

‘The Scale and Scope of UK HE TNE’ – reflections

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Published at the end of June, ‘[The Scale and Scope of UK Higher Education Transnational Education](#)’ sheds new light on the phenomenal growth not just in volume, but in the types of transnational education (TNE) that the United Kingdom (UK) delivers. In quantitative terms, UK universities’ TNE grew by 13.4% between 2012/13 and 2014/15 – more than five times the pace of international student recruitment into the UK. Perhaps more importantly, in qualitative terms, the research shows a growing maturity in the UK’s TNE offer, from diversity of delivery models, increased partnership delivery and enhanced partnership working.

[WECD](#) conducted the research, surveying UK HE public providers to better understand the TNE they deliver. The new survey captures two thirds of the HESA Aggregate Offshore Record (AOR) numbers, two thirds of the programmes, and two thirds of the big TNE providers, ie those with over 5,000 TNE students [reported to HESA](#). The report looks at the 2014/15 AOR alongside the survey returns, comparing datasets where applicable. It takes into account factors which might distort the reporting to HESA and/or the survey. The most recent and only other analysis of this depth is BIS’ (2014) ‘[The Value of TNE to the UK](#)’ which looked at activity in 2012/13; thus any discussion of recent trends uses 2012/13 as a proxy benchmark. This article outlines some of the report’s key findings, and looks at reactions and discussions within the UK HE sector in the weeks following the report’s release.

The UK’s HE TNE in numbers

Growth

Since the introduction of the AOR in 2008/09, the number of TNE enrolments reported has increased annually, and in recent years, very significantly with around a 10% increase between 2012/13 and 2014/15. Controlling for the distortive effect that one institution with a high volume of provision has on the total numbers¹, highlights even greater growth in active

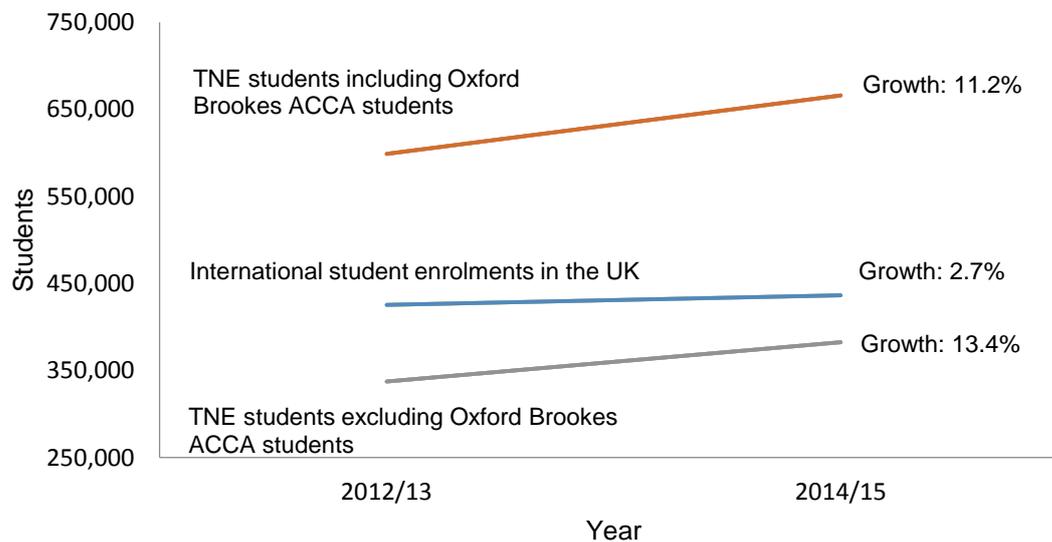
¹ Approximately 43% of all TNE students in the 2014/15 AOR data appear to study with Oxford Brookes University, and nearly 99% of these include Oxford Brookes University ACCA (the Association of Chartered Certified Accountants) registered students. The impact that these student numbers have on the total TNE figures is set out below:

	2012/13	2014/15	% INCREASE
All Students including Oxford Brookes ACCA students	598,925	665,995	11.2%
All Students excluding Oxford Brookes ACCA students	337,260	382,610	13.4%

Source: UK HE International Unit (2016), The Scale and Scope of UK Higher Education Transnational Education, Table 3.2

enrolments: the UK's HE TNE activity grew by 13.4% between 2012/13 and 2014/15, more than five times the rate of the number of international students coming to the UK to study.

International student numbers for UK higher education programmes on and offshore

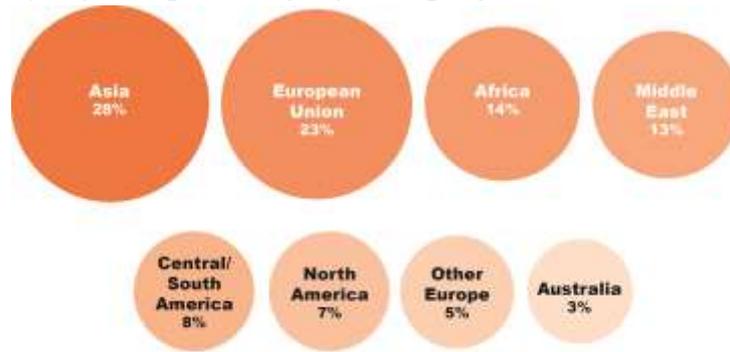


Source: HESA AOR 2012/13 and 2014/15

Location

Using the United Nations list of countries and territories at the point that the research was conducted, the phenomenal reach of UK HE via TNE is apparent: for 2014/15, there were only fifteen countries where the UK did not have any offshore programme delivery. The consistency in the five 'top' host countries is remarkable: ranked by total student numbers, they were the same between 2012/13 and 2014/15, and Asia remains the dominant host region. However, the relative dominance of leading 'host' regions has declined: Asia now accounts for 28% and the EU 23% of active TNE programmes, while just two years ago, ['The Value of Transnational Education to the UK'](#) found these to be closer to 49% and 25% respectively. It may not be that the UK's TNE has declined in those regions per se: more likely that TNE programmes are growing and/or being established in other regions.

UK HE TNE by region – percentage of TNE programmes delivered in the regions



Source: UK HE International Unit (2016), The Scale and Scope of UK Higher Education Transnational Education, Figure 3.7

The real interest lies in the churn below the surface: looking to numbers 5-10, there is clear recent and active change in TNE locations. With the exception of Greece, which is slowly but steadily moving down the list of large TNE host countries, the top 10 host countries are all in Asia or the Middle East and Africa. This seemingly contradicts the percentage of TNE by region chart above; however, when the Middle East and Africa are combined, they account for 27% of the UK’s TNE reach, thus moving into second ‘host’ position by region.

UK HE TNE Provision: Top 10 Host Countries with most TNE students registered in 2014/15 (ranked by number of students) – excluding Oxford Brookes ACCA registered students

2008/09 Ranking	2012/13 Ranking	2014/15 Ranking	Country
3	2 ↑ 1	1 →	Malaysia
1	1 ↓ 2	2 →	Singapore
2	1 ↓ 3	3 →	Hong Kong
4	4 →	4 →	China
9	4 ↑ 5	5 →	Oman
15	6 ↑ 9	3 ↑ 6	Egypt
16	6 ↑ 10	3 ↑ 7	Sri Lanka
5	2 ↓ 7	1 ↓ 8	Greece
14	8 ↑ 6	3 ↓ 9	United Arab Emirates
11	3 ↓ 14	4 ↑ 10	India

Source: UK HE International Unit (2016), The Scale and Scope of UK Higher Education Transnational Education, Table 3.4

Subject Areas

Business and management studies rank highest on all counts across the UK HE TNE analysed in this study: by number of countries where the programmes are offered (89), the percentage of TNE programmes (36%), and the percentage of students (42%).

UK HE TNE subjects by volume of countries, programmes and enrolments

Subject	Number of countries	% programmes	% enrolments
Arts and Humanities	65	15	6
Business and Management	89	36	42
Education	15	1	1
Engineering, Technology and Architecture	53	12	11
Maths and Computing	53	12	9
Medicine and Related	66	9	6
Science	39	5	3
Social Studies and Law	62	10	21

Source: UK HE International Unit (2016), The Scale and Scope of UK Higher Education Transnational Education, Table 3.12, Figure 4.2 and Figure 4.3

Ranking the subject by country, programme and enrolment, there is consistency in the most popular subject and the two least frequently occurring subjects across the rankings, but substantial differentiation in the other subjects.

UK HE TNE subjects by volume of countries, programmes and enrolments (ranked)

Rank	Number of countries	% programmes	% enrolments
1.	Business and Management	Business and Management	Business and Management
2.	Medicine and Related	Arts and Humanities	Social Studies and Law
3.	Arts and Humanities	Engineering, Technology and Architecture	Engineering, Technology and Architecture
4.	Social Studies and Law	Maths and Computing	Maths and Computing
5.	Engineering, Technology and Architecture	Social Studies and Law	Arts and Humanities
6.	Maths and Computing	Medicine and Related	Medicine and Related
7.	Science	Science	Science
8.	Education	Education	Education

Source: UK HE International Unit (2016), The Scale and Scope of UK Higher Education Transnational Education, Table 3.12, Figure 4.2 and Figure 4.3

Discussion within the sector about the report and its findings have led to several potential explanations for the different ordering of subjects by each measure. They include:

- The resources needed to deliver particular programmes – those requiring lots of physical and human capital, such as laboratories and contact time – might mean smaller numbers of students.
- Newer programmes are only just establishing themselves, so likely to have fewer students numbers. This is particularly apparent in subjects which have seen large scale introduction of new TNE programmes in recent years, eg 55% of Arts and Humanities programmes reported to the survey were established between 2012 and 2014. More established programmes are likely to serve consistently larger student cohorts; they might also operate fewer but popular programme options because of their already known reputation and brand.
- Programmes serving very particular local needs may be niche provision. They will likely have low enrolment numbers, so could appear to have disproportionately high numbers of programmes comparative to the corresponding AOR return.
- Survey respondents may have classified subjects differently. The fall in Social Studies and Law TNE numbers has been questioned, with suggestions that courses might instead have been returned as Arts and Humanities, and vice versa. Taking the example of child care and/or social work, some discussions highlighted that these courses could be returned in any of three categories: Arts and Humanities; Education, or Social Studies and Law.
- For practical reasons and to minimise the burden of participation, the survey only collected detailed programme data for the five main countries where the responding HEI delivered TNE. This means that programmes in other countries with smaller cohorts might be excluded from the subject list.
- Accreditation for professional disciplines continues to be challenging for TNE delivery: only one in ten TNE programmes have professional accreditation². This might account for the mixed ranking of subjects like Medicine and Related studies, which have limited value without professional accreditation, featuring less strongly in the number of programmes and students than other subjects, despite the subjects being in high demand and programmes being offered in one third of the countries that UK HE TNE operates in.

What do these potential explanations mean for the research, or future data questions?

- It is important to consider all of the ways that the TNE numbers might be analysed. Small numbers of programmes, or small student numbers, can nonetheless have an impact on students' lives, local society and the broader education landscape. A large number of programmes might serve a small number of students, especially if those

² This excludes the BSc in Applied Accountancy offered by Oxford Brookes University and ACCA, as the professional accreditation of that programme by student numbers could imply greater levels of accreditation across total TNE programmes

programmes are new or niche; a small number of programmes might serve a large number of students, especially if those programmes are established and/or have broad appeal without need for tailoring.

- Detailed analysis, possibly across a peer group, of subjects against delivery mode and country could inform strategic decision making about market opportunity, potential market saturation, or opportunities for success for new and existing programmes.
- Exploration of the data by programme title might shed new light on the relative chances of success of programmes in Arts and Humanities, Engineering, Technology and Architecture, Social Studies and Law, Maths and Computing, and Medicine and Related.
- There is no one size fits all model or approach. Different subjects will work in different contexts, and universities need to be very clear about their programme goals and markets if establishing, growing or maintaining TNE.

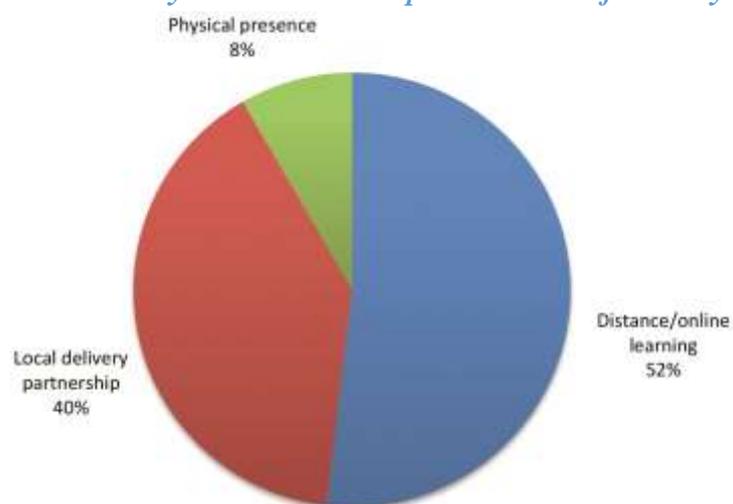
The UK's HE TNE in practice

TNE 'type'

Distance/online learning grew by 30% between 2012/13 and 2014/15, from being 40% of the UK's offshore delivery to 52%. As digital advances continue, it seems likely that distance/online learning will continue to dominate the TNE offer. It is important to note though, that when TNE delivery by mode is considered, it is clear that there are preferences by location for certain modes. Taking distance and online learning, the United States features in the ten most popular countries for distance learning for UK programmes, but the United States does not feature strongly in other TNE modes for the UK.

The role of branch campuses in the UK's HE TNE offer has remained relatively stable at 4-6% of TNE student numbers returned to the HESA AOR. Of the 8% of delivery reported to the survey via physical presence, 71% is through branch campuses.

TNE delivery method in the top 5 countries of delivery

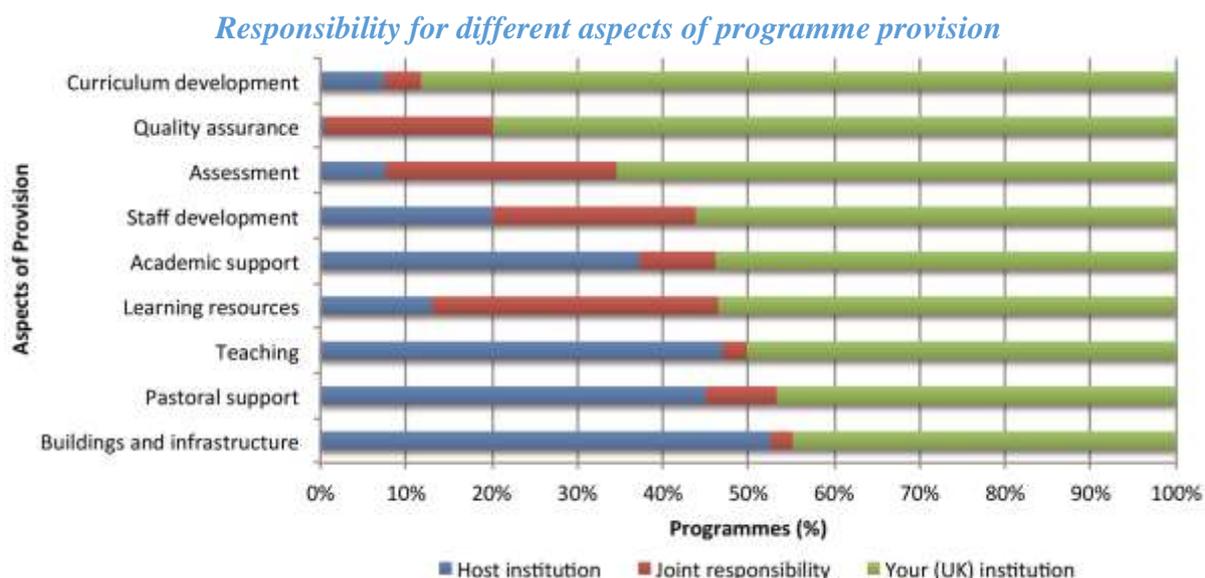


Source: UK HE International Unit (2016), The Scale and Scope of UK Higher Education Transnational Education, Figure 4.1

Only 1% of the programmes reported to the survey were categorised by respondents as ‘blended’ delivery. However, the descriptions of delivery through the case studies show that programmes are delivered and staff are engaged in a multitude of ways. Most programmes now involve more than one ‘pure’ delivery method, but are not described by the universities offering those programmes as blended. For example, it is likely that local partnership delivery will include some physical presence, with flying faculty included in both physical presence and local partnership delivery programmes.

TNE delivery arrangements

The study found that TNE is increasingly delivered through partnerships. This can reduce risk, and increase local buy in. As more TNE is delivered with others, there have been logistical changes in how partners approach TNE delivery. In particular, partnerships are becoming far more equitable. The UK institution generally leads on the three areas of HE that are its global calling cards of excellence, and the reasons that overseas interests express in their approaches for international partners that they want to work with the UK: curriculum, quality assurance, and assessment.



Source: UK HE International Unit (2016), *The Scale and Scope of UK Higher Education Transnational Education*, Figure 5.3

The other areas of shared delivery used to be dominated by a ‘lead’ partner, normally the sending institution. Now there are movements toward a more equal distribution, where the green and blue bars in the chart above are similar sizes, and in many cases a shared responsibility, represented by the red bars in the chart above. As partnerships become more balanced, the red bar in the centre of the chart is set to expand, and the sole responsibility of UK and partner institutions, in green and blue, will become borders to that central red bar.

Student registrations

In cases where TNE is delivered through partnerships, it used to be the case that more TNE students were registered with the UK institution than registered with both the UK and its partner institution(s). Since 2012/13, that preference has switched, with more programmes now registering students at both institutions than the UK institution only. There is a marked fall in programmes where registration is purely with the host country, with only 1% of programmes delivered through partnerships now registering students only with the ‘host’ partner.

Programme registrations by partner

Registration	2012/13	2014/15	Change
Host country institution only	11%	1%	↓10%
UK institution only	58%	48%	↓10%
Both host and UK institution	34%	50%	↑16%

Source: UK HE International Unit (2016), *The Scale and Scope of UK Higher Education Transnational Education*, paragraph 4.47

Although the turning point of registrations being more jointly arranged than UK only happened within the last two years, it is part of a longer trend. Only one in five programmes delivered through local delivery partnerships established before 2006 reported joint registration; while four in five programmes established since 2006 have such an arrangement.

Student mobility

‘[Exploring the impact of TNE on host countries](#)’ highlighted that part of the popularity of TNE programmes is the opportunity to spend a period of time studying in the UK, and ‘[Transnational pathways to higher education in England](#)’ showed that TNE forms an important part of the pathway to studying in England for Chinese and Malaysian students. Whilst mobility may be part of the initial attraction toward TNE, take up of the opportunity from other countries has, to date, been relatively low. Instead, TNE has oft been portrayed as a low cost alternative to mobility rather than a means to access shorter mobility periods. This is slowly changing: most learning takes place in the host country, but study in the UK is gradually increasing - 22% of programmes now include UK study, and 31% of students are enrolled on programmes which can involve UK study. Programmes established prior to 2010 had relatively low expectations of mobility, with only 3% including study in the UK; since 2010, 28% of new programmes include UK study.

Programmes which are focused on progressing careers rather than undergraduate degree learning and developing employability tend to include UK study more than others: 15% of postgraduate taught programmes compared to 1% of undergraduate programmes include mobility; 8% of postgraduate taught students are on programmes including mobility compared to 2% at undergraduate level. Part time students are more likely to be studying on programmes with mobility elements, and Business and Management courses are more likely than average to include time in the UK.

What do these potential explanations mean for the research, or future data questions?

- Over time, joint responsibility for delivery across all elements of running TNE programmes could increase. This relies on greater trust and cooperation between partners, and is important in moving away from a ‘them’ and ‘us’ mentality so that TNE models become integrated into local environments. This in turn implies increasing professionalisation in approaches to TNE management which incorporate relationship building.
- Anecdotally, there is talk of growing joint, dual and double degree structures in TNE. Using data sets currently available, it is difficult to identify whether this is the case; a reasonable proxy, in cases of HE being delivered by partnerships, is whether a student is registered with one or both partners. Detailed analysis, possibly across a peer group, of subjects against degree type in terms of shared arrangements and outcomes, could inform future modelling.
- Mobility to/from the UK is growing, and could offer new ways for universities to increase their outward student mobility as well as incoming international student numbers. This can help progress the UK sector’s aims of true internationalisation and global citizenship. However, funding constraints might limit how widely this can be applied.
- There is currently little coordinated data on student outcomes. Such data could demonstrate the contributions makes to student lives, to local economies, and to internationalisation.

[‘The Scale and Scope of UK HE TNE’](#) shows that TNE is an active area for higher education and internationalisation. The changes in approaches in just two years show rapidly evolving global programmes and delivery. There is a keen need for comprehensive and reliable data to inform future planning and strategy.

The data alone do not do justice to the breadth of offshore programming. TNE programmes are far from uniform; there is no ‘off the shelf’ approach to conceptualising or delivering offshore programmes. This is apparent from the twelve case studies included in the report: each markedly different and tailored to the local environment and institutional strategy, and each with different success factors. TNE student numbers are likely to grow, alongside new approaches to managing provision fairly, effectively and compassionately as a key part of UK universities’ international vision and delivery. The growth of TNE allows students who might not otherwise be able to access their preferred programmes to do so, widening their possible pathways and options for a truly globalised student experience.

**About the author*

Raegan Hiles heads up the HEGlobal programme, a joint initiative between the International Unit and the British Council to empower UK universities' transnational education activity. This includes managing the delivery of the national ‘Scale and Scope of

UK HE TNE' project from 2015-16 which explored the UK's offshore higher education delivery, universities' strategic priorities, and future TNE planning.

Raegan has worked across the HE sector in a university, a funding council, a professional sector grouping and Universities UK. She studied as an undergraduate at the University of Warwick, and has postgraduate qualifications from University College London and the University of York.