



Universities UK
International

FIVE LITTLE-KNOWN FACTS ABOUT INTERNATIONAL STUDENT MOBILITY TO THE UK

**ANALYTICAL SUMMARY
FOR UUKI**
JANET B. ILIEVA



CONTENTS

INTRODUCTION	1
AN OVERVIEW OF INTERNATIONAL MOBILITY FLOWS TO THE UK 2006 – 2016	1
Undergraduate entry	3
Postgraduate entry	4
SOME LITTLE-KNOWN FACTS ABOUT SHIFTS IN INTERNATIONAL STUDENT MOBILITY TO THE UK	5
FACT 1: More than half of the UK’s international students are new entrants	5
FACT 2: Despite the UK’s international postgraduate population being smaller than the US, annual intake is higher	6
FACT 3: There is a strong positive correlation between post-study work options and growth in international student enrolments	7
FACT 4: Future demand for international students to undertake postgraduate research in the UK is uncertain	8
FACT 5: The majority of international students on UK programmes are studying overseas	9
WHAT TO EXPECT IN 2018 AND PRIORITIES FOR HIGHER EDUCATION ENGAGEMENT	10
Government policies and international student flows	10
Sustaining self-funded postgraduate demand for UK higher education and working with overseas funders	11
TNE maintains higher education engagement in countries with little student mobility to the UK	12
Changing regulatory environment: challenges and opportunities	12
CONCLUSION	13

UNIVERSITIES UK INTERNATIONAL

UUKi is the international arm of Universities UK. We help UK universities flourish internationally by representing them and acting in their collective interest. We actively promote universities abroad, provide trusted information for and about them, and create new opportunities for the sector. We aim to: enable universities to develop and deliver strong international strategies; influence the policy and regulatory environment through our ability to represent UK universities; and create diverse opportunities through strategic partnerships.

TEXT AND ANALYSIS BY
JANET ILIEVA, EDUCATION INSIGHT

JULY 2018 ISBN: 978-1-84036-403-3

INTRODUCTION

This paper analyses some of the significant shifts in international student enrolments in UK higher education.

It starts with a brief overview of global demand for UK higher education. The focus of the paper is then on identifying analytical facts about international student mobility to the UK that have received little or no attention to date. The term “international students” includes students from EU and non-EU countries. This analysis of mobility to the UK focuses on first-year full-time students unless specified otherwise.¹ The international comparative analysis uses data on full-time and part-time students.

This analytical summary concludes with an overview of shifts in the external environment that will affect international student mobility to the UK.

AN OVERVIEW OF INTERNATIONAL MOBILITY FLOWS TO THE UK 2006 – 2016

International student mobility flows to the UK decelerated significantly in the aftermath of the global financial crisis of 2008-09. Figures 1a and 1b shows indexed growth of other EU students, non-EU students and total international students over the past ten years from 2006-07 to 2016-17. Recruitment growth was most pronounced among non-EU students. However, this stalled between 2010-11 and 2012-13, attributed mainly to declines in enrolment from India. Non-EU enrolment went on to peak in 2013-14, fell in 2014-15 and remained static in the last three years.

Declines in the overall international student numbers (EU and non-EU) were first reported in 2012-13, which was the first reduction in almost three decades.² This was mainly attributed to the fall in undergraduate EU entrants whose tuition fees trebled in 2012-13. The second low point in the annual growth of overall international entrants was in 2014-15 (See Figure 1), which resulted from fewer non-EU students commencing their study in the UK. Non-EU enrolments continued to stagnate in the following years, which is in stark contrast to high growth in international demand for study in Australia, Canada, Germany, New Zealand and the US. EU student numbers, however, continued to recover and in 2016-17 they surpassed the levels recorded in 2011-12 (See Figures 1a and 2a).

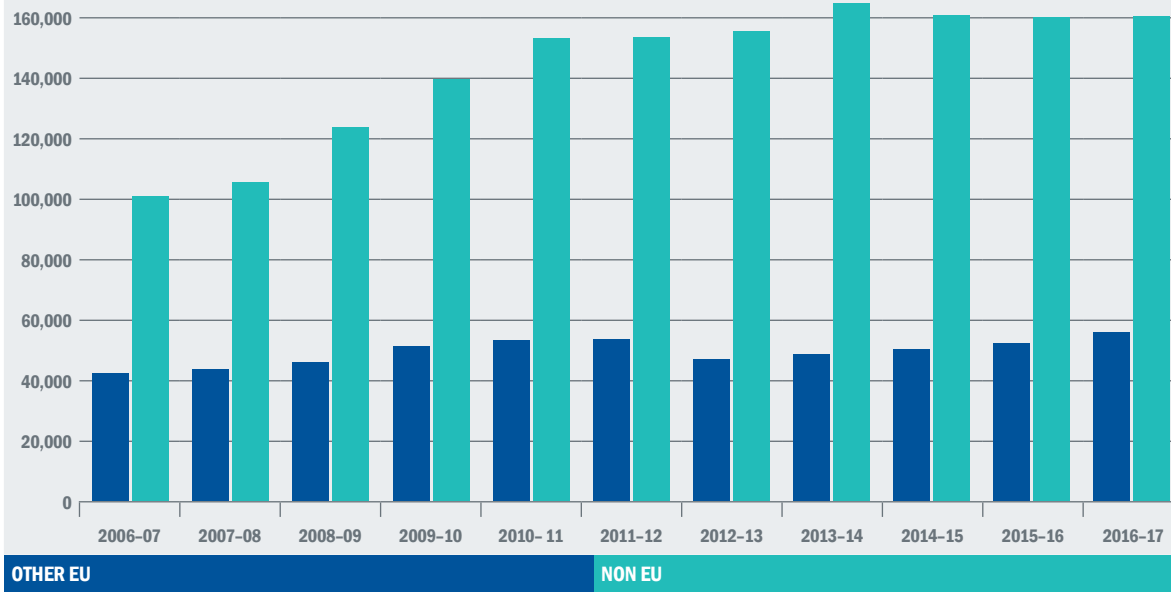
While non-EU growth remained flat in 2016-17 compared with the previous year, Higher Education Funding Council for England (HEFCE) analysis from 2018 shows that the fee income from non-EU students increased by 5% in the same period (from £3.8 billion in 2015-16 to £3.9 billion in 2016-17).³ Further analysis is required to establish whether the growth in income is attributed to growing tuition fees or that the growth in enrolment was mainly concentrated in higher education institutions with higher tuition fees, which might mask declines in other institutions.

1. The numbers of international students are rounded to the nearest 100.

2. HEFCE (2014), Global demand for English higher education: An analysis of international student entry to English higher education courses; <http://www.hefce.ac.uk/pubs/year/2014/201408a/>

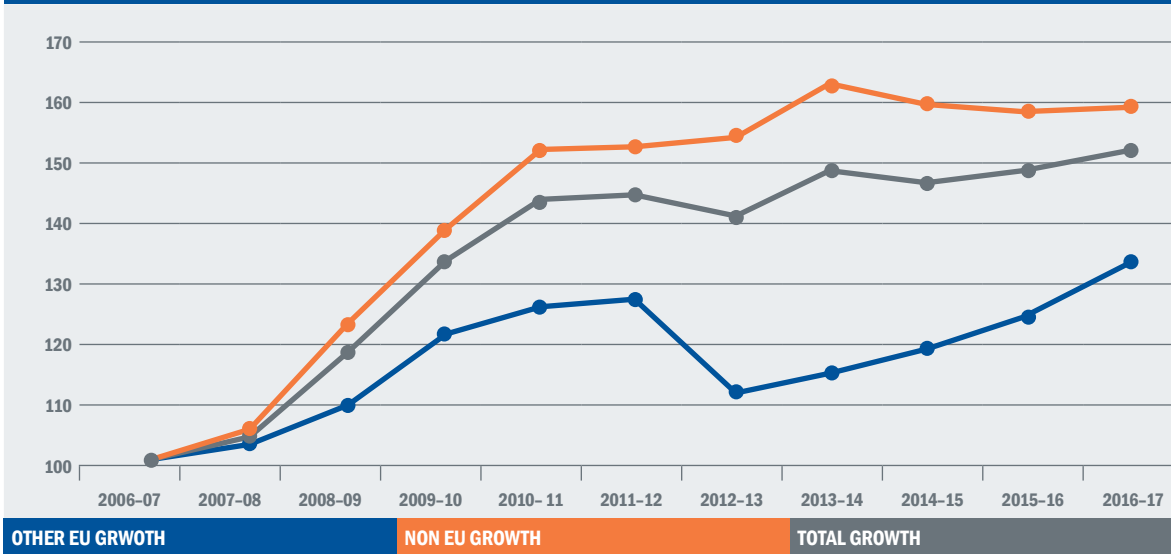
3. (HEFCE (2018), Financial health of the higher education sector: 2016-17 financial results; <http://www.hefce.ac.uk/pubs/year/2018/201804/>

FIGURE 1A: FULL TIME INTERNATIONAL ENTRANTS TO UK HIGHER EDUCATION 2006-2007-2015-16 (YEAR ON YEAR CHANGE)



Source: HESA Student Record.

FIGURE 1B: GROWTH IN EU, NON-EU AND TOTAL INTERNATIONAL STUDENTS 2006-07 - 2016-17 (2006-07=100)



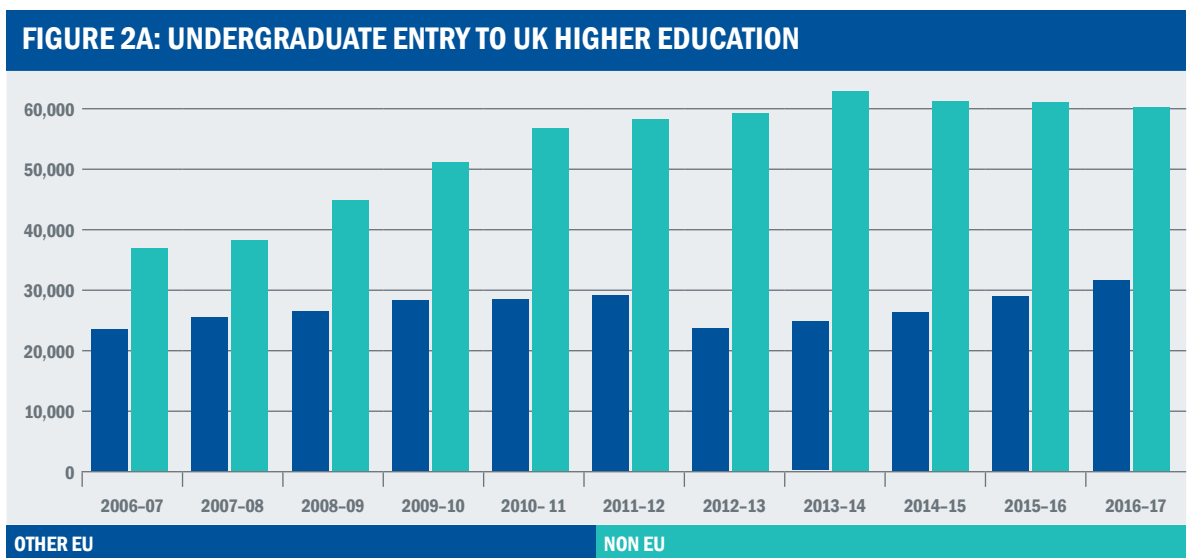
Source: HESA Student Record.

UNDERGRADUATE ENTRY

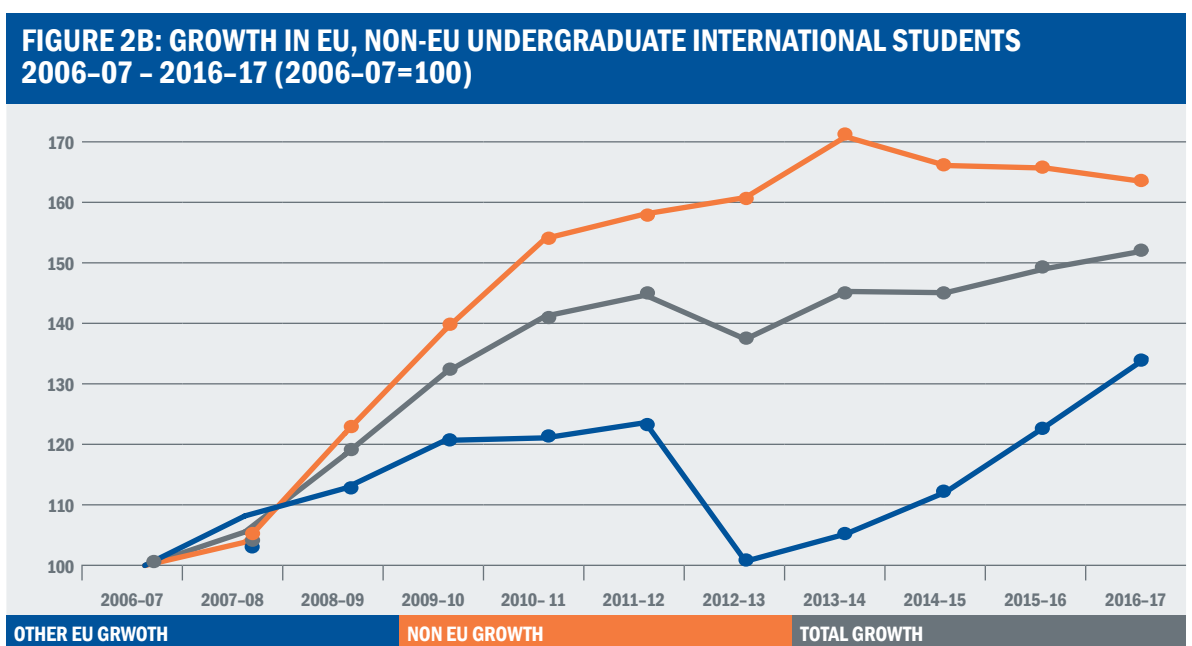
Figures 2a and 2b show annual growth in EU and non-EU entrants to UK higher education. While EU numbers took four years to recover after the 18% dip in 2012-13, the non-EU student entrants are still below their peak level in 2013-14.

UCAS application data for the 2017-18 academic year suggests the number of EU applicants was 4.4% lower than the number in 2016-17, which equates to 2,380 fewer applicants.⁴ This is likely a result of the uncertainty around the impact of Brexit on tuition fees and future access to student support. However, the UCAS June deadline analysis for the 2018-19 academic year shows the number of EU applicants has risen 2%, to 50,130.

An analysis by London Economics (2017)⁵ for the Higher Education Policy Institute (HEPI) cautions that harmonised tuition fees for EU students post Brexit may result in a 57% drop in EU enrolments, equating to about 31,000 EU students.



Source: HESA Student Record, various years.



Source: HESA Student Record, various years.

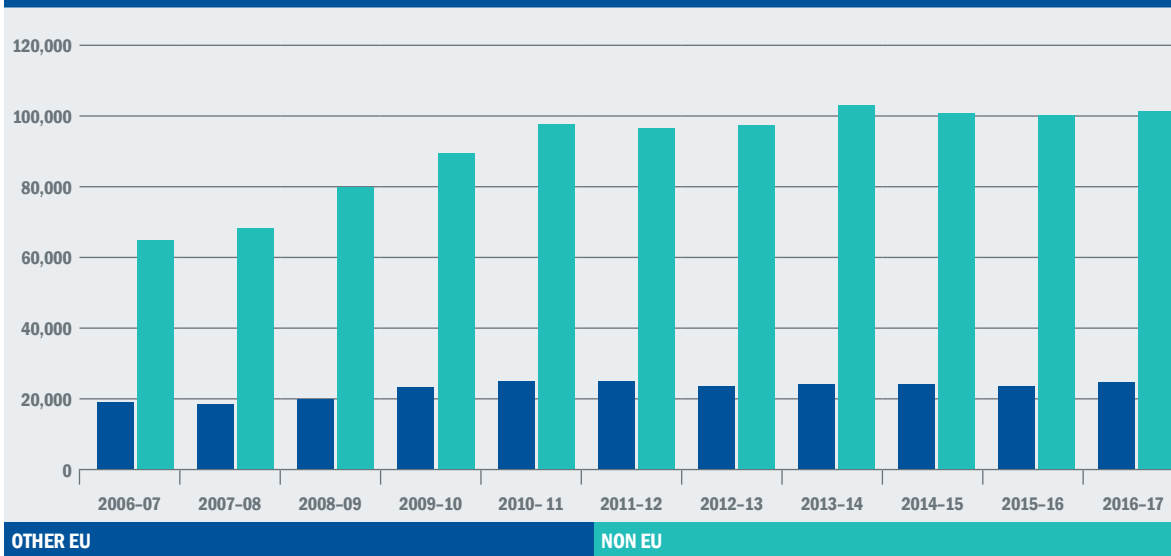
4 UCAS (2017, p.20), End of cycle report 2017: Patterns by geography; <https://www.ucas.com/file/137236/download?token=LtrRkIaK>

5 HEPI (2017), The determinants of international demand for UK higher education; an analysis by London Economics; <http://www.hepi.ac.uk/2017/01/12/universities-lose-students-gaining-financially-brexit-new-restrictions-international-students-cost-uk-economy-additional-2-billion-year>

POSTGRADUATE ENTRY

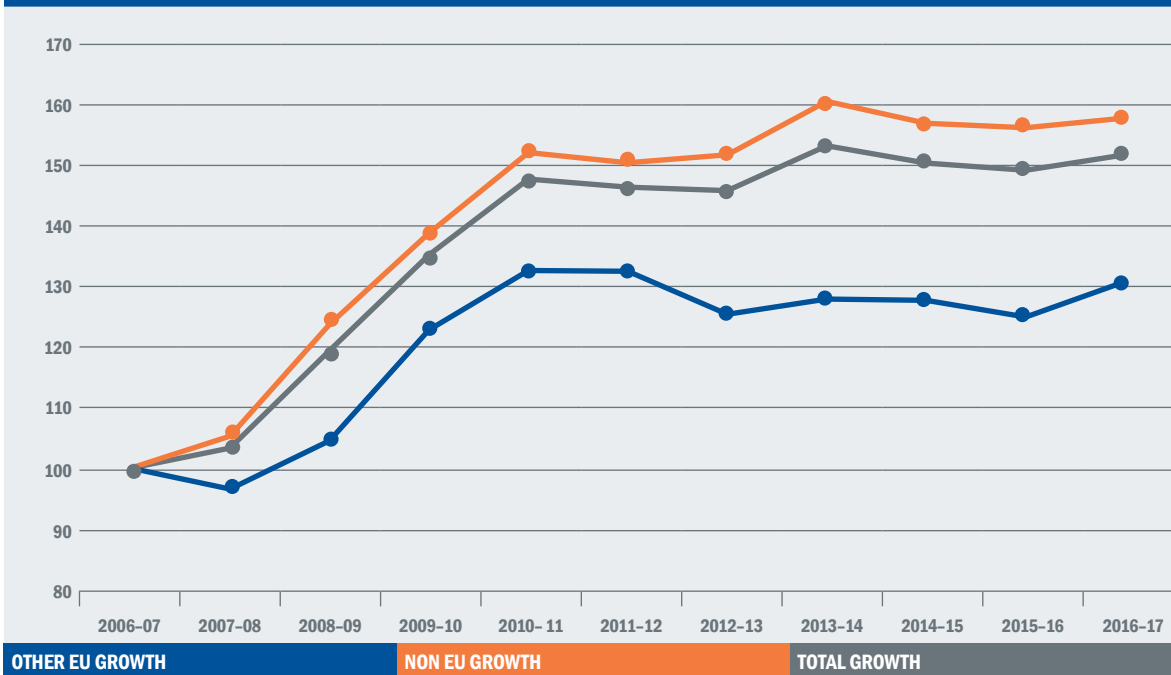
Postgraduate entry to the UK first dipped in 2011-12, mainly due to declines in students from India and Pakistan and has remained weak and unstable. While growth in 2016-17 remained just under 2%, this was well below the expansion experienced by the UK’s competitors in the same year. The UK’s international student numbers, meanwhile, are still to recover to their peak levels of 2013-14. The academic year 2016-17 marked a welcome shift from a continued decline in Indian students with a 10% increase compared with the previous year. However, this recovery should be set in the context of a 63% decline since 2008-09.

FIGURE 3A: POSTGRADUATE ENTRY: EU AND INTERNATIONAL STUDENTS



Source: HESA Student Record, various years.

FIGURE 3B: GROWTH IN EU, NON-EU POSTGRADUATE INTERNATIONAL NEW ENTRANTS 2006-07 - 2016-17 (2006-07=100)



Source: HESA Student Record, various years.

SOME LITTLE-KNOWN FACTS ABOUT SHIFTS IN INTERNATIONAL STUDENT MOBILITY TO THE UK

This analytical study summarises some little-known facts about recent shifts in international student mobility to the UK.

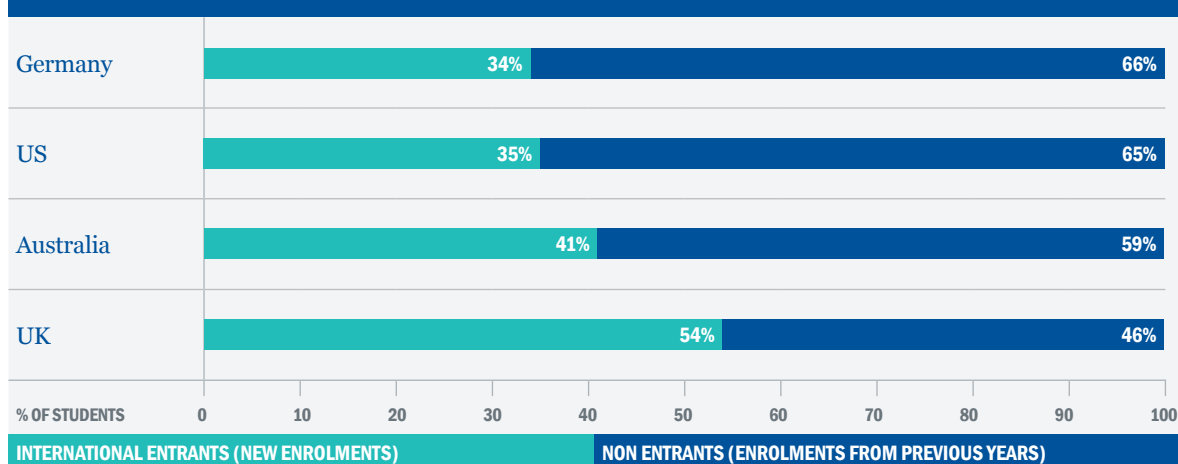
FACT 1: MORE THAN HALF OF THE UK'S INTERNATIONAL STUDENTS ARE NEW ENTRANTS

This section compares the proportion of new international entrants to higher education as a proportion of the total student population. The UK's peer group represents the countries with the largest numbers of international students in 2015 reported by the UNESCO Institute for Statistics⁶ and includes the US, Australia and Germany. More than half of the UK's international students are new entrants, i.e. they are in their first year of study in the UK. In comparison, about a third of the international students in the US and Germany are new entrants (32% and 36% respectively). This is partly explained by the fact that UK undergraduate programmes are usually three years in duration, compared with a typical four years in the US. While masters programmes in the UK typically last one year, they usually take two years in Germany and the US.⁷

The high proportion of new international entrants in the UK means that higher education institutions must continuously recruit new students. This requires a significant marketing effort related to student recruitment, and increases the importance of a streamlined student applications, admissions and visa system to facilitate this turnover.

The rapid turnover of international students also indicates the UK higher education system is more vulnerable to changes in global demand and the external environment. The time lag between a change in the environment and the subsequent impact on the sector is much shorter in the UK than in a competitor system with a higher average number of years of study per international student.

FIGURE 4: PROPORTIONS OF INTERNATIONAL FIRST-YEAR STUDENTS IN AUSTRALIA, GERMANY, THE UK AND THE US



Source: Analysis of student data sourced from Department for Education and Training (Australia); Statistisches Bundesamt, Studierendendatistik; DZHW Berechnungen (Germany); HESA student record; the Institute for International Education (US). The analysis uses the latest available 2016-17 data for Australia, the UK and the US and 2015-16 for Germany. This analysis includes part-time and full-time international students. These data exclude Optional Practical Training students in the US

⁶ France hosted more international students than Germany in 2015, however, no comparable data on international entrants were sourced.

⁷ In addition to the shorter duration of UK degrees, previous research found that a third of the students on first degrees in England commence their study overseas through a TNE course. These students appear in the data as in their first year of study in the UK but may in fact be completing a course that they began overseas. For further details see: HEFCE (2015), Transnational pathways to higher education in England; <http://www.hefce.ac.uk/pubs/year/2015/201508/>

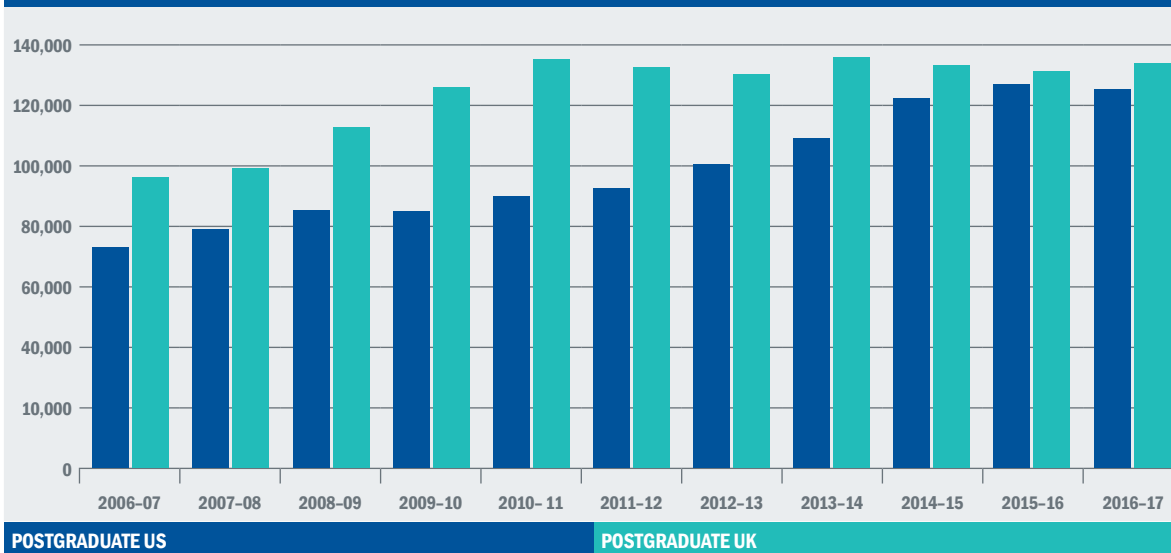
FACT 2: DESPITE THE UK'S INTERNATIONAL POSTGRADUATE POPULATION BEING SMALLER THAN THE US, ANNUAL INTAKE IS HIGHER

The UK hosts the second largest population of masters and doctoral students in The Organisation for Economic Co-operation and Development (OECD) countries⁸ after the US. The latest data from the Institute for International Education shows the US hosts 391,000 postgraduate students, twice as many as the UK. However, the longer duration of postgraduate degrees means 32% of the total US postgraduate population is in their first year of study, in contrast with the UK where 68% of the overall postgraduate students (part-time and full-time) are new entrants.⁹

This means that although the UK postgraduate sector is half the size of its US counterpart, the number of new international postgraduate students starting their degrees in the UK each year is higher.

The UK's reliance on continuous enrolments of international students indicates the strong appeal of its higher education offer, but also reveals an area of vulnerability to rapid shifts in global demand, competitive pressures, and changes to the external environment (such as currency fluctuation). This is particularly evident at postgraduate level where over two-thirds of students are new entrants.¹⁰

FIGURE 5: INTERNATIONAL ENTRANTS (FIRST-YEAR STUDENTS) IN THE UK AND THE US 2006-07 – 2016-17



Source: Analysis of HESA student record and International Institute for Education.

⁸ UUK (2018, p.22), Higher Education Research in Facts and Figures; <http://www.universitiesuk.ac.uk/facts-and-stats/data-and-analysis/Documents/higher-education-research-in-facts-and-figures.pdf>

⁹ This analysis uses part-time and full-time student population to ensure comparability between the US and the UK. Optional Practical Training (OPT) students in the US are excluded from this analysis.¹⁰ Source: <https://www.education.ie/en/Publications/Policy-Reports/International-Education-Strategy-For-Ireland-2016-2020.pdf>

¹⁰ Data source: UNESCO Institute for Statistics (data accessed on April 25, 2018): <http://data.uis.unesco.org/>

FACT 3: THERE IS A STRONG POSITIVE CORRELATION BETWEEN POST-STUDY WORK OPTIONS AND GROWTH IN INTERNATIONAL STUDENT ENROLMENTS

Research shows that international students value opportunities to gain work experience as part of their international education. UK post-study work options are less clearly presented and more limited than our competitors. Table 1 demonstrates that between 2012 and 2015, international student enrolments grew by 0.7% in the UK, compared with 18.0% in Australia; 26.9% in Canada; 16.3% in Germany and 22.5% in the US.

TABLE 1: POST-STUDY WORK OPPORTUNITIES AND GROWTH IN INTERNATIONAL ENROLMENTS

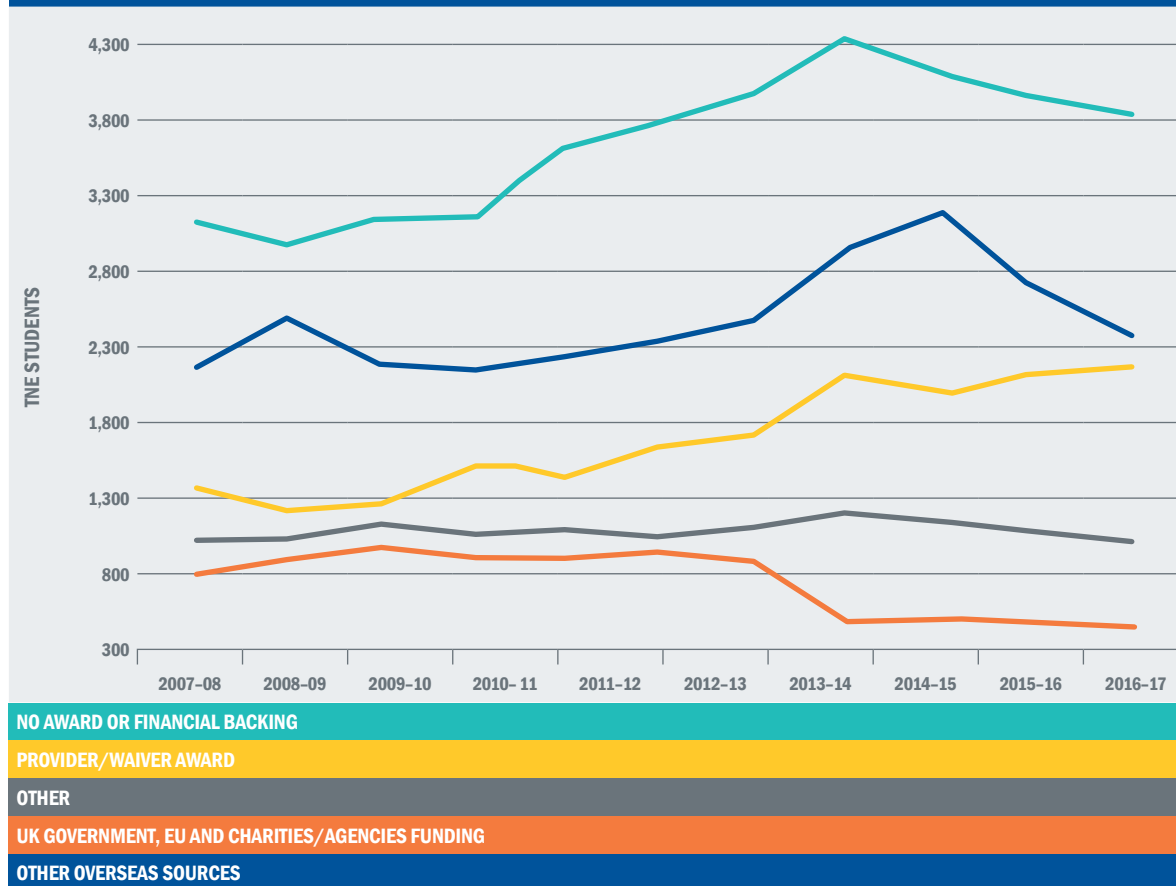
DESCRIPTION	AUSTRALIA	CANADA	GERMANY	IRELAND	NEW ZEALAND	UK	USA
Work per week allowed during study	UP TO 20 HRS	UP TO 20 HRS	UP TO 20 HRS	UP TO 20 HRS	UP TO 20 HRS	UP TO 20 HRS FOR DEGREE PROGRAMMES	UP TO 20 HRS ON CAMPUS ONLY
Post-study work	2-4 YEARS, DEPENDING ON LEVEL OF STUDY.	UP TO 3 YEARS, DEPENDING ON LENGTH OF STUDIES.	UP TO 18 MONTHS	INTERNATIONAL GRADUATES CAN REMAIN FOR UP TO 24 MONTHS TO LOOK FOR WORK, DEPENDING ON LEVEL OF STUDY.	12 MONTHS	GRADUATES MAY REMAIN FOR UP TO 4 MONTHS AFTER COMPLETING COURSE. SUBSEQUENTLY MAY SWITCH INTO TIER 2 IF THEY HOLD A JOB OFFER THAT MEETS MINIMUM SALARY THRESHOLD. EMPLOYER SPONSORSHIP REQUIRED.	12 MONTHS WITH 2 YEARS EXTENSION OPTION FOR STEM GRADUATES. WORK MUST RELATE TO FIELD OF STUDY.
International student recruitment targets	720,000 BY 2025	450,000 BY 2022	350,000 BY 2020	44,000 BY 2019 ¹⁰	143,000 BY 2025	NO NATIONAL TARGET	NO NATIONAL TARGET
Growth rate over the past 3 years (2012-15)	18.0%	26.9%	16.3%	42.5%	39.3%	0.7%	22.5%

Source: Adapted from Ilieva, J. (2017), Political influences in international education engagement, report for IEAA and IDP; http://aiec.idp.com/uploads/pdf/PDFs%20AIEC%202017/Do_political_events_in_host_countries_affect_international_education_engagement_Dr_Janet_Ilieva_AIEC2017.pdf

FACT 4: FUTURE DEMAND FOR INTERNATIONAL STUDENTS TO UNDERTAKE POSTGRADUATE RESEARCH IN THE UK IS UNCERTAIN

International postgraduate research students are particularly important to the UK. This makes the recent overall decline in the numbers of newly enrolled international full-time postgraduate research students in the UK a particular cause for concern. Both EU and non-EU research entrants peaked in 2013-14 and have been declining ever since. Our analysis of tuition fee funding sources identifies that institutional fee waivers and awards were the only sources that grew over the past two years. The most significant declines were among self-funded non-EU students and those receiving other overseas funding (usually dominated by government scholarship programmes).

FIGURE 6: MAIN FUNDING SOURCES OF TUITION FEES FOR NON-EU POSTGRADUATE RESEARCH STUDENTS



Source: HESA student record.

Communicating the UK's commitment to research and international engagement is key to attracting prospective international researchers and their funders. While there has been an overall decline in major government scholarship programmes in Malaysia, Brazil, Saudi Arabia and Iraq, the largest proportion of postgraduate researchers are self-funded. In addition to the continued system-to-system level of engagement, more should be done to project the UK's welcoming attitude to the world's research talent. Further analysis of the factors influencing postgraduate research student mobility should be a priority.

FACT 5: THE MAJORITY OF INTERNATIONAL STUDENTS ON UK PROGRAMMES ARE STUDYING OVERSEAS

In addition to shorter courses, UK universities have been innovators in creating new modes of study for higher education by delivering transnational education (TNE) programmes overseas. UK TNE can be delivered in many ways, from branch campuses to joint degree and blended programmes as well as online learning opportunities. These diverse options present international students with greater flexibility over when, where and how they commence their UK degree. Over 60% of all international students on UK higher education programmes are studying outside the UK¹¹. Figure 7 shows a significant expansion of UK TNE over the past decade, although growth now appears to be slowing.

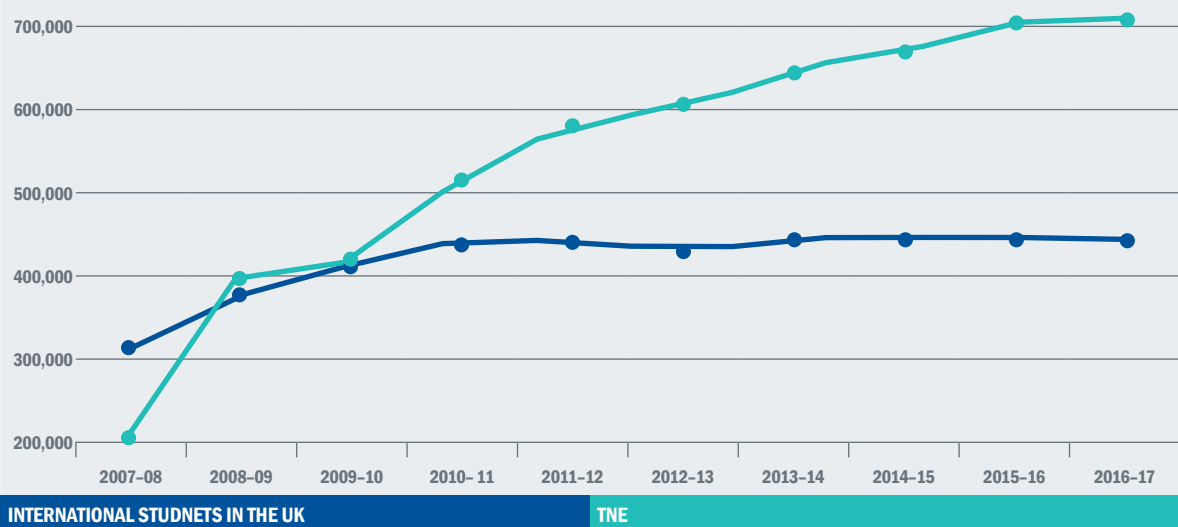
There is a clear link between TNE and onshore recruitment. Previous research has shown that a third of the non-EU first-degree entrants commence their course in England through the means of TNE programmes that begin in another country.¹² While comparable data for other countries is not available at present, research carried out by Enterprise Ireland shows that more than half of Chinese students in Ireland started their degree through the means of a TNE course in China. The latest available data for England is for 2014-15, and it shows 55% of the Chinese students in English higher education started their degree in China through a TNE programme.

Shorter duration of study in the UK complemented with study at home presents a cost-effective way of acquiring a UK degree. This also means that TNE is widening access to UK education to students who may not have had the economic means to do so otherwise.¹³

The HEFCE (2015) study highlighted that 40% of the non-EU students in the UK who commenced their study through a TNE course continued into postgraduate education. These proportions rise to 64% for Chinese students. Almost a fifth of the total Chinese postgraduate entrants in the UK in 2014-15 had first commenced their student journey through the means of an undergraduate TNE course in their home country. The impact of the wider contribution of TNE to postgraduate provision in the UK is still to be assessed. To date, we know very little about the progression of TNE students from courses in their home country directly onto postgraduate programmes in the UK.

Further analysis is required into the increasingly blurred boundaries between onshore and offshore recruitment.

FIGURE 7: INTERNATIONAL STUDENTS IN THE UK AND ON TNE PROGRAMMES



Source: HESA Student Record and HESA Aggregate Offshore Record.

¹¹ Note: this figure includes the TNE students registered with Oxford Brookes University.

¹² HEFCE (2015), Transnational pathways to higher education in England; <http://www.hefce.ac.uk/pubs/year/2015/201508/> While this research only studied entry to undergraduate degrees across higher education institutions (HEIs) in England, it reflects trends across the rest of the UK.

¹³ Ilieva, J. (2015), Transnational pathways buck the slowdown of international recruitment; <http://blog.hefce.ac.uk/2015/06/09/transnational-pathways-buck-the-slowdown-of-international-recruitment/>

WHAT TO EXPECT IN 2018 AND PRIORITIES FOR HIGHER EDUCATION ENGAGEMENT

This section considers some of the most significant trends in the global environment that are likely to affect the UK's international higher education engagement and sets out some suggestions of priorities for the UK.

GOVERNMENT POLICIES AND INTERNATIONAL STUDENT FLOWS

There is a degree of uncertainty around government policies that are likely to affect international students' perceptions when considering some of the established English-speaking destination countries. Three major considerations are: the impact of Brexit and changing fee status of EU students in the UK on EU student demand for study in the UK; the impact of President Donald Trump's immigration policies and potential changes to the US Optional Practical Training visa; and fluctuation in currency and commodity prices, particularly oil that, among other things, influences some major overseas government sources of investment in scholarships for international study.¹⁴

There are signals that the impact of the travel ban imposed by the Trump administration is already affecting international students' perceptions about their welcome in the US. The first indication of a shift in student demand was captured in the Institute of International Education (IIE) Survey of College Admissions carried out in the summer of 2017, which found a 2% drop in admissions¹⁵ with the most significant reductions recorded in Texas. The most recent Open Doors data released in November, for the academic year 2016-17, reported a decline of 10,000 international student entrants to the US: this is the first drop in new enrolments since this data has been collected over the past 13 years. New enrolments at both undergraduate and postgraduate levels declined.

In contrast, the Canadian Bureau for International Education reported a 119% growth in international students over the period 2010 - 2017.¹⁶ Last year's growth was estimated to be 20%. Interest in Canada is expected to be further supported by the "Study and Stay" policy, initially adopted by Nova Scotia,¹⁷ and shortly after, rolled out in a few more states. The programme targets students from China, India and the Philippines.¹⁸ "Study and Stay" was reported to be an extension of the country's Atlantic Immigration Pilot which allows international graduates across several Canadian states to settle permanently should they gain employment with designated employers.¹⁹

¹⁴ The impact of persistently low oil prices on government spending on scholarships is explored in Ilieva, J. and M. Edwards (2016), 'What's next for the Middle East?'; <https://www.idp.com/unitedkingdom/aboutidp/middle-east-insight>. Government spending on Gulf students in the UK is explored in UUKi (2017), 'The state of the relationship: UK higher education engagement with the Cooperation Council for the Arab States of the Gulf'; <https://www.universitiesuk.ac.uk/International/Documents/Gulf%20Mapping%20Report%202017.pdf>

¹⁵ See <https://www.iie.org/Why-IIE/Announcements/2017-07-06-IIE-Survey-of-College-Admissions-International-Students-Fall-2017>

¹⁶ <https://cbie.ca/media/facts-and-figures/>

¹⁷ <http://www.immigration.ca/nova-scotia-study-stay/>

¹⁸ <https://thepienews.com/news/canada-provinces-adopt-program-keep-intl-students/>

¹⁹ <http://www.immigration.ca/atlantic-immigration-pilot/>

SUSTAINING DEMAND FOR UK HIGHER EDUCATION AND WORKING WITH OVERSEAS FUNDERS

Non-UK students play an essential role in preserving the viability of a wide range of subjects in areas such as science, technology, engineering and mathematics (STEM) and business and administrative studies. At postgraduate research level they also contribute to the UK's research output and performance and seed future international collaboration, which is fundamentally important to high quality research in many fields. A clearer understanding of factors affecting postgraduate demand, and a strategy to preserve and build on the UK's reputation as a first-choice destination for postgraduate study, should be priorities. Particular emphasis should be placed on reviving postgraduate demand from countries with high proportions of self-funded students.

The British Council report "International Student Mobility to 2027: Local investment, global outcomes" highlights China, India, Pakistan, Bangladesh and Nigeria as the countries with the largest projections in their outward mobility to 2027. Except for China, all these markets have significantly declined in recent years which has affected postgraduate demand for UK higher education. Re-engaging with international students and their families in these countries could reverse a downward trend in postgraduate enrolments and give self-funded demand a boost. Students from India, Pakistan, Nigeria and Bangladesh are price-sensitive, and they are likely to respond positively to incentives linked to post-study work options that can help with loan repayments at home and give them an advantage in their domestic labour market.

Pressure on public finances, some of which was linked to fluctuations in oil prices in particular, has affected large scholarship schemes in Saudi Arabia, Malaysia, Brazil and Iraq. Even if economic circumstances change, there is evidence that many countries that have been traditional sources of overseas scholarship-funded students are now placing greater emphasis on the development of their own institutions.

An example of a shift away from funding individual scholars towards institutional development programmes with a focus on internationalisation is Brazil's new Institutional Program for the Internationalization of Brazilian Higher Education and Research Institutions (CAPES-PrInt).²⁰ The programme is funded by Coordination of Improvement of Higher Education Personnel (CAPES) and seen as a successor to the Science Without Borders programme.

Thailand, Vietnam and the Philippines are focusing on capacity building of domestic higher education providers through policies aimed at attracting overseas providers to develop TNE in niche subject areas.²¹ This could be an opportunity for the UK given its leading position as a provider of TNE. Greater support for TNE delivery overseas is likely to have a positive impact on the future positioning of UK higher education with overseas governments and funding agencies, which are likely to seek reputable partners for their higher education institutions.

TNE also supports recruitment to study in the UK as students transfer from local courses to complete or continue their studies.

²⁰ For further details see: <http://www.capes.gov.br/cooperacao-internacional/multinacional/programa-institucional-de-internacionalizacao-capes-print>

²¹ See the Joint Development of Niche Programmes through Philippine-UK Linkages; <https://www.britishcouncil.ph/tne/programmes>

TRANSNATIONAL EDUCATION MAINTAINS HIGHER EDUCATION ENGAGEMENT IN COUNTRIES WITH LITTLE STUDENT MOBILITY TO THE UK

A recent British Council report²² warned about a slowdown in global student mobility. While the international mobility growth rate is set to drop from 5.7% average growth in the period 2005 – 2015 to an average of 1.7% to 2027, this seems to be on a par with the world's growth in tertiary education. Analysis of UNESCO Institute for Statistics data shows that just under 2% of the world's tertiary education students are globally mobile. This ratio has remained unchanged over several decades. Decelerated growth in higher education enrolment locally also means a slow-down in global student mobility. While mobility to traditional study destinations is slowing down, intra-regional mobility appears to be growing with new study destinations arising to rival the established ones. Analysis of UNESCO Institute for Statistics data shows that countries like the UAE are hosting more MENA (the Middle East and North Africa) students than the UK and Australia. Similarly, China, Japan and Malaysia are increasingly popular with students from the East and South-East Asia region. Ghana hosts more students from neighbouring Nigeria than the UK and the US. TNE enables UK higher education institutions to maintain engagement in regions where the student flows are shifting away from the established study destinations. UK TNE in Malaysia and the UAE is catering to both local and international students. A recent analytical overview of the UK's engagement with the UAE established that most of the students on UK TNE courses are mainly from the region and South Asia.²³

Equally, TNE secures engagement with countries with little mobility to the UK, such as Trinidad and Tobago (more than 11,000 TNE students and fewer than 500 studying in the UK); Oman (more than 21,000 students on UK TNE programmes and fewer than 3,000 in the UK); Zimbabwe (over 9,000 TNE students) and Uganda (over 8,000 TNE students).

CHANGING REGULATORY ENVIRONMENT: CHALLENGES AND OPPORTUNITIES

Overall, recent changes in countries' regulatory frameworks for TNE engagement have become more liberal and supportive. While most countries appear to allow inbound TNE programmes, the quality assurance and recognition of these programmes are still to catch up.²⁴

Recent regulatory changes in China and Malaysia, which are the UK's largest TNE markets, are tightening the rules for delivery of TNE. In Malaysia, this mainly affects the opening of new international branch campuses,²⁵ whereas changes in China are likely to affect articulation of TNE students to programmes in the UK.²⁶ This is likely to encourage UK universities to both restructure and perhaps focus on a smaller number of partnerships in China and also to diversify the locations in which they offer TNE.

Notwithstanding challenges ahead, the UK's TNE engagement is likely to continue to expand. The benefits to the UK, their partner institutions and local communities significantly outweigh the difficulties in the operating environment. In many countries TNE is the main means of engagement; in others, it taps into trends that are diverting students away from the UK. TNE is enabling UK higher education institutions to be locally embedded and to maintain the global relevance of their offer.

22 PIE News (2018), Student mobility growth to drop 4% over ten years – British Council; <https://thepienews.com/news/student-mobility-slows-down-bc-report/>

23 UUKI (2017), State of the relationship: UK higher education engagement with the GCC; <http://www.universitiesuk.ac.uk/policy-and-analysis/reports/Pages/state-of-the-relationship-UK-higher-education-engagement-with-the-GCC.aspx>

24 Ilieva, J., Peak, M., Tsiligiris, V. and P. Killingley (2017), Shape of global higher education, Volume 2; <https://www.britishcouncil.org/education/ihe/knowledge-centre/global-landscape/shape-global-higher-education-vol-2>

25 PIE News (2017), Malaysia imposes "moratorium" on new uni campuses; <https://thepienews.com/news/malaysia-imposes-moratorium-on-new-uni-campuses/> and BUILA (2017), <https://www.buila.ac.uk/news/2017/malaysia-imposes-moratorium-on-new-uni-campuses>

26 QAA (2017), Country report: China; http://www.qaa.ac.uk/publications/information-and-guidance/publication/?PubID=3210#.WoIfwKhl_cs

CONCLUSION

More can and should be done to uphold the international competitiveness of UK higher education.

In addition to continued efforts by individual institutions, a united front for their international endeavours is needed. This should include better post study work opportunities, best and more comprehensive promotion of the UK as a study destination; better understanding of the factors affecting demand, particularly at postgraduate level; and a better understanding of the links between TNE and onshore recruitment and of the opportunities provided by TNE to diversify the reach of UK higher education in geographical terms.

This unity requires alignment among key higher education stakeholders: individual higher education institutions, national agencies and government departments. In this the UK can learn from the strategic approaches taken by some of its major competitors.

The global appeal of UK higher education is a national asset. Preserving and building on it should be a national priority.

UNIVERSITIES UK INTERNATIONAL

UUKi is the international arm of Universities UK, representing UK universities and acting in their collective interests globally. We actively promote universities abroad, provide trusted information for and about them, and create new opportunities for the sector.

ISBN: 978-1-84036-403-3



CONTACT US

EMAIL info@universitiesuk.ac.uk

TEL +44 (0)20 7419 4111

Woburn House
20 Tavistock Square
London, WC1H 9HQ

 [@UUKIntl](https://twitter.com/UUKIntl)

 [Universities UK International](https://www.linkedin.com/company/universities-uk-international)