

Is growth outpacing quality?

The changing shape of franchised higher education



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Rapid growth, not franchising itself, is leading to poorer outcomes

The franchising debate is often framed as a binary: good or bad, inclusive or exploitative. The reality is much more complex – different franchises are delivering different outcomes for different groups of students. But the evidence shows one clear pattern: **rapid growth is leading to poorer outcomes.**

In England, for the first time, sufficiently granular data are available at sector, provider and partnership level to analyse the outcomes and experiences of students who are taught by one institution but registered at another.

The data show that franchised provision in England is diverging into two distinct groups: small scale partnerships (often with specialist providers or colleges) which generally produce positive outcomes for students; and large-scale partnerships that have grown rapidly over a short period of time and are disproportionately failing to meet the baseline thresholds set out by the Office for Students (OfS).

It is the latter group where we believe that corrective attention should therefore focus. The evidence shows that catch-all policies risk penalising arrangements that are working well, while not going far enough to address those that pose genuine risks to student experience, academic standards and public confidence.

Data alone cannot tell the full story, and not all growth is problematic. But where a pattern is this consistent, it provides a clear and credible starting point. The challenge now is to move beyond binary debate and to implement targeted, proportionate interventions: tackling incentives that drive unmanaged growth, using data to identify genuine risks to the student experience, and intervening where quality and students need protection.

The scope of analysis

The analysis in this report uses England-specific data, because the scale of franchised provision is smaller in the other UK nations and the more granular level of data now publicly available in England is not available elsewhere. However, there are valuable learnings for those involved in franchising across the UK. The focus of this report is solely on domestic franchising, but many learnings will inevitably translate to transnational education too.



Data sources

This report utilises a variety of insight from several sources:

- 1. OfS data sources:** all quantitative data analysed in this report come from OfS data sources and therefore relate to **English providers**¹
 - a. Student characteristics data source
 - b. Provider level size and shape data source
 - c. Subcontractual partnership student outcomes data source
 - d. Subcontractual partnership size and shape data source
 - e. Teaching Excellence Framework (TEF) data
- 2. Partnership roundtables** run by QAA, GuildHE, Independent HE, The Office of the Independent Adjudicator for Higher Education, and Universities UK in 2025. These covered commercial risk and due diligence, academic governance and external regulation and oversight.
- 3. Partnerships in practice forums** hosted by QAA for QAA members to discuss partnership provision, share best practice, and unpick challenges. These forums were attended by 35 attendees from 32 higher education providers.
- 4. Insight** drawn from QAA's broader work with the sector, including reviews in Scotland and Wales.

¹ At the partnership level, there may be delivery providers from other UK nations included in the data if they are working with an English, OfS registered, lead provider.

→ Rapid growth, not franchising itself, is leading to poorer outcomes

Definitions

1. Franchised provision: a franchise provider (also called delivery partner) delivers higher education courses on behalf of a lead provider. The lead provider controls the course content, assessment, oversees quality and standards and ultimately awards the degree. Students register with the lead provider, but the franchise provider teaches them. Franchised provision is also referred to as subcontracted provision.

2. Validated provision: the delivery partner designs and delivers the programme and, in most cases, registers the students; the awarding provider awards the qualification. Data for validated provision is not publicly available and therefore this type of partnership arrangement is not included in the analysis.

3. Taught direct provision: students that are taught and registered at the provider that awards their qualification, i.e. they are not taught through franchised or validated provision.

4. Students: unless otherwise stated, we use students in this report to refer to full-time, first-degree, UK domiciled students. Different data sources will include variations on this grouping - where applicable, this will be clearly noted in the text and charts.

5. Outcomes: outcomes in this context refers to continuation, completion, attainment and progression as defined by the OfS. Briefly², definitions are:

a. Continuation: the proportion of entrants that are continuing in study after one year.

b. Completion: the proportion of entrants that have gained a HE qualification after four years.

c. Attainment: the proportion of qualifiers that were awarded a 1st class or 2:1 degree classification.

d. Progression: the proportion of UK domiciled qualifiers that have progressed to a positive outcome.



² Full definitions can be found on the OfS website.

Unprecedented growth: what has grown, how fast and where

The number of franchised students has grown substantially over the past five years, predominantly through UK domiciled students studying full-time, first-degree courses (Chart 1).

These students will therefore be the focus of the analysis.

Franchised provision has grown significantly and rapidly

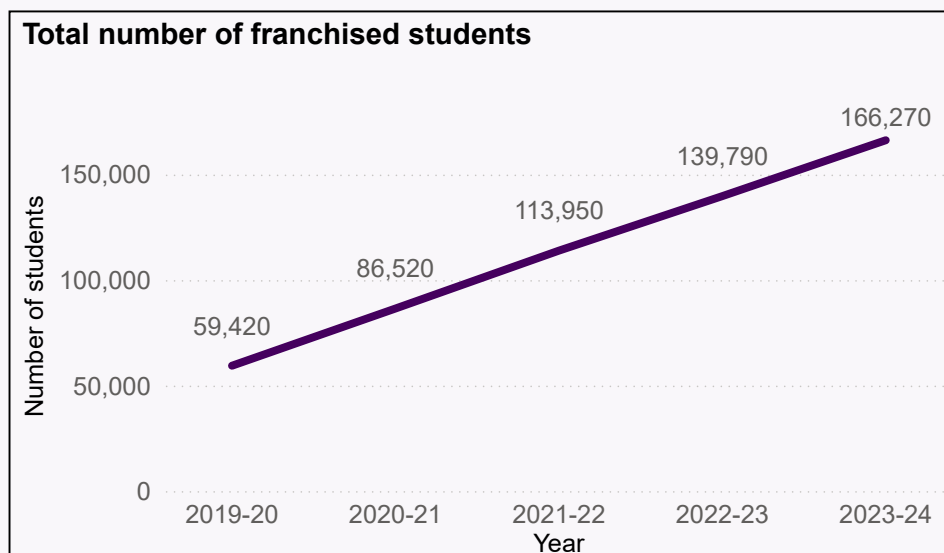
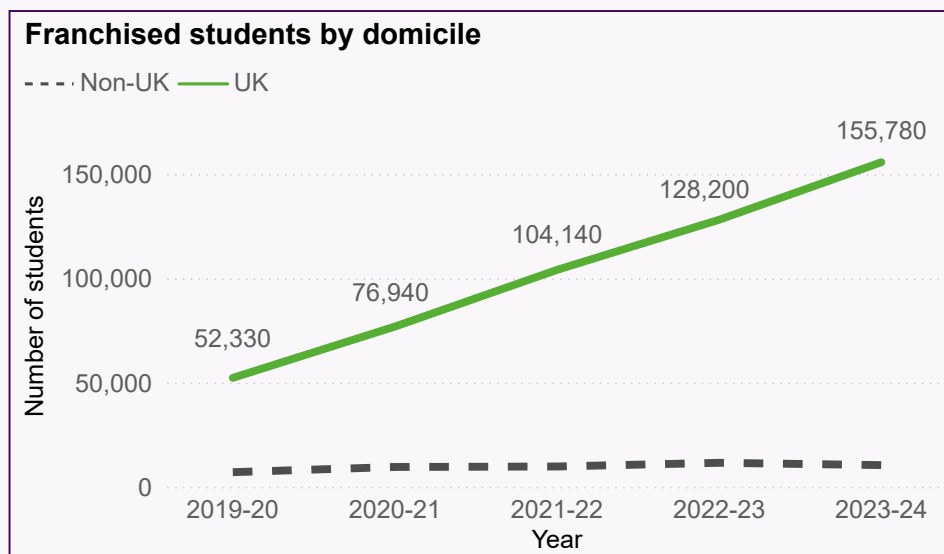


Chart 1A/B:
Rapid growth in franchised provision is predominantly in full-time first-degree courses taken by UK domiciled students



Click to download chart

75%

of franchised students in 2023-24 were UK domiciled and in full-time, first degree provision

Franchised students by level of study

Pink dashed line is first degree

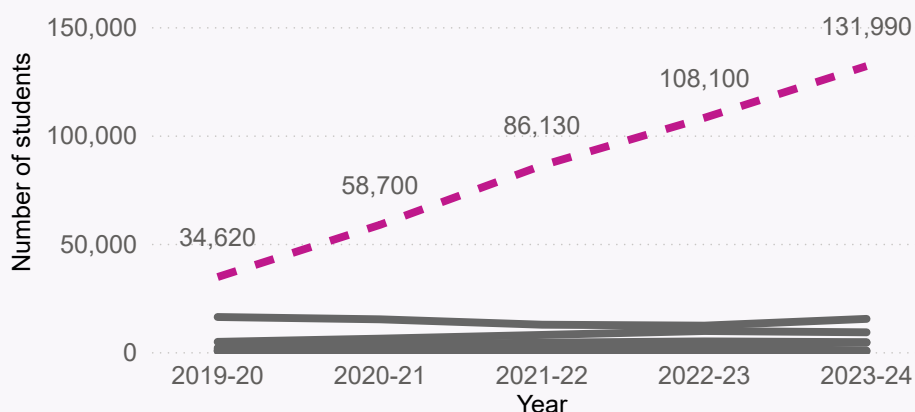
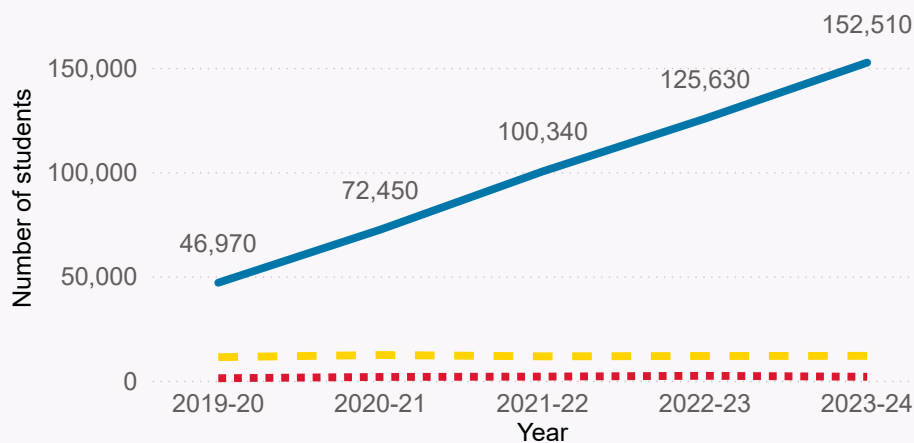


Chart 1C/D: Rapid growth in franchised provision is predominantly in full-time first-degree courses taken by UK domiciled students

Franchised students by mode of study

--- Apprenticeship — Full-time - - - Part-time



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Unprecedented growth: what has grown, how fast and where

Overall student numbers in the English sector have increased substantially over the past decade; however, as shown in Chart 2, for students taught directly this growth has been gradual and has started to decline in recent years. In contrast, growth in franchised provision far outpaces the overall trend.

Chart 3 shows that franchised student numbers began rising sharply from 2020 onwards. Between 2019-20 and 2023-24, student numbers in franchised provision increased by 343%, compared with just 2% growth in directly taught student numbers.

Some of this growth can be explained by the myriad of benefits franchising offers. Franchising can help to extend a provider's

geographic reach, particularly in cold spots. It can widen participation in higher education, providing tailored support and flexible delivery. And it can offer a college or private provider the prestige offered by partnering with a recognised institution.

There are, however, external pressures and incentives. The Higher Education and Research Act 2018 made it much easier for new providers to enter the market and partner with other institutions who hold degree-awarding powers. Financial pressures have also incentivised providers to engage in endeavours that can bolster their incomes, including franchising. For some, these financial pressures both incentivise expansion and limit the extent to which this expansion can be accompanied by suitably resourced

oversight. Franchising has not grown in a vacuum, and the regulatory, financial and policy landscape have all contributed to this growth as much as, if not more so, than the actions of individual providers.

343%
rise in UK domiciled, full-time, first degree franchised provision between 2019 and 2024

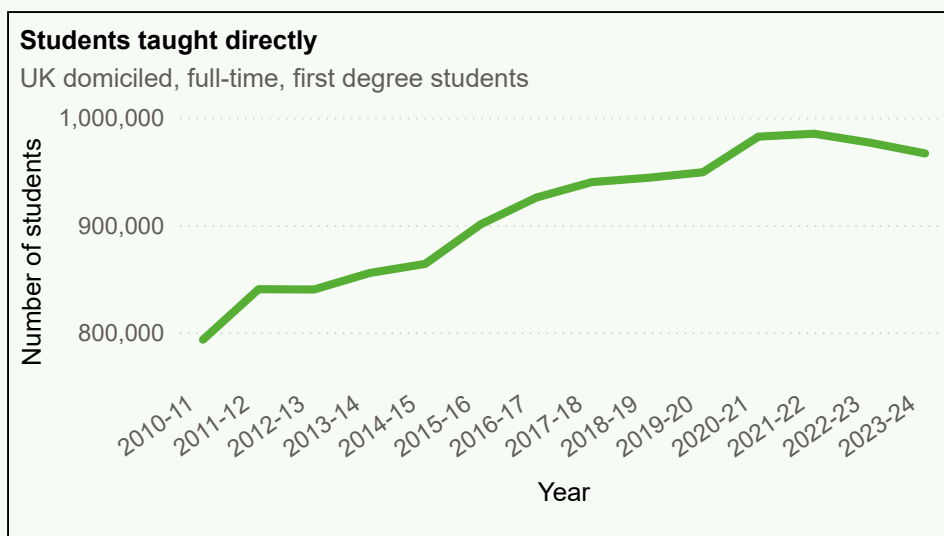


Chart 2: Growth in numbers of students taught directly by their registering provider has been steady over time, with slight decline in recent years

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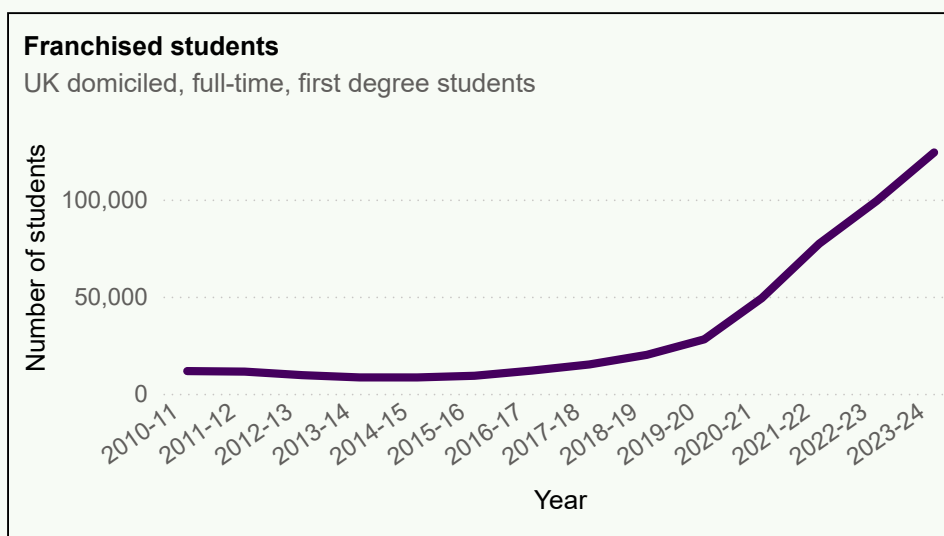


Chart 3: Number of franchised students has grown by 343% between 2019-20 and 2023-24

[Click to download chart](#)

72%

of franchised students were studying business and management by 2023-24

The growth in franchised provision has been dominated by business and management programmes (Chart 4)³. By 2023-24, 72% of franchised students were studying business and management.

Again, this rapid growth is not mirrored in the directly taught provision. By 2023-24, 37% of all students studying business and management were doing so through franchised provision.

Business and management accounts for 78% of franchising growth

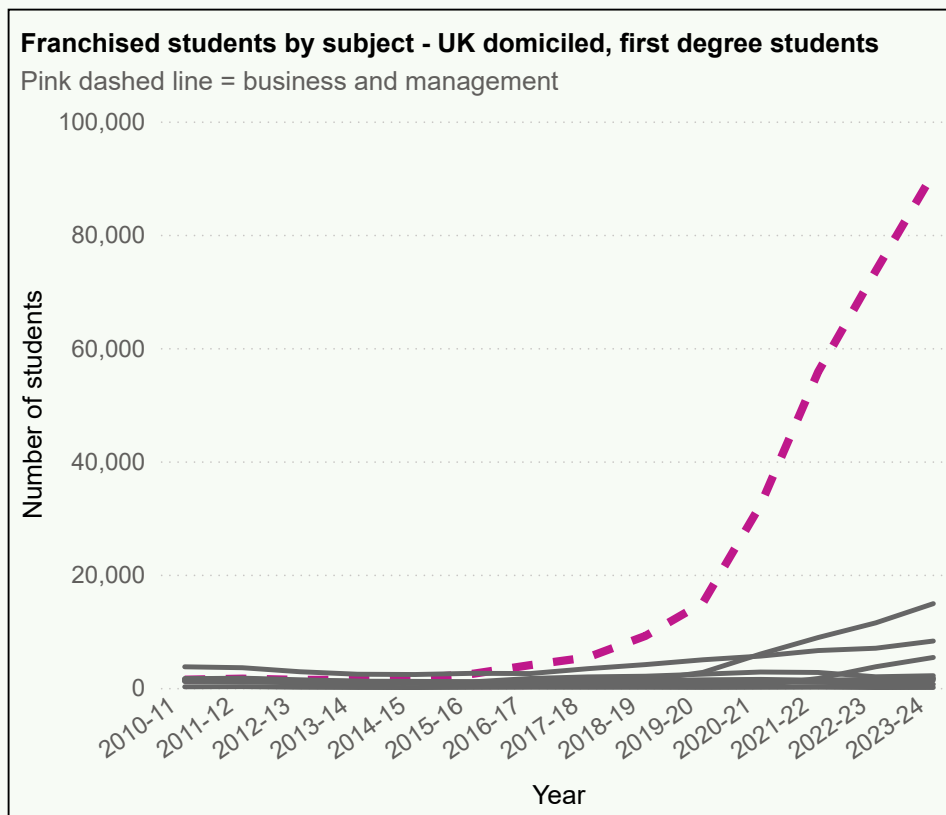


Chart 4: The number of franchised students studying business and management has grown rapidly since 2019-20

Click to download chart

³ Due to the structure of the data, the statistics relating to subject here cover all modes of study, not just full-time provision.

Unprecedented growth: what has grown, how fast and where

Chart 5 demonstrates how franchise growth is both driving, and being driven by, increases in business and management provision.

Without further investigation, it is not possible to know with certainty why business and management provision dominates so profoundly. However, there are plausible potential reasons:

1. Cost: business and management programmes are relatively low cost, requiring minimal physical resources and equipment. They are also scalable and less dependent on high-cost staff-student ratios. When delivered at scale these programmes are financially attractive, particularly in models where margins are small.

2. Demand: this subject area has strong, predictable demand from specific student groups such as mature learners, those seeking vocational credibility rather than discipline specialism and those who are unsure of long-term career pathways. It can be delivered flexibly with relative ease, which means it is supportive of the modularisation and top up routes often sought by these student groups. These factors feed perceptions of low risk.

3. Speed: these programmes are often less tied to specialist academic identity and therefore are less fragile in terms of personnel or pedagogic changes. This enables them to be validated at pace and brought to the market with relatively low cost or resource implications.

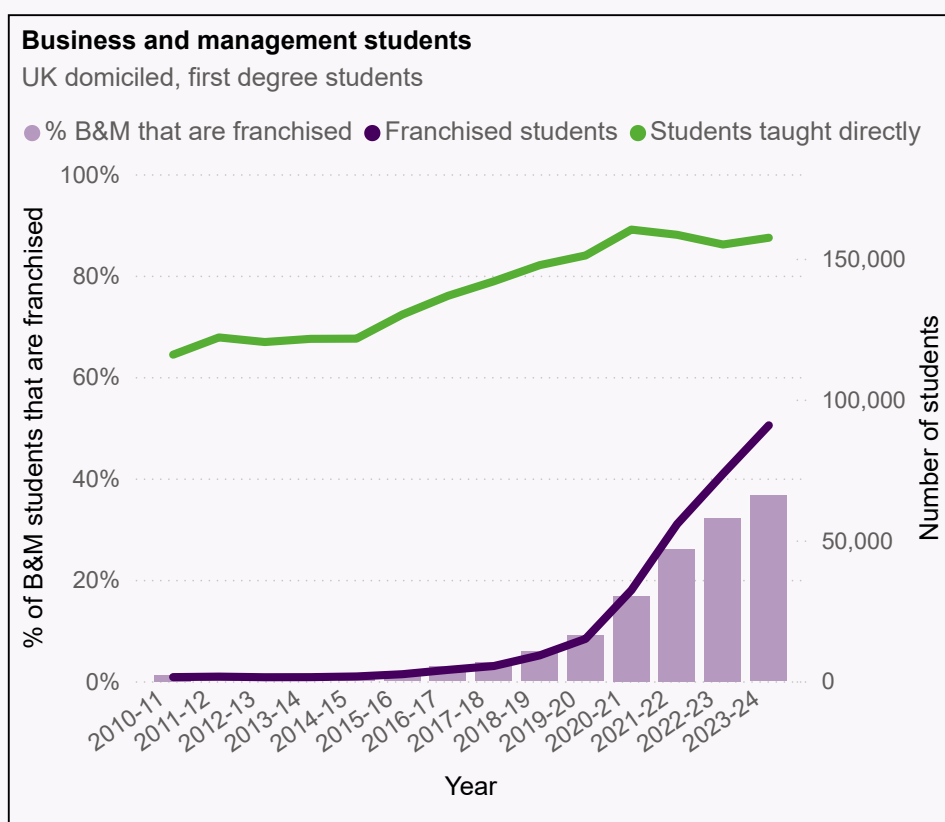


Chart 5: Rapid growth in franchised provision of business and management study is not mirrored in taught direct provision. In 2023-24, 37% of all business and management students were franchised students.

[Click to download chart](#)

What has this growth meant for outcomes?

The data demonstrate that students taught via franchise have poorer outcomes on average than those who are taught directly. This gap has expanded following rapid growth of franchised provision, driven by declining outcomes for franchised students (Chart 6).

Franchised provision at a sector level is now below OfS thresholds for continuation and progression. The completion metric is marginally exceeding the threshold but relies on older data which is trending downwards.

Franchised provision delivers poorer outcomes – and rapid growth is exacerbating this

UK domiciled, full-time, first degree students ● Franchised student ● Taught directly

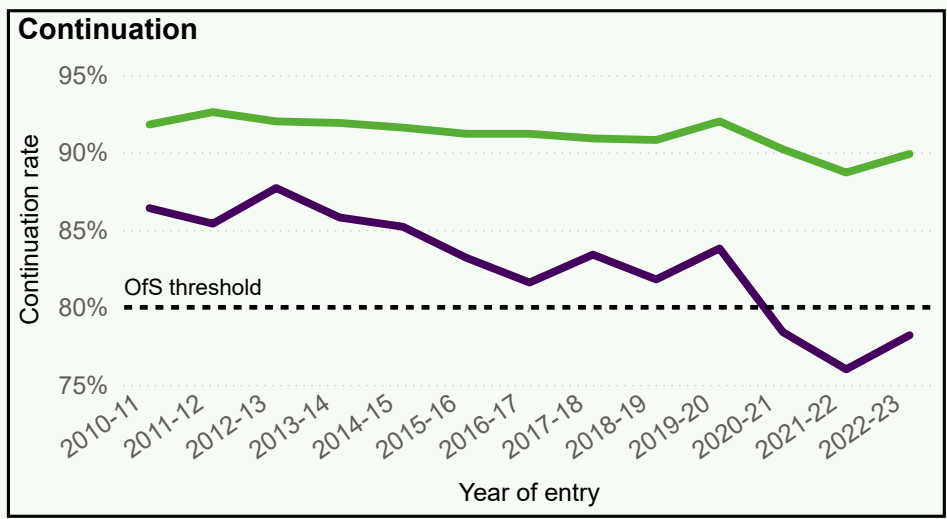


Chart 6A/B: The gap in outcomes between franchised students and those taught directly has expanded following rapid growth, with some outcomes now below the OfS threshold.



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→ What has this growth meant for outcomes?

The deterioration of outcome performance coinciding with rapid growth suggests a dynamic failure, rather than a static difference. As such, it is likely more indicative of system strain rather than inherent weakness in franchised delivery.

The expanding outcomes gap suggests that rapid growth has exceeded the quality system's capacity to accommodate it. This is not necessarily a function of student demographics or franchising as a model, but of the strain of scaling up on admissions, academic oversight, support and enhancement processes.

UK domiciled, full-time, first degree students ● Franchised student ● Taught directly

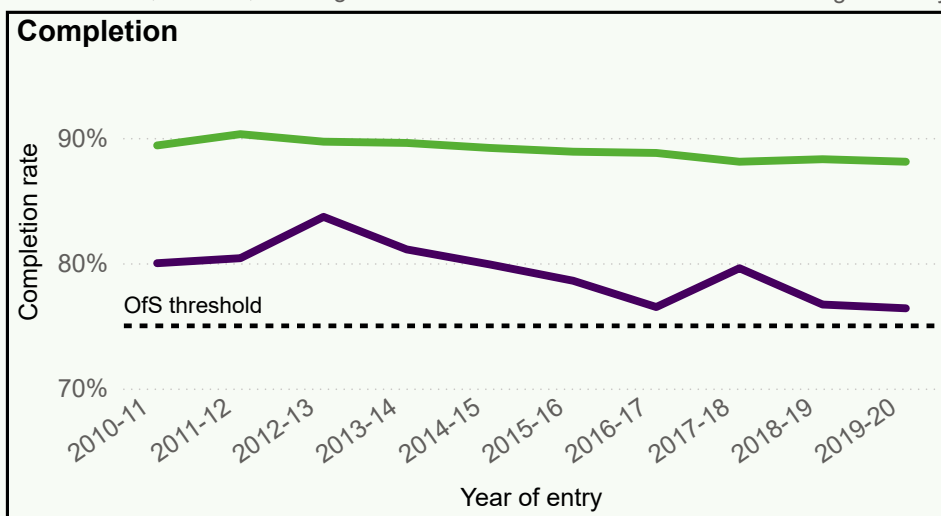
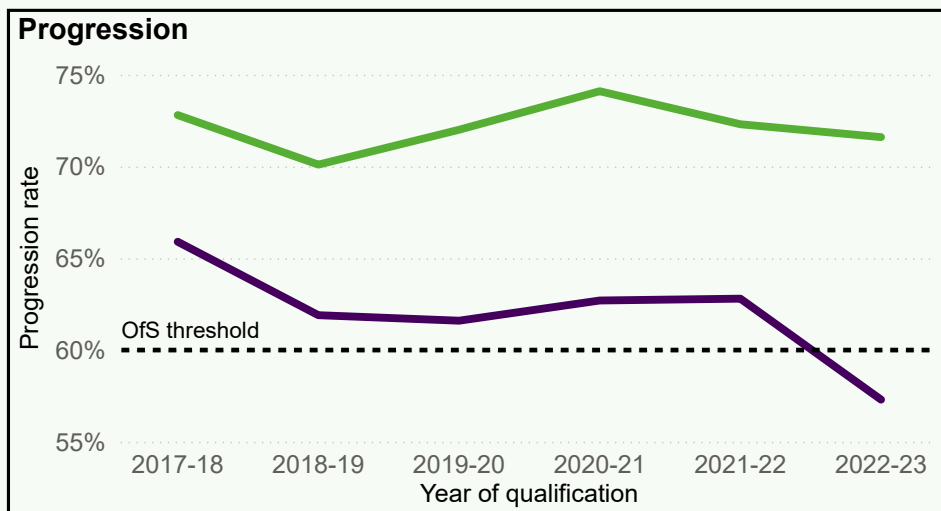


Chart 6C/D:
The gap in outcomes between franchised students and those taught directly has expanded following rapid growth, with some outcomes now below the OfS threshold.



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→ What has this growth meant for outcomes?

This pattern is, however, not found among part-time, UK domiciled, first-degree franchised students. Numbers of part-time franchised students are low (and decreasing over time) but the data show that these students perform better than, or comparably to, students taught directly across all indicators (Chart 7).

Franchised provision performs better than direct delivery in part-time settings

UK domiciled, part-time, first degree students ● Franchised student ● Taught directly

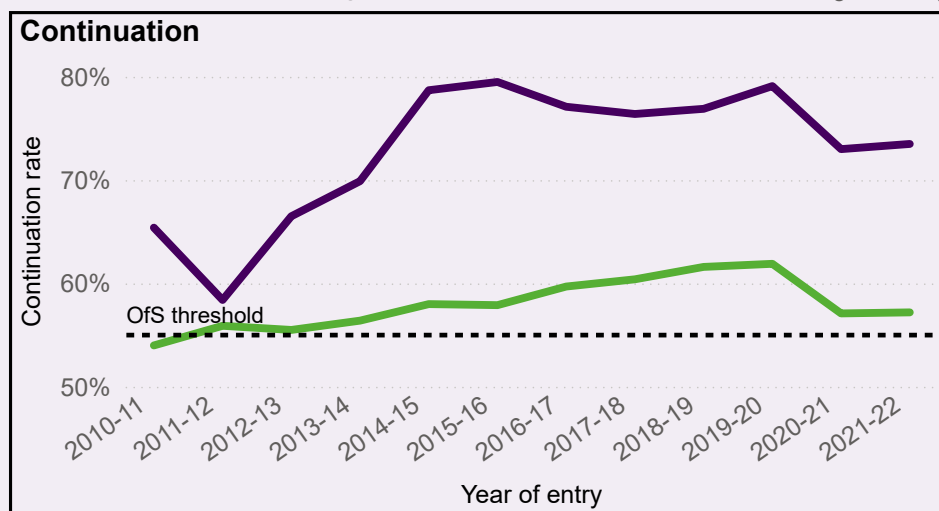
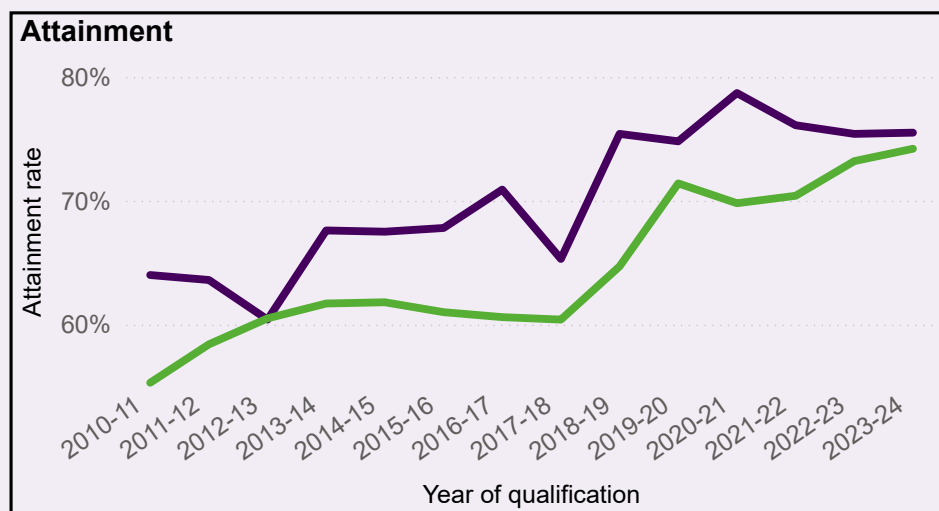


Chart 7A/B:
Outcomes for franchised students taught on a part-time basis are stronger than (or equivalent to) outcomes for students taught directly



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What has this growth meant for outcomes?

While it is difficult to know why this is the case for certain, this pattern demonstrates that franchised provision can deliver positive outcomes. This consequently reinforces the theory that it is not franchising itself which is the issue but rather accommodating the rapid growth of provision.

UK domiciled, part-time, first degree students ● Franchised student ● Taught directly

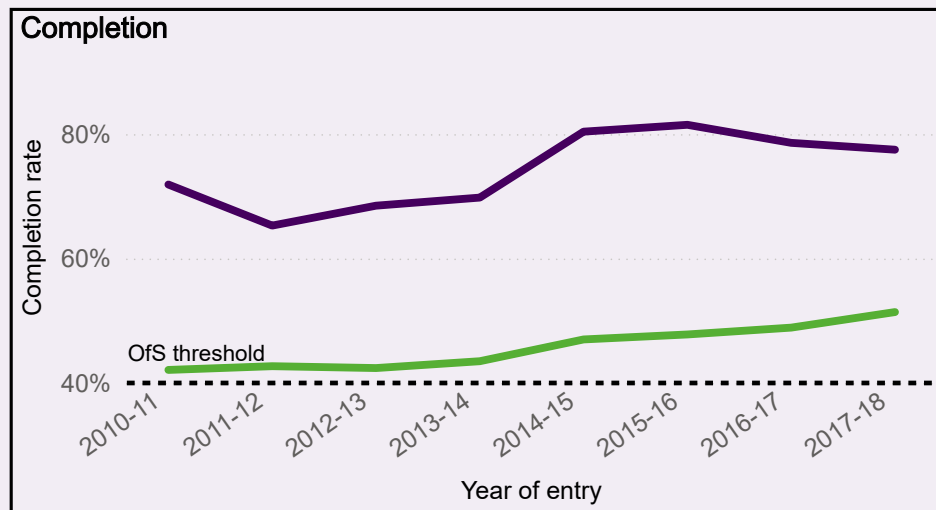
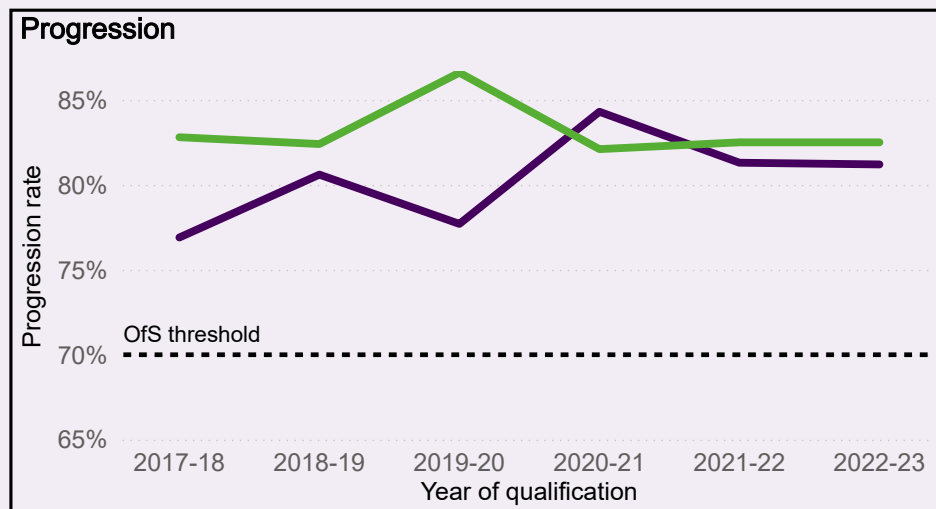


Chart 7C/D:
Outcomes for franchised students taught on a part-time basis are stronger than (or equivalent to) outcomes for students taught directly



[Click to download chart](#)

Why rapid growth (and ensuing concerns) are confined to a significant minority

Around a quarter of OfS registered providers (28%) have some franchised provision. Most providers that are engaged with franchising work with only a small number of partners. Across all levels and modes of study, 58% of lead providers in 2023-24 had only one or two delivery partners and 84% of delivery partners worked with a single lead provider. The challenges and concerns are therefore limited to an, albeit significant, minority of the sector.

Providers are engaged at different intensities, however. 70% of the full-time, undergraduate franchised provision is concentrated in just nine awarding providers. Chart 8 shows that six of these nine had more students taught by franchise partners than they taught directly in 2023-24. For three of those providers, over three-quarters of their provision was franchised. For comparison, at the sector level, 9% of students are taught in franchised provision.

70%

of full-time, undergraduate franchised provision was awarded by just nine providers

Type of provision split - nine largest franchising providers compared to the sector

Full-time, undergraduate students

● Franchised ● Taught directly

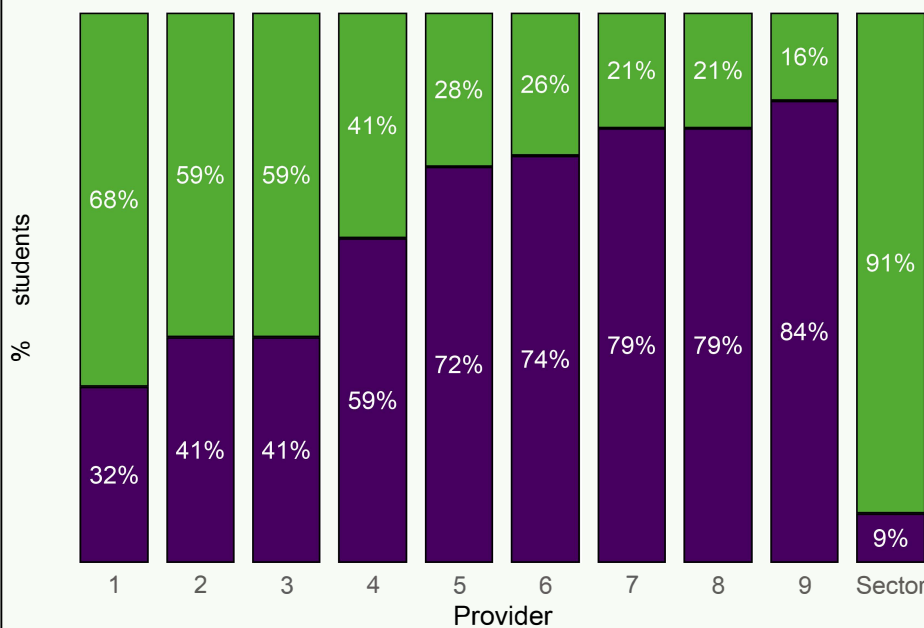


Chart 8:
Six lead providers now have more students taught by partner providers than they teach directly

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→ Why rapid growth (and ensuing concerns) are confined to a significant minority

Some delivery providers have outgrown their lead partners

Large delivery providers have been growing in size and number over the past few years. In 2017-18, no delivery providers were larger than 1,000 students. By 2023-24 there were at least six that had over 1,000 students⁴, two of which had over 7,000 students. In just five years, one franchisee has become the largest provider of full-time, undergraduate provision in the UK, surpassing long-established, multi-faculty providers. For context, five of the nine largest lead providers directly teach fewer than 7,000 of their registered students. In these instances, delivery partners are beginning to outgrow their lead providers.

There are clear quality implications for this evolving power dynamic. As franchised provision scales up, power in the partnership can shift from the lead provider to the delivery partner, regardless of the contract, because the financial incentives are linked to expansion. Where growth outpaces oversight capacity, academic governance can weaken and quality assurance can become reactive, reducing the ability to intervene decisively. Effective quality assurance therefore depends on recognising and rebalancing power, embedding academic oversight operationally and treating growth as a management quality risk rather than purely success.

Diversity in partnership provision is decreasing

Looking across all levels and modes of study, diversity in the franchise landscape is decreasing – in 2023-24 there were fewer providers engaged as either lead or delivery partner in franchised arrangements and fewer distinct arrangements than there were in 2020-21, particularly those offering part-time or postgraduate study.

Two delivery partners
now have over

7,000

students each



⁴ Suppression of data means we don't have numbers for all providers, so this should be seen as a minimum number of large providers.

Partnership dynamics: size and speed matter most⁵

Despite the rapid growth in franchised student numbers, the majority of partnerships are relatively small (Chart 9).

In 2023-24, 53% of partnerships had fewer than 100 students and 82% had fewer than 500.

However, the number of large partnerships is growing. The share of franchised partnerships with 1,000 or more students has almost doubled, from 6% in 2020-21 to 11% in 2023-24.

Most partnerships are small, but the number of large partnerships is growing

Number of partnerships by size

Full-time, undergraduate students

● 2020-21 ● 2021-22 ● 2022-23 ● 2023-24

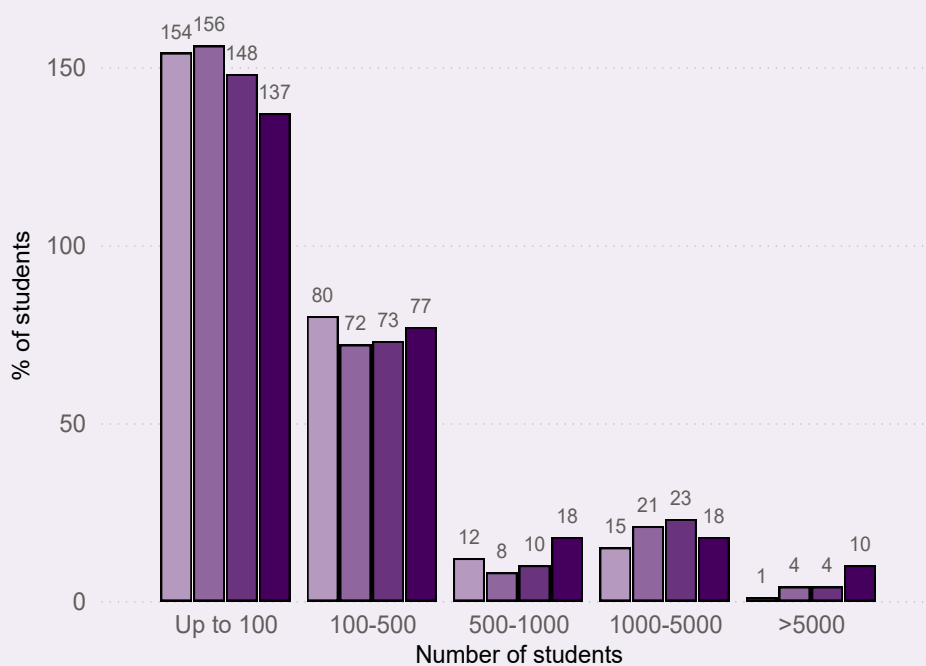


Chart 9:
The majority of partnerships are smaller than 500 students, but the number of very large partnerships is growing

[Click to download chart](#)

⁵ Throughout this section we are excluding very small partnerships (those with less than three students) in our calculations

Partnership dynamics: size and speed matter most

Focusing in on full-time, first-degree provision, where the outcomes are more concerning, we see that outcomes have declined over time. More partnerships have fallen below threshold through the period of rapid growth (Chart 10)⁷.

The continuation metric relies on the most recent data, and so best demonstrates the consequences of the rapid growth seen in recent years. 17% of the partnerships in scope were below threshold in 2019-20, increasing to 47% in 2022-23.

Outcomes are more likely to be below threshold for large, rapidly growing partnerships

Distribution of outcomes over time

Full-time, first degree study

● Below threshold ● In line with threshold ● Above threshold

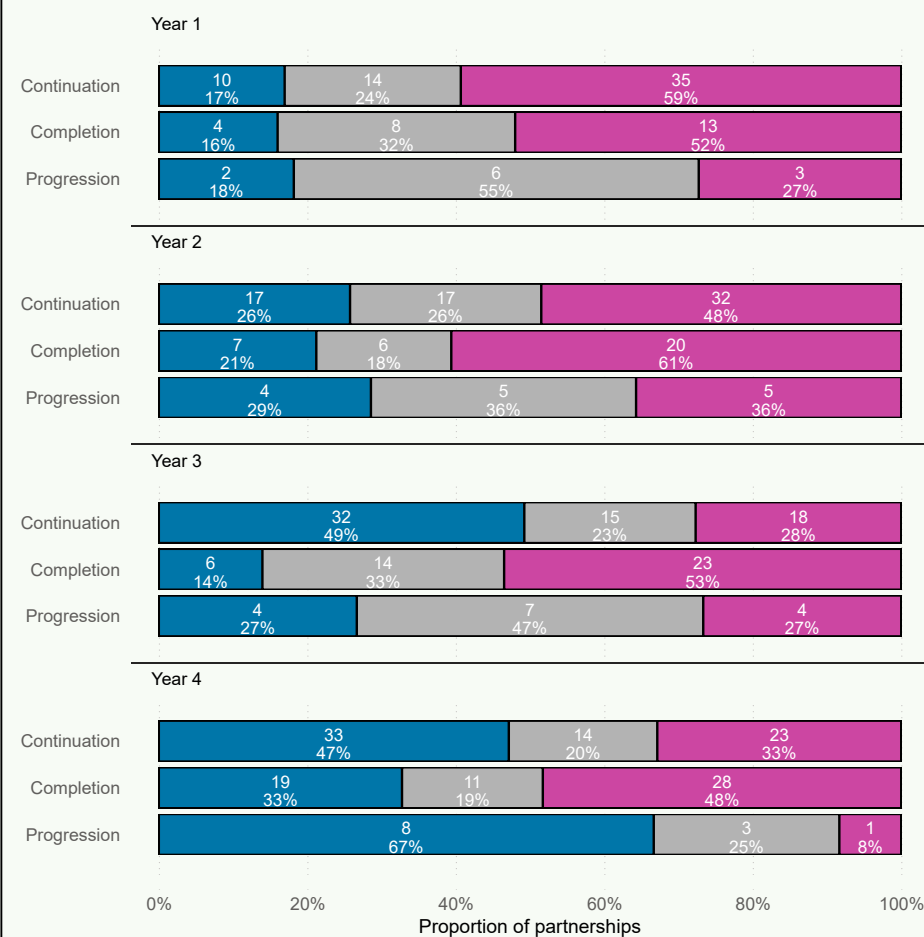


Chart 10: Outcomes for partnerships have declined through the period of rapid growth, with more partnerships dropping below threshold in later years

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⁶ To examine the outcomes of partnerships, we have categorised the B3 results for each partnership as either below, in line with or above the relevant OfS threshold and looked at the distribution of partnerships across these categories (see technical detail section for further details).

⁷ Note that completion, as the indicator with the longest lag, has not seen the full impact of rapid expansion yet.

→ Partnership dynamics: size and speed matter most

Performance on outcomes metric is also linked to both the size and rate of growth within franchised arrangements.

Smaller partnerships (those with fewer than 1,000 students in total) are least likely to have outcomes below threshold. For the largest partnerships (over 5,000 students), all outcomes were below threshold (chart 11)⁸.



All outcomes were below threshold for partnerships with 5,000+ students

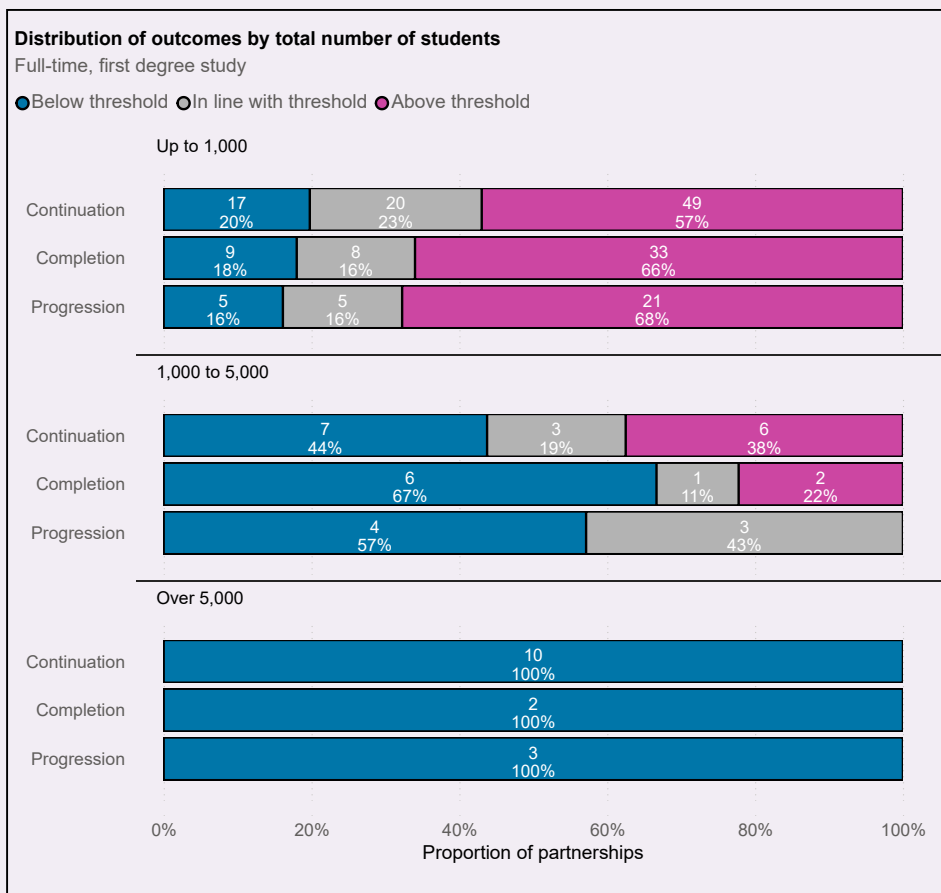


Chart 11:
Larger partnerships are more likely to have outcomes below threshold

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⁸ Aggregated over the most recent four years of data

→ Partnership dynamics: size and speed matter most

The fastest growing partnerships are more likely to have outcomes below threshold than those that have grown modestly or shrunk (Chart 12)⁹.

Rapid growth does not automatically lower quality. But if it is not deliberately planned for and supported in terms of governance and resource, it could weaken the very controls that protect academic standards until outcomes fall below thresholds.

Quality and standards can be put at risk when numbers outpace the systems designed to secure them. Capacity lags behind volume and, as a result, academic oversight, admissions control, student support, assessment moderation and enhancement processes often scale more slowly than student numbers.

Standards can drift before they collapse. Early signals appear as weaker progression and continuation, even while satisfaction remains high.

Oversight becomes diluted and governance becomes more retrospective and data led rather than forward-looking and relational/academic.

Student support can be diluted in first year and foundation routes, where higher risk learners need more, not less, structured support.

Power shifts can influence action, and large partnerships can become harder to challenge or slow, even when quality concerns emerge.

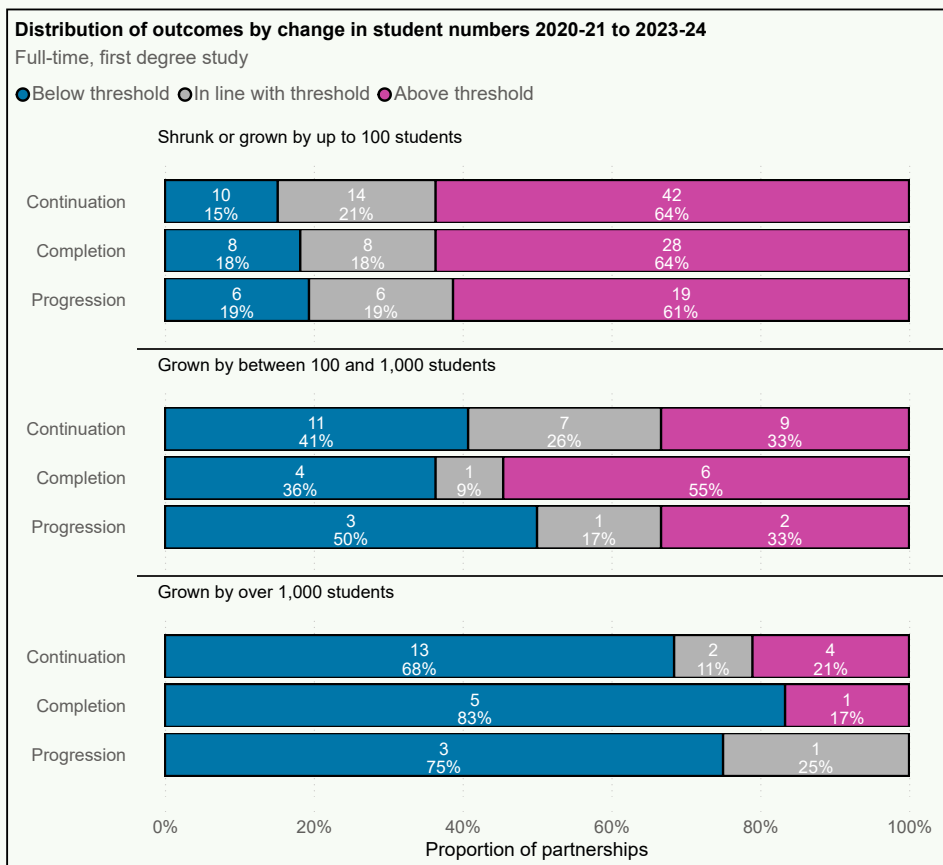


Chart 12: Partnerships that have grown by over 1,000 students between 2020-21 and 2023-24 are more likely to have outcomes below threshold

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⁹ Grouping partnerships by the change in total student numbers between 2020-21 and 2023-24

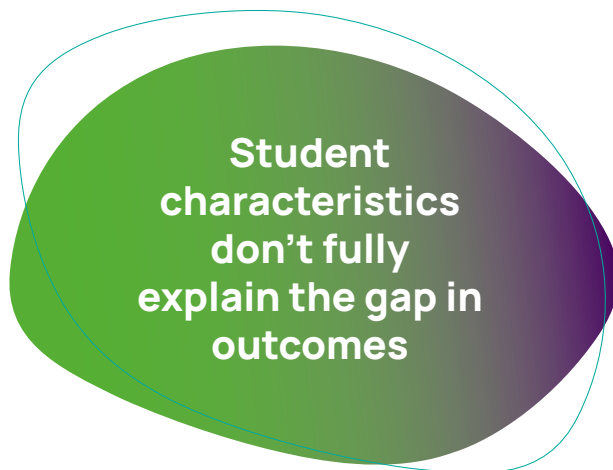
Partnership dynamics: size and speed matter most

Recent growth in franchised students comes primarily from more mature students (particularly those aged 31 and over) and students from the most deprived areas (chart 13).¹⁰

The largest partnerships have similar student characteristic profiles:

The biggest partnerships (those with 5,000 or more students) have very similar profiles¹¹:

- At least half of students aged 31 and over.
- Over half of students from IMD Q1 or Q2 areas – most have over 40% Q1.
- Almost exclusively UK-domiciled students.
- Most have at least 80% of students on first degrees with an integrated foundation year.
- Most have at least 70% of students with no/unknown entry qualifications.
- Most predominantly offering business and management courses



While this can be seen as a positive in terms of providing access to higher education for groups that are otherwise underserved, the outcomes data presented here suggest that more needs to be done to support these students throughout the full learner journey if this expanded franchised provision is going to succeed.

Student characteristics at the nine largest franchising providers
UK domiciled, full-time, first degree students

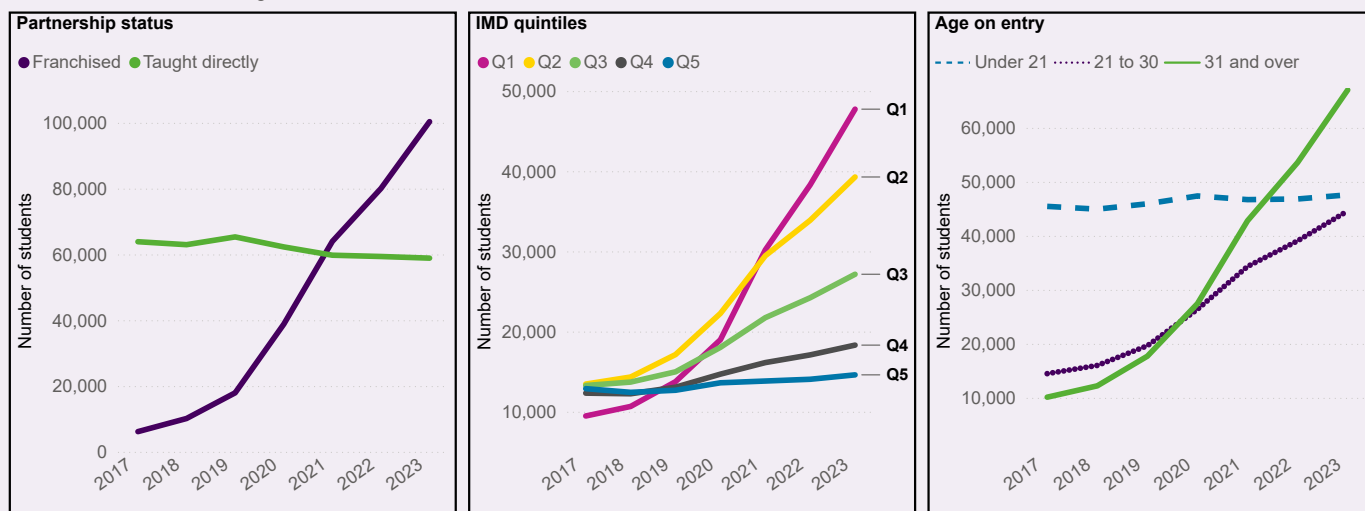


Chart 13:
Growth in the number of franchised students is accompanied by growth from IMD Q1 and Q2, and older students

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¹⁰ Quintiles 1 and 2 in the Index of Multiple Deprivation (IMD). Data on the characteristics of franchised students are not available at the sector level, but – by combining the data for the nine largest franchising providers (which make up 70% of the full-time, undergraduate franchised population), we can confidently infer this finding.

¹¹ Recently released data let us look in detail for the first time at the demographics of the franchised student population for each partnership.

Partnership dynamics: size and speed matter most

Student demographics alone therefore do not explain the poorer outcomes found in franchised provision. While older students and students from the most deprived areas do typically have poorer outcomes compared to younger students and those from less deprived areas, none of the outcomes for these groups are below the OfS threshold at the sector aggregate level¹² (Chart 14).

The fact that these groups meet regulatory thresholds at sector level indicates that effective support and provision models already exist. Where franchised outcomes fall below threshold, this may therefore be more related to erosion, dilution or insufficient scaling of the academic and pastoral structures to mitigate these risks. Sufficiently resourcing the spectrum of learners requiring support is critical in underpinning these needs. The difference in outcomes suggest that, whether by choice or necessity, this is not occurring at scale in franchised provision.

Outcomes for these student groups are above threshold at sector level

UK domiciled, full-time, first degree students

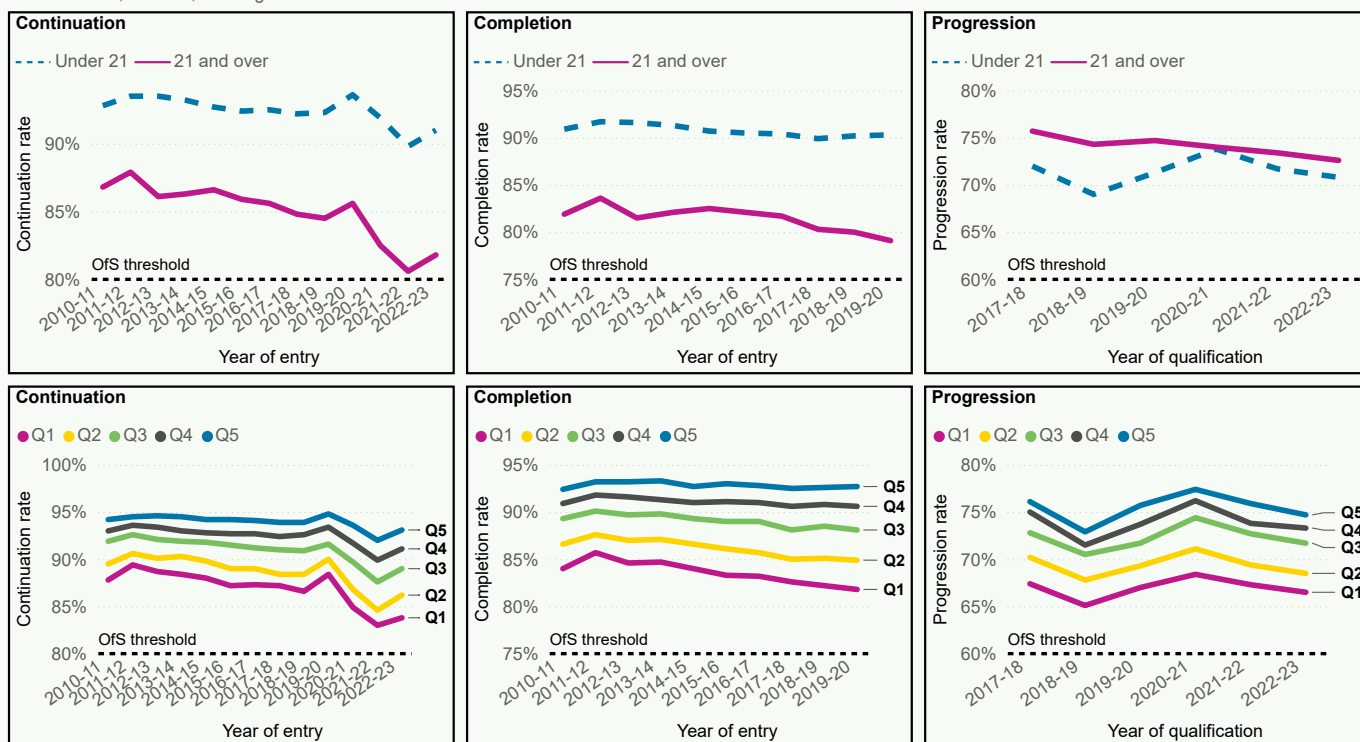


Chart 14:
Outcomes for older students and students from more deprived areas are poorer than their peers, but above OfS threshold levels

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¹² Looking specifically here at outcomes for UK domiciled students in full-time, first degree provision including both franchised students and those taught directly.

Despite poorer outcomes, franchised students are more satisfied

Not all data tell the same story. The National Student Survey (NSS) data that are publicly available provide limited scope for comparing the experiences of franchised students and those taught directly. However, what is available shows that, across almost all themes, franchised students are significantly more positive than students that are taught directly (Chart 15)¹³. The exception is the learning resources theme, where positivity across the two groups is comparable.

Further insight into the reasons for this may reside in question-level data or open comment answers, which are not publicly available. It is reasonable to speculate that there may be some relation to the student demographics that typically study under franchised arrangements – at the sector level we tend to see greater positivity among older students and students from more deprived areas.

However, greater positivity among franchised students could also reflect the flexible delivery models, smaller cohorts and consequent strong relational support, access and engagement. For those unfamiliar with higher education or who were unable to access provision at lead providers, there may also be an element of emotional investment.

When positivity co-exists with weaker outcomes, it can indicate a misalignment between experience and academic traction. Effective enhancement must strengthen assessment literacy, academic challenge and early progression support. Contrasting NSS and outcomes data should serve more as a diagnostic prompt than irrefutable evidence of quality success.

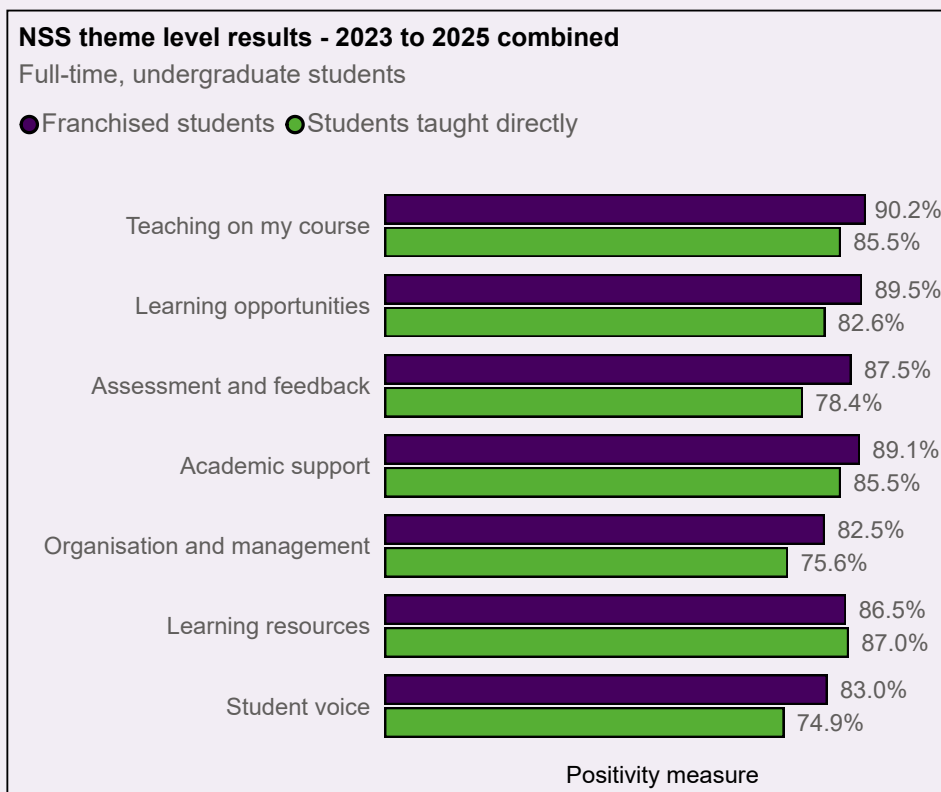


Chart 15:
Franchised students are significantly more positive than students taught directly across almost all themes within the NSS

[Click to download chart](#)

¹³ It is possible to examine differences at the theme level using outcomes aggregated over the past three years from the OfS's Teaching Excellence Framework (TEF) data. These data are available at undergraduate level only and are not disaggregated by qualification type (for example, first degree).

What does this mean for the franchising debate?

We have presented evidence that franchised delivery is variable in aim, scope and quality. Risk identification and ensuing intervention should focus on scale of provision, speed of growth and quality assurance capacity.

Franchising is not inherently low quality. Many small and specialist partnerships deliver positive outcomes, demonstrating the potential for this model where provision is deliberately designed around specific learner needs and supported by strong academic oversight. The data instead point to rapid, under-resourced growth as the leading cause of poor outcomes.

This distinction matters for policy and regulation. Treating franchising as a uniformly high-risk activity risks penalising effective, mission-aligned partnerships while obscuring the small but influential subset of arrangements driving sector-level concerns. The concentration of provision among a minority of awarding providers, the emergence of very large delivery partners, and evidence of outcomes declining below regulatory thresholds all indicate that risk is unevenly distributed and highly correlated with growth patterns.

Our findings also challenge assumptions about student characteristics as the primary explanation for poorer outcomes. It suggests that the issue lies not in who franchised provision serves, but in whether governance, admissions practices, academic support and enhancement processes have scaled sufficiently to meet the needs of those learners as numbers increase.

For providers, the data underscore the fact that growth through franchising is a quality risk that must be actively managed, not simply a commercial or access opportunity. Effective franchising at scale requires deliberate investment in academic governance, data maturity, student support and the ability to exercise challenge within partnerships – particularly where financial dependence or student volume shifts power dynamics away from the awarding body. For providers looking to explore this further and enhance their provision, the UK Quality Code [Principle 8 Advice and Guidance](#) should be helpful.

For the wider sector, this evidence supports a more nuanced debate: one that focuses less on whether franchising should exist, and more on the conditions under which it can expand without undermining standards or student outcomes. The policy challenge is therefore not to constrain franchising per se, but to ensure that growth is intentional, paced, and fully resourced, so that expansion strengthens rather than erodes quality.

To achieve this, any successful intervention must meet three tests:

1. Does it address the incentive of rapid growth by tackling the underlying cause (under resourcing in higher education)?
2. Is it sufficiently targeted at areas or characteristics where risk has been identified?
3. Do the consequences of non-compliance raise quality, deter poor practice and protect students?



Technical details

The quantitative data used for the analysis in this report come from a variety of OfS data sources:

[Student characteristics data source](#) provides sector level data on population and outcomes.

[Provider level size and shape data source](#) gives the number of students and how they are studying (directly, franchised to another provider or franchised in from another provider) for OfS registered providers. The [subcontractual partnership size and shape data source](#) breaks this down by individual partnerships.

Outcomes data at partnership level come from the [subcontractual partnership student outcomes data source](#).

[Teaching Excellence Framework \(TEF\) data](#) give sector and provider level NSS results at the theme level (aggregated over three years) which are split between students taught directly and franchised students.

Note that OfS dashboards refer to 'subcontracted students' and 'not subcontracted' students. Throughout this report we have used the terms 'franchised students' for subcontracted students and 'taught direct' students for not subcontracted students.

Analysis of outcomes classifies each outcome for each partnership arrangement as either below, in line with or above the relevant OfS threshold level. Where the outcome is determined to be above threshold, at least 90% of the statistical distribution is above threshold and similarly for below threshold. In most cases we have used aggregated results over the most recently available four years.

Results for many partnerships are suppressed because of the size of the partnership. We have chosen to look at outcomes where the denominator of the calculation is 50 or above – this avoids most of the suppressed data. Note therefore that we cannot make conclusions about the outcomes of small partnerships.

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