



SERVICES FOR INTERNATIONAL EDUCATION MARKETING

TNE in China and the effect on UK institutions

SIEM conference

10 December, 2014

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Latest developments related to TNE in China

Greater recognition of TNE at the most senior levels of China.

“The fifth key measure is to increase consumption in education, culture and sports, to improve policy on tuition fees in private education, as well as to expand transnational education.”

-Premier Li Keqiang at meeting of State Council, October 2014

Publication of the first official list of 615 joint vocational programmes in China.

For now, the list only includes 25 of 31 provinces and data of some reporting provinces may be incomplete, but it is the first step toward greater quality control at the national level. The list is only one of many recent measures to increase the appeal of vocational education in China.

Announcement of 252 “terminated” sub-degree TNE programmes in October.

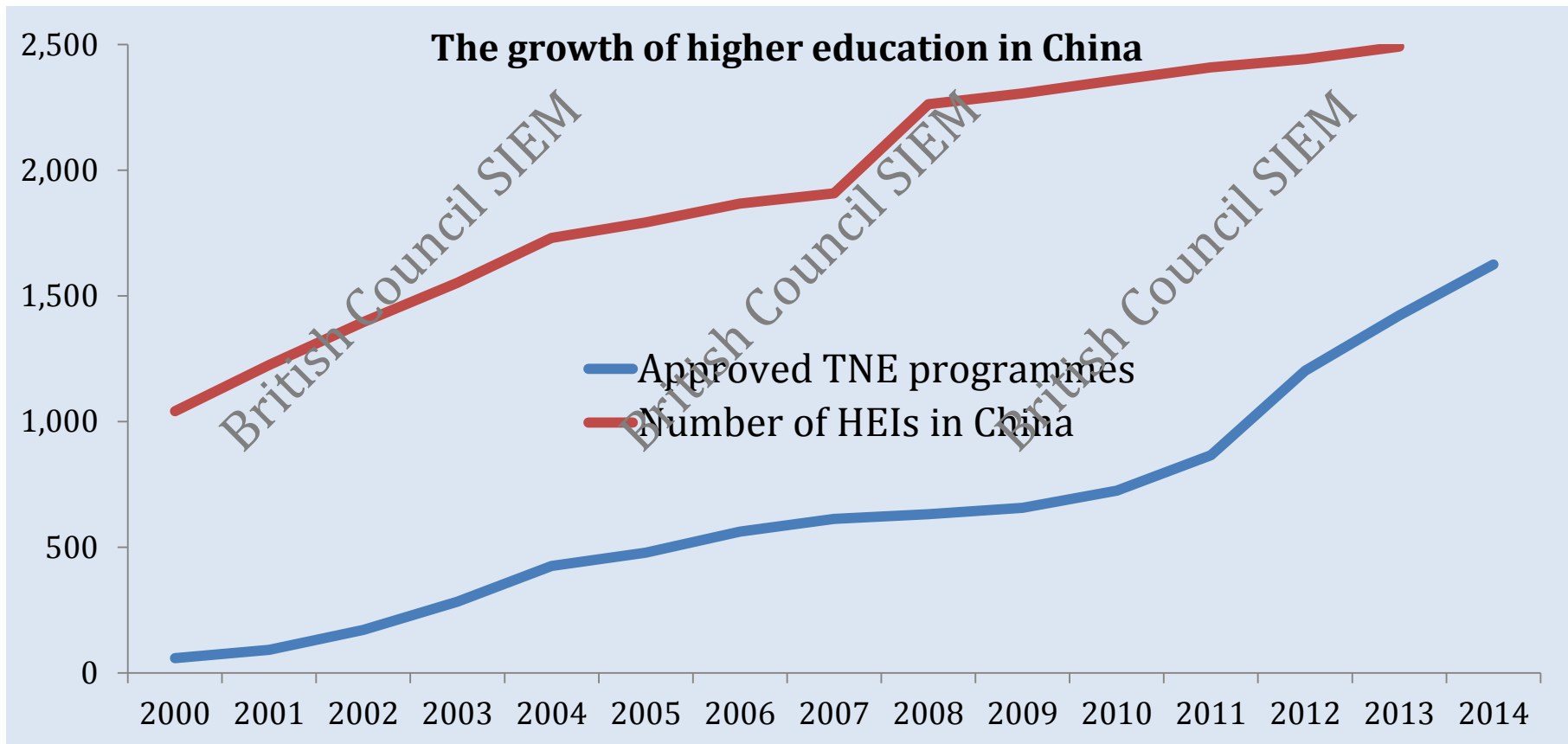
Rather than actually terminating any existing programmes, the announcement only clarifies which TNE programmes are no longer in operation – another move toward greater oversight.

TNE in China

- ❖ By level of study
- ❖ By partner country
- ❖ By subject
- ❖ By province
- ❖ By year

TNE programmes by level of study

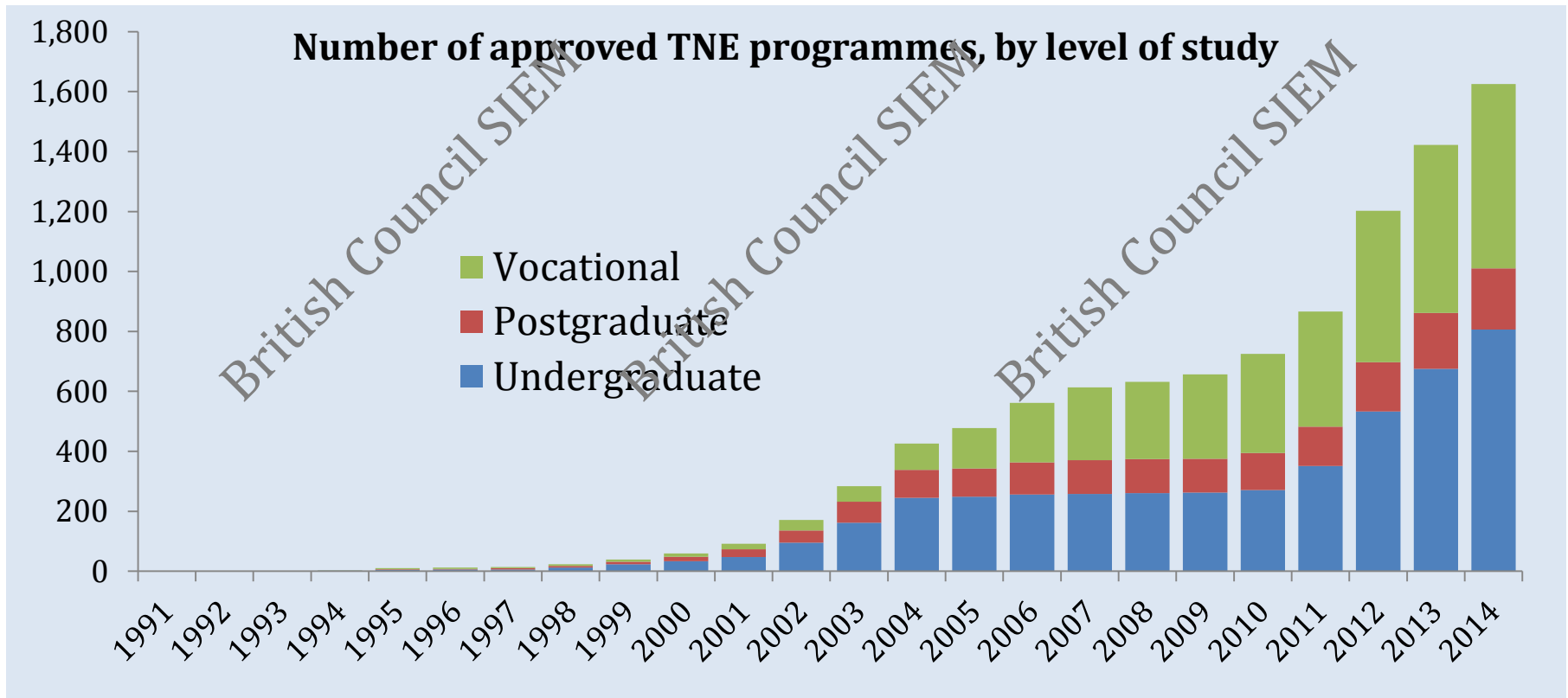
- ❖ The growth of TNE in China has run parallel with the expansion of higher education.
- ❖ While the number of HEIs has stabilised in China, the number of approved TNE programmes continues to rise.



Source: Ministry of Education; data on HEIs unavailable in 2014; TNE programmes include undergraduate, postgraduate and vocational programmes.

TNE programmes by level of study

- ❖ TNE has grown in cycles in China, with a large uptick in new programmes since 2010, with the release of Outline for Medium- and Long-term Education Reform and Development.
- ❖ China is now home to more than 1,600 TNE programmes: more than 800 at undergraduate levels, 200 at postgraduate levels and 600 with vocational colleges.

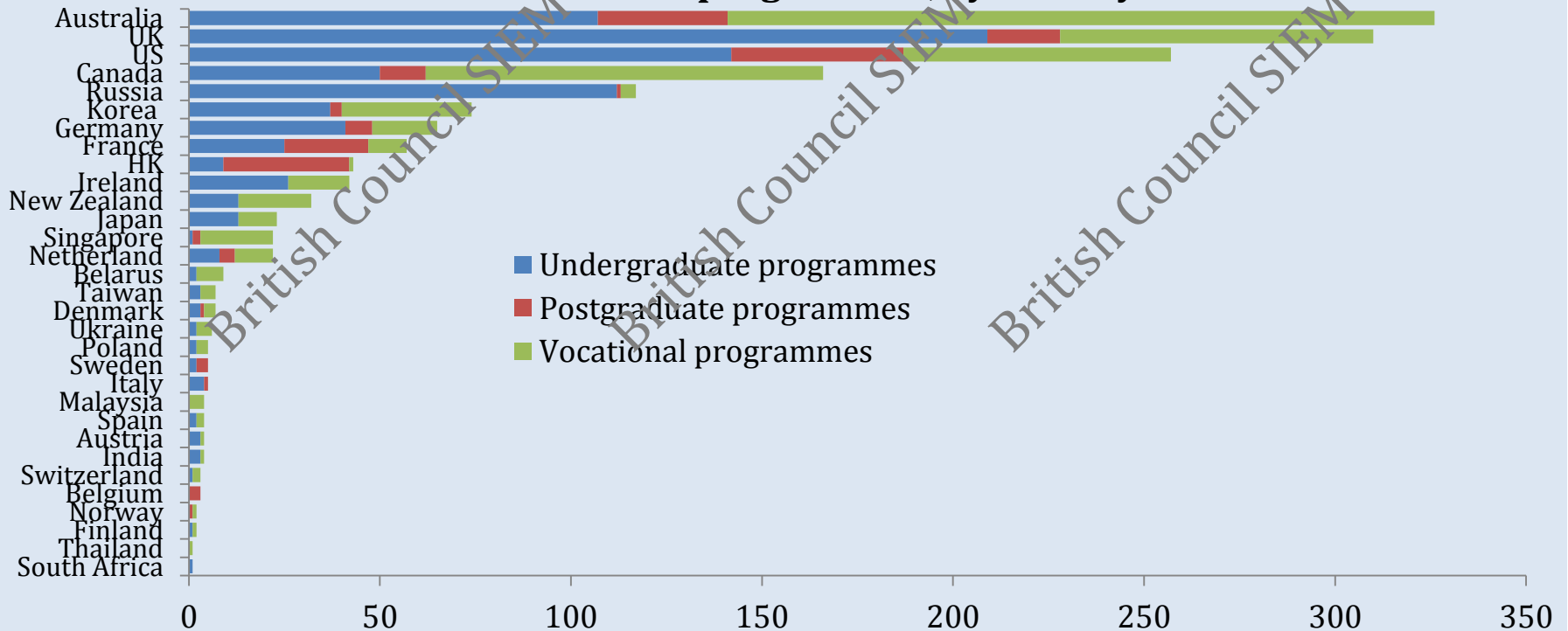


Source: Ministry of Education, 2014; note: vocational programme data only includes 25 of 31 provinces.

TNE programmes and partner countries

- ❖ The UK is the preferred overseas partner at undergraduate levels, the US at postgraduate levels and Australia at vocational levels.
- ❖ The recently released list of approved vocational programmes shows growing concern over quality assurance at national levels, but this could benefit quality providers.

Number of TNE programmes, by country

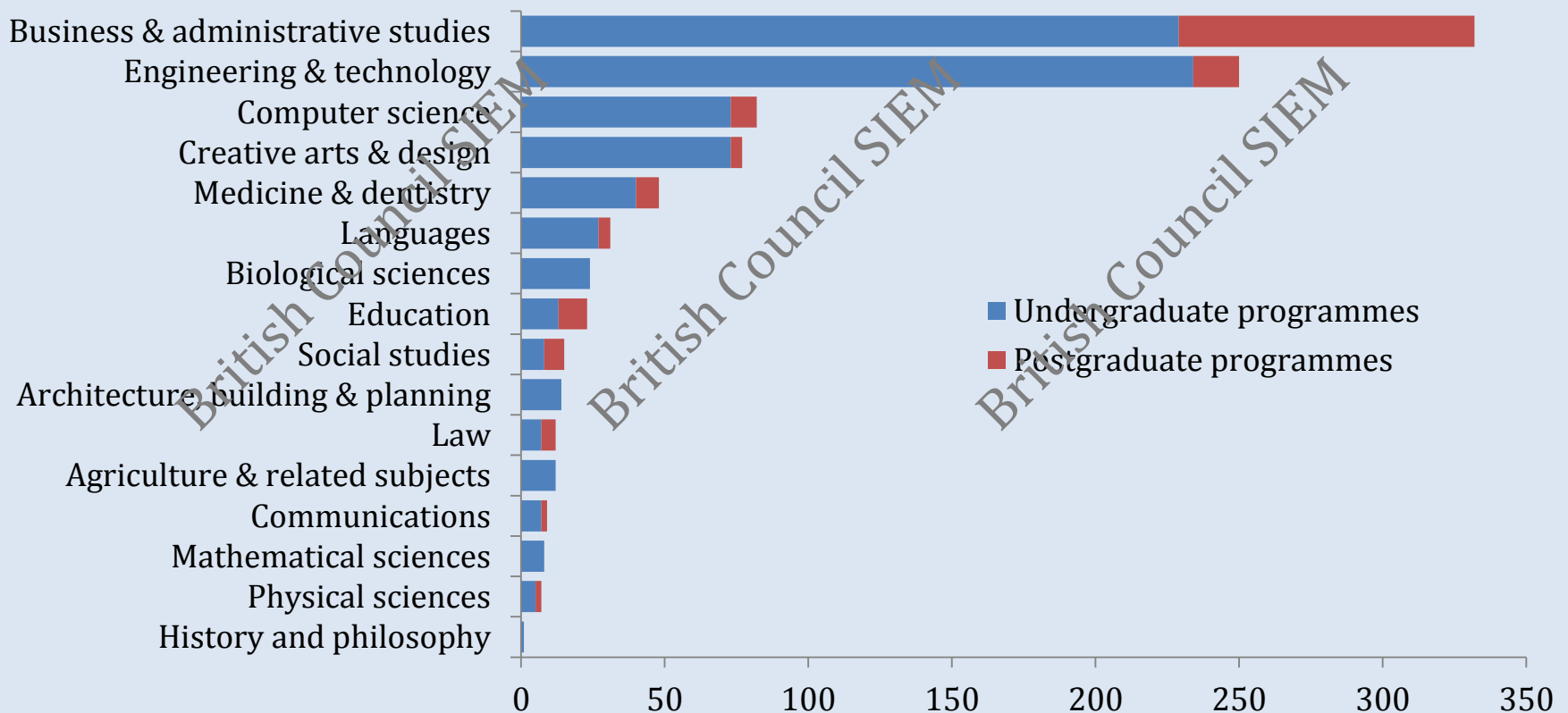


Source: Ministry of Education, 2014; note: vocational programme data only includes 25 of 31 provinces.

TNE programmes by subject

- ❖ Business and engineering subjects dominate the TNE landscape in China, but official attitudes may be shifting as other subjects have shown stronger growth in recent years.

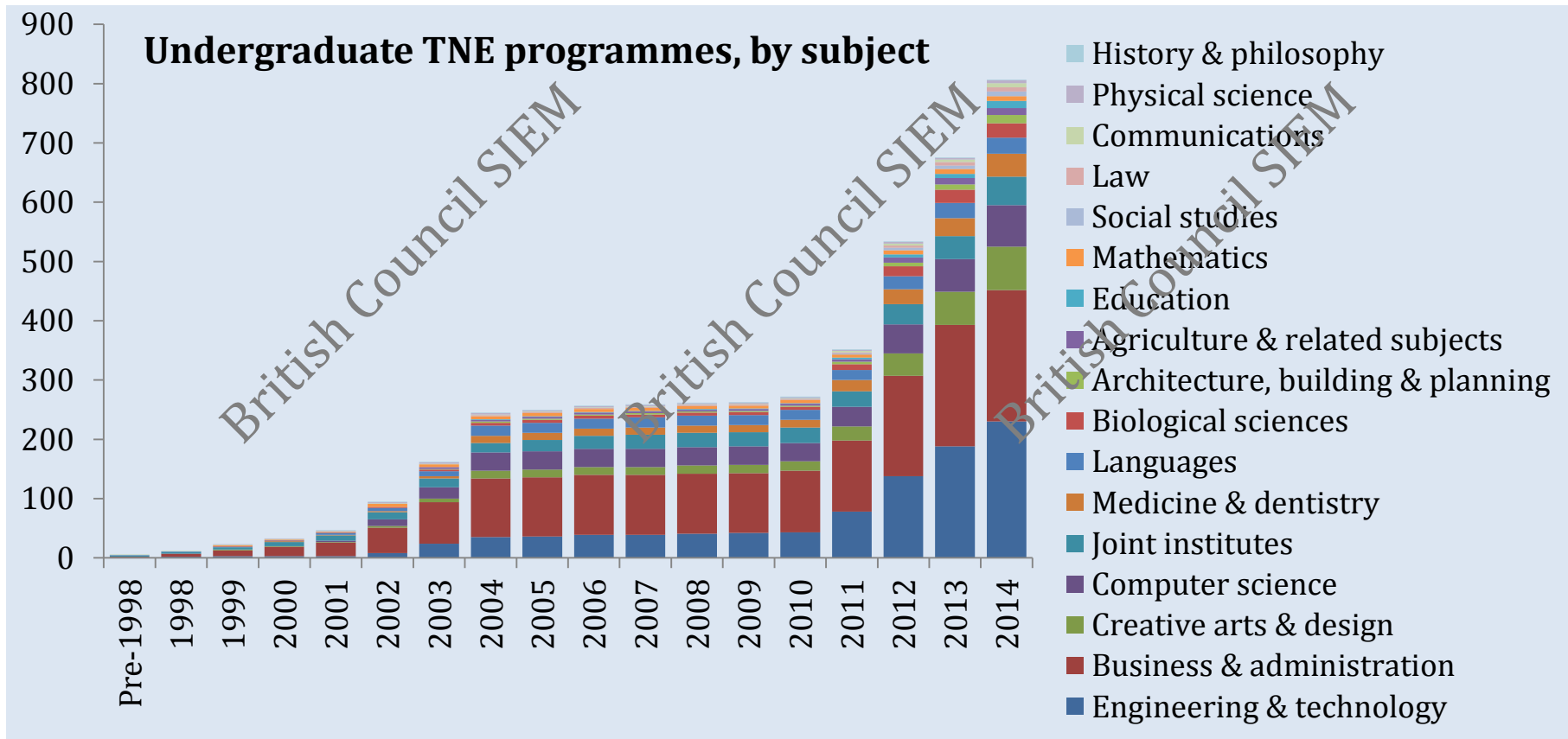
Number of approved TNE programmes, by subject



Source: Ministry of Education, British Council SIEM

TNE programmes by subject

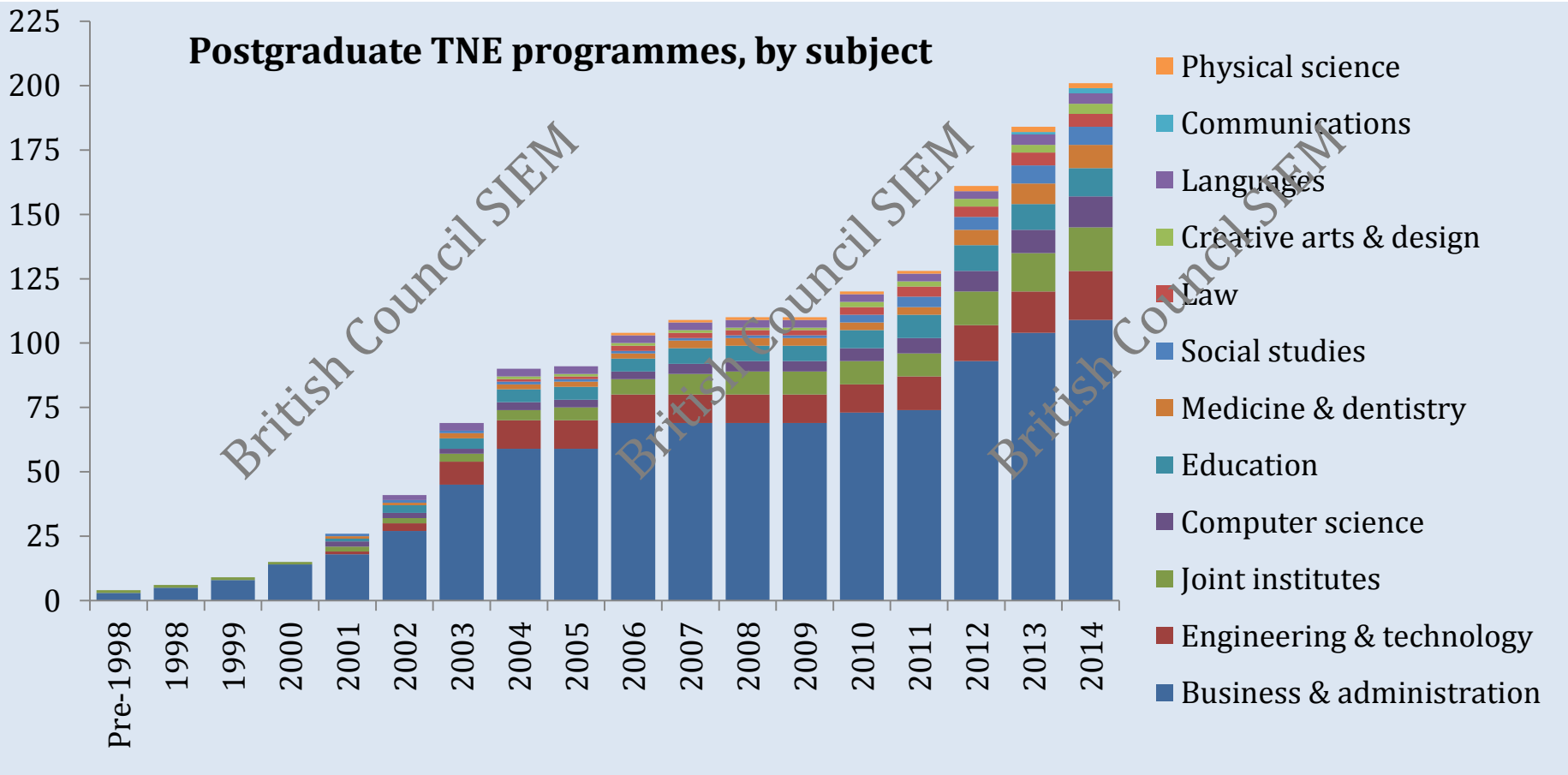
- ❖ Engineering has overtaken business as the most common subject at undergraduate levels.
- ❖ Education, communications, architecture, engineering and creative arts subjects are the fastest growing subjects since 2010.



Source: Ministry of Education, British Council SIEM

TNE programmes by subject

- ❖ At postgraduate levels, business subjects account for more than half of all programmes.
- ❖ Since 2010, medicine, computer science and social studies have grown most rapidly.

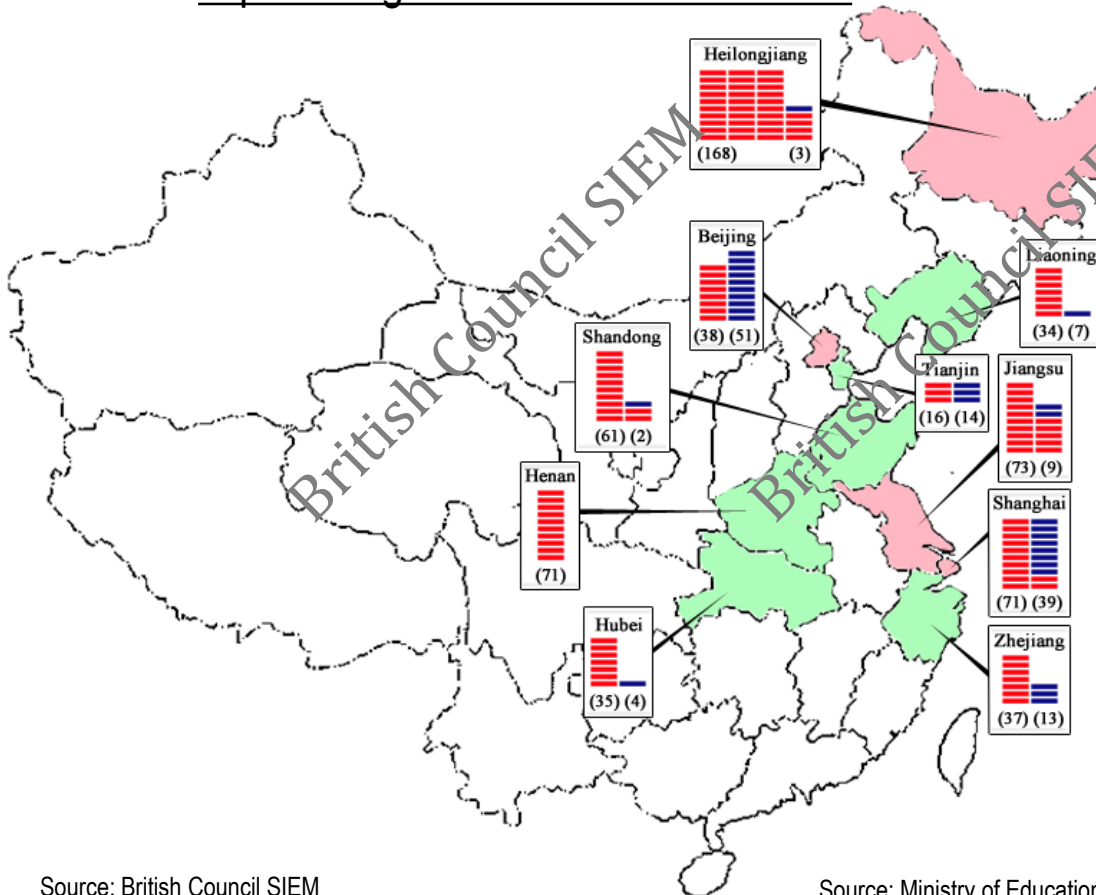


Source: Ministry of Education, British Council SIEM

TNE programmes by location

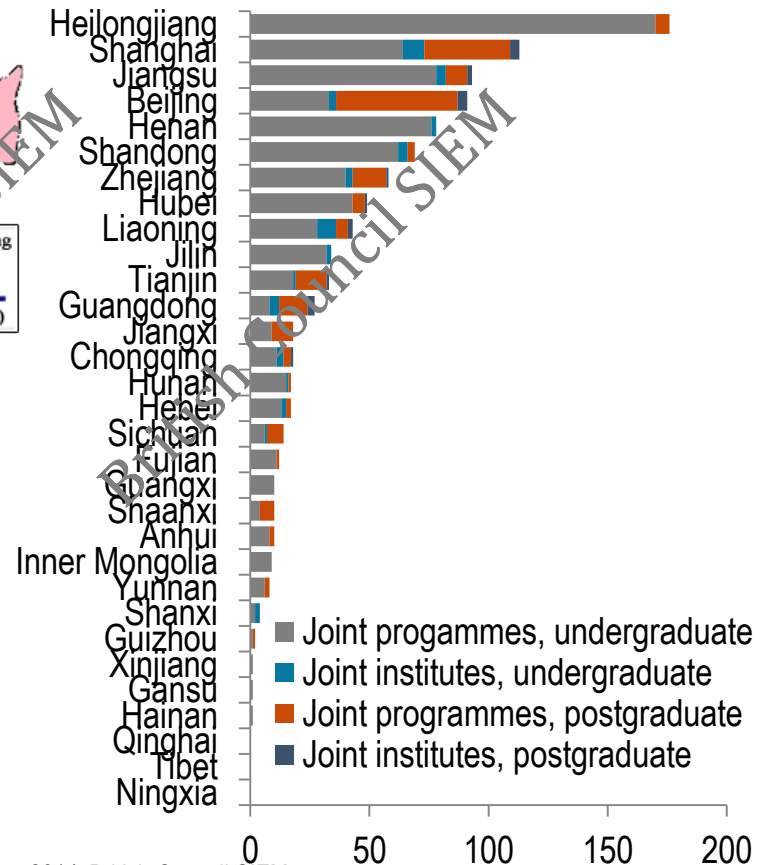
- ❖ Half of all TNE programmes at UG/PG levels are located within four provinces of China
- ❖ The more developed areas attract greater amounts of TNE activity at postgraduate levels.

Top ten largest TNE markets in China



Source: British Council SIEM

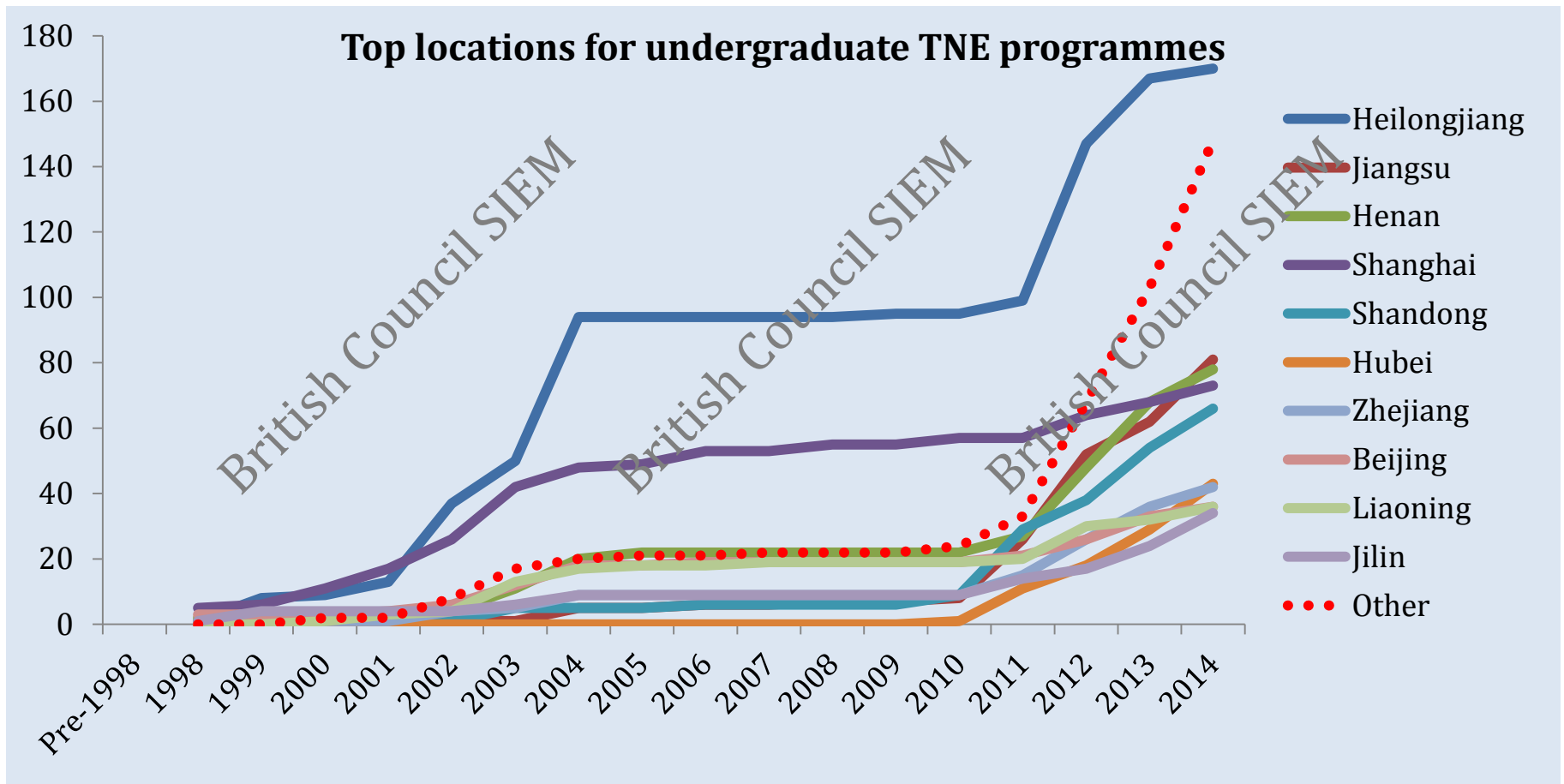
Type of TNE programme, by province



Source: Ministry of Education, 2014, British Council SIEM

TNE programmes by location

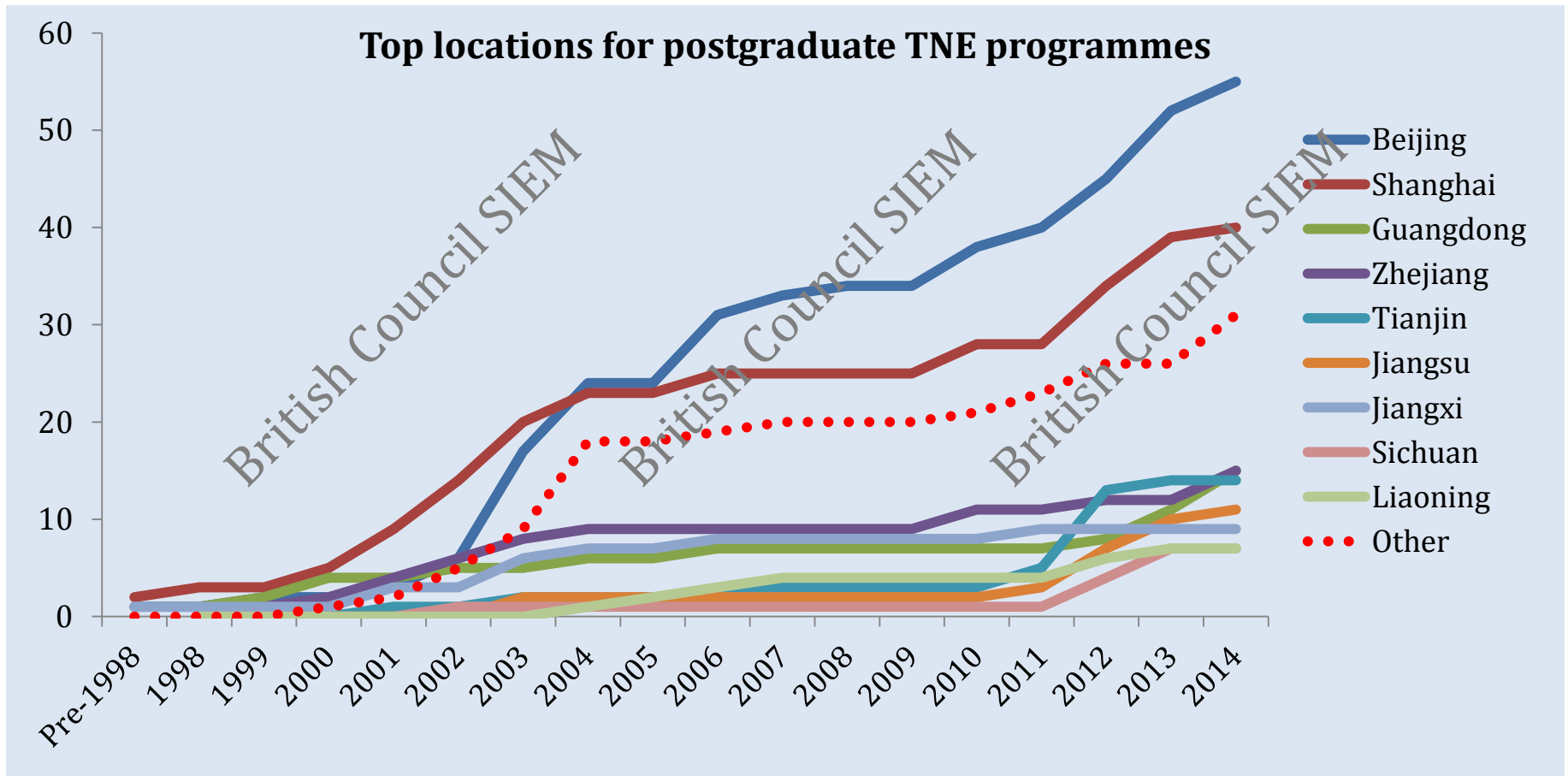
- ❖ Since 2011, undergraduate TNE activity has grown fastest in Jiangsu, Hubei and provinces outside of the traditional top markets – Tianjin, Jiangxi and Shaanxi.



Source: Ministry of Education, British Council SIEM; data current through March 24, 2014

TNE programmes by location

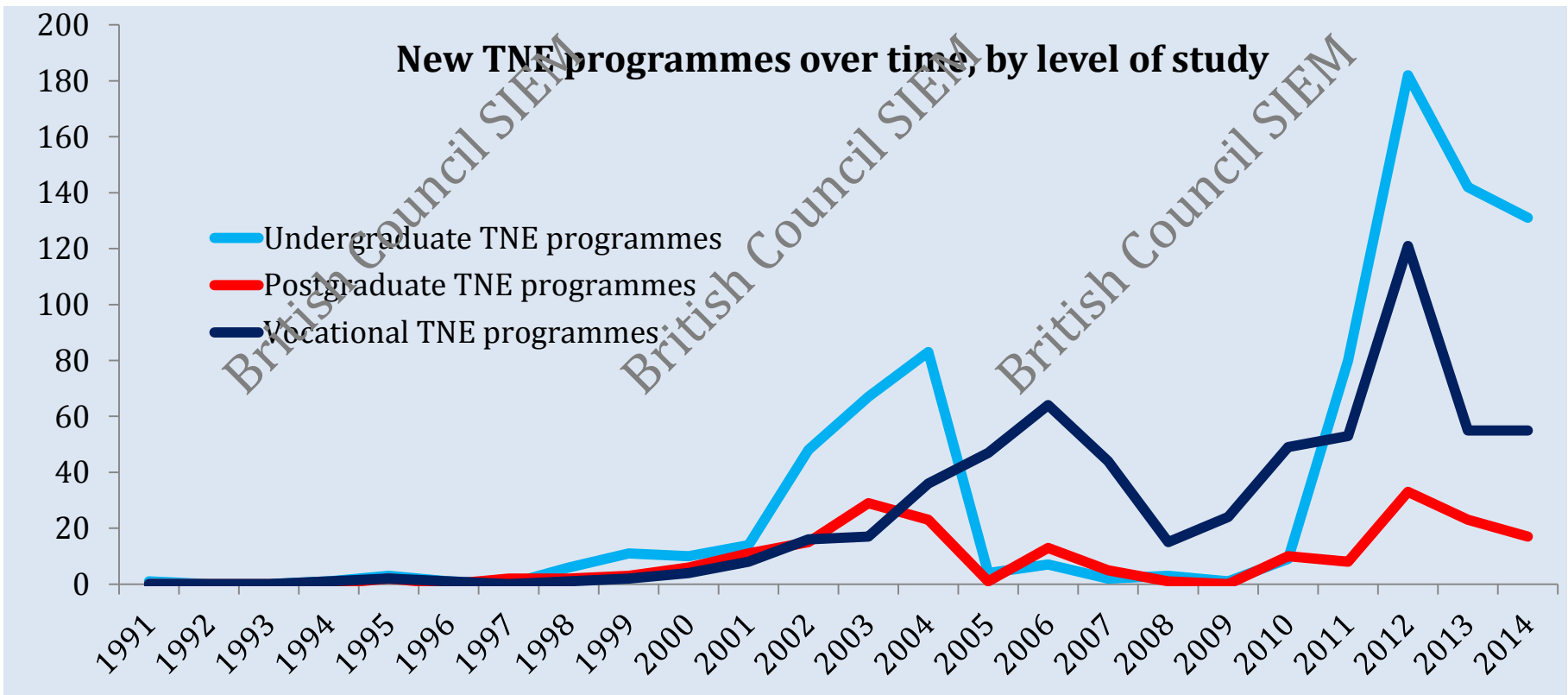
- ❖ Beijing and Shanghai remain the key markets for postgraduate TNE programmes.
- ❖ New markets are also growing more rapidly than many traditional top provinces.



Source: Ministry of Education, British Council SIEM

TNE programme approvals over time

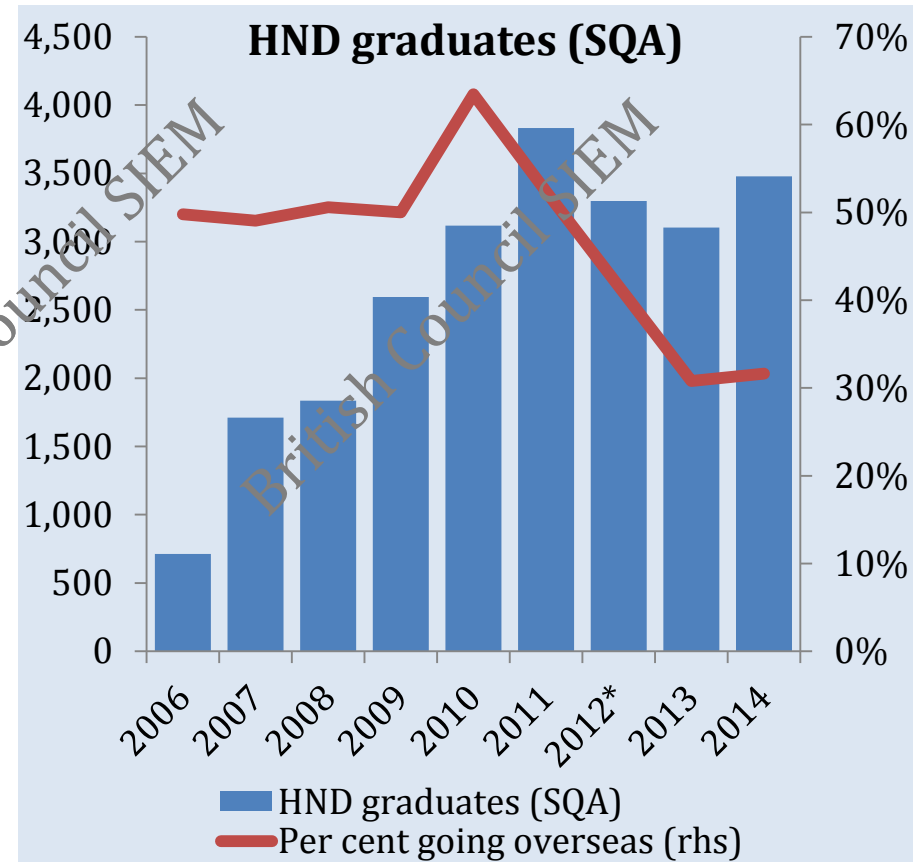
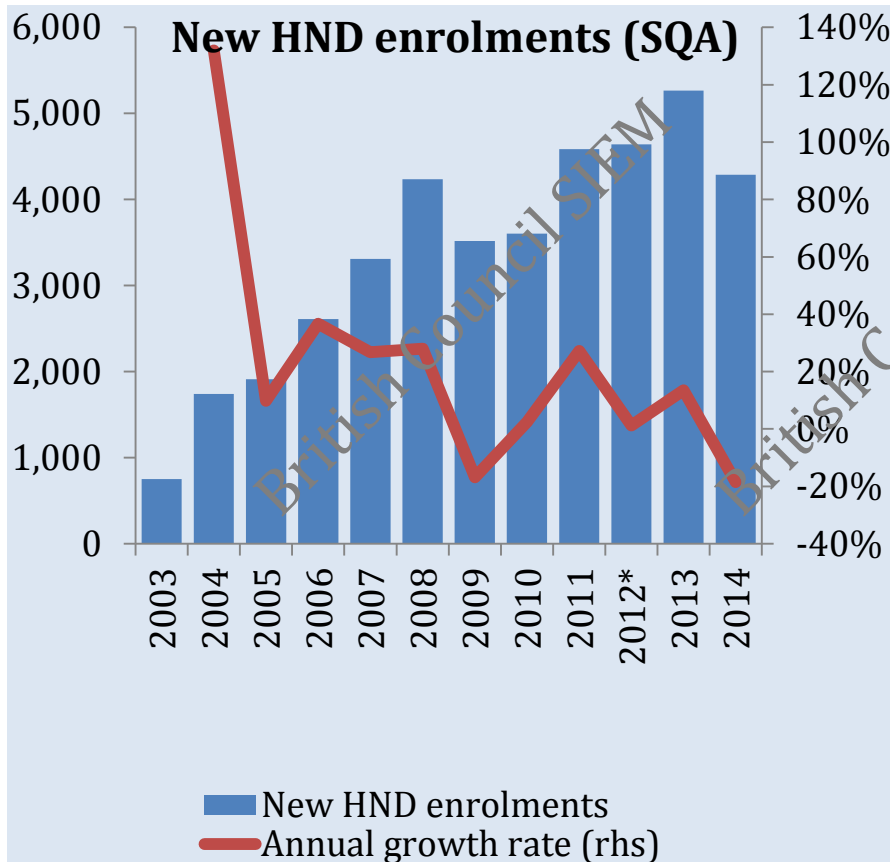
- ❖ The number of new programme approvals has slowed slightly since 2012, as the Ministry of Education has taken a closer look at the quality and record of existing partnerships.
- ❖ The slowdown could be attributed to fewer applications from overseas partners, greater scrutiny from the MoE or the emergence of new models of collaboration in China.



Source: Ministry of Education, British Council SIEM

HND

- ❖ New HND enrolments are dropping in China, as is number of graduates going overseas.
- ❖ Around 2,000 students enrolled in EdExcel HND programmes in 2013, but this figure is also decreasing over time, indicating preference for alternate progression pathways.



Source: SQA-CSCSC; *note: number of 2012 graduates going overseas is estimate.

Latest trends in MoE approvals of TNE in China

Quality and proven track record

- ❖ Following audits of TNE programmes in China from 2009-12, the Ministry of Education has begun to emphasise the need for greater quality in TNE partnerships in China.
- ❖ For UK universities, this means limiting the number of local TNE partners and establishing a proven track record before expanding.

Greater equity in location and subject

- ❖ The number of TNE programmes in less developed markets and in less supplied subjects has grown more rapidly than those in traditional locations and popular subjects.
- ❖ When choosing a partner, location matters; when choosing a location, subjects matter.

More time in China, less time overseas

- ❖ The portion of 3+1 or 4+0 TNE programmes in China has increased in recent years.
- ❖ However, this is not about partner income so much as about resource deployment in China, as overseas partners are expected to deliver more course content and instructors in China.

Thank you

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