

INTERNATIONAL EDUCATION CONFERENCE

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ELT does TNE:
the hows, whys and wherefores of delivering
training overseas

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The context

- TNE is a huge story in the HE sector
- According to Universities UK, 693,695 students from 225 countries were studying on HE TNE programmes with 139 UK HEIs in 2017-18
- Many ministries of education around the world are pursuing English language policies, **making English language study compulsory at basic education level** and establishing **ambitious EMI objectives**
- **Burgeoning locally-owned private English language teaching sectors** in many countries, driven by high demand
- There is a **dearth of any concrete evidence on trends** in the delivery of English language teaching overseas by the UK ELT sector
- Anecdotally, there is a **perceived reluctance or inability of the sector to respond** to this opportunity

The research

In 2018 Ipsos MORI conducted research on behalf of the Dept for International Trade to understand the capacity of the UK ELT industry to deliver overseas.

Objectives included:

1. **examining current provision** delivered overseas by UK providers
2. **gauging potential** for expanding provision
3. **understanding the barriers** to providing teaching overseas
4. **explore the support needed** to overcome these barriers

The research - methodology

Online, self-completion survey of ELT centres in the UK – 62 centres participated (sample was 436 English UK member centres; response rate was 19%)

Depth interviews with 15 survey participants

82% of survey participants were private year round-providers

Of these, 24% were part of a group or chain

18% were state-funded providers

Current ELT provision delivered overseas by UK sector (1/2)

- **One in five** UK centres delivering overseas (21%)
- Centres approached by students, agents, businesses and schools based overseas with business proposals and/or requests to form partnerships
- Those currently delivering overseas perceive **overseas delivery to be a growing market**
- Conversely, centres had experienced **reduced or stagnated demand for delivering courses in the UK**
- Main markets for overseas delivery – Europe, Asia and the Middle East

Current ELT provision delivered overseas by UK sector (2/2)

- **Local delivery partners** are a popular choice of delivery mode as they offer **quicker and easier routes to market** at a **fraction of the cost** of setting up a physical presence
- Smaller, independent centres **struggled with competition** from larger chains, which had existing networks across the globe – harder to access delivery partners in an affordable way
- Centres see distance or online learning as a way to **extend their teaching, expand into multiple regions and reach wider audience** in a **cost-effective** way
- Challenges in marketing and effectively monetising online courses

Expanding overseas ELT provision by UK sector (1/3)

- Centres divided on perceived importance of delivering ELT overseas
- 52% said it was important to them, & becoming increasingly important and necessary to do in order to remain competitive and generate revenue
- One third of centres not currently delivering overseas had plans to do so
- Almost half of the centres currently delivering overseas expected to increase the number of countries in which they provide teaching in the next three years

Expanding overseas ELT provision by UK sector (2/3)

However, nearly half of centres were not currently delivering overseas and had no plans to do so

Why not?

Too busy with other priorities – focus resources and funding on expanding in the UK, a more familiar market with strong demand

Did not see value in expanding provision overseas – expanding overseas would not be profitable, market saturated with competitors, strong competition from other MESDCs/local providers in the target market

Expanding overseas ELT provision by UK sector (3/3)

- Research participants felt that **growth in demand (particularly from Middle East, Asia and Latin America) would continue** over the next five years – students preferring to study in their home countries and finding it harder to get visas to study in the UK
- **Growing appetite for shorter and online or blended courses (low cost)**
- Slowing demand for general English
- Growing **demand for higher level, specialist and professional teaching** (medicine, law, engineering, finance)

Barriers to providing teaching overseas

- **Difficulty in finding potential partners**
- **Too many laws and regulations** in the target market and/or lack of knowledge or understanding of these
- **Difficulty in identifying opportunities and submitting bids**
- **Operational obstacles** – high cost for sending staff overseas, difficulty in obtaining visas for staff, lack of knowledge around how to set up and teach courses (particularly online courses)
- **Fiscal barriers** – not perceiving overseas delivery as a profitable avenue, lacking funding to be able to move forward, overseas market saturated by providers offering courses at low prices, high set-up costs
- **Strong competition** and perceived lack of demand for UK-provided courses overseas

Support needed

- Advice or guidance around the **set-up processes** for delivering teaching overseas
- Information about **partners in foreign markets**
- Support with **submitting bids** (forming consortiums + business, financial or strategic planning)
- **Information about the demand overseas** and profitability of delivering in different countries
- Guidance on **local contacts** in overseas markets to provide legal/regulatory advice
- **Market-specific guidance** – access to a ‘one-stop shop’
- Tailored **one-to-one support** (particularly at the bidding stage)
- **Promotion of the UK** as a high-quality and valuable teaching provider

Thank you!

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