

The Scale and Scope of UK Higher Education Transnational Education

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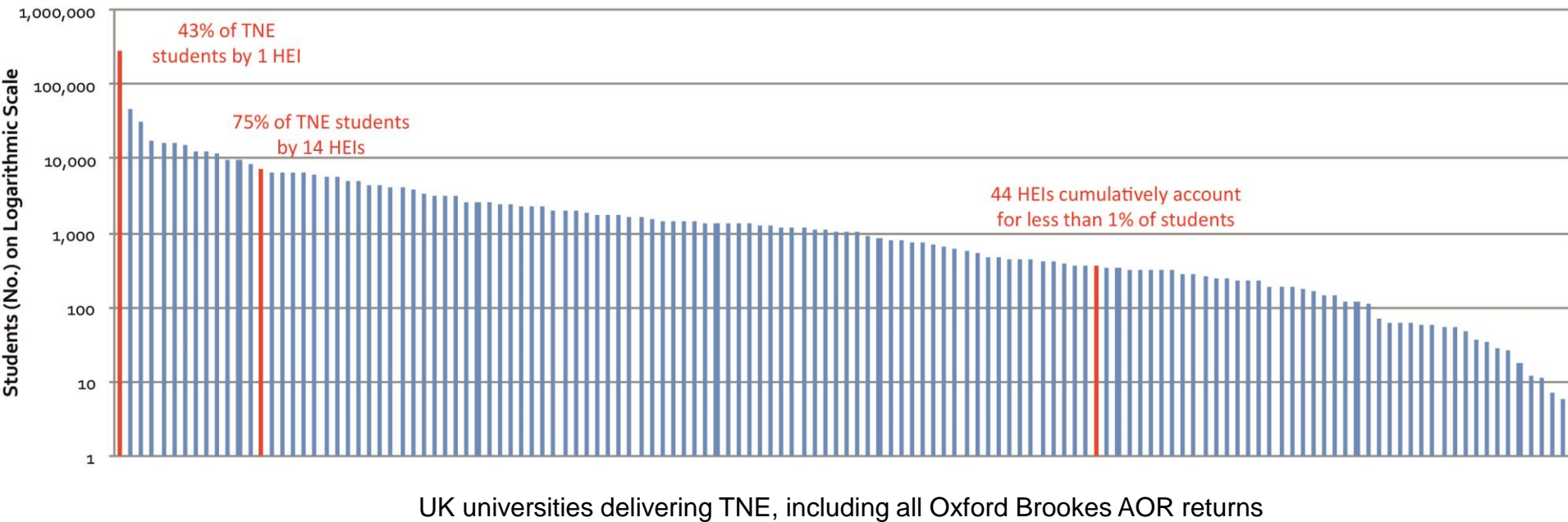


- The top 5 countries that UK TNE is delivered in has remained constant since 12/13, but there are changes in the next 5 countries, showing this is an evolving landscape
- There are only 15 countries where the UK does not offer any HE TNE
- Excluding the BSc in Applied Accounting offered through Oxford Brookes University and ACCA, the rate of TNE growth is 13.4% between 12/13 and 14/15



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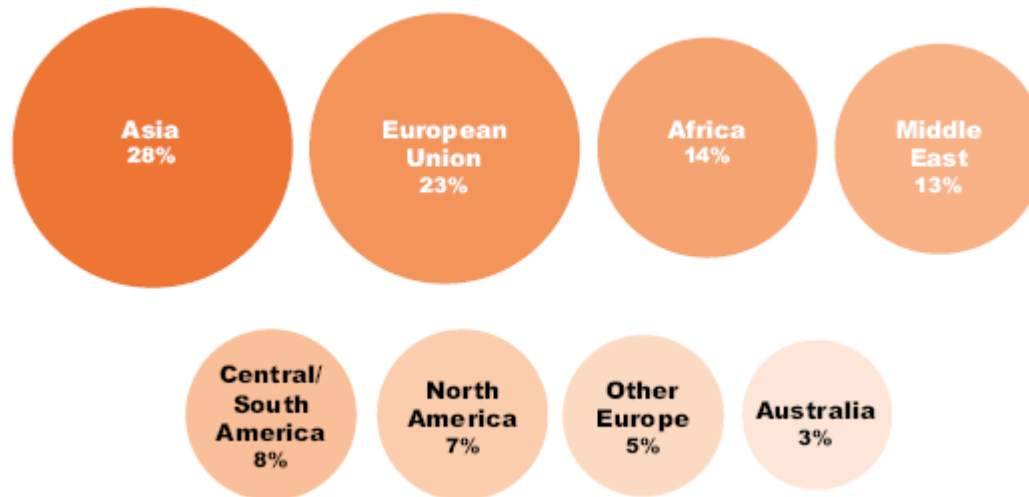
Students























NB: if we exclude BSc Applied Accountancy Oxford Brookes/ACCA students, 75% of TNE students study with 19% of the UK HEIs providing HE TNE

Regions (programmes)

- Over one quarter of programmes are delivered to students in Asia
- EU accounts for just under a quarter of programmes
- Africa and the Middle East account for 14% and 13% respectively























Countries (students)

2008/09 Ranking	2012/13 Ranking	2014/15 Ranking	Country
3	 1	 1	Malaysia
4	 3	 2	China
2	 2	 3	Singapore
21	 17	 4	Pakistan
25	 19	 5	Nigeria
1	 4	 6	Hong Kong
9	 2	 7	Oman
30	 23	 8	Ghana
16	 3	 4	Sri Lanka
15	 2	 7	Egypt

Source: AOR Data.

Includes BSc Applied Accounting through Oxford Brookes University/ACCA

2008/09 Ranking	2012/13 Ranking	2014/15 Ranking	Country
3	 2	 1	Malaysia
1	 1	 2	Singapore
4	 1	 3	Hong Kong
2	 4	 4	China
9	 4	 5	Oman
15	 6	 3	Egypt
16	 6	 3	Sri Lanka
5	 2	 1	Greece
14	 8	 3	United Arab Emirates
11	 3	 4	India

Source: AOR Data.

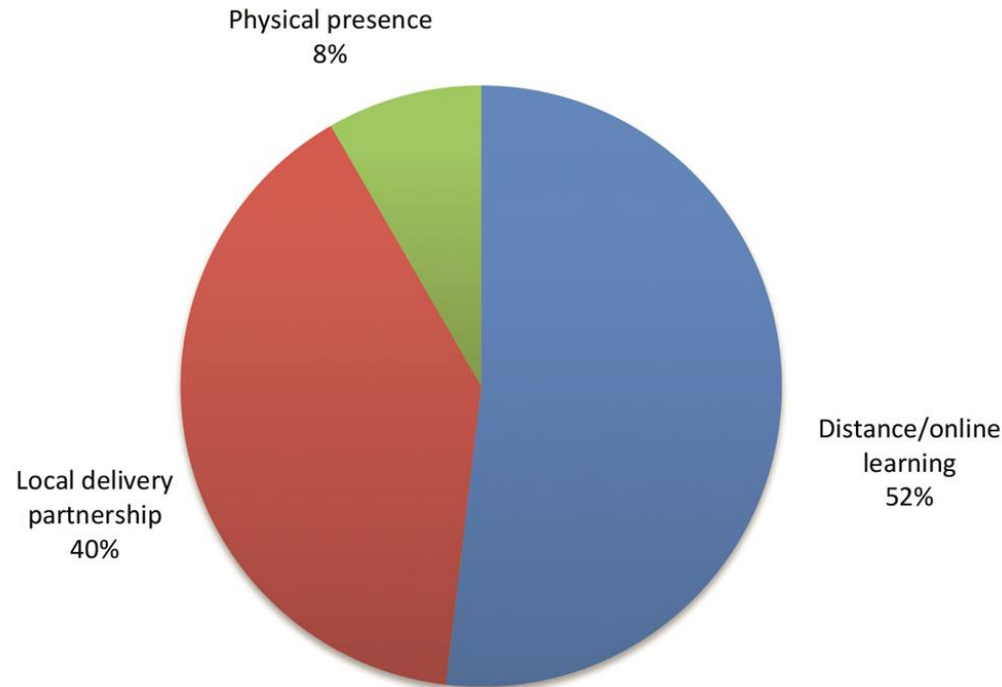
Excludes BSc Applied Accounting through Oxford Brookes University/ACCA

Scale of global branch campuses (2016)

Host countries / receiving countries		Home countries / sending(delivering) countries	
China	27	United States	77
United Arab Emirates, Dubai	24	United Kingdom	45
Singapore	13	Russia	22
Qatar	11	Australia	19
Malaysia	9	France	15
France/South Korea/Uzbekistan	6	India	11

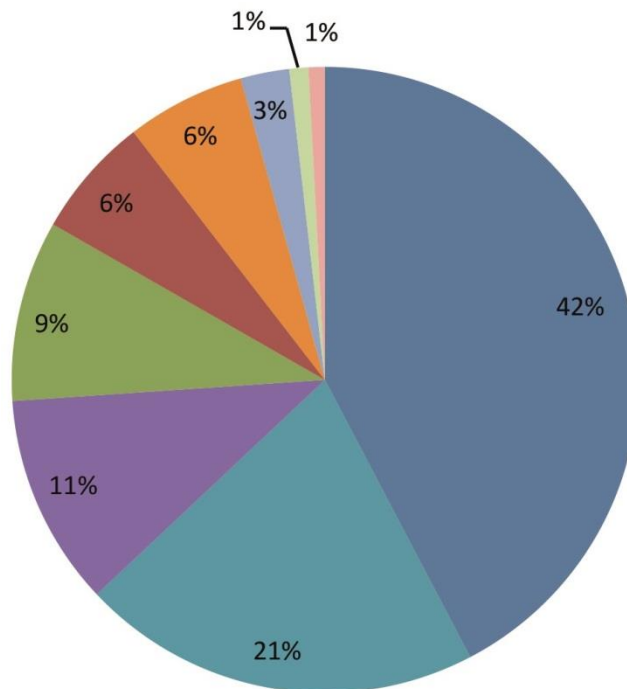
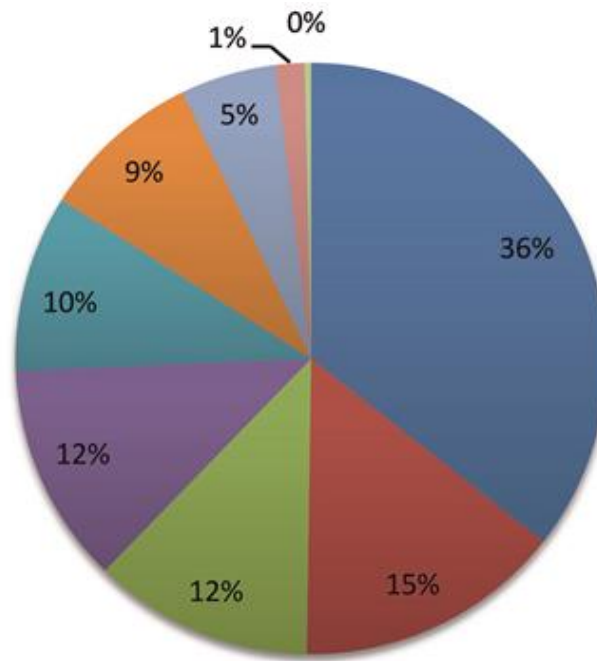
The Scope of UK HE TNE

- Since 12/13, there has been an increase in the flexibility of offer in mode of delivery, with more programmes being offered as full time, part time, or both
- There is small but growing mobility between TNE hosts and the UK as part of TNE programmes
- Over half of programmes are delivered through distance or online learning
- Only 1% of programmes were reported as 'blended' learning



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Programmes Students

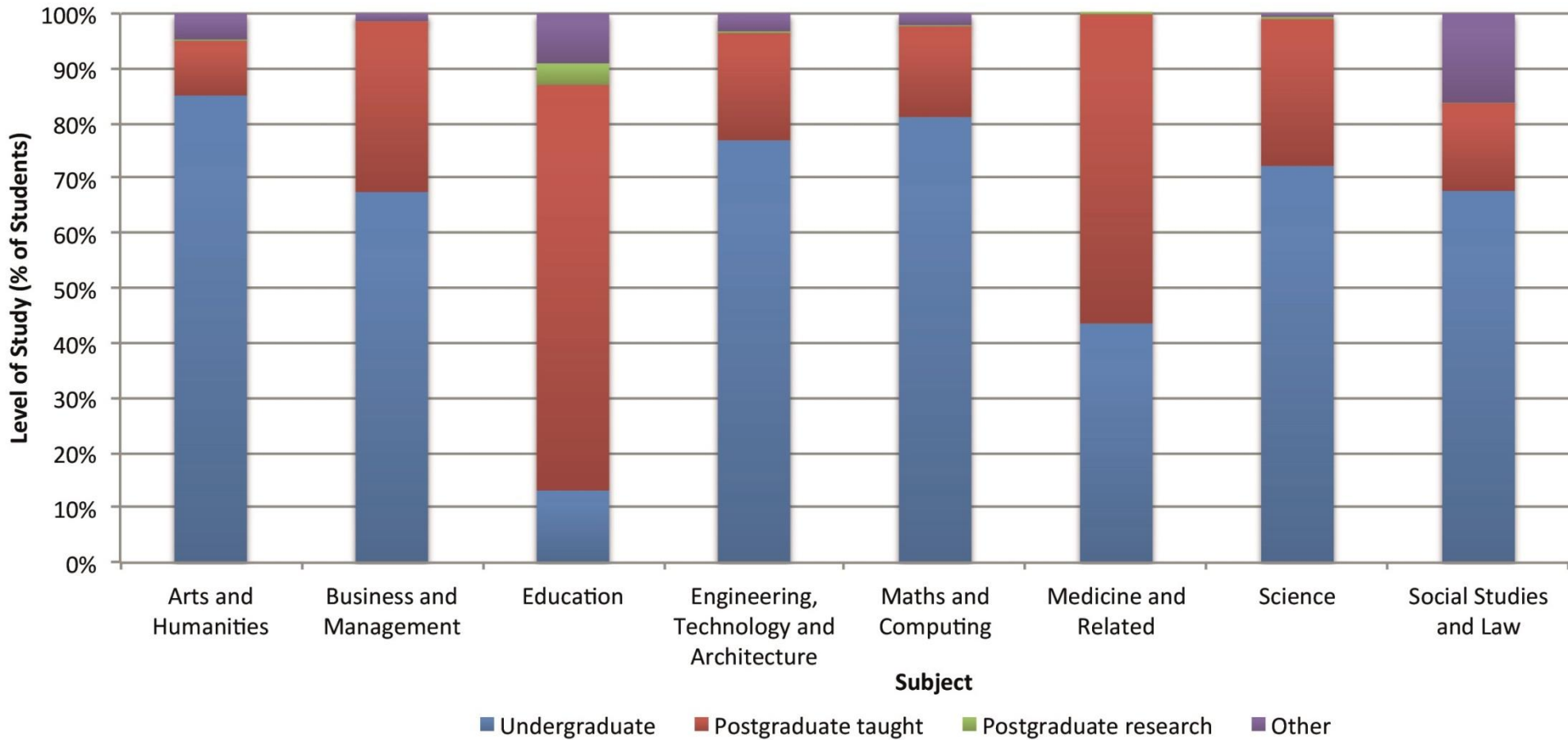


- Business and Management
- Arts and Humanities
- Maths and Computing
- Engineering, Technology and Architecture
- Social Studies and Law
- Medicine and Related
- Science
- Education
- No linked qualification



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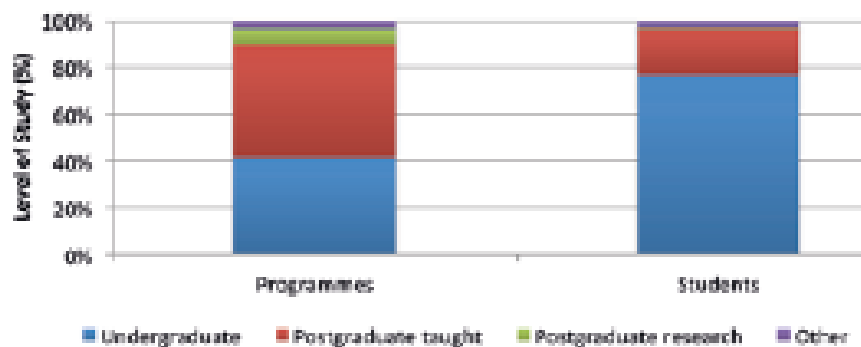
Level of study



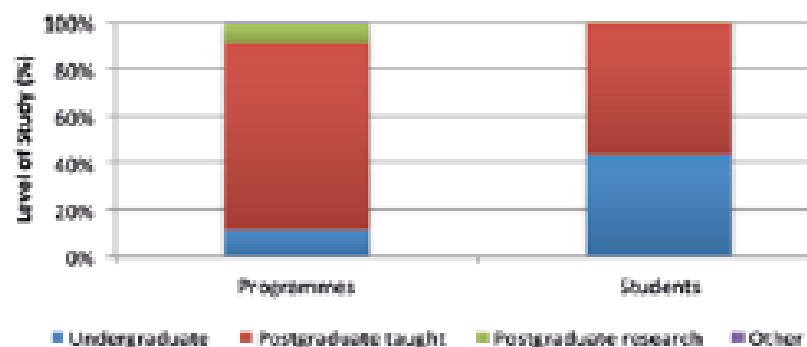
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Level of study

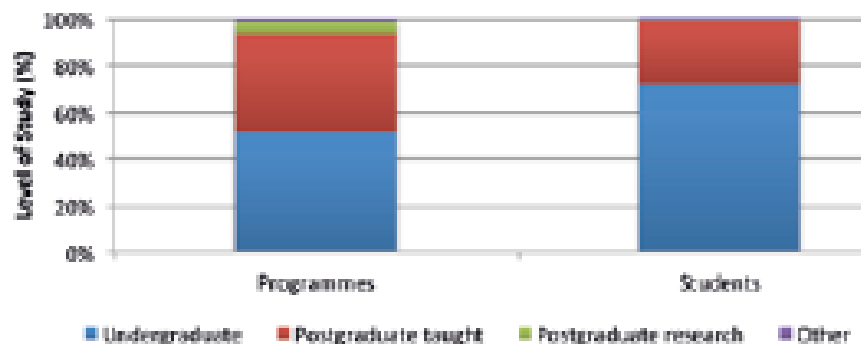
Engineering, Technology and Architecture



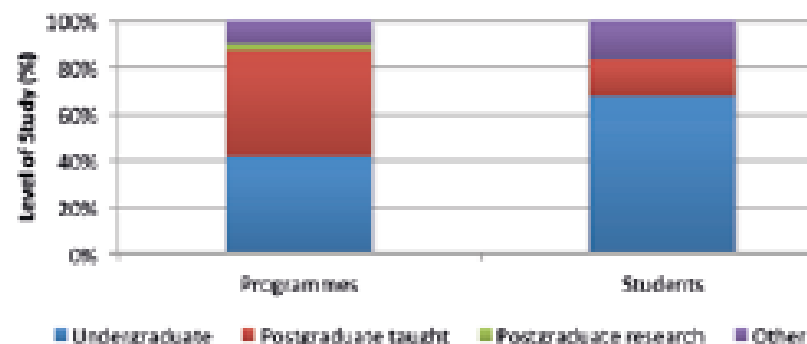
Medicine and Related



Science



Social Studies and Law

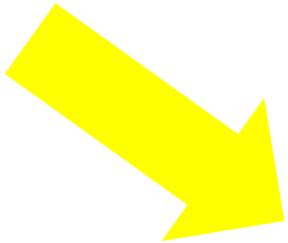


Registrations



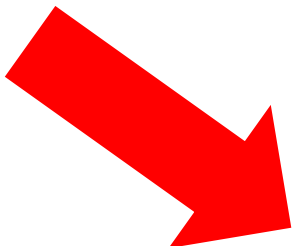
Increase in joint/dual registration

- >60% students jointly registered, especially Social Studies and Law, Science and Education
- Medical and related programmes tend to be joint registrations
- No difference in likelihood of joint/single registration at undergraduate or postgraduate levels
- Full-time students most likely to be jointly registered



Decline in UK only registration

- Almost all distance/online programmes register only with the UK provider
- Even distribution of joint and UK only registration for programmes delivered via physical presence

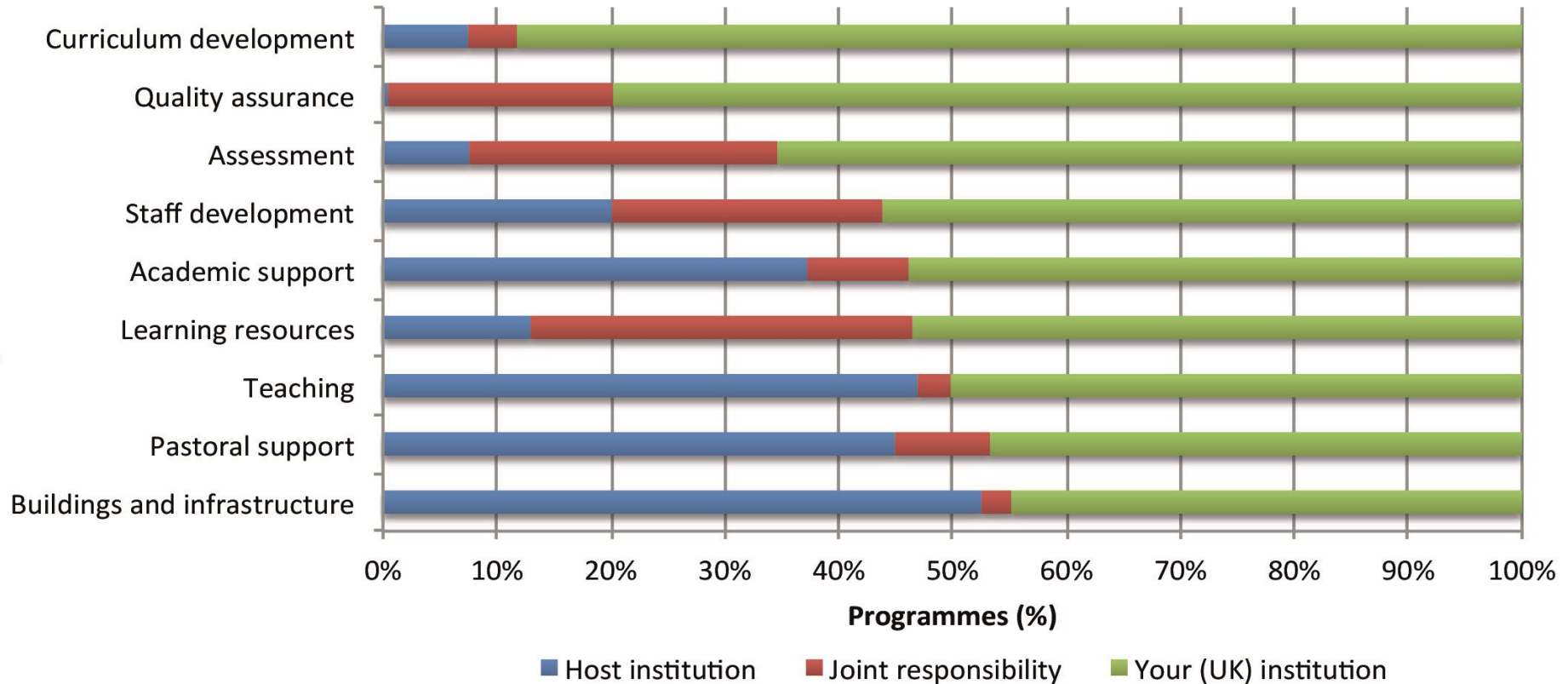


Decline in overseas only registration

- Although almost all programmes/students involving local partnership delivery registered with host provider

What works?

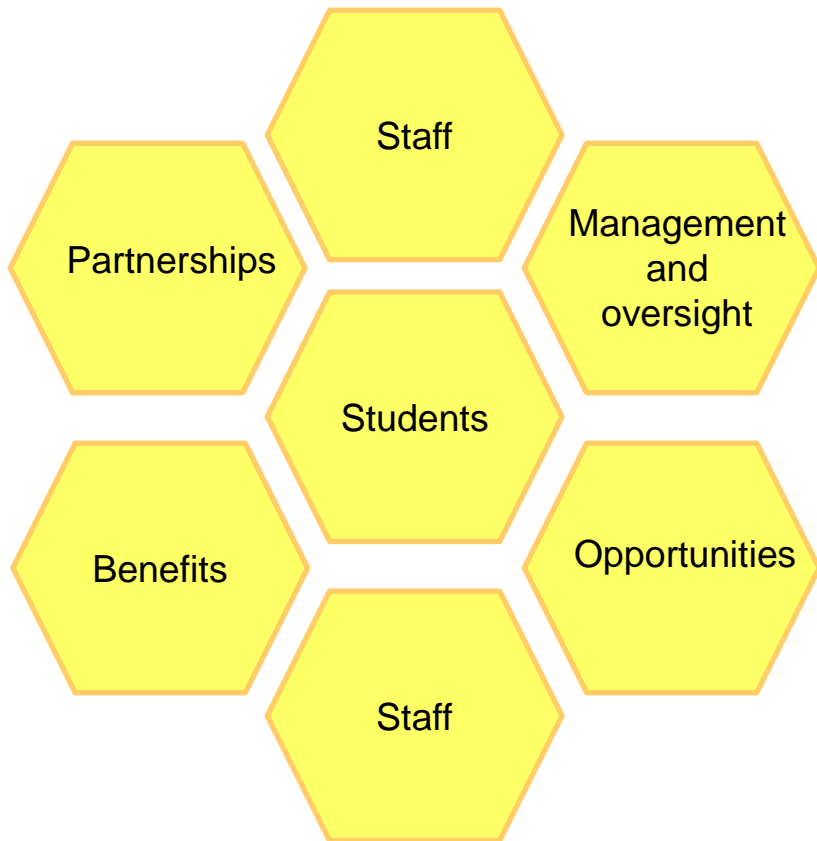
The nature of partnerships



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What works?

Case study lessons



- Strategic alignment between partners
- Champions
- Whole institution approaches
- Long term commitment
- Resource management
- Reflection to improve home delivery



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Case studies

- Bangor College China (BCC)
- University of Greenwich validated degrees at October University for Modern Sciences and Arts (MSA)
- Staffordshire University's validated degrees at Asia Pacific University of Technology and Innovation (APU)
- Oxford Brookes University's programme with the Association of Chartered Certified Accountants (ACCA)
- Heriot-Watt University Dubai and Malaysia Campuses
- Goldsmiths, University of London validated degrees at LASALLE College of the Arts
- SWJTU-Leeds Joint School
- University of Bradford's franchised degrees at Namal College
- Newcastle University Medicine Malaysia (NUMed)
- University of Glasgow-Nankai University Joint Graduate School
- Lancaster University Ghana
- University of Liverpool's online degree programmes with Laureate Online Education



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What next? The future of partnerships

What does this mean for transnational education?

TNE, in whatever shape it might take in the future, can offer long term mutual benefits to universities and is a true opportunity for growth. There are substantial changes happening in world socio-economic and demographic landscapes, and countries' defined skills needs. These have created global education challenges which TNE may be the most dynamic response to. This level of environmental change means that TNE is unlikely to be sustained through traditional offshore models; providers hoping to grow their TNE provision in response to those higher education questions must look to greater partnership working and multiregional approaches.

Ilieva (2016), Global Trends Shaping TNE

Thai thinking: Ahead of the curve?

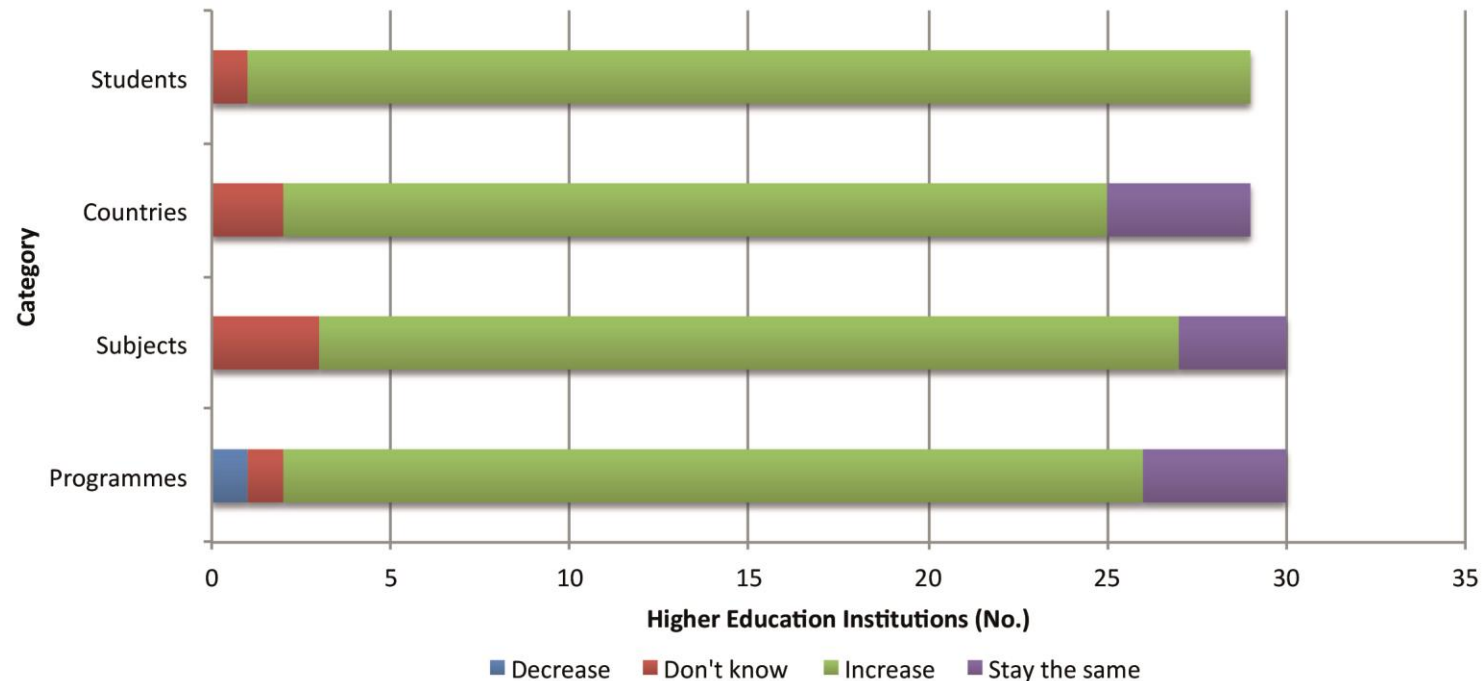
The survey and interviews with the Thai universities send a clear message on the level and type of engagement desired with UK partners. All indicated an interest in developing dual or double degrees, including at postgraduate level and with an eye to developing existing research expertise and collaborations. Six of the eight mentioned joint degrees and none mentioned branch campuses. That last point is not surprising from the perspective of Thai universities: after all, attracting branch campuses is a project led by host governments, not institutions. From the perspective of universities, it is all about partnerships and this indicates a certain level of maturity and capacity.

Their expected outcomes for TNE engagement include items like curriculum development and internationalising the student experience. Revenue was not mentioned. But most frequently mentioned was mobility: inbound and outbound for both students and staff.

Lawton (2016), Lessons from Thailand

What next? Planned growth

Four in five of the universities that commented on future plans plan to expand their TNE provision. There is growing sophistication of approaches to TNE development and management across UK universities, resulting in improved benefits for TNE hosts



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Trends: opportunities and models

- Regions expressing interest in hosting UK TNE remain Asia and MEA
 - appetite still exists in main markets - but requirements more specific
 - interest is expanding across countries within that are expanding
- Increase since 12/13 in the flexibility of offer in mode of delivery, with more programmes being offered as full time, part time, or both
- Small but growing mobility between TNE hosts and the UK as part of TNE programmes
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Future markets: 2014 predictions

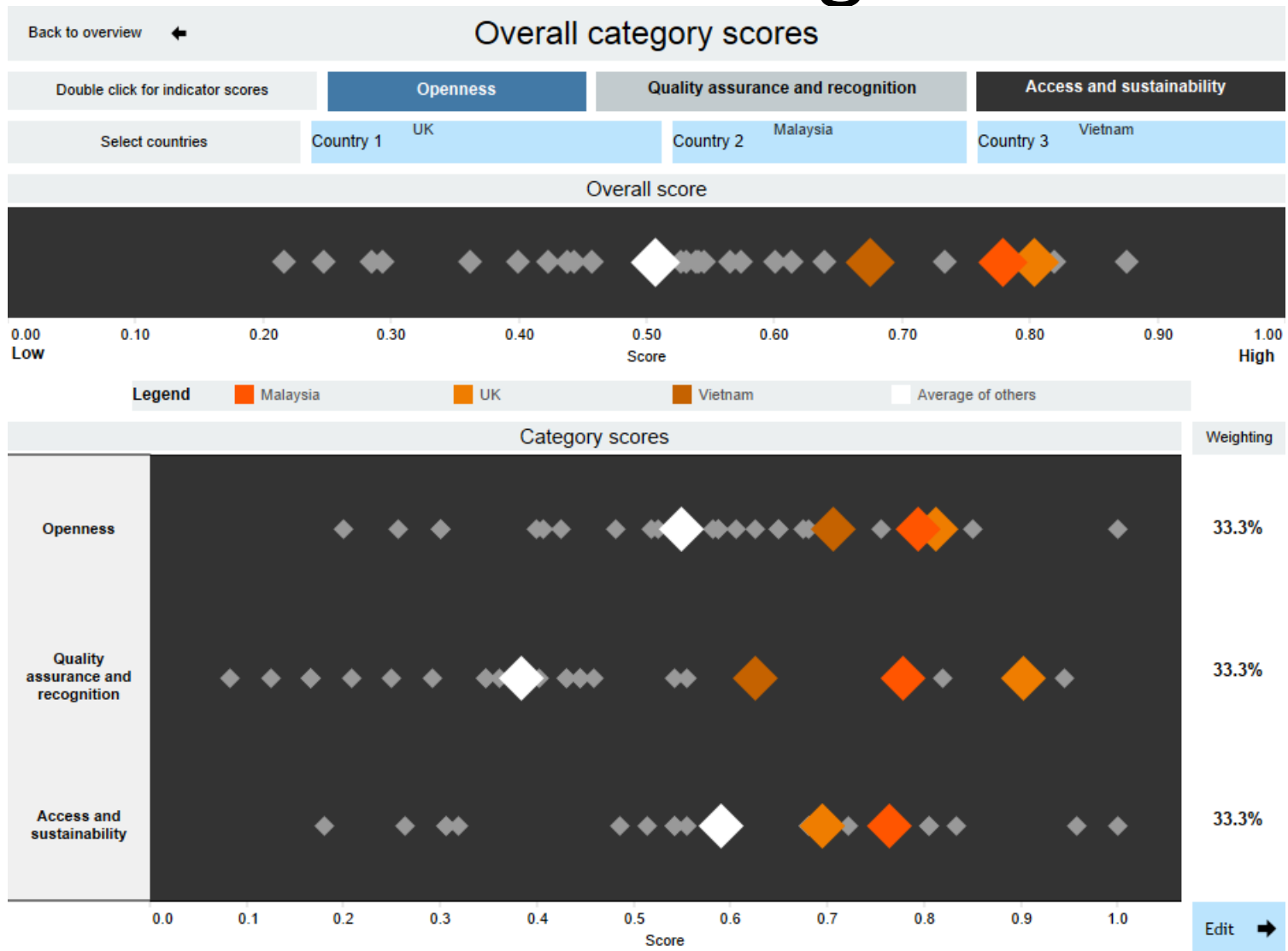
Group 1 Well above average	Group 2 Above average	Group 3 Average	Group 4 Below average	Group 5 Well below average
Hong Kong	Qatar	Botswana	Brazil	Nepal
Malaysia	South Korea	Bahrain	Indonesia	Sri Lanka
Singapore		China	Mexico	
UAE		India	Nigeria	
		Mauritius	Pakistan	
		Oman	Poland	
		Spain	Russia	
		Thailand	Turkey	
		Vietnam		

British Council (2014), The Shape of Things to Come 2



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Final measurements

Where does TNE feature within your institution's strategy?

- Within the institution's overall strategy
- Within the international strategy
- As a standalone strategy
- Not documented formally but informally it is a high priority
- Not included in any strategy

What are the main reasons for your institution to engage in TNE activities?

Rank in order of importance where 1 is the most important, 2 is the second most important, etc

- Increasing student numbers
- Increasing income
- Creating new institutional relationships
- Developing existing institutional relationships
- Access to new markets
- Gaining know how and experience in TNE
- Increasing our institution's status / reputation
- Other reason/s (please specify)

What are your plans for your TNE provision in the next 3 years?

The number of programmes to... Increase? Decrease? Stay the same? Don't know?

The number of subjects to... Increase? Decrease? Stay the same? Don't know?

The number of countries we deliver in to... Increase? Decrease? Stay the same? Don't know?

(If 'increase' or 'decrease', please provide details of which countries)

The number of students we deliver to... Increase? Decrease? Stay the same? Don't know?



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