Evolving TNE approaches: From short-termism to sustainability?

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Structure of presentation

- The global landscape: shifts in TNE
- The UK picture:
  Changing institutional TNE strategies
- Questions and points for further discussion

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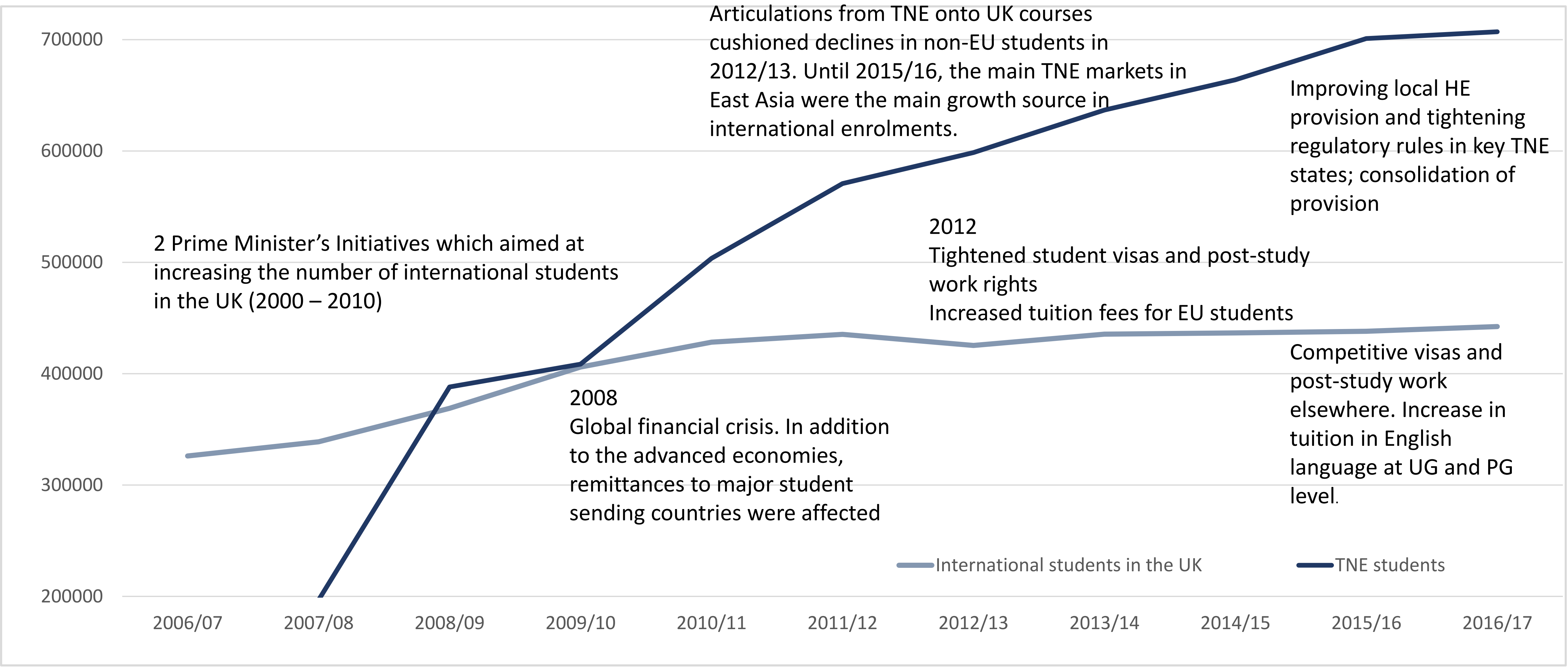
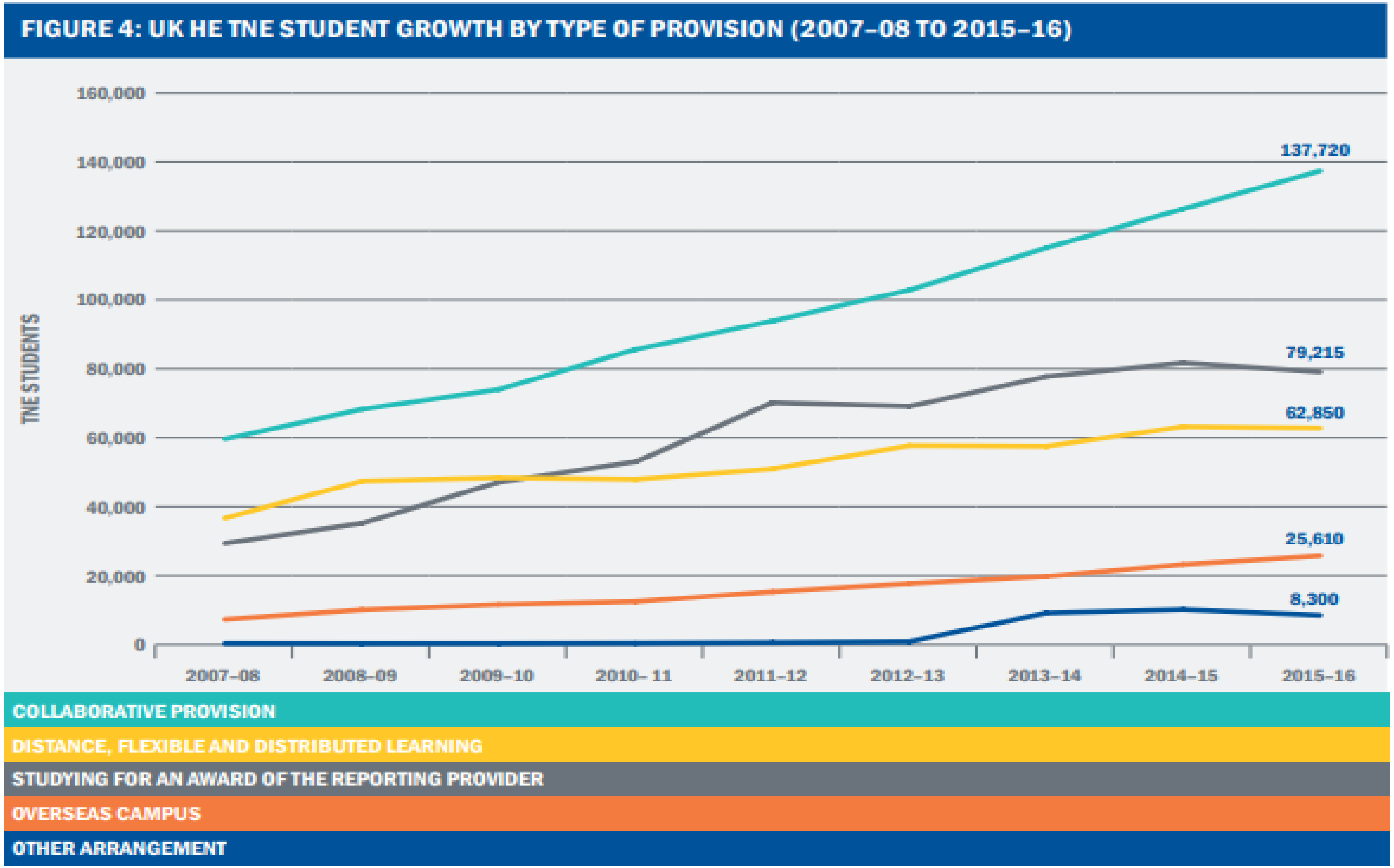
The global transnational education landscape

Shifting landscapes



Data source: HESA Student Record and Aggregate Offshore Record; All students, various years.



Further increases in collaborative provision in 2016/17 when student enrolments reached 146,665 (increase of 8,945 students, 6.5%).

However, there were significant declines in students registered with overseas partner (-7,885 students).

Source: HESA Aggregate Offshore record https://www.hesa.ac.uk/data-and-analysis/students/where-from/transnational

Source: UUKi (2018), The scale of UK transnational education provision 2015-16; https://www.universitiesuk.ac.uk/policy-and-analysis/reports/Pages/the-scale-of-UK-higher-education-transnational-education-2015-16.aspx

Slow-down in UK TNE

The Aggregate Offshore Record (AOR) shows a stagnation in UK TNE in 2016/17. Possible reasons include:

- Maturing HE countries – almost all declines are concentrated in non-EU first-degree provision by “overseas partner organization” and some declines in other undergraduates

Countries with the most pronounced declines are:

- Malaysia (-4,610)
- Pakistan (-2,770)
- Nigeria (-2,090)
- Hong Kong (1,830)
- Singapore (-1,680)

However, significant increases were noted in GCC (Oman, UAE, Saudi Arabia, Kuwait) and South Asia (India and Sri Lanka)

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Sustainable models of TNE

- While most of the UK TNE is at an undergraduate level, some key host countries (China, Malaysia, Singapore, Hong Kong) are maturing. Consolidation of TNE provision is likely. There is growing pressure from local education providers for greater equity in international partnerships
- As such, the focus is expected to shift towards postgraduate provision in maturing HE systems, unless it continues to cater to students from disadvantaged backgrounds and the wider region
- There is a growing South-to-South student mobility towards emerging education hubs (Malaysia, UAE, Ghana). TNE equips UK HEIs to maintain engagement with increasing flows of students who are going elsewhere for their studies
- Another shift, which is likely to gather momentum, is a move away from funding individual scholars towards institutional development through international partnerships (Brazil's CAPES-PrInt; CHED/BC Joint Development of Niche Programmes; similar initiatives in Thailand and Vietnam)
- Collaborative TNE which contributes to the local capacity building is essential in countries aiming at developing home-grown PG provision. This will likely attract funding locally.

EXAMPLE: What type of TNE will be best supported by ASEAN-5 national governments?

Image: World Economic Forum

Type of education provision	Indonesia	Malaysia	Philippines	Thailand	Vietnam
Double and joint degrees	√	√	√	√	√
Independent branch campus					
Joint/collaborative university					
Franchising arrangements					
Validation					
Independent online/distance learning					
Locally supported/collaborative online/distance learning	√				

Source: Hot Topics in Higher education, session with representatives of ministries for higher education in ASEAN-5; British Council (2018), Going Global Conference 2018.

Equity and multilateralism in partnerships are likely to redefine and repurpose TNE

- Engaging in collaborations with partners in strategic regions and access to their networks is becoming a critical decision making factor when choosing international collaborators
- There is a shift towards multilateral and multidisciplinary partnerships: a whole-institution approach towards strategic engagement with partners who build on one's strengths
- Technology will play a more significant role in enabling students to access the best experts irrespective of their geographical location. Equally, education programmes can reach the population in remote areas
- While niche TNE for capacity building attracts local funding, TNE which supports quality and equitable access (SDG 4) to HE will likely attract aid funding from the "sending" country
- The tension between mutual benefits and the value of TNE in the long-run on the one hand, and the pressure to generate immediate returns on the other will continue. This will most likely result in innovative and diversified approaches with varied price levels

The UK picture:

Changing institutional TNE strategies

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National focus on partnerships

- More UK sector talk of long-term, deep, multi-faceted partnerships and collaborative models
- Partnership approaches with host country partners becoming more equitable

(see HEGlobal (2016), *The Scale and Scope of UK Higher Education Transnational Education*)

- Shifting balance of power between UK and partners (Brexit etc.)

BUT….. Financial imperatives still strong

- Under pressure to find 'replacement' income streams for 'at risk' international student fee income

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Survey to investigate further…

- how TNE drivers and approaches have changed for UK institutions over the last few years

- the priority that UK HEIs give to different modes of delivery and levels of study in their future TNE strategies

- the kind of engagement that governing bodies have with TNE strategy

(Am not going to talk about levels of study or governing body engagement in this presentation – but happy to do so in later discussion)

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Methodology

- Online link circulated via direct emails / LinkedIn messages to individuals and via social media during June 2018

- Targeted those in roles which provide them with clear understanding of institutional TNE strategy and its drivers. Anonymous completion.

- Questions mix of free text, matrix / rating scale and multiple choice

Caveats

- 29 completed responses – snapshot of insights rather than comprehensive overview

- Responses from Russell Group, other pre-92 and post-92 HEIs in England, Scotland and Wales (broadly reflective of category size, but numbers too low to generalise)

- Percentages to be treated with caution (3 or 4% indicative of a single institution)

Biggest changes in own institution's approach to TNE over last few years

Three top themes (free text format – tagged to aid analysis):

- Expansion (larger network OR extended range of programmes with existing partners)

- Better coordination (integration between TNE modes and across institutional priorities; establishment of supporting functions, roles, governance, processes)

- Reduction! (consolidating / rationalising partners / countries)

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Key drivers for recent changes - and broader institutional goals supported by these

Dominant themes:

- Financial returns

(surplus; diversification; institutions more savvy re resources – ROI)

- Internationalisation / global engagement strategy
- Student number growth (global footprint; diversification / inclusion; income)
- Global reach (reputation and networks for many; research and industry links for some)

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Question about preferred TNE modes in future strategy

- Respondents asked to rate different modes on a matrix / rating scale:

  - Our preferred mode
  - Features prominently
  - Features somewhat
  - Doesn't feature explicitly but would be open to it
  - Do not want to go down this road

- Nine options listed – adapted from Knight's 2015* categorisation which distinguishes between **collaborative** and **independent** TNE modes

*Source: Knight, J. (2015), Transnational Education Remodeled: Toward a Common TNE Framework and Definitions, *Journal of Studies in International Education*. EAIE

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Collaborative vs. independent modes

Collaborative	Independent
Validation / franchise / twinning	Branch campus
Joint / dual / multiple degrees	Franchise university (private provider offering progs from different foreign HEIs)
Co-founded university	Independent distance / online / blended learning
Locally supported distance / online / blended learning	Other independent mode
Other collaborative mode	

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Validation / franchise / twinning prominent

- Over 50% listed validation / franchise / twinning as either preferred mode or prominent in future strategy (over 75% for post-92s)
- Around one-third listed as preferred / prominent:
    - **locally supported** distance / online / blended learning
    - **independent** distance etc. learning
    - joint / dual / multiple degrees
- Post-92s less inclined than pre-92s to favour distance etc. learning (whether locally supported or independent)

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Collaborative modes favoured over independent

- About 75% ruled out a branch campus or co-founded university. No post-92s listed a branch campus or franchise university as a preferred / prominent mode
- Nobody ruled out joint / dual / multiple degrees
- Collaborative modes (with the exception of validation / franchise / twinning) were less likely to be ruled out than independent modes
- Independent modes (with the exception of independent distance etc. learning) were also less likely to be preferred / prominent

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Key insights from this research

- UK HEI strategies for TNE seem to have become **more purposeful** - and supporting infrastructure better coordinated (though some HEIs still at early stage)
- **Financial returns** still a key driver, but much focus on global footprint and – in some cases – wider strategic goals (e.g. research, student experience)
- **Collaborative modes** favoured over independent, with validation / franchise / twinning most popular and all responding institutions open to joint / dual / multiple degrees

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Questions and points for further discussion

- How can UK HEIs become more responsive to the changes in TNE demand and regulatory frameworks around the world?

- Where will innovation in TNE come from? Has online education under-delivered on stakeholders' expectations?

- Will the long-term, holistic view be the preserve of wealthier institutions which can afford to invest in long-term initiatives?

Thanks!

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