

An overview of current and emerging TNE markets for the UK

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Transnational Education

the number of students studying their entire UK qualification outside of the UK has increased to approx. 500,000 in 2009-10

UK qualifications are now delivered in 223 countries outside of the UK

There are now 78 countries where at least as many students study a UK HE qualification *in that country* compared to the number of students travelling to the UK for their education

There are 12 countries where the difference between students studying a UK qualification in country and those studying in the UK is greater than 5,000:

Top 10 countries of activity for UK HE qualifications studied outside of the UK (2009-10)

Country of activity	2008/09	2009/10	Growth
Malaysia	42535	48255	13.4%
Singapore	40360	42715	5.8%
Hong Kong (SAR)	22170	24135	8.9%
Pakistan	23145	23570	1.8%
Nigeria	15670	16930	8.0%
China	15010	14785	-1.5%
Ireland	13975	14155	1.3%
Ghana	13420	13640	1.6%
Greece	11675	11515	-1.4%
Trinidad and Tobago	13080	11230	-14.1%

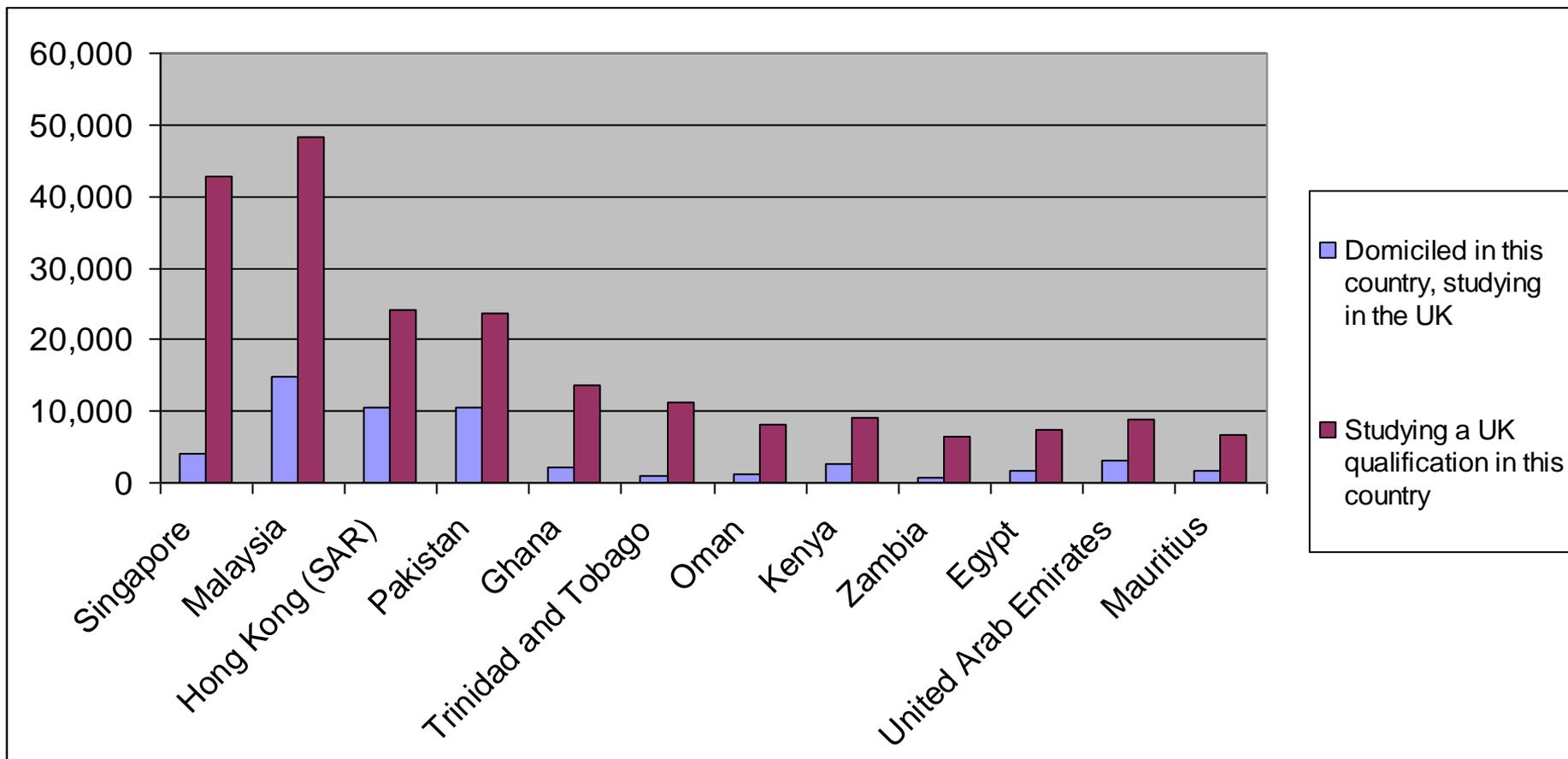
Source: HESA, Aggregate overseas record (2011)

All countries with more than 700 students which have recorded a growth of more than 18% from 08-09 to 09-10

Country of activity	2008/09	2009/10	Growth
Uzbekistan	610	1095	79.2%
Botswana	1800	3065	70.2%
South Africa	2870	3930	37.0%
Vietnam	1590	2115	33.0%
Qatar	545	715	31.6%
France	1350	1665	23.0%
United States	3710	4545	22.4%
Tanzania	1260	1530	21.6%
Italy	2015	2440	21.0%
Sri Lanka	3970	4780	20.4%
Canada	3125	3740	19.7%
Saudi Arabia	2110	2525	19.5%
United Arab Emirates	7380	8775	18.9%
Australia	1270	1505	18.8%

Source: HESA, Aggregate overseas record (2011)

Study in UK vs TNE



Other emerging markets

South America

Mexico, Colombia, Brazil

SE Asia

Vietnam, Indonesia, Thailand, South Korea

South Asia

Bangladesh, Sri Lanka, Nepal

The Americas

Mexico will be unable to meet the future demand of university places without implementing new models. Possible consortia approach

Higher education in Colombia has a well-developed legal framework, mature institutions, good educational quality and excellent international links. However, underfunding, lack of places for potential undergraduate students, and centralisation of both resources and institutions are putting constraints on further development

Engagement between UK and Brazilian universities is already well established. Several UK universities are members of the Santander Universities Network and welcome Brazilian students to their campuses. Joint research flourishes between UK and Brazilian institutions in a range of fields, including tourism, bioscience, chemistry, mathematics and law.

Bangladesh

Draft regulation on CBHE- If adopted by the government, this will bring much needed policy certainty and allow the market for transnational education to grow.

Rising income levels / rising middle class - Bangladesh's sustained real GDP growth in excess of 6% for the last six years,

Rising demand for tertiary education - forecast that the tertiary level enrolment rate will increase from just over 10% in 2010 to 21.4% in 2030.

Shortage of post graduate programmes -The shortage of masters and PhD programmes in Bangladesh provides significant opportunities for foreign education providers

Access programmes - Access programme have been among the fastest growing cross border programmes in Bangladesh.

Sri Lanka/Nepal

One of Sri Lanka's five key national development priorities is the development and transformation of its higher education sector establishing itself as a regional knowledge and education hub in South Asia by 2015.

Over 30 foreign universities now offer accredited programmes to more than 10,000 Sri Lankan students and several more international universities on the verge of investing in campus development

Nepal – evidence of rising demand from Nepalese students for international education, Ministry of Education positive but limited existing provision

Indonesia - opportunities

Large and young population

Institutions claim **interest in developing international partnerships**

– opportunity to market UK institutions more strongly, increase accessibility, tackle negative cultural perceptions

Increase presence in Indonesia - compete with Australia by creating an international office providing clear, simple direction to appropriate contacts.

Attractive price options: Consider costing options to offset perceptions of the UK as expensive and far away – reinforce quality of UK education.

Undergraduate and post graduate.

Indonesia - barriers

Limited knowledge and awareness of UK institutions and their offer.

Cultural barriers strong for institutions: British are seen as aloof and arrogant, difficult to access, not showing a strong interest in Indonesia.

Students currently **favour Australia (esp.) and the US** over the UK as a study destination.

English language barriers for staff and students.

Low average income per capita

Thailand opportunities

Large population

Higher average income than Vietnam, Indonesia. **UK education is viewed positively** by institutions and students (highest interest from students across the three countries) – **focus on prestige, status benefits.**

UK seen by institutions to be **proactive and interested** – **build on this rapport.**

English language skills improving (yet still a barrier).

Invest time and effort into demonstrating **interest in meeting Thai needs** – how UK institutions can augment the Thai education offer.

Predominantly **post graduate** opportunities at this stage.

Vietnam Opportunities

Large, young population

Fast growing economy requires skills – business, engineering popular.

Increase **awareness of UK institutions** – market to the **South** in particular

Students very positive about TNE and interested in international education – market the UK directly to students.

Contribute to **English language development** for potential students.

Attractive price options: Consider costing options to offset perceptions of the UK as expensive and far away – reinforce quality of UK education.

Post graduate and undergraduate.

South Korea – overview

Delivery in Korea of joint degrees appears to have the most potential. The market has only been open to foreign providers since 2000, and current provision is limited to a small but growing number of programmes.

demand is high for in-country programmes at both undergraduate and postgraduate level, and that there are sufficient students with the money and the levels of English required.

The very small levels of current provision do indicate the need for caution and a slow and measured approach, but the indicators for potential growth in the joint degree market are clear.

South Korea – factors effecting demand

High demand for UK qualifications

Levels of English are generally low

Penetration of broadband internet access

Oversupply at PG level – many students go overseas, keeping them in Korea by offering joint programmes is attractive

Culture of attaching high value to education

No significant legal barriers

Iraq/Kurdistan

Relatively safe stable environment

Investment in infrastructure

Presence of private providers is growing

Support from regional government

Already significant interest from foreign providers

Challenges

The UK needs 230,310+ new students each year to maintain the current international student body. Increasingly students are doing shorter courses (up to one academic year)

Era of public austerity and big cuts in HE funding, combined with potential cap on international students coming to the UK and rising fees for UK students poses some challenges for the UK HE system

Increased diversity and flexibility of offshore courses:

- HESA data suggest almost equal divide between onshore and offshore international students – we are expecting to see increase in the off-shore student with components of UK studies
- Increase in the campuses and programmes delivered overseas

Increase in cross-border university collaborations – both in terms of teaching and research

Contributing to UK export agenda