evidence gathered and upon completing this study, I have now come to realise that not only are Pathway colleges an integral part of the current British universities’ world, but they are also poised to become an integral part of the UK higher education’s future.

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Table of appendices

Appendix A - Delphi Questionnaire - Round 1

University of Nottingham
UK | CHINA | MALAYSIA

UK Pathway Colleges - Round 1

Page 1: Welcome to the Pathway Colleges Research

This project is part of a doctoral research in education I am conducting at The University of Nottingham. The purpose of the project is to better understand the chronological evolution of the UK Pathway Sector.

This phase of the research is based on the principles of the Delphi method of enquiry. It aims to better define the Pathway sector, to identify the future risk factors the sector needs to monitor, and to measure their likelyhood and impact on the industry.

Your participation will include the completion of 3 successive online questionnaires allowing you to share your expert opinion. This questionnaire is the first of three.

Your answers will be anonymised throughout the process and will be combined to fellow experts' responses between each round to inform the following set of questions. At the second and third rounds you will be asked to reflect on the summary of the answers collectively provided by the anonymous panel of experts.

Page 2: Consent form

Pathway Colleges Research - Agreement to Participate

Please complete this after reading the Participant Information sheet. Tick your responses below.

I understand the nature and purpose of this research. ✱ *Required*

○ Yes	○ No

I have been provided with, and I have read a copy of the project information sheet. ✱ *Required*

○ Yes	○ No

I have received enough information to make an informed decision about taking part. ✱ *Required*

○ Yes	○ No

I understand that I can decide to withdraw from this project up until submission of the thesis and that if I withdraw data associated with me would be destroyed. ✱ *Required*

○ Yes	○ No

Please record today's date ✱ *Required*

Dates need to be in the format 'DD/MM/YYYY', for example 27/03/1980.

(dd/mm/yyyy)

Your consent indicates that you have decided to take part in this project after considering the information provided.

For more information, you can contact Julien Boville (Principal Investigator), University of Nottingham School of Education, ttxjb48@nottingham.ac.uk or Professor Howard Stevenson (Supervisor) *Howard.Stevenson@nottingham.ac.uk*

You can also raise issues with the Research Ethics Committee, University of Nottingham School of Education educationresearchethics@nottingham.ac.uk

Page 3: Your role

I currently work for:

- ○ A pathway provider
- ○ A university working with a single pathway provider
- ○ A university working with more than 1 pathway provider
- ○ A university not working with any pathway provider
- ○ Other

If you selected Other, please specify:

Page 4: Definition of the Pathway sector

The Pathway Colleges business model could be defined as:

An industry of private for profit providers, engaged in the recruitment and preparation of international students for UK universities. The Pathway providers offer to international students access to their HE partners and a guaranteed university place upon succesful completion of their programmes of study. The pathway courses mix study skills, academic foundation and English competence. Without pathway courses these students would not be able to enrol at the partner universities.

Do you agree with this definition? * *Required*

- Yes
- No

If you disagree with this definition, please explain why below. *Optional*

Page 5: Defining events for the Pathway sector

Can you think of any specific event(s) past or present which you think were key turning points for the pathway sector (i.e. policy, government, market changes).

Please describe this/these event(s) and why you feel they were key for the sector.

Page 6: Opportunities for the Pathway Sector

Can you think of any opportunities for the Pathway sector? Please list as many as you can, with a short description of why you feel each would be an opportunity.

Of the opportunities you've just listed, which top 3 would you pick as having the most positive impact on the sector?

Page 7: Challenges for the Pathway Sector

Can you think of any challenges for the Pathway sector? Please list as many as you can with a short description of why you feel each would be a challenge.

Of the Challenges you've just listed, which top 3 would you pick as having the most negative impact on the sector?

Page 8: Recommendation

Would you like to recommend somebody who you feel should be part of this research because of their expertise in the Pathway sector? Please write their name, role and contact details below. *Optional*

Page 9: Code name

This page will allow you to choose a code name to be associated with your answers.

In the eventuality that you withdraw consent during the research, I am required to identify and delete all your data from the results.

As there is nothing in the format of the questionnaire allowing me to identify you, I have inserted this section to allow you to choose a code name.

In the eventuality that you withdraw your consent, I would ask you to disclose your code name to me. This would allow me to delete the data you provided.

This will be the only way of linking your answers back to you.

Please note that unless you decide to withdraw consent this code name should not be shared with me.

I would recommend you keep the same code name for all 3 questionnaires however, you may also choose one for each.

Choose a code name and please type it in the box below:

Page 10: Thank you

Thank you for taking the time to complete this first questionnaire. I understand the demands on senior leaders and I am extremely grateful for your support.

What's next?

After receptions of all responses, I will analyse the panel's answer and send the second round of questionnaires in April. The second round will be much shorter and will be mainly based on Likert scales and multiple choices answers.

As always, if you have any questions about this research, please don't hesitate to contact me (ttxjb48@nottingham.ac.uk) and if you have concerns or questions about this research you can also contact the School of Education Research Ethics Coordinator (educationresearchethics@nottingham.ac.uk) or my research supervisor Professor Howard Stevenson (Howard.Stevenson@nottingham.ac.uk).

Thank you again for your time.

Julien

Appendix B - Delphi Questionnaire - Round 2

UK Pathway Colleges - Round 2

Page 1: Welcome back to the Private Pathway Colleges Research

Thank you again very much for agreeing to participate in my 3 parts doctoral research on the UK Private Pathway Sector and for already volunteering your time.

Your contribution is really appreciated, and this second round will be much faster to complete than the first one you completed over the summer.

In this round you will be asked to reflect on the summary of the answers collectively provided by the anonymous panel during the first round you completed.

Page 2: Your role

I currently work for:

- A pathway provider
- A university working with a single pathway provider
- A university working with more than 1 pathway provider
- A university not working with any pathway provider
- Other

If you selected Other, please specify:

Page 3: Definition of the Private Pathway sector

The UK **Private** Pathway Colleges business model could be defined as:

An industry of private for-profit providers, engaged in the recruitment and preparation of international students for UK universities. The Pathway providers offer international students access to their HE partners and a guaranteed university place upon successful completion of their programmes of study. The pathway courses mix study skills, academic foundation (e.g. Business, Sciences, Art and Humanities) and English competence. Without pathway courses these students would not be eligible for direct enrolment at the partner universities.

Do you agree with this revised definition of the Private pathway sector? * *Required*

- Yes
- No

If you disagree with this revised definition, please explain why below. *Optional*

Page 4: Defining events for the Pathway sector

You will find below a timeline combining what the panel collectively identified as key turning points for the pathway sector (i.e. policy, government, market changes).

2004-5: The first pathway colleges in the UK allowing international students unable to complete a Year 13 in their home country to enrol on programmes aligned to RQF level 3 and later to RQF 4 and 6.

2009: The implementation of the Tier 4 Points Based System set in motion a chain of challenges for this relatively new and developing sector, the rigorous controls and restrictions had a major impact on the global market/agent network.

2010 (April): The Conservatives' Party manifesto includes a section on student immigration titled "Attract the brightest and best to our country" and suggests a reform of the student immigration rules.

2010 (May): Theresa May is Home Secretary.

2010: Immigration rules change with the introduction of processes around issuing CAS numbers, Highly Trusted Sponsor (HTS) and the introduction of Secure English Language Tests (SELTs) to evidence language proficiency.

2012: The move of the accreditation framework away from the British Accreditation Council (BAC) to the Quality Assurance Agency (QAA) and the creation of Education Oversight (ECREO) by QAA.

2012: The post study work is abolished.

2015: Site and Partnerships.

2016: Theresa May is the UK Prime Minister – Continuation of the hostile environment towards international students. International students still included in the net migration.

2017: The introduction of Teaching Excellence Framework (TEF) in HE institutions due to the possible impact of lower continuation/completion data of students on their TEF statistics.

2018 (January): The introduction of OfS and the ability for the Pathways sector to be able to register will mean pathways providers should be judged in the same way as mainstream HE institutions.

2018 (February): The Augar review could potentially impact on the delivery model for some pathway providers if foundation degrees are abolished and these have embedded English Language within them.

2019: Theresa May leaves and Boris Johnson replaces her.

Other non time-specific events also identified by the panel as key to the sector:

- The increasing numbers of in-country foundation/access programmes linked with or run by HE institutions.
- The increasing numbers of distance-learning programmes (usually at PG level).
- The relatively sudden increase in Undergraduate fees and its impact on the wider HE sector recruitment.
- The increasing numbers of pathway providers competing.
- The shift in economies meant that universities could no longer rely on Malaysia and India for their students (countries that traditionally students wouldn't need a foundation programme).
- The growth of China international students where students would need a foundation programme.
- The willingness of universities to work with a private provider.
- The China-US political tension possibly denting China-US student traffic.
- The substantial increase of Chinese students coming to the UK to study and the impact that this had on pre sessional / summer school English Language provision.

Do you agree with this timeline? * *Required*

- ◯ Yes
- ◯ No

If you disagree with this timeline, please explain why below. *Optional*

Within the results identified which 3 events would you pick as the 3 most significant/impactful for the sector? (Please feel free to copy and paste 3 items from the list above) * *Required*

Do you feel that any elements should be added or removed from this timeline?

Page 5: Opportunities for the Pathway Sector

Of the opportunities identified by the panel for the Pathway sector, please score **how likely** these events are to take place. Use the scale to score the level of likelihood from very unlikely '1' to very likely '10'.

	How likely? (1-unlikely; 10-very likely) * *Required*									
	1	2	3	4	5	6	7	8	9	10
Brexit: Expected growth in non-EU numbers to compensate for likely EU decline	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
UK pathway providers expanding into FE and offering UK FE students with a more internationally focused curriculum	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
UK pathway expanding beyond the UK borders thanks to Pathway programmes in anglophone countries	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Continued growth of the international student market offering more opportunities to recruit	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Expand product offering, increase product flexibility (delivery, location, timeframes, curriculum contents) and tailor it to changing market demand	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐

UK pathway expanding beyond the UK borders thanks to a rise of new markets (Africa or Asian nations)	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
UK pathway expanding beyond the UK borders thanks to the development of transnational pathway programmes with year in home country	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
UK pathway expanding beyond the UK borders thanks to HEIs satellite campuses in Europe.	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
University validating a level 6 award (i.e. Advanced Diploma) as a pathway into their Post-Graduate programmes	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
FE colleges becoming degree-awarding institutions would lead to more potential partners and an increase in subjects	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Pathway sector filling-up undersubscribed HEIs places	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Pathway providers with Student Accommodation are more attractive to HEIs limited in growth by lack of student accommodation	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐

Pathway providers becoming a main source of recruitment for the HEI thanks to a closely aligned recruitment strategy	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Technology based offering to enhance pre and/or post pathway programme	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
If the reduction of Undergraduate fees is passed on to international students, this would make the UK more competitive	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Universities keen to raise revenue thanks to international students' fees	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
HE funding cuts and/or reduced fees (Augar) could result in Pathway providers replacing HEIs' international offices which could then be cut as a result	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Freedom of pricing strategy and competitiveness for the pathway providers	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Working with international agents providing competitive commission structure	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Change of UK Prime Minister	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐

Of the opportunities identified by the panel, please score **how much impact** you expect each element to have on the Pathway sector. Use the scale to score the level of impact from no impact at all '1' to very high impact '10'.

	How much impact? (1-no impact; 10-high impact) * *Required*									
	1	2	3	4	5	6	7	8	9	10
Brexit: Expected growth in non-EU numbers to compensate for likely EU decline	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
UK pathway providers expanding into FE and offering UK FE students with a more internationally focused curriculum	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
UK pathway expanding beyond the UK borders thanks to Pathway programmes in anglophone countries	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Continued growth of the international student market offering more opportunities to recruit	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Expand product offering, increase product flexibility (delivery, location, timeframes, curriculum contents) and tailor it to changing market demand	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
UK pathway expanding beyond the UK borders thanks to a rise of new markets (Africa or Asian nations)	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐

UK pathway expanding beyond the UK borders thanks to the development of transnational pathway programmes with year in home country	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
UK pathway expanding beyond the UK borders thanks to HEIs satellite campuses in Europe.	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
University validating a level 6 award (i.e. Advanced Diploma) as a pathway into their Post-Graduate programmes	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
FE colleges becoming degree-awarding institutions would lead to more potential partners and an increase in subjects	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Pathway sector filling-up undersubscribed HEIs places	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Pathway providers with Student Accommodation are more attractive to HEIs limited in growth by lack of student accommodation	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Pathway providers becoming a main source of recruitment for the HEI thanks to a closely aligned recruitment strategy	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Technology based offering to enhance pre and/or post pathway programme	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐

If the reduction of Undergraduate fees is passed on to international students, this would make the UK more competitive	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Universities keen to raise revenue thanks to international students' fees	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
HE funding cuts and/or reduced fees (Augar) could result in Pathway providers replacing HEIs' international offices which could then be cut as a result	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Freedom of pricing strategy and competitiveness for the pathway providers	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Working with international agents providing competitive commission structure	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Change of UK Prime Minister	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐

Do you think that any opportunities have been missed out and should be added to this list? * *Required*

- ○ Yes
- ○ No

If you think opportunities have been missed out, please explain which ones below. *Optional*

Page 6: Challenges for the Pathway Sector

Of the challenges identified by the panel for the Pathway sector, please score **how likely** these events are to take place. Use the scale to score the level of likelihood from very unlikely '1' to very likely '10'.

	How likely? (1-unlikely; 10-very likely) * Required									
	1	2	3	4	5	6	7	8	9	10
Competition from other Anglophone countries										
Competition from the public sector wishing to deliver their own pathway courses										
Decline of youth demographic in parts of Asia (e.g. Taiwan HK, Japan) could reduce market size										
Slowdown in Chinese economic growth and loosening of 1 child policy means growth in middle classes could decline and the "wealth per child" will reduce										
Increasing competition of non-UK universities offering English language programmes and recruiting internationally										
Overseas campuses developed by UK HEIs in partnership with local HE providers										

Improvement of education standards from supply countries throughout world meaning students can study their pathway programme in their home country	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Competition from university partnerships and pathway programmes being established in non-anglophone countries	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Bad TEF grading is making overseas recruitment more difficult	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Lowering of HEIs entry requirements challenging the need for foundation courses	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Resistance to Pathway partnerships within HEIs (i.e. within departments and/or through Unions)	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Poor employability of students returning home after studying expensive UK degrees	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Increase competition and need for pathway providers to identify their USPs to stand out	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
The decline in the reputation of UK education despite costing more than many other locations	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
The strength of the pound	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐

The Augar review recommendations										
Potential for further increase of international fees due to pressure put on the UK HE sector funding by the Augar review										
commission based agencies cheapen the market and make it seem very commoditised										
Brexit's impact and its uncertainty										
Perceived hostile environment: Reputation of the UK for not being welcoming to International Students and recent reinforcement of this with Brexit										
Growth of nationalism and continued anti-immigration sentiment amongst voters										
Home Office rules and UK visa restrictions										
on-going uncertainty of UK government immigration policy										
The shifting external regulatory requirements e.g. UKVI, OfS										

Of the challenges identified by the panel, please score **how much impact** you expect each element to have on the Pathway sector. Use the scale to score the level of impact from no impact at all '1' to very high impact '10'.

	How much impact? (1-no impact; 10-high impact) * *Required*									
	1	2	3	4	5	6	7	8	9	10
Competition from other Anglophone countries	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Competition from the public sector wishing to deliver their own pathway courses	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Decline of youth demographic in parts of Asia (e.g. Taiwan HK, Japan) could reduce market size	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Slowdown in Chinese economic growth and loosening of 1 child policy means growth in middle classes could decline and the "wealth per child" will reduce	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Increasing competition of non-UK universities offering English language programmes and recruiting internationally	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Overseas campuses developed by UK HEIs in partnership with local HE providers	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Improvement of education standards from supply countries throughout world meaning students can study their pathway programme in their home country	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐

Competition from university partnerships and pathway programmes being established in non-anglophone countries	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Bad TEF grading is making overseas recruitment more difficult	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Lowering of HEIs entry requirements challenging the need for foundation courses	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Resistance to Pathway partnerships within HEIs (i.e. within departments and/or through Unions)	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Poor employability of students returning home after studying expensive UK degrees	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Increase competition and need for pathway providers to identify their USPs to stand out	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
The decline in the reputation of UK education despite costing more than many other locations	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
The strength of the pound	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
The Augar review recommendations	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Potential for further increase of international fees due to pressure put on the UK HE sector funding by the Augar review	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐

commission based agencies cheapen the market and make it seem very commoditised	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Brexit's impact and its uncertainty	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Perceived hostile environment: Reputation of the UK for not being welcoming to International Students and recent reinforcement of this with Brexit	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Growth of nationalism and continued anti-immigration sentiment amongst voters	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Home Office rules and UK visa restrictions	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
on-going uncertainty of UK government immigration policy	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
The shifting external regulatory requirements e.g. UKVI, OfS	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐

Do you think that any challenges have been missed out and should be added to this list?
✱ *Required*

○ Yes
○ No

If you think challenges have been missed out, please explain which ones below.

Optional

Page 7: Username

As in the first round, this page will allow you to choose a username to be associated with your answers.

In the eventuality that you withdraw consent during the research, I am required to identify and delete all your data from the results.

As there is nothing in the format of the questionnaire allowing me to identify you, I have inserted this section to allow you to choose a username.

In the eventuality that you withdraw your consent, I would ask you to disclose your username to me. This would allow me to delete the data you provided.

This will be the only way of linking your answers back to you during this research.

Please note that unless you decide to withdraw consent this username should not be shared with me.

I would recommend you keep the same username as in the first round of Delphi however, you may also choose a different one if you can't remember it.

Choose a username and please type it in the box below:

Page 8: Thank you

Thank you for taking the time to complete this second questionnaire. I understand the demands on senior leaders and I am extremely grateful for your support.

What's next?

After receptions of all responses, I will analyse the panel's answer one more time and send the third and final round of questionnaires in January 2020.

As always, if you have any questions about this research, please don't hesitate to contact me (ttxjb48@nottingham.ac.uk) and if you have concerns or questions about this research you can also contact the School of Education Research Ethics Coordinator (educationresearchethics@nottingham.ac.uk) or my research supervisor Professor Howard Stevenson (Howard.Stevenson@nottingham.ac.uk).

Thank you again for your time.

Julien

Appendix C - Delphi Questionnaire - Round 3

UK Pathway Colleges - Round 3

Page 1: Welcome back to the Private Pathway Colleges Research

Thank you again very much for agreeing to participate in my 3 parts doctoral research on the UK Private Pathway Sector and for already volunteering your time.

Your contribution is really appreciated, and this third and final round will be much faster to complete than the first two.

In this round you will be asked to reflect on the summary of the answers collectively provided by the anonymous panel during the first two rounds.

Page 2: Your role

I currently work for:

- ○ A pathway provider
- ○ A university working with a single pathway provider
- ○ A university working with more than 1 pathway provider
- ○ A university not working with any pathway provider
- ○ Other

If you selected Other, please specify:

Page 3: Definition of the Private Pathway sector

The UK **Private** Pathway Colleges business model could be defined as:

An industry of private for-profit providers, engaged in the recruitment and preparation of international students for UK universities. Upon successful completion of their programmes of study which may require some students to achieve particular overall scores or meet specific module or English Language requirements, the Pathway providers offer international students a guaranteed university place and access to their HE partners. Students sometimes elect to progress to another HE institution as there is broad acceptance of qualifications. The pathway courses mix study skills, academic foundation (e.g. Business, Sciences, Art and Humanities) and English competence. Without pathway courses most of these students would not be eligible for direct enrolment at the partner universities.

Do you agree with this revised definition of the Private pathway sector? * *Required*

- Yes
- No

If you disagree with this revised definition, please explain why below. *Optional*

Page 4: Defining events for the Pathway sector

You will find below a timeline combining what the panel collectively identified as key turning points for the pathway sector (i.e. policy, government, market changes).

Mid-90s: A number of pathway programmes start (Navitas 1996; Aspect **XXXX?).** They were often based in English Language Schools, FE Colleges and some were delivered by UK universities. The programmes sometimes validated or recognised by UK HEIs, provided university preparation/year 13 type courses.

2004-5: The first pathway colleges located on UK university campuses open establishing the embedded college model which allows international students unable to complete a Year 13 in their home country, to enrol on programmes aligned to RQF level 3. Later additional courses were added and aligned to RQF 4 and 6.

2009: The implementation of the Tier 4 Points Based System and CASs set in motion a chain of challenges for this relatively new and developing sector, the rigorous controls and restrictions had a major impact on the global market/agent network.

2010 (April): The Conservative Party manifesto includes a section on student immigration titled "Attract the brightest and best to our country" and suggests a reform of the student immigration rules.

2010 (May): Theresa May is Home Secretary.

2010: Immigration rules change with the introduction of Highly Trusted Sponsor (HTS) and the introduction of Secure English Language Tests (SELTs) to evidence language proficiency.

2012: The move of the accreditation framework away from the British Accreditation Council (BAC) to the Quality Assurance Agency (QAA) and the creation of Education Oversight (ECREO) by QAA.

2012: The post study work is abolished.

2012 (December): the UK Visa & Immigration (UKVI) introduced credibility interviews for those applicants applying for Tier 4 visas from overseas

2015: Site and Partnerships.

2015(September): student number controls were scrapped entirely in the UK HE sector by the UK government. Universities can recruit as they wish.

2015 (October): Theresa May (Home Secretary) addresses the Conservative Party conference. In her speech she claims that "too many [international students] are not returning home as soon as their visas run out". "I don't care what the university lobbyists say. The rules must be enforced. Students, yes; overstayers, no." she continued.

2016: Theresa May is the UK Prime Minister – Continuation of the hostile environment towards international students. International students still included in the net migration.

2017: The introduction of Teaching Excellence Framework (TEF) in HE institutions due to the possible impact of lower continuation/completion data of students on their TEF statistics.

2018 (January): The introduction of OfS and the ability for the Pathways sector to be able to register will mean pathways providers should be judged in the same way as mainstream HE institutions.

2018 (February): The Augar review could potentially impact on the delivery model for some pathway providers if foundation degrees are abolished and if these have embedded English Language within them.

2019 (July): Theresa May leaves office and Boris Johnson replaces her. The new Prime Minister and Home Secretary are seen as much more supportive of international students. There are indications that there is a readiness to dismantle Theresa May's immigration barriers to international students with the most significant example of this is being the re-introduction of a post study work visa for up to two years. These developments indicate that the UK is not isolationist but open for business and despite the confusion around Brexit does give a stronger message to the global market recruiting international students to the UK

2019 (September): Announcement that post study work rights were being re-introduced for international students who graduate from Summer 2021. Under the scheme, international students would be able to get a post study work visa for up to two years.

Other non time-specific events also identified by the panel as key to the sector:

- The increasing numbers of in-country foundation/access programmes linked with or run by HE institutions.
- The increasing numbers of distance-learning programmes (usually at PG level).
- The relatively sudden increase in Undergraduate fees and the cap in number of recruited students coming off allowed universities to recruit more international students than ever before and in turn impacted on foundation colleges.
- The increasing numbers of pathway providers competing.
- The shift in economies meant that universities could no longer rely on Malaysia and India for their students (countries that traditionally students wouldn't need a foundation programme).
- The growth of China international students where students would need a foundation programme.
- The willingness of universities to work with a private provider.
- The China-US political tension possibly denting China-US student traffic.
- The substantial increase of Chinese students coming to the UK to study and the impact that this had on pre sessional / summer school English Language provision.
- The decline in numbers of UG students as a result of birth rate, over past decade.

Do you agree with this timeline? * *Required*

- Yes
- No

If you disagree with this timeline, please explain why below. *Optional*

In the previous round, the panel members were asked to select three key milestones they felt were the most significant/impactful for the sector. The events with the most votes are listed below.

First (with the most votes)**:**

- 2012: The post study work is abolished

Equal second:

- 2009: The implementation of the Tier 4 Points Based System set in motion a chain of challenges for this relatively new and developing sector, the rigorous controls and restrictions had a major impact on the global market/agent network
- 2010: Immigration rules change with the introduction of processes around issuing CAS numbers, Highly Trusted Sponsor (HTS) and the introduction of Secure English Language Tests (SELTs) to evidence language proficiency.

Third:

- 2018 (January): The introduction of OfS and the ability for the Pathways sector to be able to register will mean pathways providers should be judged in the same way as mainstream HE institutions.

Do you agree with the panel selection? ✱ *Required*

- Yes
- No

If you disagree with the panel selection, please explain why below. *Optional*

Page 5: Opportunities for the Pathway Sector

Listed below are the opportunities originally identified by the panel and later scored by the group for both levels of impact and likelihood. These are now ranked from the highest too the lowest combined 'impact' x 'likelihood'. A high combined score highlights a very likely event having a high impact on the sector.

Please review the list, and comment below on the groups findings. Do you agree/disagree with the groups findings? if so why?

Rank	Criteria	Average score received for 'how likely'	Average score received for 'how impactful'	Opportunities: Likely x Impact
1	Expand product offering, increase product flexibility (delivery, location, timeframes, curriculum contents) and tailor it to changing market demand	8.43	8.00	67.43
2	Technology based offering to enhance pre and/or post pathway programme	7.71	7.86	60.61
3	Universities keen to raise revenue thanks to international students' fees	8.43	6.29	52.98
4	Pathway providers with Student Accommodation are more attractive to HEIs limited in growth by lack of student accommodation	7.29	7.14	52.04
5	UK pathway expanding beyond the UK borders thanks to Pathway programmes in anglophone countries	7.71	6.57	50.69
6	UK pathway expanding beyond the UK borders thanks to a rise of new markets (Africa or Asian nations)	7.71	6.57	50.69
7	UK pathway expanding beyond the UK borders thanks to the development of transnational pathway programmes with year in home country	7.29	6.86	49.96
8	Continued growth of the international student market offering more opportunities to recruit	6.71	7.29	48.92
9	Working with international agents providing competitive commission structure	7.43	6.43	47.76
10	If the reduction of Undergraduate fees is passed on to international students, this would make the UK more competitive	7.00	6.14	43.00
11	UK pathway expanding beyond the UK borders thanks to HEIs satellite campuses in Europe	5.86	7.14	41.84

12	Pathway providers becoming a main source of recruitment for the HEI thanks to a closely aligned recruitment strategy	6.00	6.86	41.14
13	Freedom of pricing strategy and competitiveness for the pathway providers	6.14	6.29	38.61
14	University validating a level 6 award (i.e. Advanced Diploma) as a pathway into their Post-Graduate programmes	6.43	5.71	36.73
15	Pathway sector filling-up undersubscribed HEIs places	5.43	6.29	34.12
16	HE funding cuts and/or reduced fees (Augar) could result in Pathway providers replacing HEIs' international offices which could then be cut as a result	4.86	6.57	31.92
17	Brexit: Expected growth in non-EU numbers to compensate for likely EU decline	4.86	6.00	29.14
18	UK pathway providers expanding into FE and offering UK FE students with a more internationally focused curriculum	4.71	5.57	26.27
19	FE colleges becoming degree-awarding institutions would lead to more potential partners and an increase in subjects	4.86	5.29	25.67
20	Change of UK Prime Minister	4.57	4.86	22.20

Do you agree with the group's findings? * *Required*

- Yes
- No

Please explain below why you agree or disagree with the group findings. * *Required*

Page 6: Challenges for the Pathway Sector

Listed below are the challenges originally identified by the panel and later scored by the group for both levels of impact and likelihood. These are now ranked from the highest too the lowest combined 'impact' x 'likelihood'. A high combined score highlights a very likely event having a high impact on the sector.

Please review the list, and comment below on the groups findings. Do you agree/disagree with the groups findings? if so why?

Rank	Criteria	Average score received for 'how likely'	Average score received for 'how impactful'	Challenges: Likely x Impact
1	Competition from other Anglophone countries	7.86	6.86	53.88
2	Lowering of HEIs entry requirements challenging the need for foundation courses	7.00	7.00	49.00
3	Increasing competition of non-UK universities offering English language programmes and recruiting internationally	7.57	6.29	47.59
4	The strength of the pound	6.29	6.86	43.10
5	Overseas campuses developed by UK HEIs in partnership with local HE providers	6.29	6.14	38.61
6	Competition from university partnerships and pathway programmes being established in non-anglophone countries	6.00	6.43	38.57
7	Slowdown in Chinese economic growth and loosening of 1 child policy means growth in middle classes could decline and the "wealth per child" will reduce	6.29	6.00	37.71
8	Decline of youth demographic in parts of Asia (e.g. Taiwan HK, Japan) could reduce market size	6.71	5.43	36.45

9	The decline in the reputation of UK education despite costing more than many other locations	5.86	6.14	35.98
10	Improvement of education standards from supply countries throughout world meaning students can study their pathway programme in their home country	5.57	6.14	34.22
11	Potential for further increase of international fees due to pressure put on the UK HE sector funding by the Augar review	5.86	5.71	33.47
12	The shifting external regulatory requirements e.g. UKVI, OfS	5.57	6.00	33.43
13	Increase competition and need for pathway providers to identify their USPs to stand out	5.86	5.57	32.63
14	Home Office rules and UK visa restrictions	5.29	5.71	30.20
15	Brexit's impact and its uncertainty	5.86	5.00	29.29
16	Perceived hostile environment: Reputation of the UK for not being welcoming to International Students and recent reinforcement of this with Brexit	5.29	5.29	27.94
17	Competition from the public sector wishing to deliver their own pathway courses	5.00	5.14	25.71
18	The Augar review recommendations	5.14	5.00	25.71
19	commission based agencies cheapen the market and make it seem very commoditised	6.00	4.29	25.71
20	Resistance to Pathway partnerships within HEIs (i.e. within departments and/or through Unions)	5.29	4.71	24.92
21	Poor employability of students returning home after studying expensive UK degrees	5.00	4.71	23.57

22	on-going uncertainty of UK government immigration policy	4.71	5.00	23.57
23	Bad TEF grading is making overseas recruitment more difficult	5.14	4.57	23.51
24	Growth of nationalism and continued anti-immigration sentiment amongst voters	4.86	4.57	22.20

Do you agree with the group's findings? * *Required*

- Yes
- No

Please explain below why you agree or disagree with the group findings. * *Required*

Your answer should be no more than 20000 characters long.

Page 7: Username

As in the last two rounds, this page will allow you to choose a username to be associated with your answers.

In the eventuality that you withdraw consent during the research, I am required to identify and delete all your data from the results.

As there is nothing in the format of the questionnaire allowing me to identify you, I have inserted this section to allow you to choose a username.

In the eventuality that you withdraw your consent, I would ask you to disclose your username to me. This would allow me to delete the data you provided.

This will be the only way of linking your answers back to you during this research.

Please note that unless you decide to withdraw consent this username should not be shared with me.

I would recommend you keep the same username as in the first two rounds of Delphi however, you may also choose a different one if you can't remember it.

Choose a username and please type it in the box below:

Page 8: Thank you

This concludes the Delphi process.

Thank you for taking the time to complete these questionnaires and supporting my doctoral research. I am grateful for your participation.

What's next?

After receptions of all responses, I will analyse the panel's answers one more time and depending on the findings I may conduct some targeted interviews in the next 3 months.

If you are willing to be interviewed as part of this research, please leave your preferred contact details below or email me directly on ttxjb48@nottingham.ac.uk.

As always if you have any concerns or questions about this research you can contact the School of Education Research Ethics Coordinator (educationresearchethics@nottingham.ac.uk) or my research supervisor Professor Howard Stevenson (Howard.Stevenson@nottingham.ac.uk).

Thank you again for your time.

Julien

Please leave below your preferred contact details if you wish to take part in an interview in the next few months. *Optional*

Appendix D – Interview project brief

The University of Nottingham
UNITED KINGDOM · CHINA · MALAYSIA

School of Education

The Dearing Building
Jubilee Campus
Wollaton Road
Nottingham
NG8 1BB

Tel: +44 (0) 115 951 4543
Fax: +44 (0) 115 846 6600
www.nottingham.ac.uk/education

Pathway Colleges Research – Project Information

This project is part of a doctoral research in education I am conducting at The University of Nottingham.

The purpose of the project is to better understand the private Pathway Sector, its past, its present and its future.

It will first define the private Pathway sector by studying its origins, its evolution to date; then it will study the industry leaders' experience and how they negotiate the public/private sector relation; finally it will identify the future risk factors the sector needs to monitor and their possible impact on the industry.

The findings of this research will inform academic and professional publications, and will help me complete my doctoral research.

You have been approached because of your knowledge of working for and/or with private Pathway providers and the expert opinion you will be able to bring to the research. Your participation will include an individual interview which I will be conducting, and which will focus on your professional experience of private providers in the UK Higher Education Sector.

Given your public profile in the industry and the small size of the sector, I am taking the approach of using real names of companies and participants throughout the research, its associated publications and conference presentations. Note that this study is only focusing on your professional opinion and do not intend to actively investigate any personal data or elements of your personal life. It is also anticipated that, unless you state otherwise, you will be speaking in a personal capacity. The views and opinions expressed during the interview will not reflect those of your employer unless you state otherwise.

Your participation is completely voluntary, and you can withdraw at any point of the research until the publication of the thesis. If you decide to withdraw any data associated with you would be destroyed.

Interview recordings will be stored electronically in a password protected section of the University of Nottingham servers accessible only by me and accessed for research purposes only. An electronic backup of the data collected will also be stored offline as per the UK Data Archive best practice for researchers' guidelines. You will have the right to review and amend the transcript of your interview. As stated above, data and research findings will be used to support my doctoral thesis, will be disseminated in academic and professional publications, and will also be used in conference presentations.

If you have any questions about this research, please don't hesitate to contact me (ttxjb48@nottingham.ac.uk) but if you have concerns or questions about this research you can also contact the School of Education Research Ethics Coordinator: educationresearchethics@nottingham.ac.uk

Thank you, in advance, for your time. I understand the demands on business leaders and I am extremely grateful for your support.

Yours faithfully

Julien Boville
Doctoral candidate

Appendix E – Interview consent form

The University of Nottingham

UNITED KINGDOM · CHINA · MALAYSIA

Pathway Colleges Research

Agreement to Participate

Please complete this after reading the Participant Information sheet. Check your responses below.

1. I understand the nature and purpose of this research.
   Yes ☐ No ☐

2. I have been provided with, and I have read a copy of the project information sheet.
   Yes ☐ No ☐

3. I have received enough information to make an informed decision about taking part.
   Yes ☐ No ☐

4. I understand that I can decide to withdraw from this project up until submission of the thesis and that if I withdraw data associated with me would be destroyed.
   Yes ☐ No ☐

5. I understand that quotation attributed to the interviewee by name will be used in the thesis, its associated publication and in conference presentations.
   Yes ☐ No ☐

6. I agree that the conversation or discussion can be audio/video-recorded
   Yes ☐ No ☐

Your consent indicates that you have decided to take part in this project after considering the information provided.

Signature ____

Date ____

Name ____

Email/contact

(optional)____

For more information, you can contact Julien Boville (Principal Investigator), University of Nottingham School of Education, *ttxjb48@nottingham.ac.uk* or Professor Howard Stevenson (Supervisor) *Howard.Stevenson@nottingham.ac.uk*

You can also raise issues with the Research Ethics Committee, University of Nottingham School of Education educationresearchethics@nottingham.ac.uk

Appendix F – Ethics - First submission

University of Nottingham
UK | CHINA | MALAYSIA

School of Education
University of Nottingham
The Dearing Building
Jubilee Campus
Wollaton Road
Nottingham
NG8 1BB

educationresearchethics@nottingham.ac.uk

16/11/2017

Our Ref: 2017/101

CC. Prof. H. Stevenson

Dear Julian Boville

Thank you for your research ethics application for your project:

Private Pathway Colleges on UK campuses

Our Ethics Committee has looked at your submission and has the following comments.

- Although this comes out as "high risk", the risk does not seem particularly high to one reviewer. The main issue is that the staff interviewed and their organisations will be identified; however, they are senior staff who should be well able to judge what they wish to disclose. There is also the safeguard of allowing them to check the transcripts.

However, before your research can be approved, the Committee requests the following clarifications are made:

- The research participants are a very particular group of individuals (CEOs of companies). Whilst they may be identifiable to each other and a related circle of education industry providers, they may not be 'well-known' to wider audiences. One reviewer questioned whether they should have the choice to be anonymised. The decision to use real names is rationalized using the education literature. Please confirm whether you intend to give participants the choice once you have discussed this further with your supervisor.

- If you decide participants will be named, please adjust the Consent Form. The statement "5. I understand that direct quotation will be used in the thesis, its associated publication and in conference presentations" should be amended to make it unambiguous that the quotation *will* be attributed to the interviewee by name.

- Regarding the "Signature/verbal consent" on the Consent Form: presumably verbal consent is envisaged for situations where the interviewer and interviewee are not physically co-present (e.g. in a telephone or skype interview). In this case, it should be normal that the form be sent to and completed by the interviewee; if this is not possible for some reason, there should be a detailed note of the circumstances on this form, and it should be signed and dated by interviewer.

- Data is referred to as if it is all one thing – there is a need to distinguish between personal data and research data. Please specify to participants on the Consent Form how data will be stored. It is not enough to say 'as per the University's data storage regulations.'

+44 (0)115 9514470
educationadmin@nottingham.ac.uk
nottingham.ac.uk/education

- Please also make clear that participants understand they have a right to review and alter the transcripts. They have the right to refuse to be named.

- We would like to see the research instruments. Please forward the schedules of questions.

- Because of the lack of anonymity, there is a particular impost to consider how harm will not be done to participants. How will you deal with any highly critical comments which might be both personally and institutionally damaging? Note – because we cannot see the interview questions or prompts, we are not sure what kind of data you will be generating. This is also an area where there is potentially litigation and regular practices of redaction for Freedom Of Information requests, so the issue of harm risk management and confidentiality do need more attention.

Based on the above assessment, it is deemed your research is:

- **Revise and resubmit.**

We look forward to hearing from you with the information that is requested.

Dr Kay Fuller
Chair of Ethics Committee

Appendix G – Ethics – Second submission

University of Nottingham
UK | CHINA | MALAYSIA

School of Education
University of Nottingham
The Dearing Building
Jubilee Campus
Wollaton Road
Nottingham
NG8 1BB

educationresearchethics@nottingham.ac.uk

06/12/2017

Our Ref: 2017/101
CC. Prof. H. Stevenson

Dear Julian Boville

Thank you for your resubmitted research ethics application for your project:

Private Pathway Colleges on UK campuses

Our Ethics Committee has looked at your submission and has the following comments.

- You have clarified that four levels of safeguarding measures are being put in place to protect the participants:

1. All potential participants can refuse to take part in the research;
2. All participants who accept to join the research will be able to withdraw at any point of this project up until submission of the thesis. If they decide to withdraw, all associated data would be destroyed;
3. All participants will be given an opportunity to review and amend the transcript of their interview;
4. Finally, controversial discussions will be presented in a non-attributable way if it is felt after the data collection that some elements could be linked to a risk of litigation.

- You have amended the Consent Form - statement to make it unambiguous that the quotation will be attributed to the interviewee by name.
- You have also removed from the consent form the option for verbal consent to ensure written consent is collected prior to the interview taking place.
- You have introduced in the 'Participant brief' a paragraph referring to the data collected. In line with the University of Nottingham 'Research Data Management Planning Checklist' and the UK Data Archive 'Guidelines for Researchers', participants now have detailed information about: which data will be collected; where it will be stored; how it will be backed-up; and finally how it will be disseminated.
- Participants are being informed in the 'Participant brief' of their right to review and amend the transcript of their interview (as above).

However, before your research can be approved, the Committee requests the following clarifications are made:

- We also asked to see the research instruments. Please forward the schedules of questions when they are ready. These will be stored with your application.

Based on the above assessment, it is deemed your research is:

- **Approved**

We wish you well in what sounds like a very interesting and worthwhile project.

K Fuller

Dr Kay Fuller
Chair of Ethics Committee

+44 (0)115 9514470
educationadmin@nottingham.ac.uk
nottingham.ac.uk/education

Appendix H – Interview questions

General questions about the establishment of the pathway Colleges in the UK and relationship between pathway providers

- Could you please run me through your involvement with the pathway colleges and the evolution of your role?
- Now there are 5 or 6 large companies sharing the market and there are now more than 40 partnerships established. What do you think has led to this growth?
- In your opinion, what were the key milestones in the development of the UK pathway colleges?
- Looking at the data I collected the number of new college opening seems to have slowed down in recent years. Does this match your view of the industry? Why do you think that is?
- I've come across colleagues using language such as "the pathway sector". Is there such thing as a pathway sector and if so, how would you define it in relation to the wider education sector and/or the university sector?

Questions about relationship with university partners

- How would you describe the relationship of a pathway provider with their partner universities?
- Have you ever been involved in creating a partnership or managing a relationship between a pathway provider and a university? If you have, did you face any challenges in the process?
- A lot of the literature on private businesses involvement in UK education (that is for schools) refers to tensions in values between the public and private sector. For example some questions appear to be raised in the literature about the quality, and the accountability of private businesses involved in education. Would you say this also applies to the pathway sector in their relationship with universities? Is this something you've experienced in your role?

Questions about the future of the pathway colleges.

- There are several providers in the market. I believe they have relations beyond competition (eg. Shared lobbying through "destination for education"). How would you describe the nature of the relationship between pathway providers?
- Considering potential shared challenges (i.e. change in immigration rules, Brexit and/or Covid) how do you see the future of the pathway colleges?
- Considering recent events (Brexit, covid etc), what tools or strategies do you use to either forecast them or to prepare the business to respond to them?

Appendix I – Interview transcription and coding – an example

<u>Original transcript as generated by the software:</u>

00:22:34.810 --> 00:23:09.480
Dr Elisabeth Grindel-Denby
Yeah, I think I think there is a, like you said, I think the sector might stagnate, right, that that that's not the bad thing, right? The sector will still take over and probably try put juice even figures, but I don't think that it is effective, which you're gonna invest if you want to have a, a a massive crows right. There will be a little bit of a shifting of between the five or six whatever you call it. You know. So there are contracts running out and people bidding for it and the university might change and use one another provide.

00:23:10.160 --> 00:23:13.270
Dr Elisabeth Grindel-Denby
There might be one of you universities that's.

00:23:14.000 --> 00:23:30.480
Dr Elisabeth Grindel-Denby
That might still a neighbor and then possibly model or say OK well that that might be another option for us to to try us out. But I would assume that more the kind of aspiring lower lower to medium ranked ones.

00:23:31.530 --> 00:23:45.250
Dr Elisabeth Grindel-Denby
That see that? Umm, actually with something like that and you can see that I believe the crows is actually more in the in the medium sized ones rather than the vessel crew port, right. The vessel groups don't need it.

Initial corrections made to the transcript following review:

00:22:34.810 --> 00:23:09.480
Dr Elisabeth Grindel-Denby
Yeah, I think I think there is a, like you said, I think the sector might stagnate, right, that that that's not a bad thing, right? The sector will still tick over and probably try produce even figures, but I don't think it's a sector, which you're gonna invest if you want to have a, a a massive growth right. There will be a little bit of a shift of between the five or six whatever you call it. You know. So there are contracts running out and people bidding for it and the university might change and use one another provider.

00:23:10.160 --> 00:23:13.270
Dr Elisabeth Grindel-Denby
There might be one or few universities that's.

00:23:14.000 --> 00:23:30.480
Dr Elisabeth Grindel-Denby
That might still enable a pathway model or say OK well that that might be another option for us to to try us out. But I would assume that more the kind of aspiring lower lower to medium ranked ones.

00:23:31.530 --> 00:23:45.250
Dr Elisabeth Grindel-Denby
That see that? Umm, actually with something like that and you can see that I believe the growth is actually more in the in the medium sized ones rather than the Russel Group, right. The Russel Group don't need it.

Finalised transcription

00:22:34.810 --> 00:23:09.480

Dr Elisabeth Grindel-Denby

Yes, I think, like you said, that the sector might stagnate, right, and that's not a bad thing, right? The sector will still tick over and probably even try to produce some figures, but I don't think that it is a sector you're going to invest in if you want to have a massive growth. There will be a little bit of shifting between the five or six - whatever you call it - you know, there are contracts running out and people bidding for it, and the university might change and use another provider; There might be one or few universities that might still enable a pathway model, or say OK well that might be another option for us to try out. But I would assume that's more the kind of aspiring lower to medium ranked ones that go for something like that; and you can see it. I believe the growth is actually more in the medium ranked ones rather than the Russel Group, right. The Russel Group. They don't need pathway really.

Coding of this passage

Initial coding - a priori theme: 'the future of higher education'

Final coding - final template theme: 'strategic goal alignments'

Appendix J - Census of pathways colleges and pathways partnerships

Name of the pathways college	Parent Company	Established	University Partner
London Brunel International College (LBIC)	Navitas UK Holdings Ltd (Navitas UK)	2003	Brunel University London
INTO UEA	INTO University Partnerships Ltd	2005	University of East Anglia
Nottingham Trent International College	Kaplan International Colleges UK Ltd	2005	Nottingham Trent University
Sheffield International College (SIC)	Bellerbys Educational Services Ltd (Study Group)	2006	University of Sheffield
University of Sussex International Study Centre	Bellerbys Educational Services Ltd (Study Group)	2006	University of Sussex
Kingston University, London International Study Centre (ISC)	Bellerbys Educational Services Ltd (Study Group)	2007	Kingston University, London
Lancaster University International Study Centre (ISC)	Bellerbys Educational Services Ltd (Study Group)	2007	Lancaster University
University of Stirling International Study Centre (ISC)	Bellerbys Educational Services Ltd (Study Group)	2007	University of Stirling
University of Surrey International Study Centre (SISC)	Bellerbys Educational Services Ltd (Study Group)	2007	University of Surrey
INTO University of Exeter	INTO University Partnerships Ltd	2007	University of Exeter
INTO University of Stirling	INTO University Partnerships Ltd	2007	University of Stirling (see study group as well)
University of Liverpool International College (UoLIC)	Kaplan International Colleges UK Ltd	2007	the University of Liverpool
Glasgow International College (GIC)	Kaplan International Colleges UK Ltd	2007	University of Glasgow
ARU college - formerly known as Cambridge Ruskin International College (CRIC)	Navitas UK Holdings Ltd (Navitas UK)	2007	Anglia Ruskin University
International College Wales, Swansea (ICWS)	Navitas UK Holdings Ltd (Navitas UK)	2007	Swansea University
Heriot-Watt University International Study Centre (ISC)	Bellerbys Educational Services Ltd (Study Group)	2008	Heriot-Watt University
Liverpool John Moores University International Study Centre (LJMU ISC)	Bellerbys Educational Services Ltd (Study Group)	2008	Liverpool John Moores University
University of Huddersfield International Study Centre (ISC)	Bellerbys Educational Services Ltd (Study Group)	2008	University of Huddersfield
Wales International Study Centre (WISC)	Bellerbys Educational Services Ltd (Study Group)	2008	University of Wales, Newport
London South Bank FoundationCampus	CEG UFP Ltd	2008	London South Bank University
ONCAMPUS University of Central Lancashire	CEG UFP Ltd	2008	University of Central Lancashire
Coventry FoundationCampus	CEG UFP Ltd	2008	University of Coventry
INTO Manchester	INTO University Partnerships Ltd	2008	Manchester Metropolitan University
INTO Manchester	INTO University Partnerships Ltd	2008	University of Manchester
Kaplan International Colleges UK Ltd	Kaplan International Colleges UK Ltd	2008	City University, University of London
Kaplan International College London (KICL)	Kaplan International Colleges UK Ltd	2008	City University (2008)
Leicester University Global Study Centre	Navitas UK Holdings Ltd (Navitas UK)	2008	University of Leicester
Keele University International Study Centre	Bellerbys Educational Services Ltd (Study Group)	2009	University of Keele
INTO Queen’s	INTO University Partnerships Ltd	2009	Queen's University Belfast
University of Plymouth International College	Navitas UK Holdings Ltd (Navitas UK)	2009	the University of Plymouth
International College Portsmouth (ICP)	Navitas UK Holdings Ltd (Navitas UK)	2009	University of Portsmouth

University of Lincoln International Study Centre (ISC)	Bellerbys Educational Services Ltd (Study Group)	2010	University of Lincoln
London FoundationCampus	CEG UFP Ltd	2010	Birkbeck College (Birkbeck); University of London: Institute of Education; Goldsmiths; The Courtauld Institute of Art; Queen Mary, University of London; Royal Veterinary College and Royal Holloway, University of London
Kaplan International College London (KICL)	Kaplan International Colleges UK Ltd	2010	University of Westminster
The Royal Holloway, University of London International Study Centre (ISC)	Bellerbys Educational Services Ltd (Study Group)	2011	Royal Holloway, University of London
University of Brighton's International College (UBIC)	Kaplan International Colleges UK Ltd	2011	University of Brighton
Kaplan International College London (KICL)	Kaplan International Colleges UK Ltd	2011	Cranfield University
Birmingham City University International College	Navitas UK Holdings Ltd (Navitas UK)	2011	Birmingham City University
Edinburgh International College (EIC)	Navitas UK Holdings Ltd (Navitas UK)	2011	Edinburgh Napier University
International College at Robert Gordon University (ICRGU)	Navitas UK Holdings Ltd (Navitas UK)	2011	Robert Gordon University
Hertfordshire International College (HIC)	Navitas UK Holdings Ltd (Navitas UK)	2011	University of Hertfordshire
Open Study College	QAHE Limited	2011	Ulster University
The Istituto Marangoni International Study Centre (IMISC)	Bellerbys Educational Services Ltd (Study Group)	2012	Istituto Marangoni
Amsterdam FoundationCampus	CEG UFP Ltd	2012	Coventry University (the University
University of the West of England (UWE), Bristol's International College (UWEBIC)	Kaplan International Colleges UK Ltd	2012	University of the West of England (UWE)
Leeds International Study Centre (LISC)	Bellerbys Educational Services Ltd (Study Group)	2013	Leeds Metropolitan University (LMU) and the University of Leeds (UL)
University of Strathclyde International Study Centre (UoSISC)	Bellerbys Educational Services Ltd (Study Group)	2013	University of Strathclyde
ONCAMPUS Sunderland	CEG UFP Ltd	2013	University of Sunderland
Bournemouth University International College (BUINTCOL)	Kaplan International Colleges UK Ltd	2013	Bournemouth University
De Montfort University International College	Oxford International	2013	De Montfort University
Study Group International Study Centre London (SGISCL)	Bellerbys Educational Services Ltd (Study Group)	2015	Coventry University London Campus (CULC) and the University of Law (ULaw). The Centre for both partners is located at the ULaw campus in Bloomsbury
ONCAMPUS Hull	CEG UFP Ltd	2015	University of Hull
University of Roehampton Pathway	QAHE Limited	2015	University of Roehampton London
University of York International Pathway College (YIPC)	Kaplan International Colleges UK Ltd	2016	University of York
University of Northampton International College	Navitas UK Holdings Ltd (Navitas UK)	2016	University of Northampton
Bangor University International College (BUIC)	Oxford International	2016	University of Bangor
Open Study College	QAHE Limited	2016	University of Roehampton
Durham University International Study Centre	Bellerbys Educational Services Ltd (Study Group)	2017	Durham University’s Queen’s Campus in Stockton-on-Tees

The University of Nottingham International College (TUNIC)	Kaplan International Colleges UK Ltd	2017	The University of Nottingham
International College Dundee	Oxford International	2017	University of Dundee
University of Essex International College	Kaplan International Colleges UK Ltd	2018	University of Essex
University of Greenwich International College (UGIC)	Oxford International	2018	University of Greenwich
Solent University Pathway	QAHE Limited	2018	Solent University
Cardiff University International Study Centre	Bellerbys Educational Services Ltd (Study Group)	2019	Cardiff University
University of Aberdeen International Study Centre	Bellerbys Educational Services Ltd (Study Group)	2019	University of Aberdeen
University of Bristol - International Foundation Programme	Kaplan International Colleges UK Ltd	2019	University of Bristol
Northumbria University International Foundation Programmes	QAHE Limited	2019	Northumbria University
Cardiff University International Study Centre	Bellerbys Educational Services Ltd (Study Group)	2020	Cardiff University
University of Birmingham foundation pathways	Kaplan International Colleges UK Ltd	2020	University of Birmingham
Teesside University International Study Centre	Bellerbys Educational Services Ltd (Study Group)	2021	Teeside University
ONCAMPUS Aston	CEG UFP Ltd	2021	Aston University
The University of Southampton International Pathway Centre	CEG UFP Ltd	2021	University of Southampton
INTO Newcastle University Centre	INTO University Partnerships Ltd	2021	University of Newcastle
UA92 Global	Navitas UK Holdings Ltd (Navitas UK)	2021	UA92
University of Bradford International College	Oxford International	2021	University of Bradford
University of South Wales Pathway	QAHE Limited	2021	University of South Wales
No specific name	Oxford International	2022	Ravensbourne University London
ONCAMPUS Loughborough.	CEG UFP Ltd	2023	University of Loughborough
INTO City University of London	INTO University Partnerships Ltd	???	City University, University of London
Oxford International Pathway College - Oxford	Oxford International	???	Oxford University