



SERVICES FOR INTERNATIONAL EDUCATION MARKETING

Beyond Mobility: Assessing performance and planning for the future of TNE in East Asia

SIEM Conference

11 December 2014

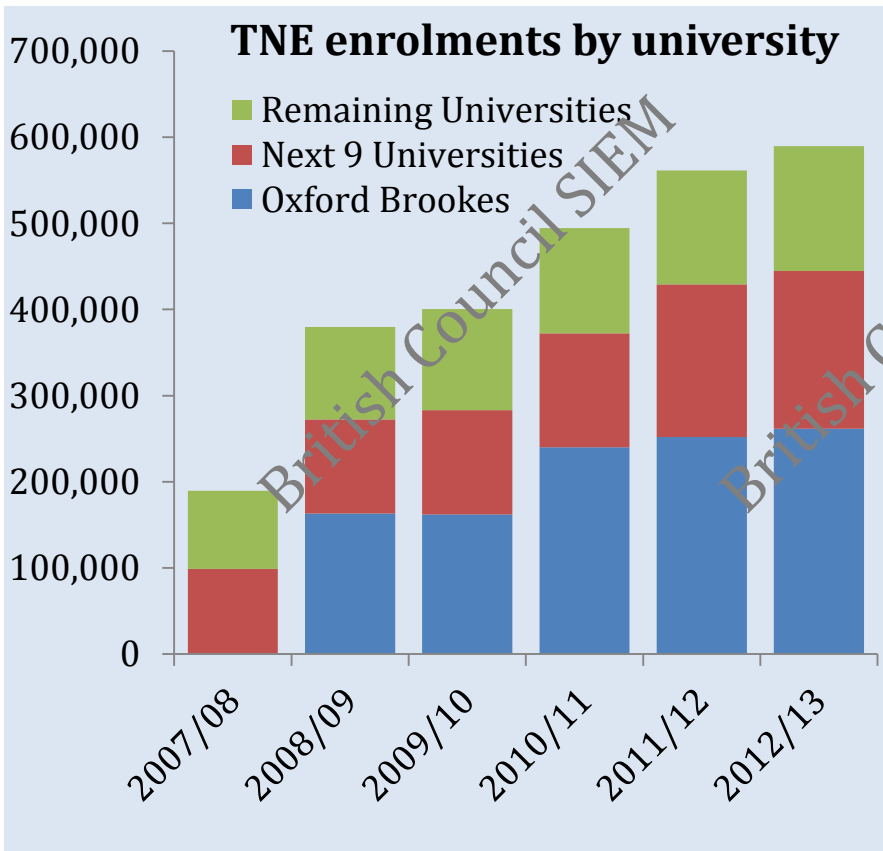
www.britishcouncil.org/siem

- I. A brief history of UK TNE
- II. TNE and student mobility
- III. TNE and research output
- IV. TNE and tuition fees
- V. Benchmarking local partners
- VI. Benchmarking TNE performance

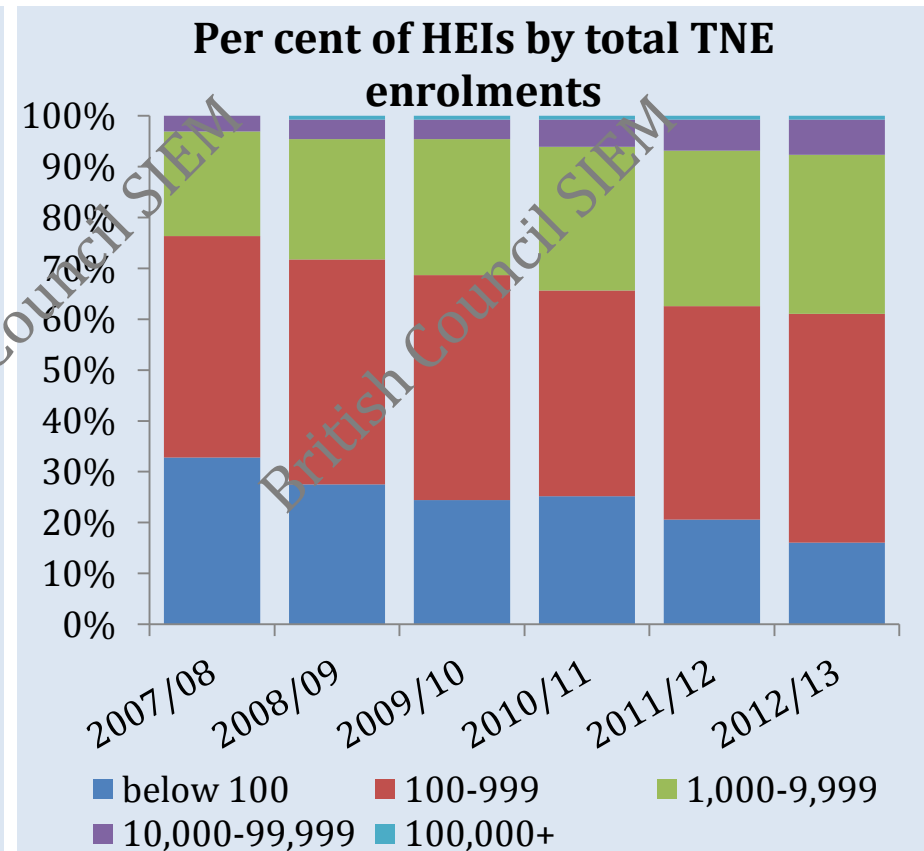
- I. A brief history of UK TNE**
- II. TNE and student mobility
- III. TNE and research output
- IV. TNE and tuition fees
- V. Benchmarking local partners
- VI. Benchmarking TNE performance

I. A Brief History of UK TNE

- ❖ TNE enrolments tripled from 2007-13, but most of the growth has been concentrated in a few UK universities – the top 10 now make up three quarters of all TNE enrolments.
- ❖ Only 21 universities enrol fewer than 100 TNE students, while 51 enrol more than 1,000.



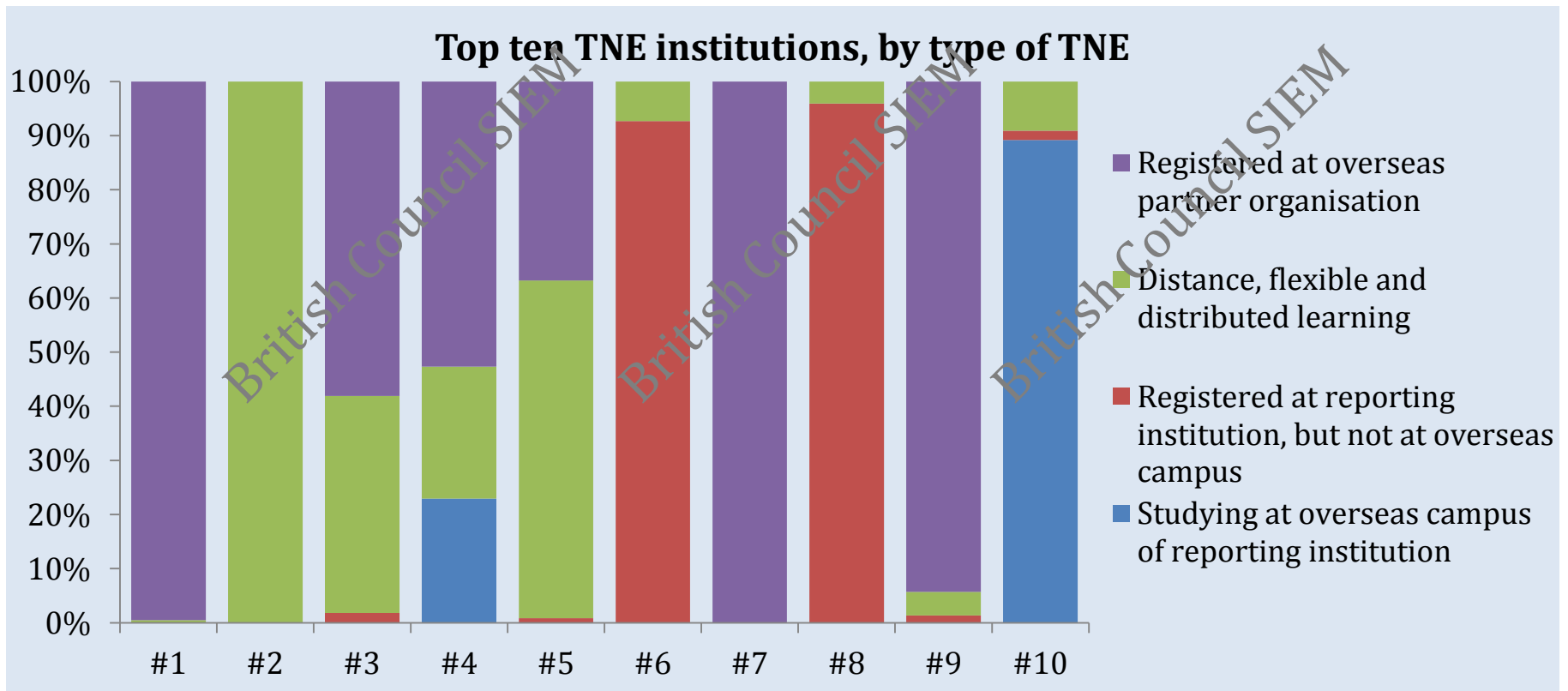
Source: HESA, British Council SIEM



Source: HESA, British Council SIEM

I. A Brief History of UK TNE

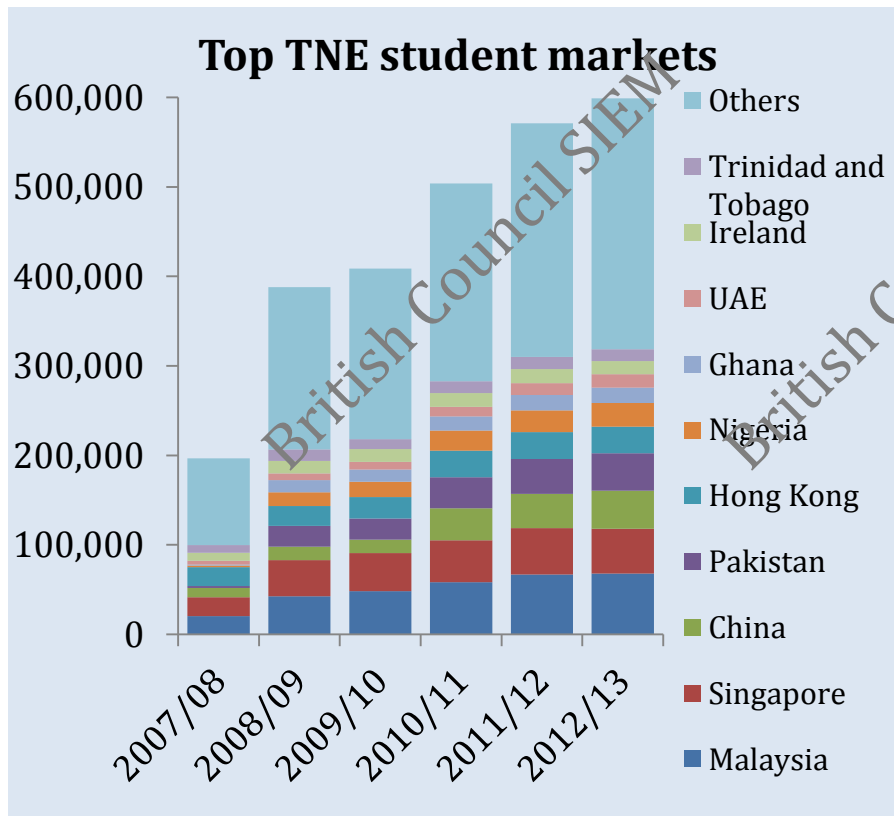
- ❖ The type of TNE activity varies widely across the top ten UK providers, although the data is only semi-reliable as categorisation of different TNE models is not always clear.
- ❖ Each type of TNE activity accounted for at least 89 per cent of all students studying overseas at one or more of the top 10 UK institutions.



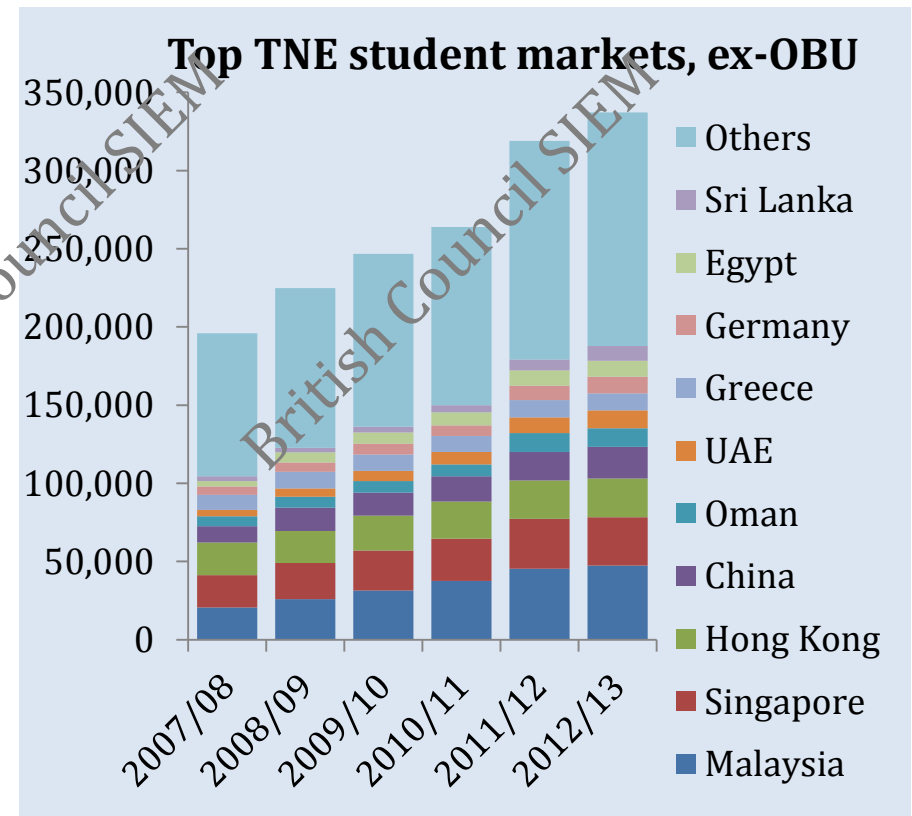
Source: HESA, British Council SIEM

I. A Brief History of UK TNE

- ❖ East Asia is home to four of the top five TNE student markets in the world, and the four largest when excluding OBU.
- ❖ The top 10 countries make up 56 per cent of all TNE enrolments, with the top four East Asian TNE markets accounting for one third of all enrolments.



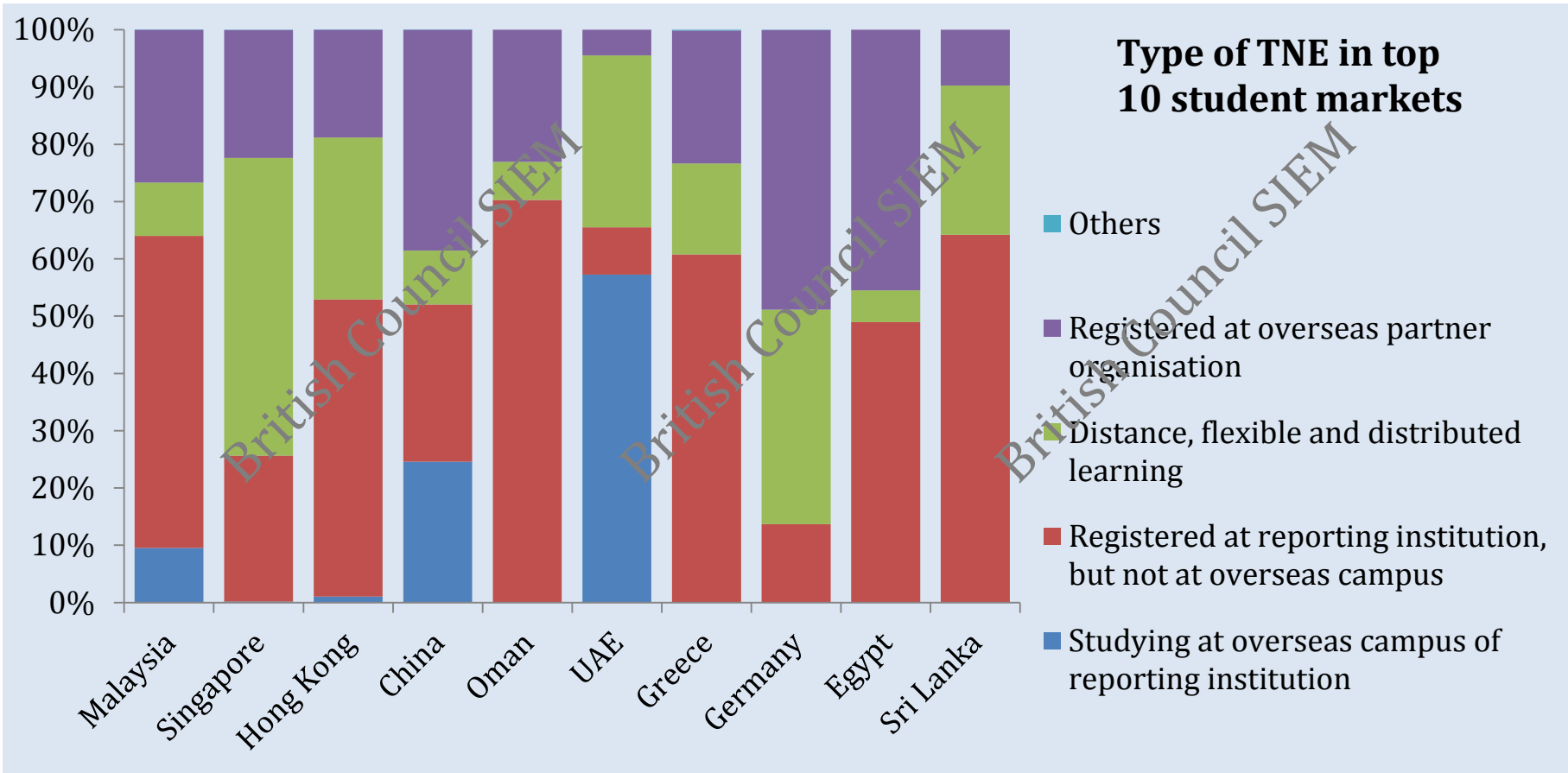
Source: HESA, British Council SIEM



Source: HESA, British Council SIEM

I. A Brief History of UK TNE

- ❖ Each of the four types of TNE is the leading mode in at least one of the top 10 countries.
- ❖ In 8 of 10 student markets, one mode accounts for more than half of all TNE enrolments.



Source: HESA, British Council SIEM

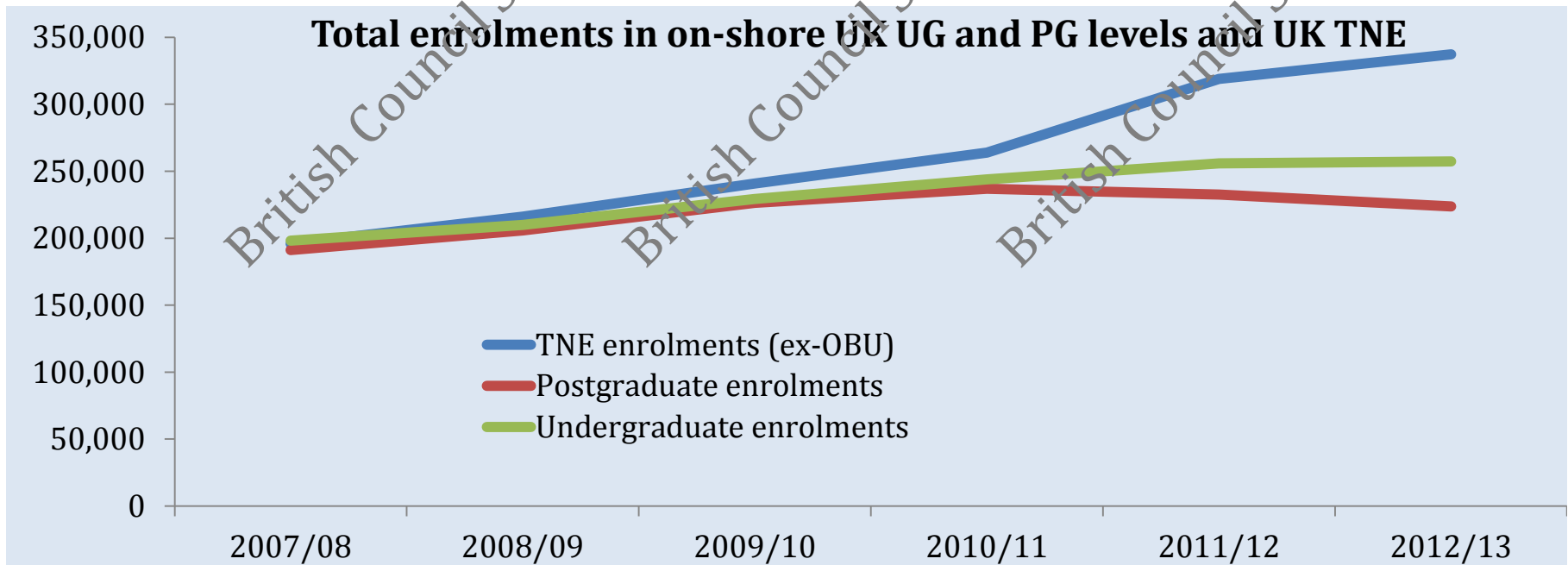
I. A Brief History of UK TNE: Section summary

- ❖ UK TNE enrolments are on the rise globally, but remains largely concentrated in a few particularly active UK universities.
- ❖ The type of TNE activity varies widely among these active UK TNE universities, suggesting a variety of institutional approaches and strategies.
- ❖ TNE activity is unevenly distributed globally, with the four largest markets all located in East Asia.
- ❖ TNE activity also varies considerably within countries -- each type of TNE model makes up the majority of TNE enrolments in at least one of the top 10 largest TNE markets.
- ❖ At the institutional level, the countries which make up the TNE portfolio varies considerably.

- I. A brief history of UK TNE
- II. TNE and student mobility**
- III. TNE and research output
- IV. TNE and tuition fees
- V. Benchmarking local partners
- VI. Benchmarking TNE performance

II. TNE and Student Mobility

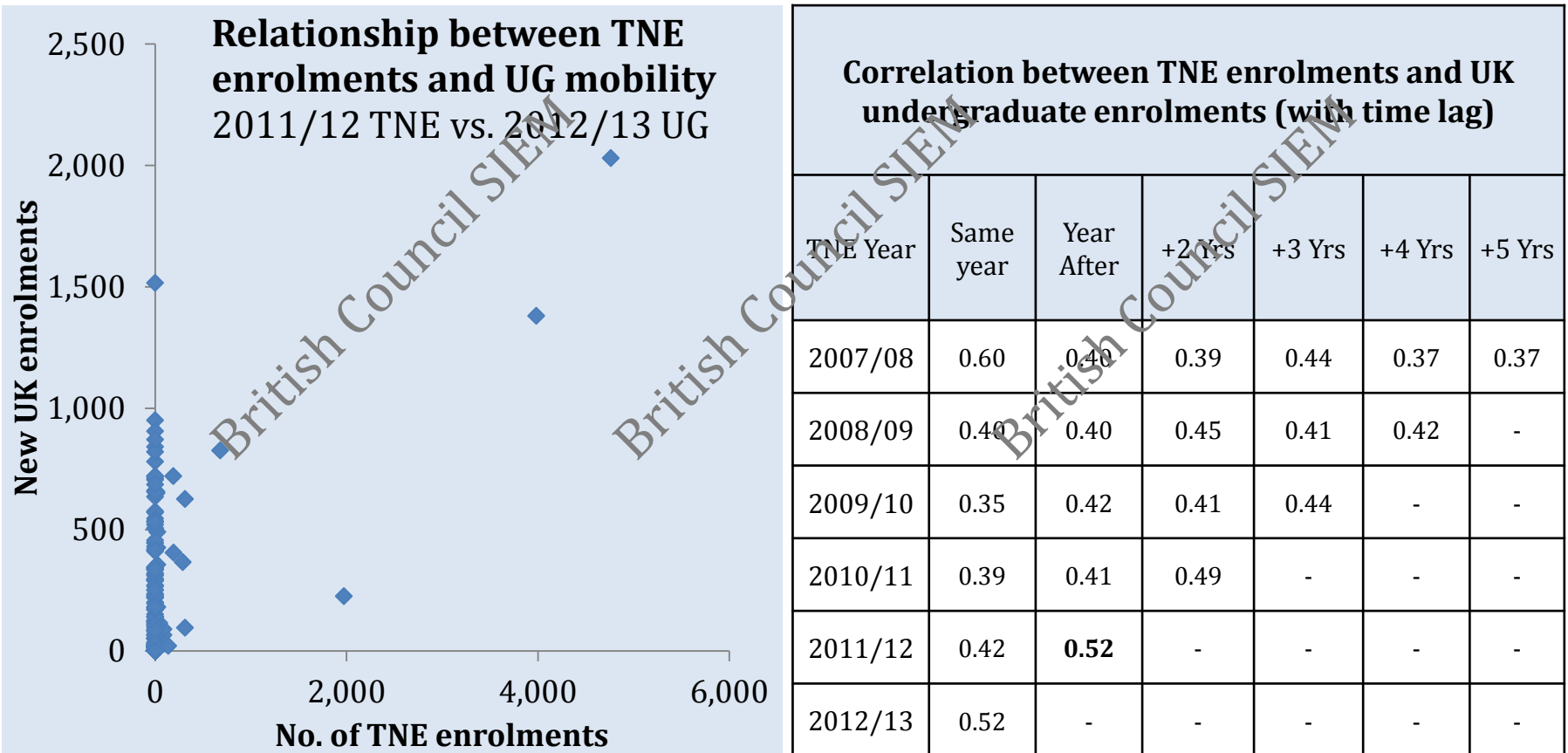
- ❖ Total enrolments in UK TNE programmes closely tracked enrolment in both the UG and PG levels until 2010, but has since diverged, complicating the potential correlation.
- ❖ Due to the uneven distribution of TNE activity in a few UK HEIS, as well as the great diversity of TNE models and top partner countries, the effect of TNE enrolments on mobility to the UK sector as a whole is unclear.
- ❖ It is more instructive to look at the TNE activity of institutions and the effect on mobility.



Source: HESA, British Council SIEM

II. TNE and Student Mobility: China

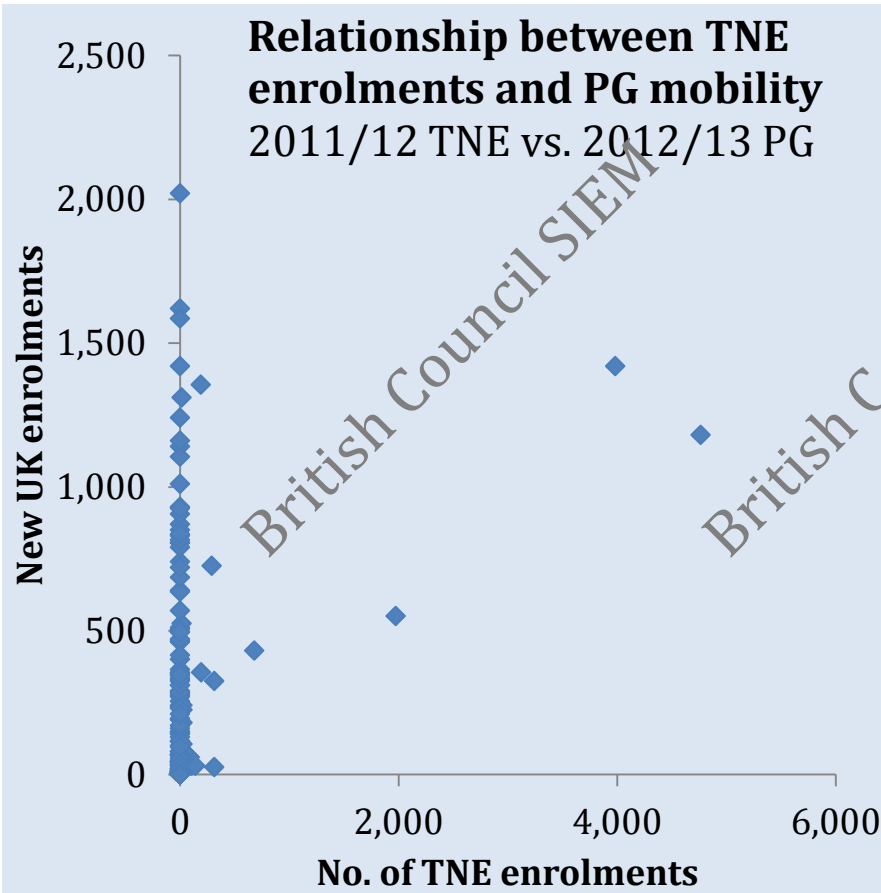
- ❖ China exhibits the strongest correlation of all major TNE markets between the number of TNE enrolments and inbound mobility of students to the same UK institution.
- ❖ This is largely explained by the two UK branch campuses operating in China.



Source: HESA, British Council SIEM; does not include TNE enrolments of OBU, Open University or University of London international programmes.

II. TNE and Student Mobility: China

- ❖ At postgraduate levels, the correlation between TNE and mobility is weaker.
- ❖ This pattern holds for every top TNE market, suggesting PG students likely switch HEIs.



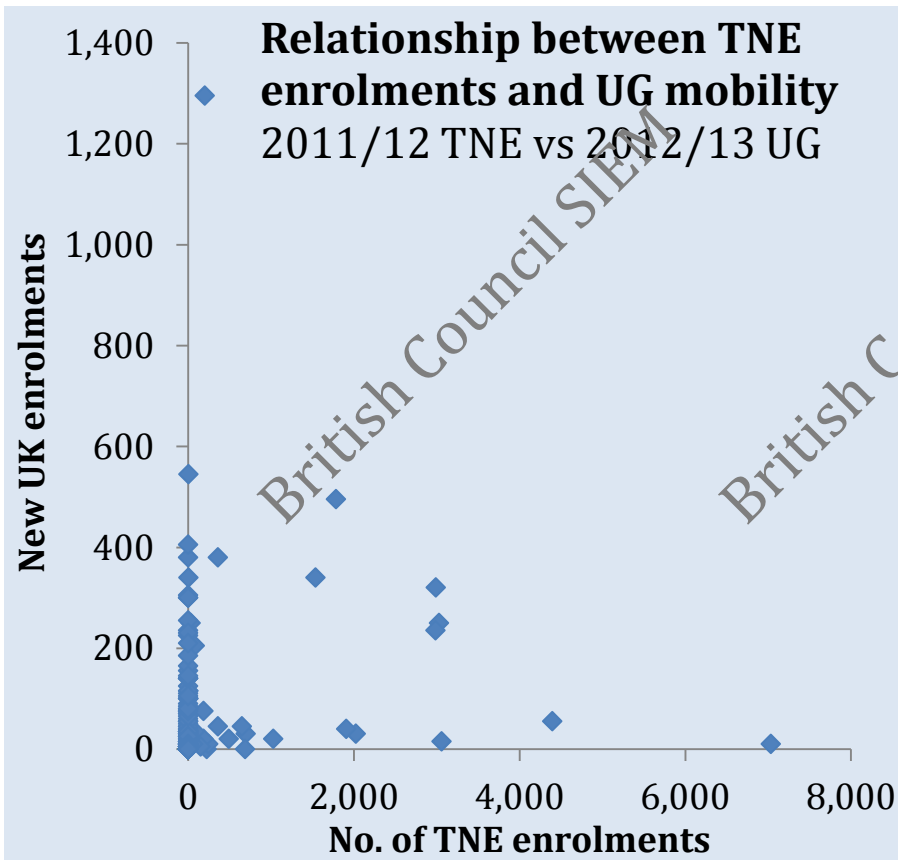
Correlation between TNE enrolments and UK postgraduate enrolments (time lag)

TNE year	Same year	Year after	+2 Yrs	+3 Yrs	+4 Yrs	+5 Yrs
2007/08	0.28	0.25	0.23	0.18	0.18	0.20
2008/09	0.28	0.26	0.21	0.21	0.22	-
2009/10	0.26	0.24	0.23	0.25	-	-
2010/11	0.26	0.26	0.27	-	-	-
2011/12	0.27	0.28	-	-	-	-
2012/13	0.28					

Source: HESA, British Council SIEM; does not include TNE enrolments of OBU, Open University or University of London international programmes.

II. TNE and Student Mobility: Malaysia

- ❖ Next to China, Malaysia exhibits the strongest correlation between TNE and mobility.
- ❖ Correlations peak in the same year or one year after TNE enrolments are recorded, but they are weakening over time, perhaps coinciding with the recent surge in TNE activity.



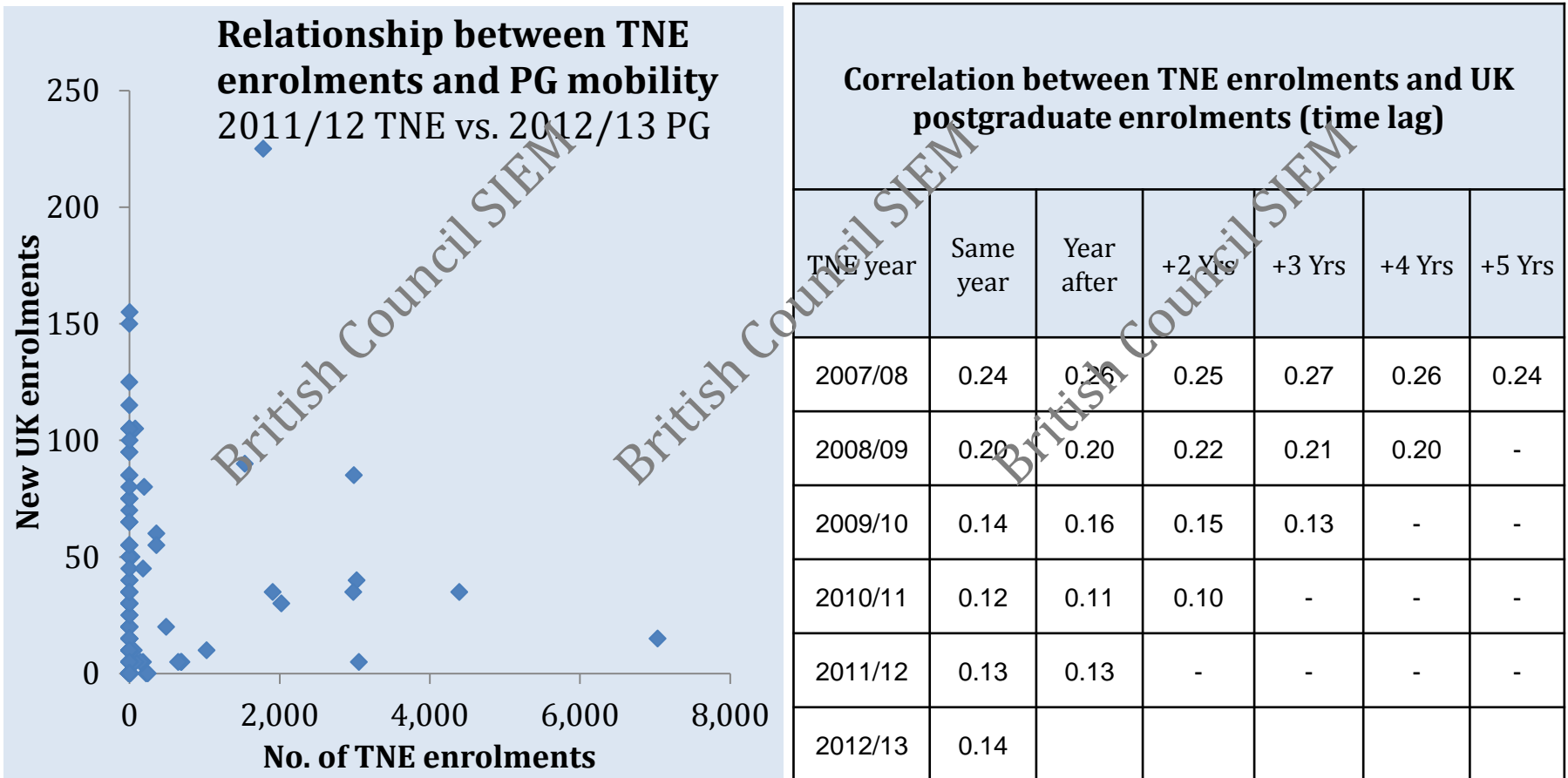
Correlation between TNE enrolments and UK undergraduate enrolments (time lag)

TNE year	Same year	Year after	+2 Yrs	+3 Yrs	+4 Yrs	+5 Yrs
2007/08	0.28	0.32	0.28	0.25	0.23	0.23
2008/09	0.30	0.27	0.23	0.22	0.21	-
2009/10	0.21	0.17	0.17	0.14	-	-
2010/11	0.12	0.12	0.09	-	-	-
2011/12	0.13	0.12	-	-	-	-
2012/13	0.13	-	-	-	-	-

Source: HESA, British Council SIEM; does not include TNE enrolments of OBU, Open University or University of London international programmes.

II. TNE and Student Mobility: Malaysia

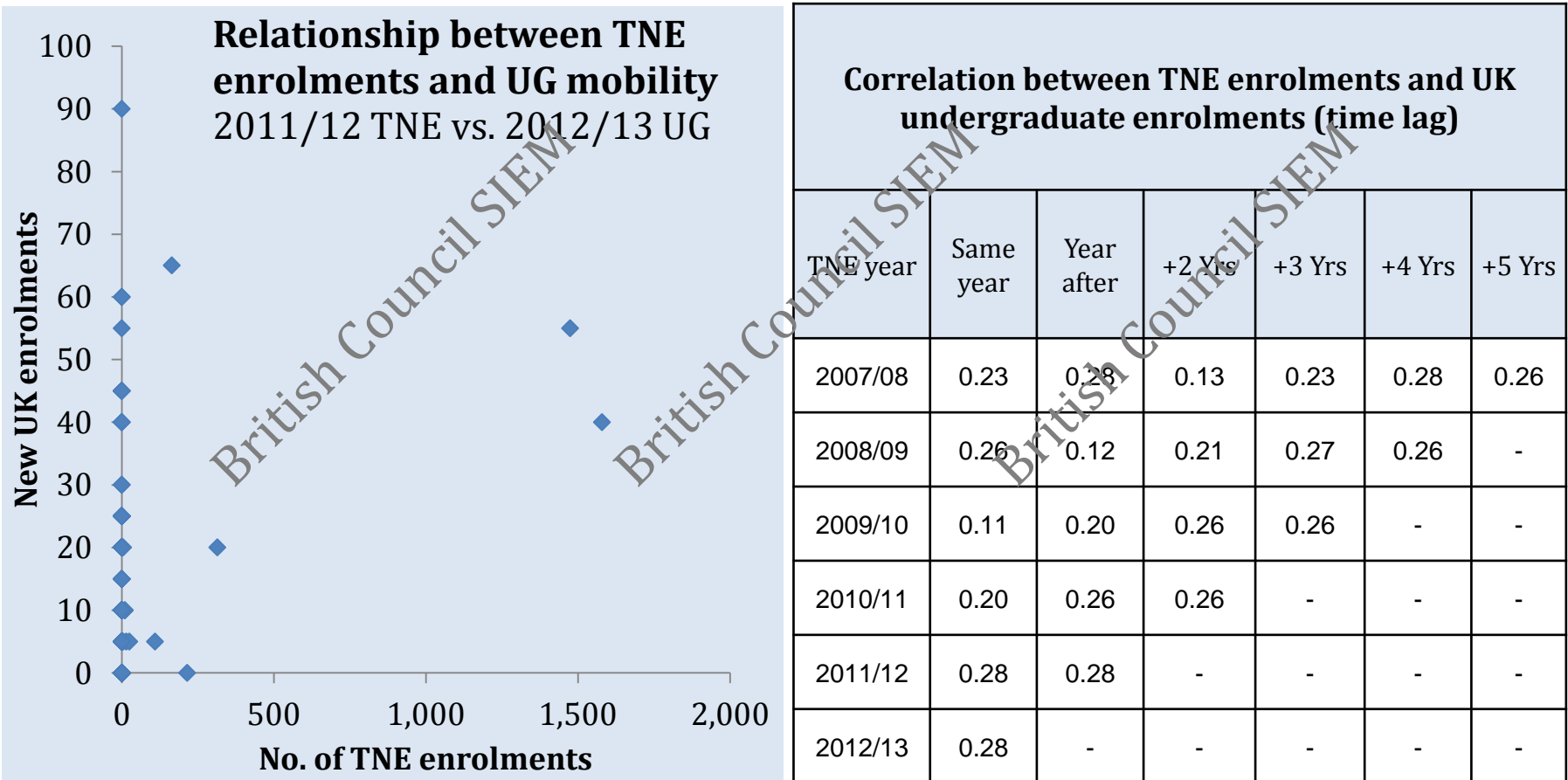
- ❖ The correlation between TNE enrolments and mobility into postgrad education is weaker.
- ❖ Correlations have also grown weaker over time, despite the rise of new branch campuses.



Source: HESA, British Council SIEM; does not include TNE enrolments of OBU, Open University or University of London international programmes.

II. TNE and Student Mobility: UAE

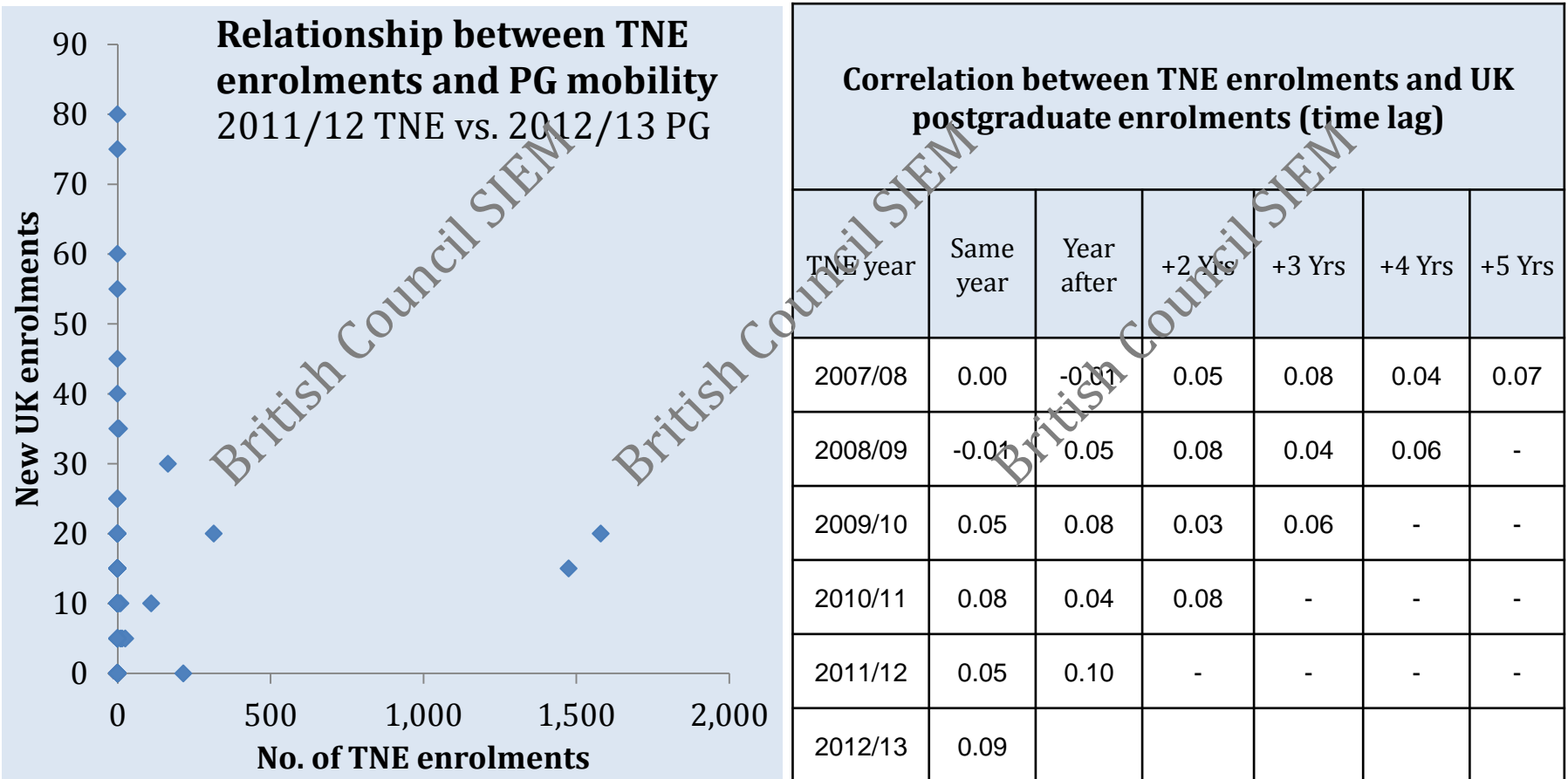
- ❖ UAE is the only other major TNE market which demonstrates even weak correlation (>.20) between TNE enrolments and inbound mobility, perhaps resulting from branch campuses.



Source: HESA, British Council SIEM; does not include TNE enrolments of OBU, Open University or University of London international programmes.

II. TNE and Student Mobility: UAE

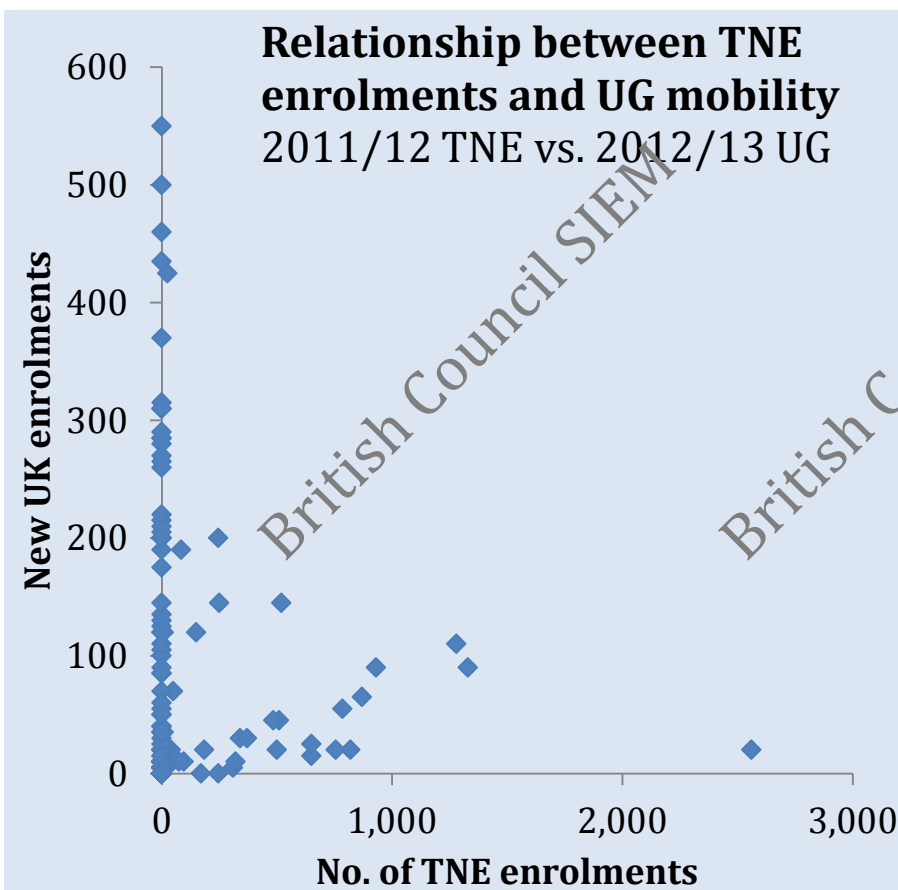
- ❖ At postgraduate levels, the correlation disappears between TNE enrolments and mobility to the same institution. This is the result of institution swapping, not lack of demand.



Source: HESA, British Council SIEM; does not include TNE enrolments of OBU, Open University or University of London international programmes.

II. TNE and Student Mobility: Hong Kong

- ❖ There is no correlation whatsoever between TNE enrolments in Hong Kong and mobility.
- ❖ Those UK HEIs with high numbers of TNE enrolments have notably low mobility to the UK.



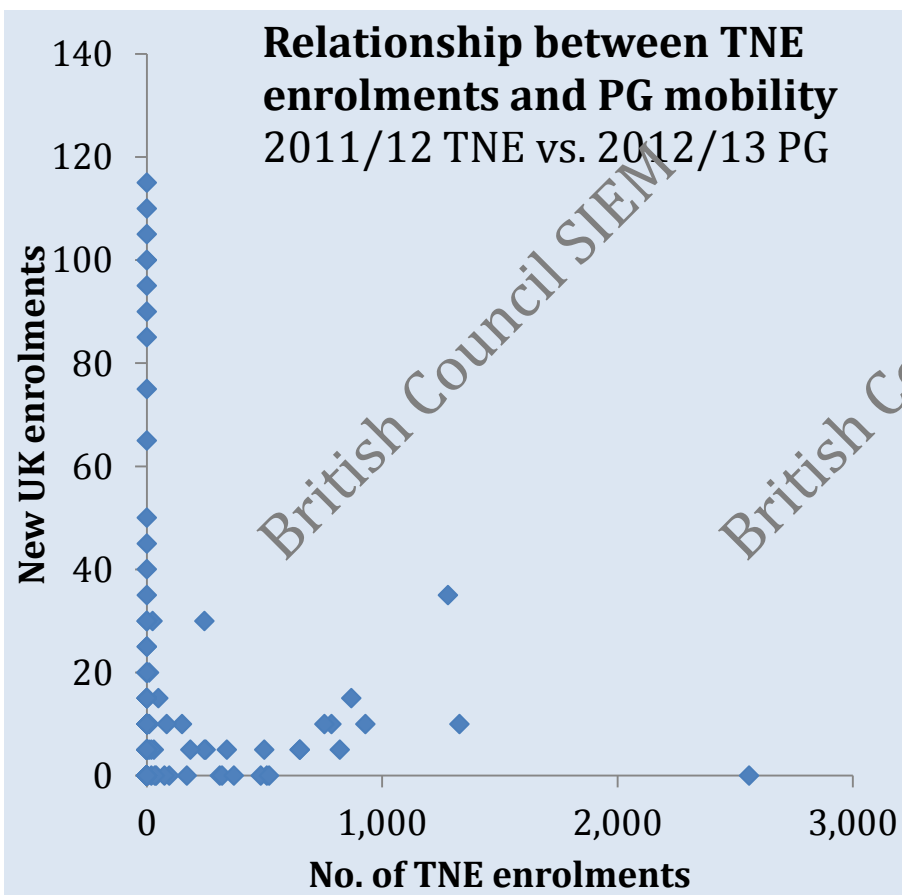
Correlation between TNE enrolments and UK undergraduate enrolments (time lag)

TNE year	Same year	Year after	+2 Yrs	+3 Yrs	+4 Yrs	+5 Yrs
2007/08	0.12	0.12	-0.01	-0.01	-0.03	-0.07
2008/09	0.07	0.00	0.00	-0.03	-0.06	-
2009/10	-0.01	-0.01	-0.04	-0.07	-	-
2010/11	-0.01	-0.03	-0.06	-	-	-
2011/12	-0.04	-0.05	-	-	-	-
2012/13	-0.04	-	-	-	-	-

Source: HESA, British Council SIEM; does not include TNE enrolments of OBU, Open University or University of London international programmes.

II. TNE and Student Mobility: Hong Kong

- ❖ The lack of correlation persists at postgraduate levels, with even negative correlation.
- ❖ Most mobility to PG programmes does not occur through TNE with the same institution.



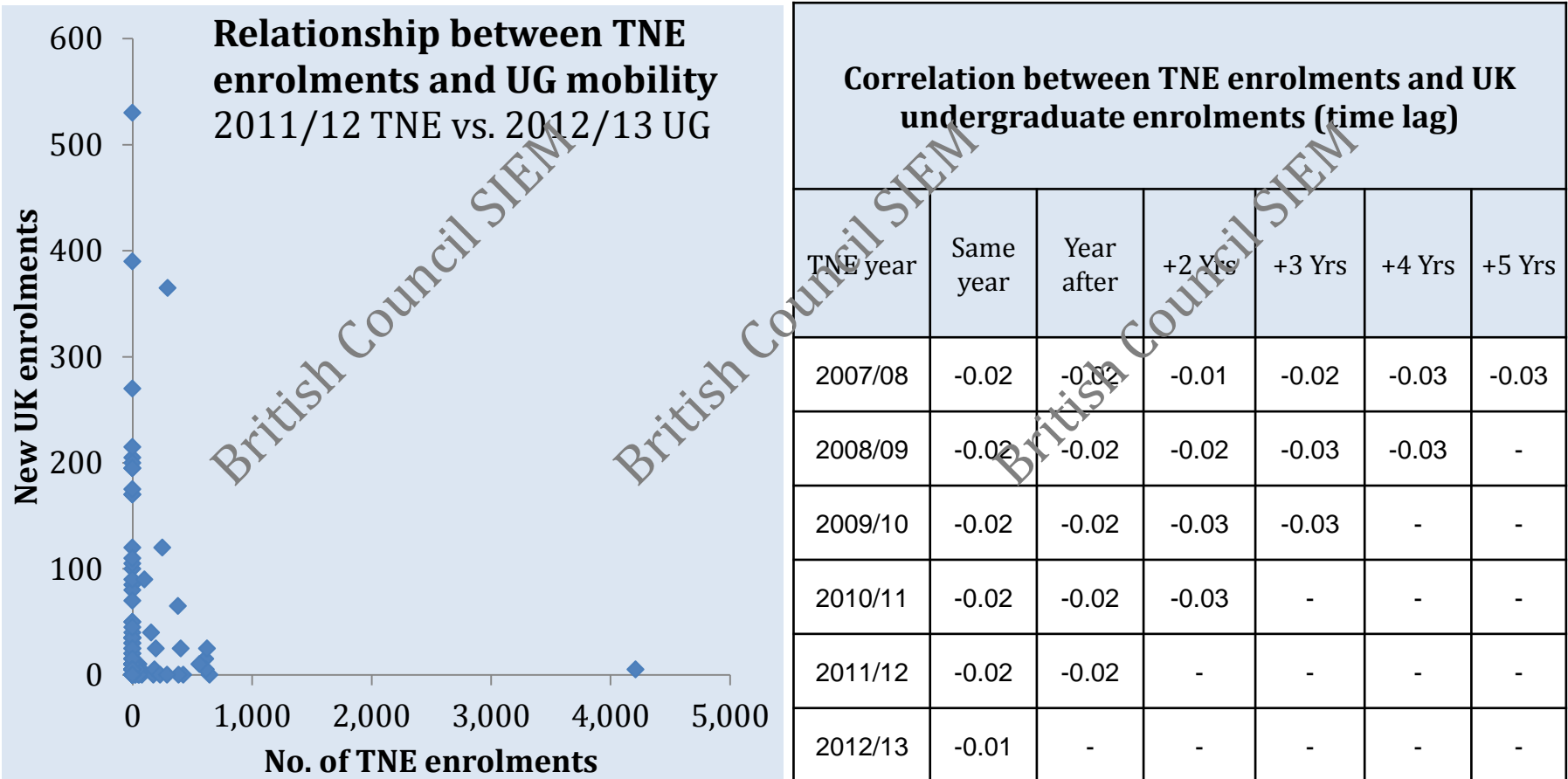
Correlation between TNE enrolments and UK postgraduate enrolments (time lag)

TNE year	Same year	Year after	+2 Yrs	+3 Yrs	+4 Yrs	+5 Yrs
2007/08	0.03	0.05	-0.02	-0.04	-0.04	-0.05
2008/09	0.08	-0.01	-0.03	-0.04	-0.03	-
2009/10	-0.02	-0.04	-0.05	-0.05	-	-
2010/11	-0.04	-0.05	-0.06	-	-	-
2011/12	-0.06	-0.06	-	-	-	-
2012/13	-0.06					

Source: HESA, British Council SIEM; does not include TNE enrolments of OBU, Open University or University of London international programmes.

II. TNE and Student Mobility: Singapore

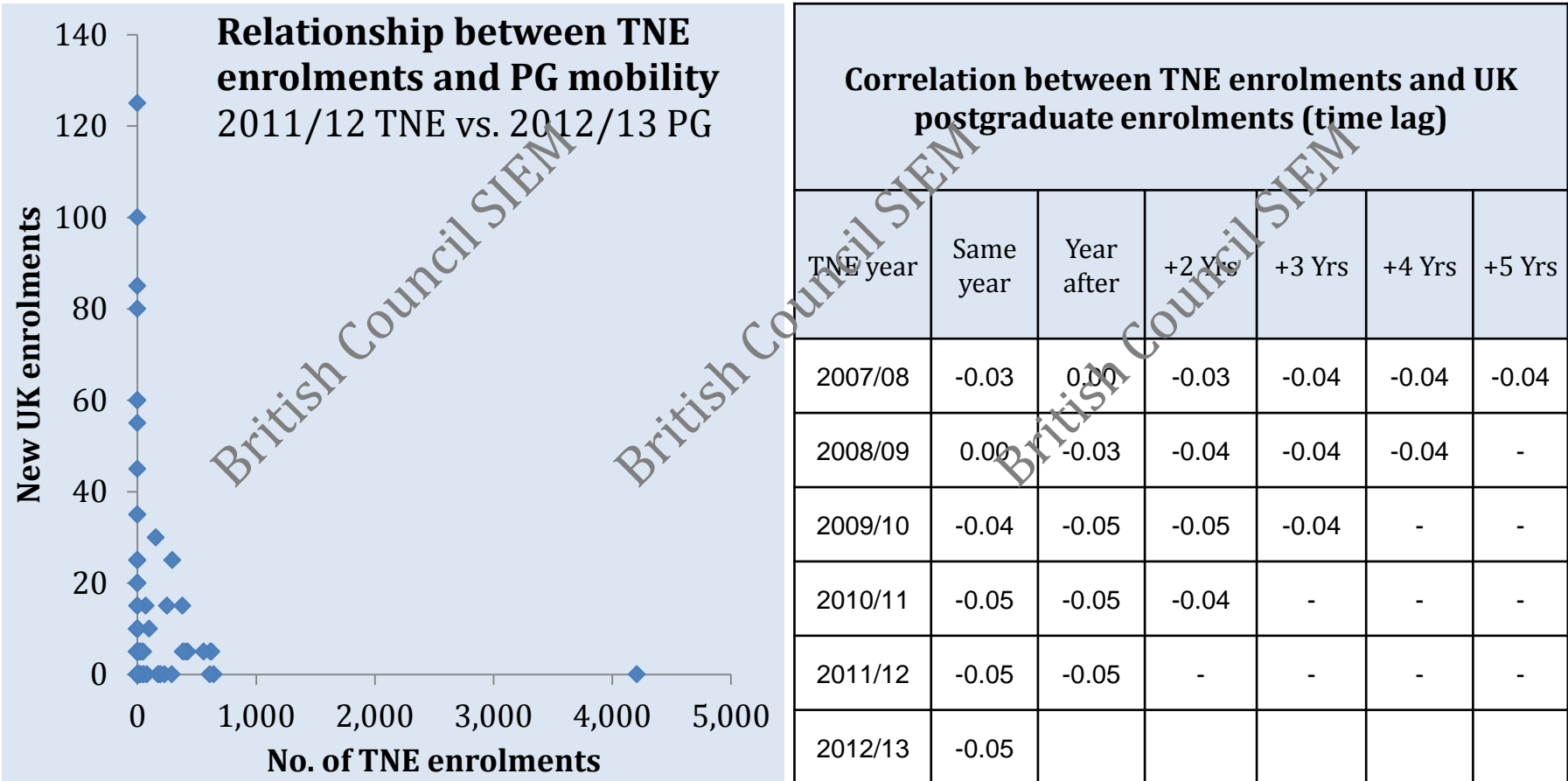
- ❖ Singapore also has no correlation, perhaps owing to its heavy reliance on distance learning TNE students, who are less likely to enrol overseas by their very nature.



Source: HESA, British Council SIEM; does not include TNE enrolments of OBU, Open University or University of London international programmes.

II. TNE and Student Mobility: Singapore

- ❖ At postgraduate levels, there is also no correlation, with those institutions enrolling TNE students in Singapore having noticeably low rates of mobility to the same institution.



Source: HESA, British Council SIEM; does not include TNE enrolments of OBU, Open University or University of London international programmes.

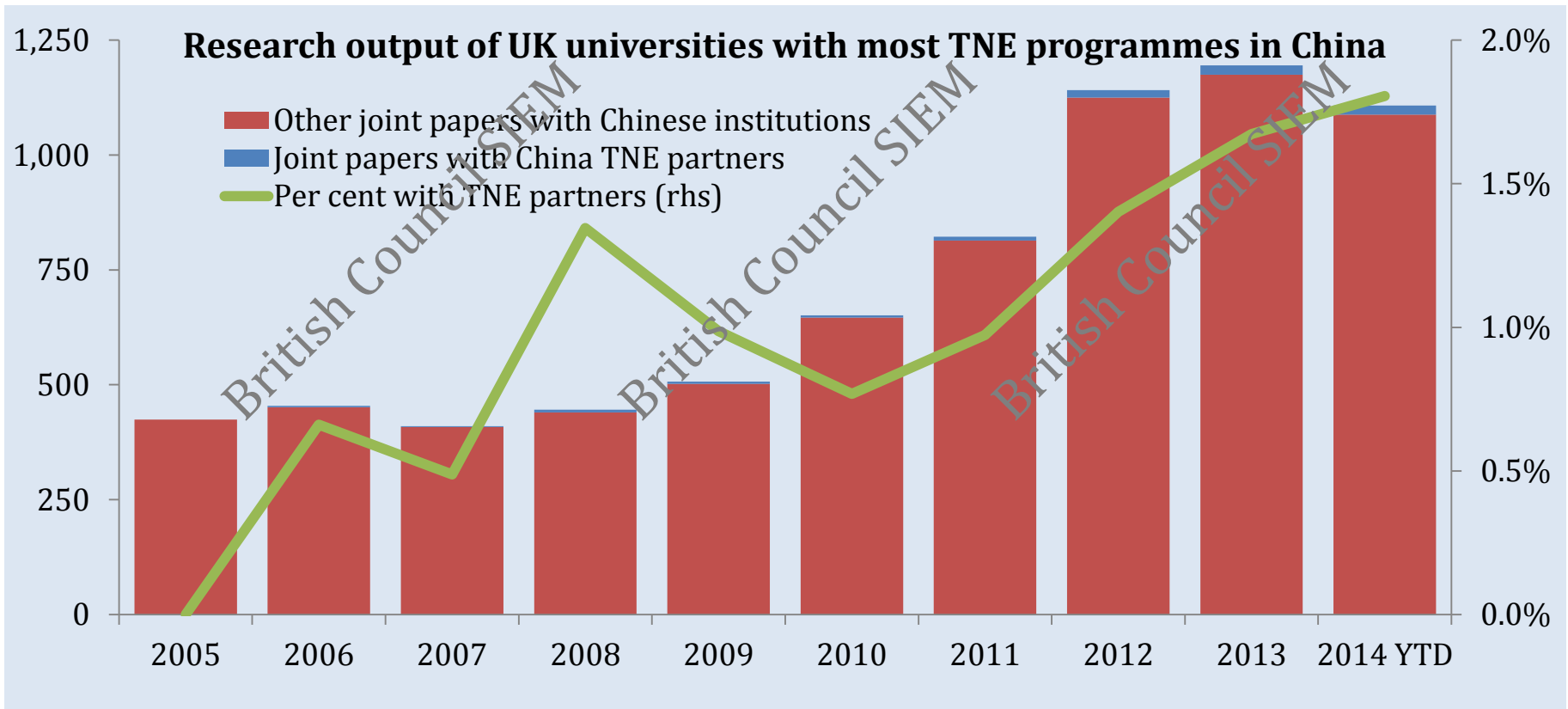
II. TNE and Student Mobility: Section summary

- ❖ While growth in UK TNE enrolments coincided with rising inbound mobility from 2007-2010, it has continued to grow even as mobility has languished.
- ❖ China exhibits the strongest correlation between TNE enrolments and mobility to the same institution in the UK, but much of this correlation is explained by the two UK branch campuses. China also has fewer TNE enrolments than some other markets in the region.
- ❖ The correlation between TNE enrolments and mobility to the same institution is weaker at postgraduate levels, implying that many TNE students enrol in different institutions for postgraduate study.
- ❖ Hong Kong and Singapore have no correlation whatsoever between TNE enrolments and mobility to the same institution, even as they enrol large numbers of students in the UK. They also have no UK branch campuses.

- I. A brief history of UK TNE
- II. TNE and student mobility
- III. TNE and research output**
- IV. TNE and tuition fees
- V. Benchmarking local partners
- VI. Benchmarking TNE performance

III. TNE and Research Output: China

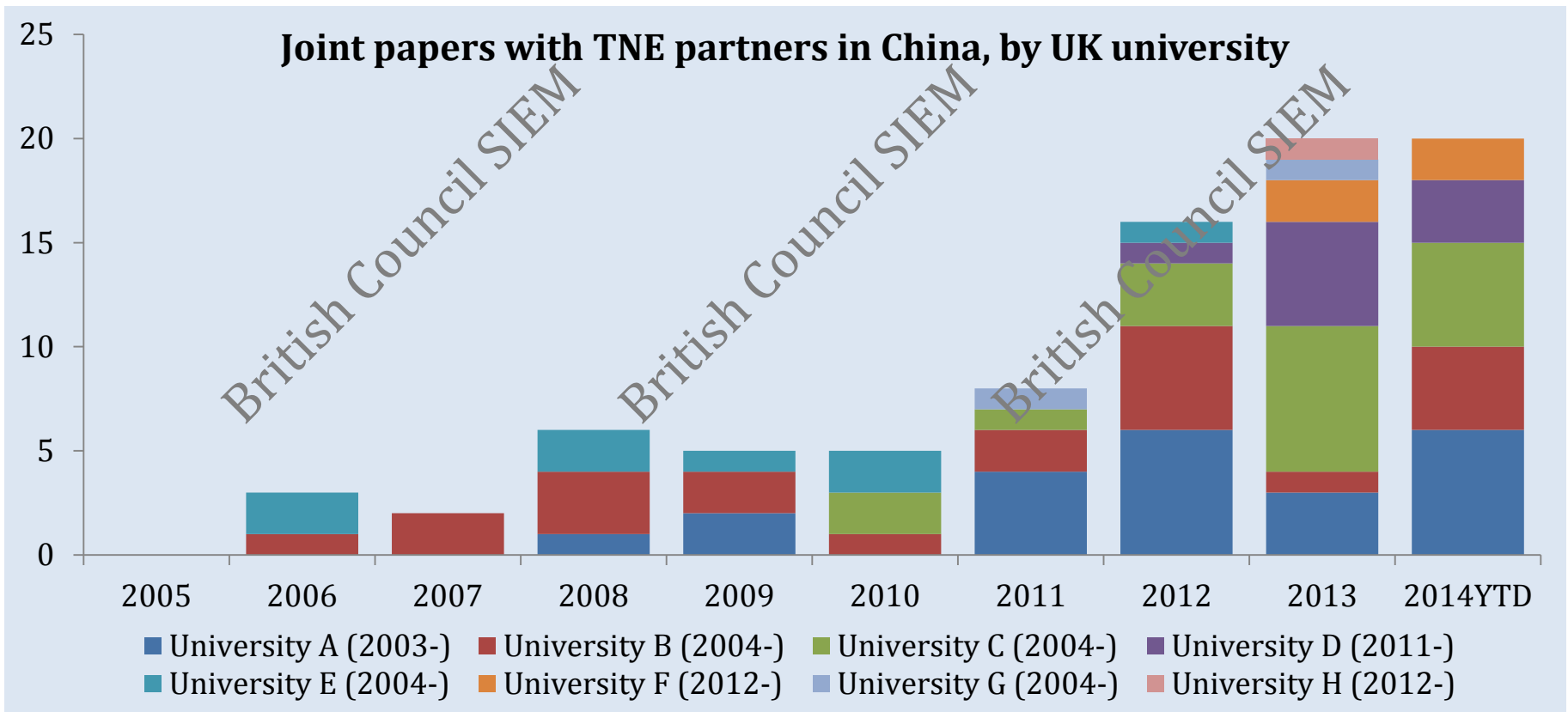
- ❖ The research output of UK universities with Chinese institutions is growing quite rapidly, but the portion of these publications with TNE partners in China remains tiny.
- ❖ This suggests that TNE partnerships are not integral to research output in China.



Source: Ministry of Education, Web of Science Core Collection, British Council SIEM; top participants are defined as the 20 UK universities with the greatest number of joint programmes.

III. TNE and Research Output: China

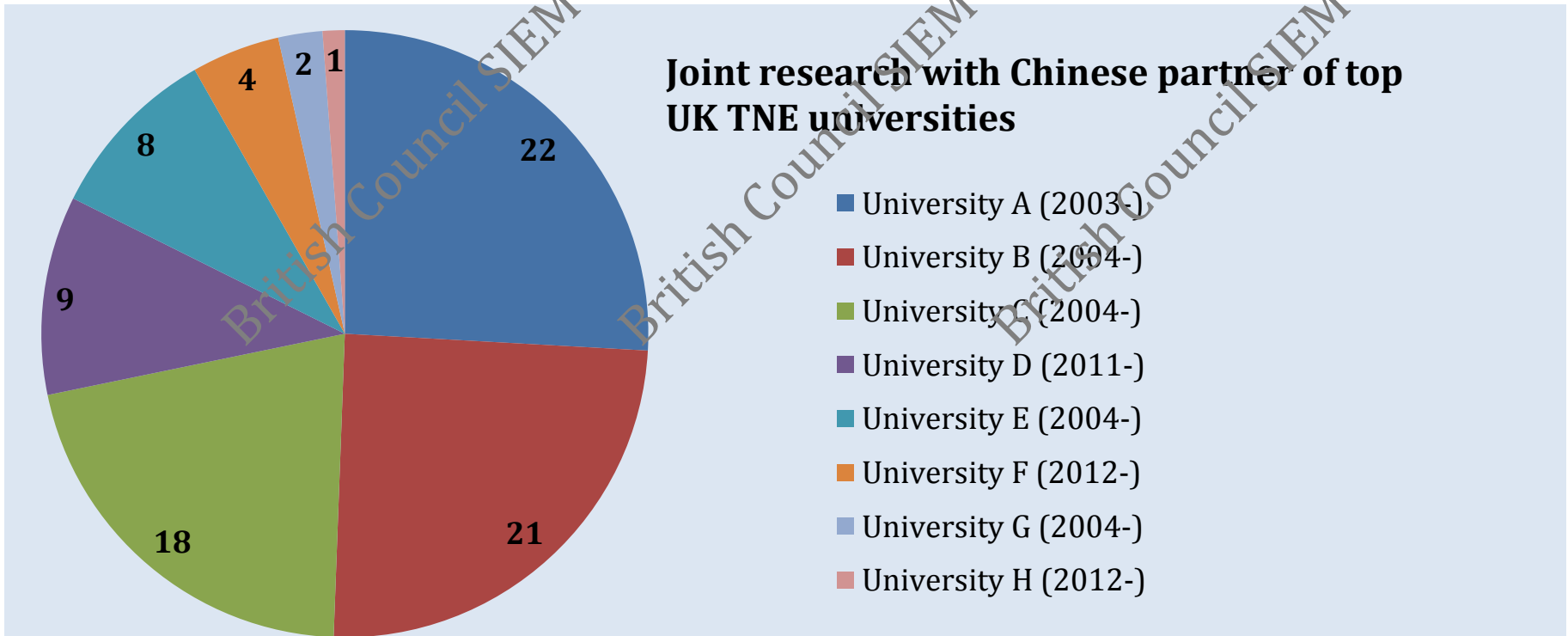
- ❖ The number of joint papers between UK institutions and their China TNE partners is growing but remains low overall.
- ❖ The TNE partnerships leading to joint research have also grown in number.



Source: Ministry of Education, Web of Science Core Collection, British Council SIEM; top participants are defined as the 8 UK universities with the greatest number of joint publications.

III. TNE and Research Output: China

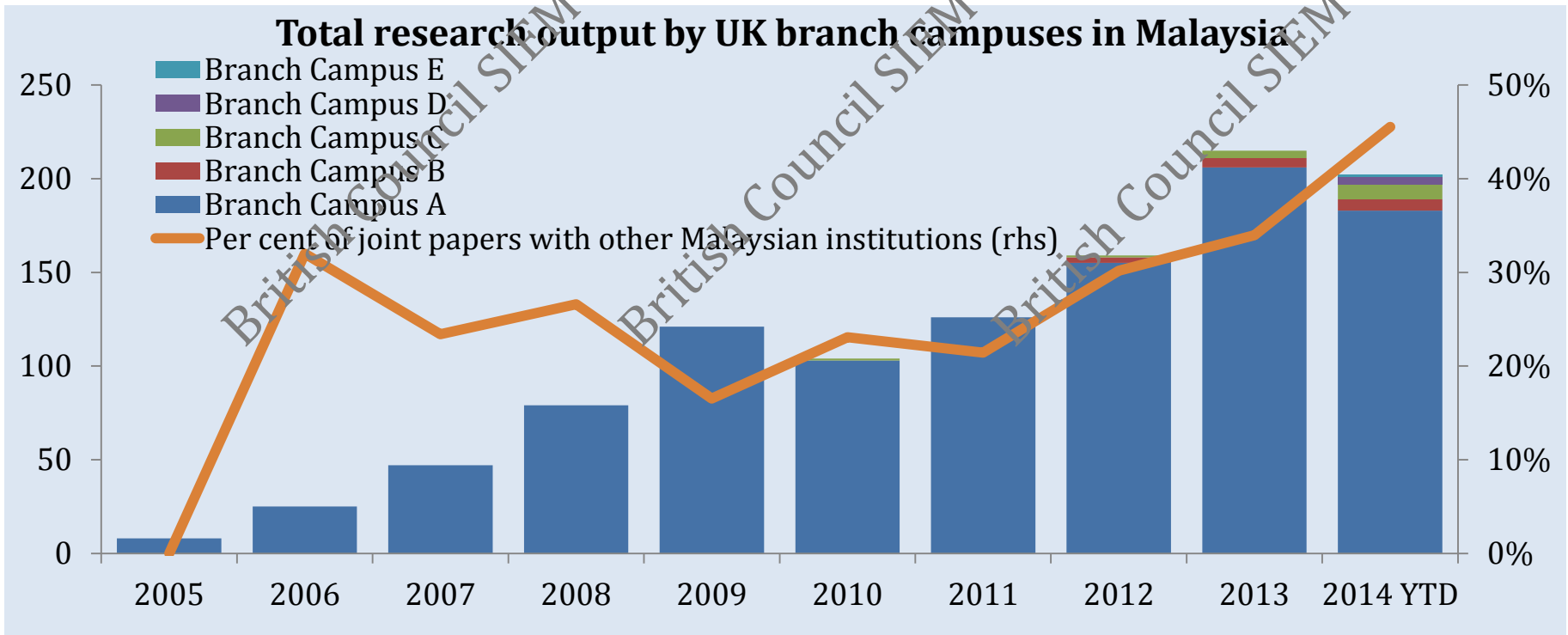
- ❖ Three UK universities account for 72 per cent of all joint research with TNE partners in China (among the top 20 universities by TNE programmes)
- ❖ Only eight of the 20 UK universities with the most TNE programmes in China have any joint research with their local partner at all.
- ❖ This suggests that the majority of TNE programmes in China have no research component.



Source: Ministry of Education, Web of Science Core Collection, British Council SIEM; top participants are defined as the 8 UK universities with the greatest number of joint publications.

III. TNE and Research Output: Malaysia

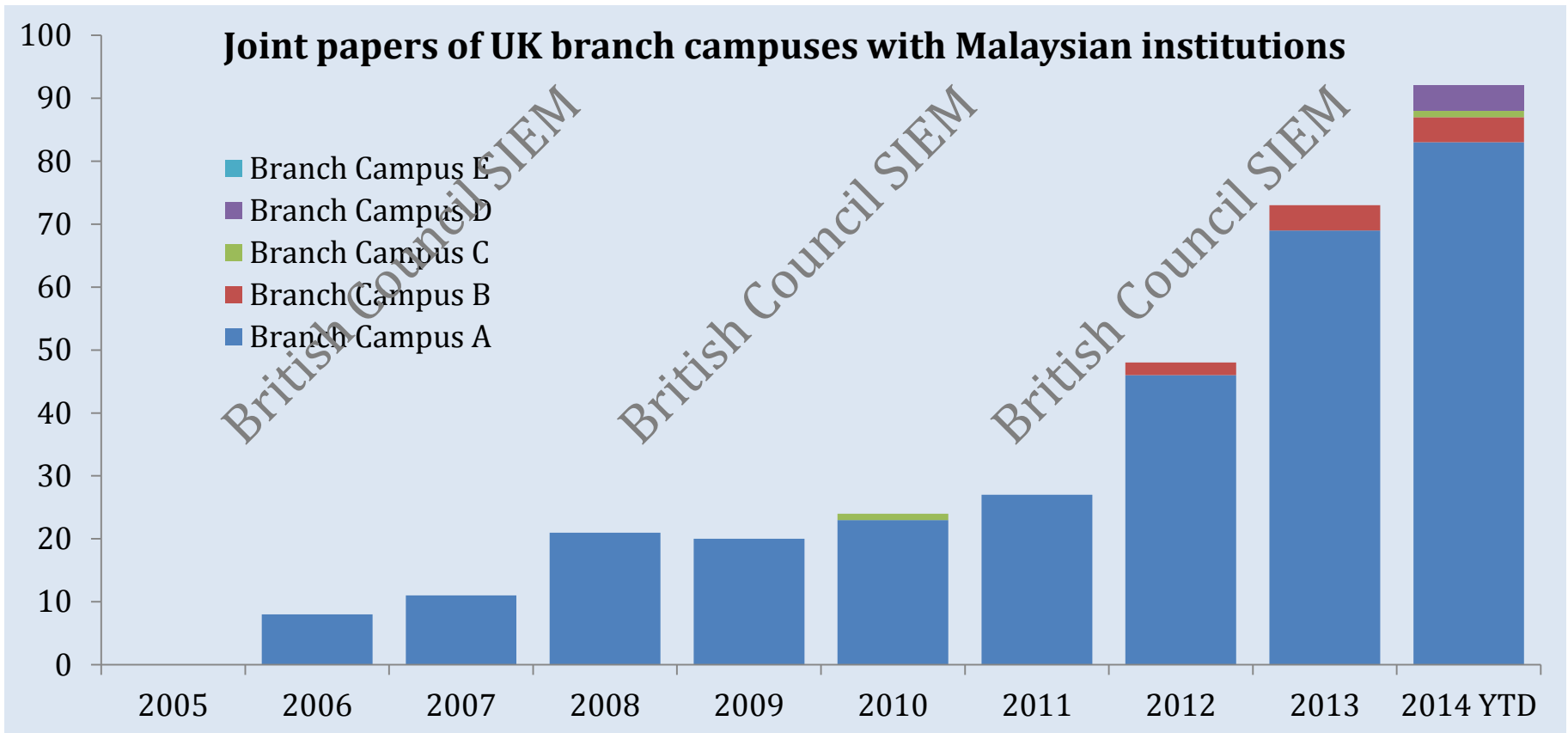
- ❖ There is virtually no joint research between UK HEIs and their local TNE partners in Malaysia, with the exception of branch campuses.
- ❖ In Malaysia, one UK university accounts for 97% of all research by UK branch campuses.
- ❖ As with China, a large proportion of research of these branch campuses is done in conjunction with other Malaysian institutions, and the proportion is growing over time.



Source: Web of Science Core Collection, British Council SIEM

III. TNE and Research Output: Malaysia

- ❖ The number of joint papers of branch campuses with Malaysian institutions is growing, but non-branch campus TNE activity rarely leads to any joint research output.
- ❖ As the number of UK branch campuses continues to grow in Malaysia, so will joint papers.



Source: Web of Science Core Collection, British Council SIEM

III. TNE and Research Output: Section summary

- ❖ The joint research footprint of UK HEIs with the most TNE activity in China is growing quite rapidly, but only a small fraction of this research activity takes place with TNE partner universities. This fraction is rising over time, but still represents less than two per cent of total joint research with Chinese institutions.
- ❖ Only eight of the 20 UK HEIs with the most TNE activity in China have produced any joint research with their local partner, and two of these eight account for more than half of the total. This suggests that most UK TNE activity in China does not have a research component, although this could change in the coming years.
- ❖ In Malaysia, UK research activity is confined entirely to branch campuses, and primarily one branch campus, which represents 97 per cent of total research output to date. However, the portion of this research that is done jointly with a local institution is rising, suggesting that branch campuses are fostering greater academic links.

- I. A brief history of UK TNE
- II. TNE and student mobility
- III. TNE and research output
- IV. TNE and tuition fees**
- V. Benchmarking local partners
- VI. Benchmarking TNE performance

IV. TNE and Tuition Fees: China

Tuition fees in Chinese TNE

- ❖ While data on local tuition fees for TNE programmes in China remains limited, general patterns still emerge.
- ❖ Tuition fees in China appear to be more dependent on the Chinese partner than the UK university.
 - Ex: Chongqing Jiaotong University has TNE programmes with two different UK HEIs in two different subjects, but charges the same fee for both programmes.
- ❖ Based upon a sample of TNE tuition fees, 4+0 programmes in China charge higher tuition fees than 3+1 or 2+2 programmes. This suggests that UK HEIs are financially compensated for the loss of revenue from enrolling students at the UK campus.
 - However, this is difficult to know with precision, as the share of revenue going to UK HEIs is not publically available.
 - 4+0 programmes can charge upwards of RMB 40,000-60,000 per year, compared with 2+2 or 3+1 programmes which charge fees more often in the range of RMB 15,000-25,000 per year.
 - Pricing is most dependent on the local partner and the local pricing bureau.

IV. TNE and Tuition Fees: Malaysia

Tuition fees in Malaysia TNE

- ❖ In Malaysia, tuition fees for TNE programmes are easier to analyse and generally depend on two factors: the local partner and the subject offered. Unlike in China, tuition fees in Malaysia appear to be unrelated to the structure of the programme – i.e. 3+0 and 2+1 programmes charge broadly similar fees.
- ❖ Pricing for a degree from the same UK university with similar subject and delivery mode can vary by up to 60 per cent depending on the local partner, while pricing for degrees offered by different UK universities at the same Malaysian institution rarely varies by more than 10 per cent (and usually is identical).
 - However, the same degree offered by the same UK HEI can vary by more than 100 per cent depending on the local institution.
- ❖ Fees can also vary depending on the subject area
 - The same local university charges different rates for different subjects offered by the same UK HEI, but charges the same fee for the same subject offered by different UK HEIs.
- ❖ However, for credit transfer programmes, the local HEI charges the same exact tuition fee for the same subject no matter who the UK/foreign HEI is.

- I. A brief history of UK TNE
- II. TNE and student mobility
- III. TNE and research output
- IV. TNE and tuition fees
- V. Benchmarking local partners**
- VI. Benchmarking TNE performance

V. Benchmarking partners

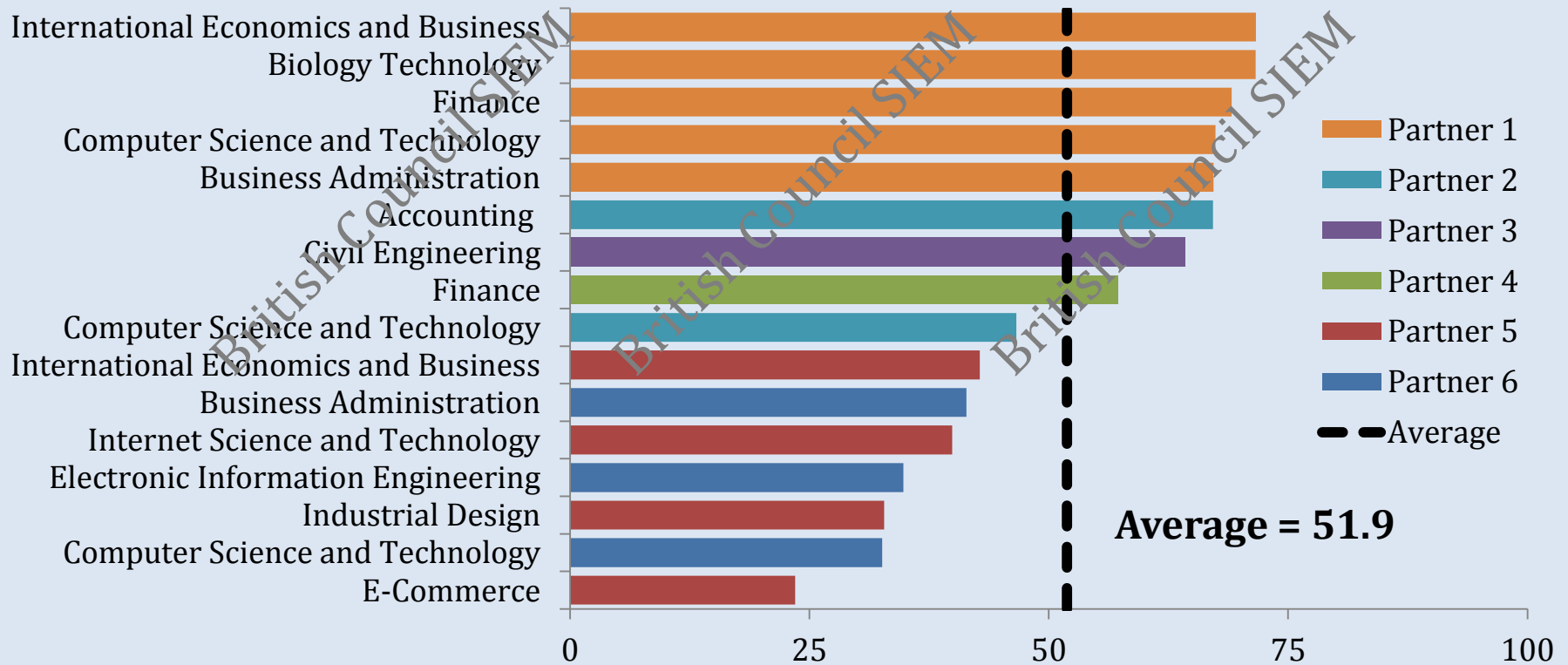
- ❖ In China, as in nearly every country, rankings matter. Based on the selectiveness of local universities in China according to Gaokao entrance requirements, it is possible to generate an approximate subject ranking of universities.
- ❖ Based on these subject rankings, it is clear how “strong” each undergraduate UK TNE partnership in China is relative to other TNE partnerships.
- ❖ This analysis allows UK institutions to benchmark their own performance internally because the strength of local partners particularly matters for Chinese students.

Top six UK universities in no. of TNE programmes in China	Number of UG TNE partners in China	Number of UG TNE programmes in China	Average number of programmes per partner
UK university #1	6	16	2.67
UK university #2	4	11	2.75
UK university #3	3	10	3.33
UK university #4	5	7	1.4
UK university #5	4	5	1.25
UK university #6	5	8	1.6

V. Benchmarking partners: UK HEI no. 1

- ❖ This UK HEI has a wide portfolio of partners in China, of varying quality.
- ❖ But there is little variation in the subject rankings within its Chinese university partners.

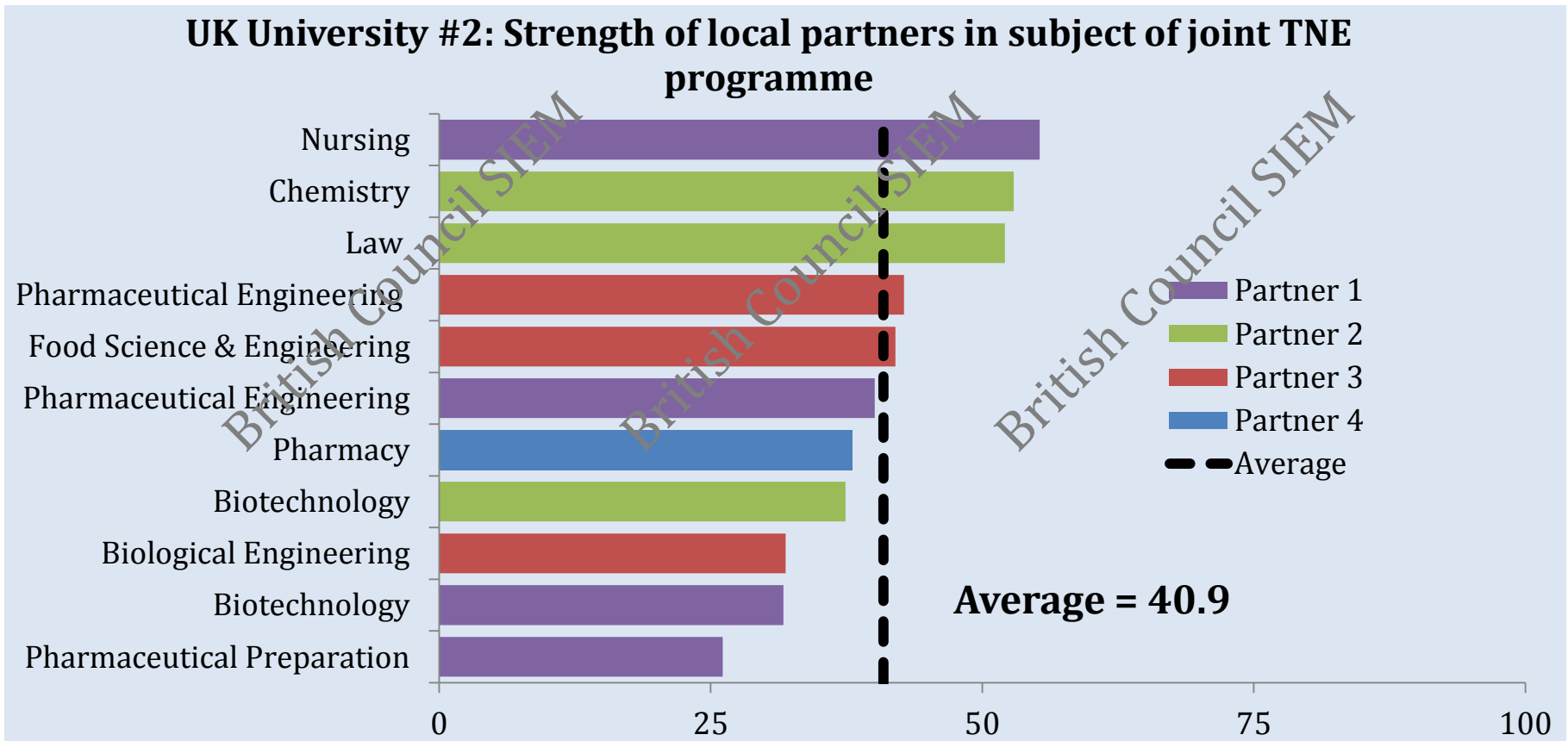
UK HEI #1: Strength of local partners in subject of joint TNE programme



Source: Ministry of Education, British Council SIEM

V. Benchmarking partners: UK HEI no. 2

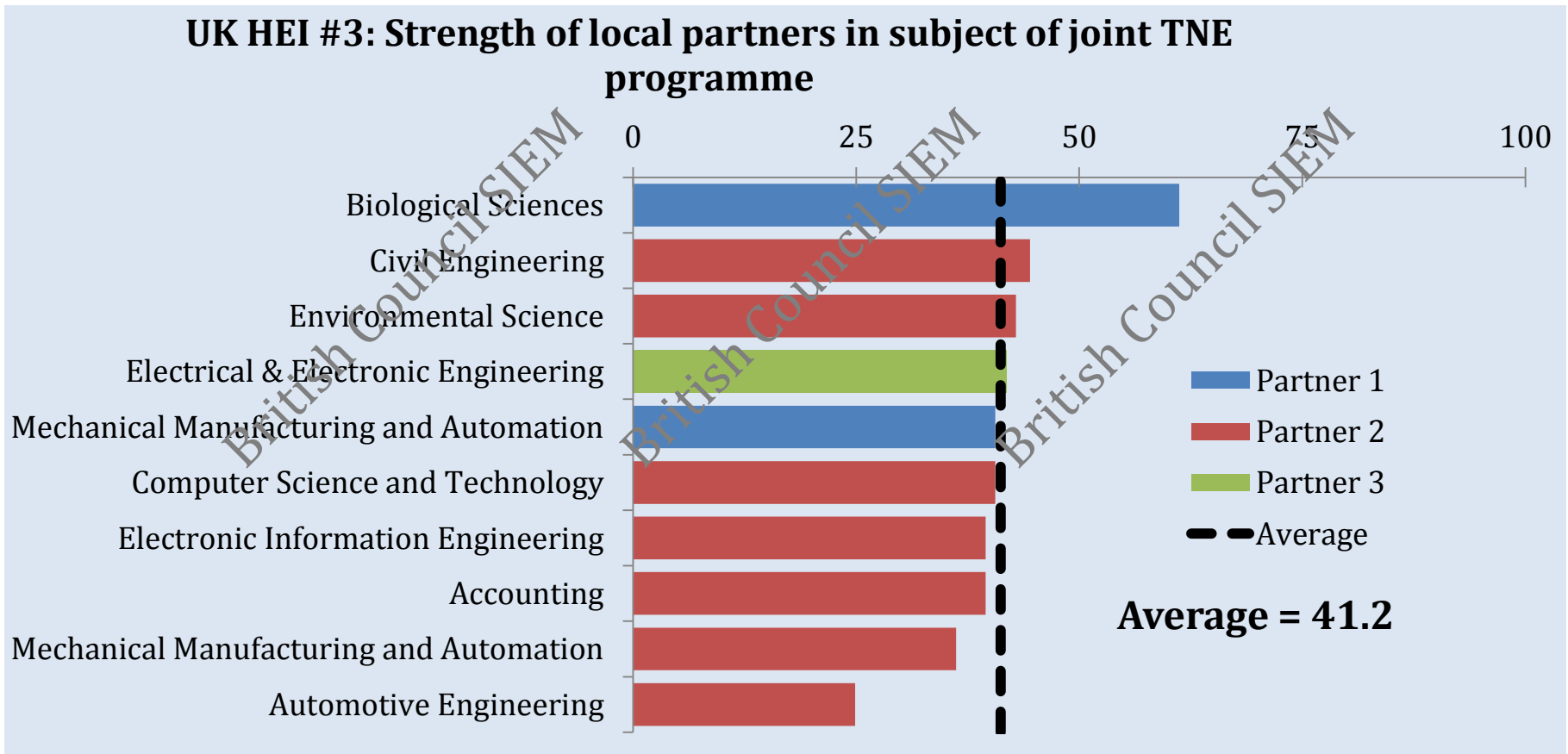
- ❖ This UK HEI partners with lower quality Chinese universities overall, but forms multiple partnerships with three of the four.
- ❖ At lower levels, the variation in subject ranking within Chinese universities can be greater.



Source: Ministry of Education, British Council SIEM

V. Benchmarking partners: UK HEI no. 3

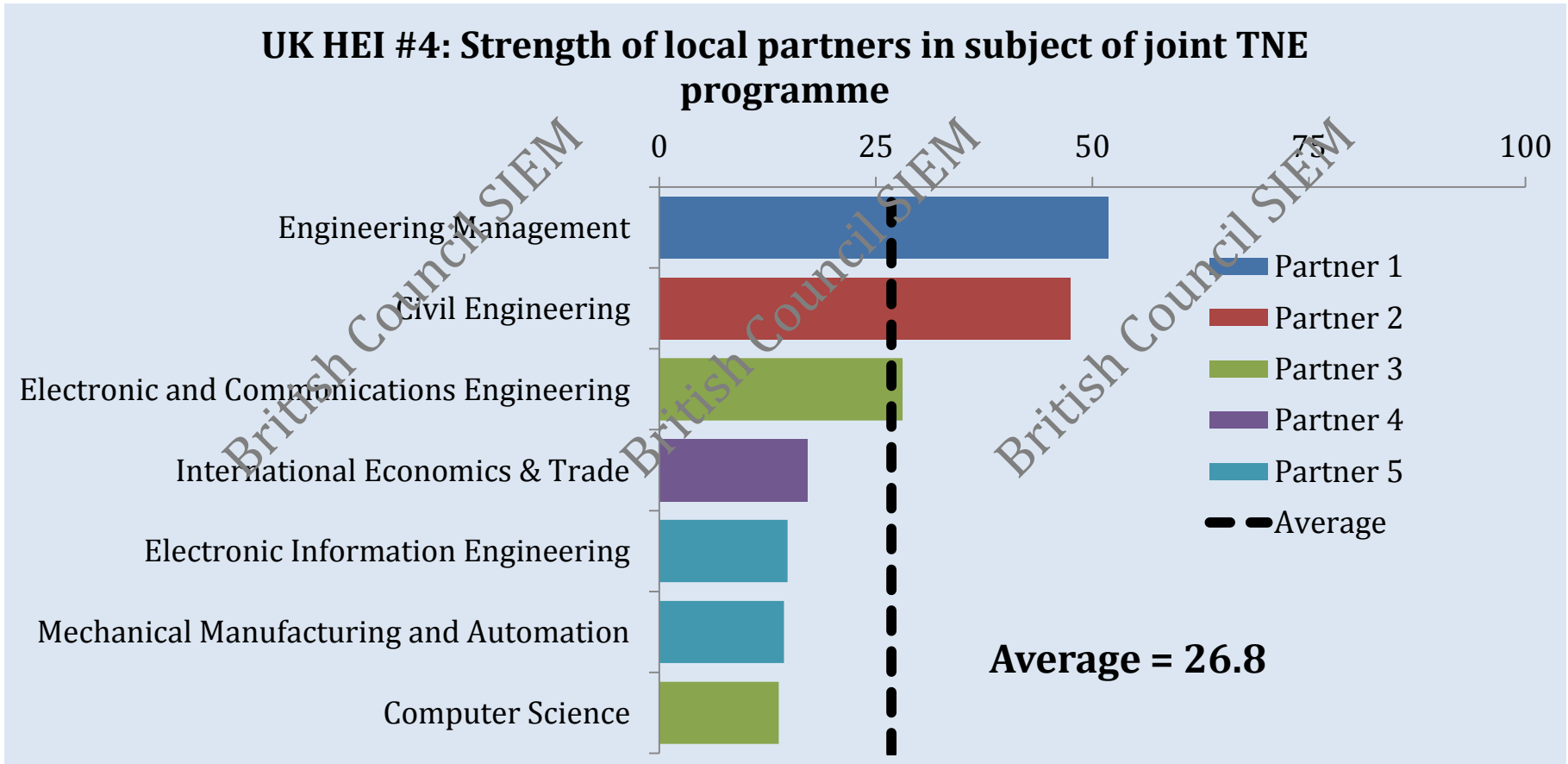
- ❖ This UK HEI has a heavy reliance on one Chinese partner, with less variation in outcomes.
- ❖ However, this HEI may be better off forming joint programmes with its second partner.



Source: Ministry of Education, British Council SIEM

V. Benchmarking partners: UK HEI no. 4

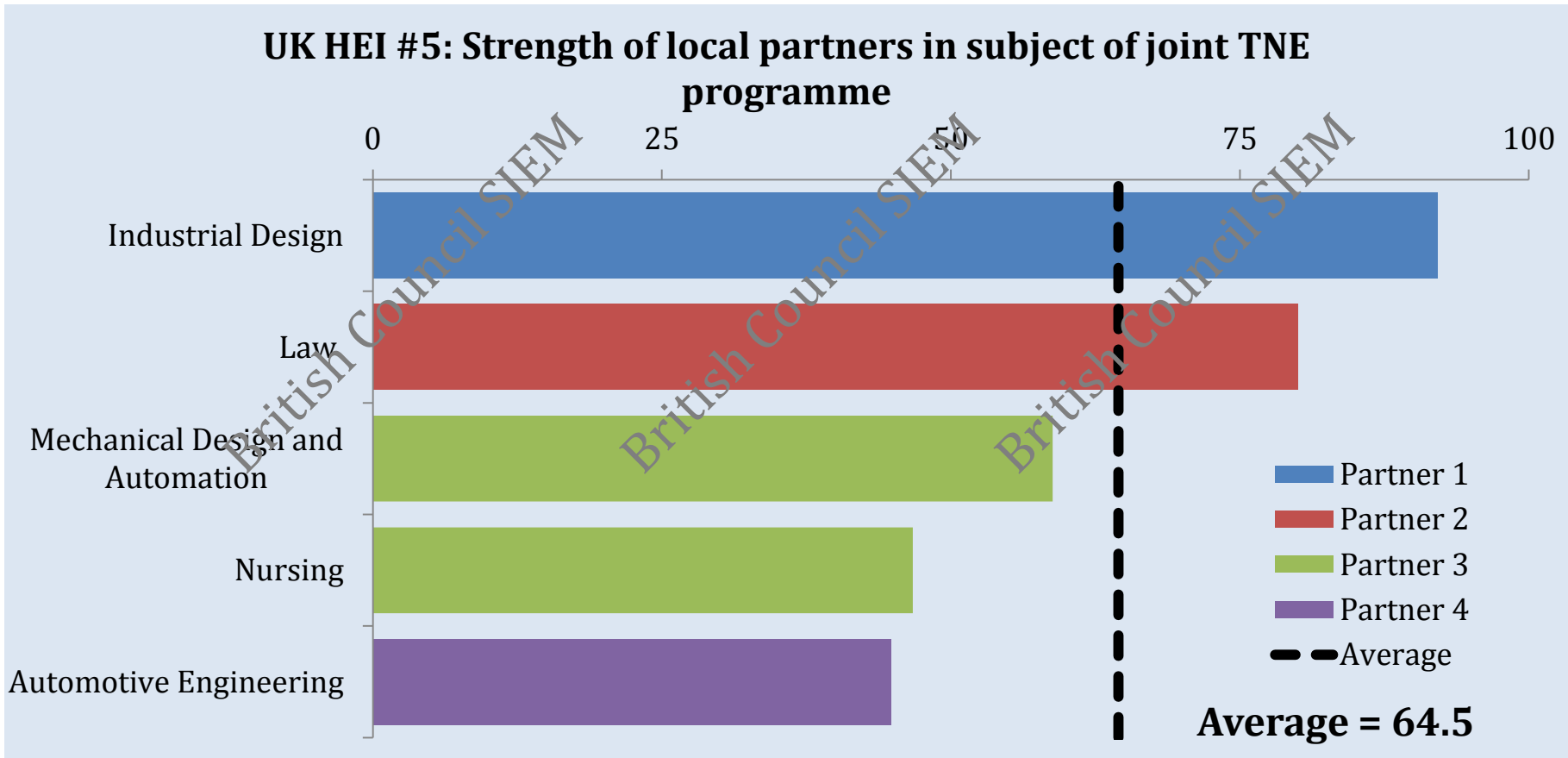
- ❖ This UK HEI has the weakest overall TNE portfolio in China, and large variations as well.
- ❖ Four of the seven programmes are with universities with index scores below 20.



Source: Ministry of Education, British Council SIEM

V. Benchmarking partners: UK HEI no. 5

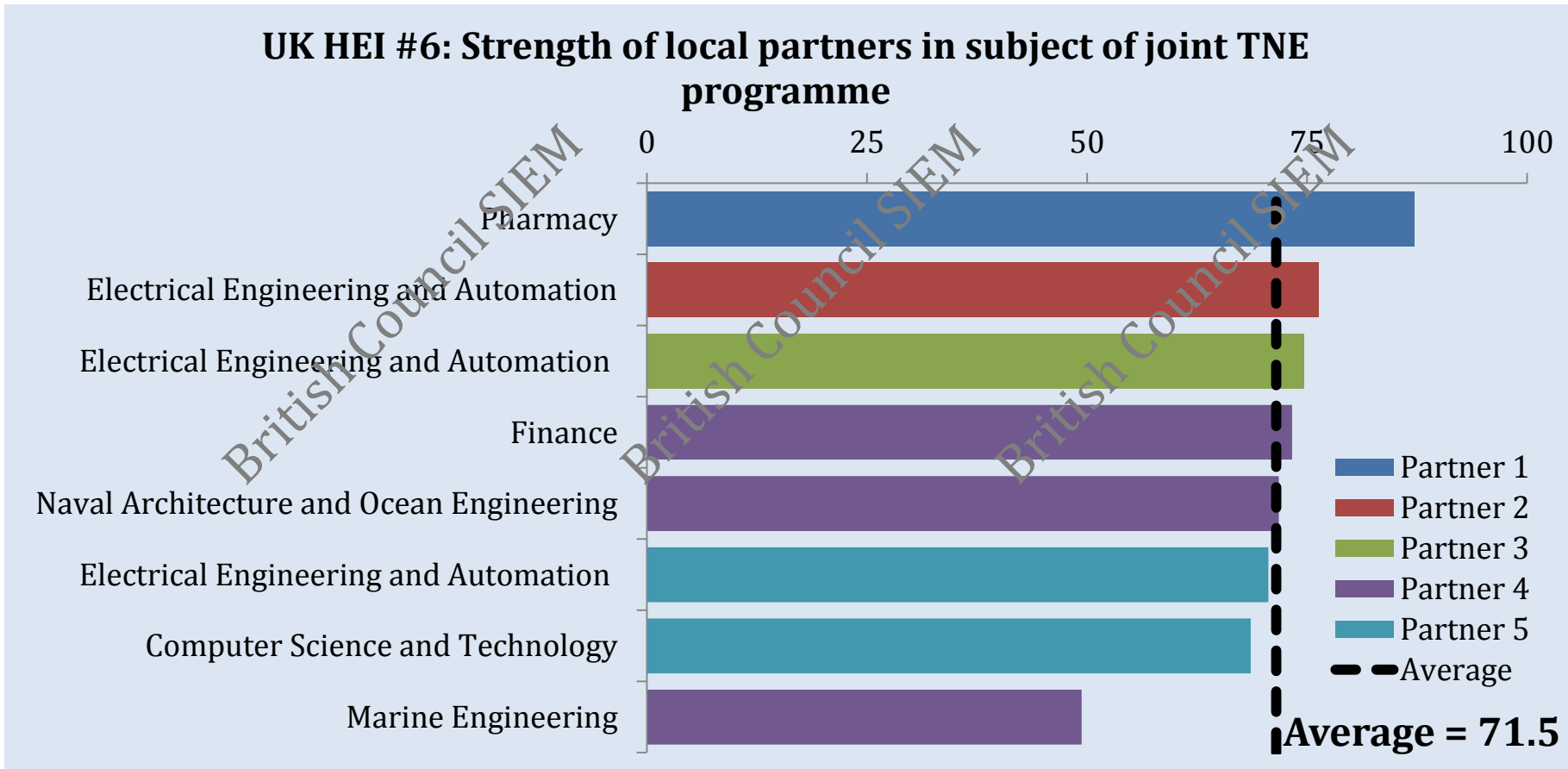
- ❖ This UK HEI has strong partners overall, but might be better off focusing on its top two.
- ❖ Its programme in auto engineering appears to offer particularly little strategic value.



Source: Ministry of Education, British Council SIEM

V. Benchmarking partners: UK HEI no. 6

- ❖ This UK HEI has the strongest overall TNE portfolio in China, and little variation to boot.
- ❖ These eight programmes span a total of five Chinese universities, all of similar quality.



Source: Ministry of Education, British Council SIEM

V. Benchmarking partners: Section summary

- ❖ As the selectiveness of local universities in China is a key determinant of its strength, it is possible to generate an approximate ranking of each local TNE partner of UK HEIs.
- ❖ Moreover, by analysing the strengths of local universities in the subjects in which they have formed TNE programmes, we get a better sense of the true “strength” of the local partner.
- ❖ The overall TNE portfolio of the top six UK HEIs in terms of number of joint TNE programmes in China reveals wide diversity within the overall strength and variance of their local Chinese partner institutions.
- ❖ However, the subject rankings within Chinese universities do not vary as much as those among universities do. This is important to remember for UK HEIs which wish to grow beyond their immediate TNE programme into alternative subjects.

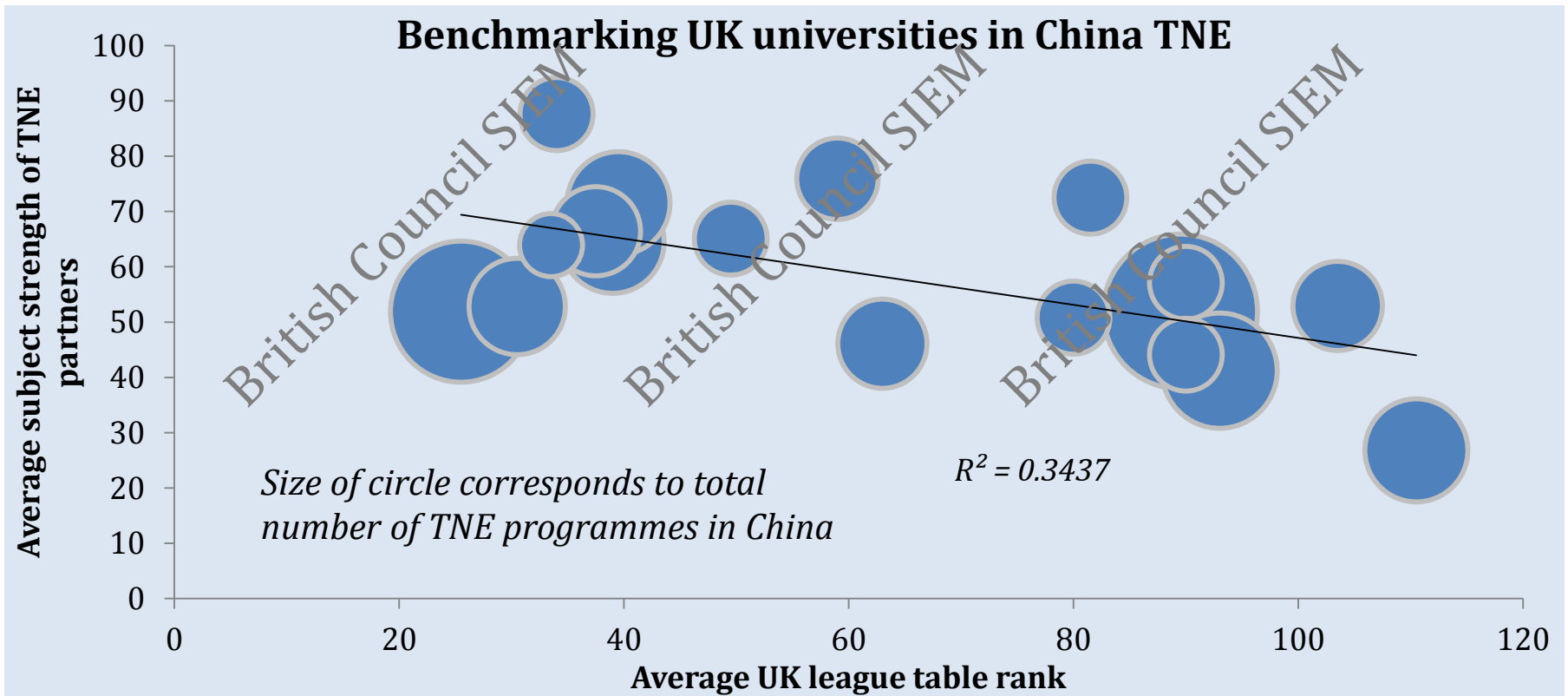
- I. A brief history of UK TNE
- II. TNE and student mobility
- III. TNE and research output
- IV. TNE and tuition fees
- V. Benchmarking local partners
- VI. Benchmarking TNE performance**

VI. Benchmarking: China

- ❖ There is a correlation between the ranking of a UK university and the strength of its partners in China, although there are also large variations in performance and outcomes.
- ❖ It is therefore possible to form partnerships with top Chinese universities even if your UK league table ranking is comparatively low.

VI. Benchmarking: China

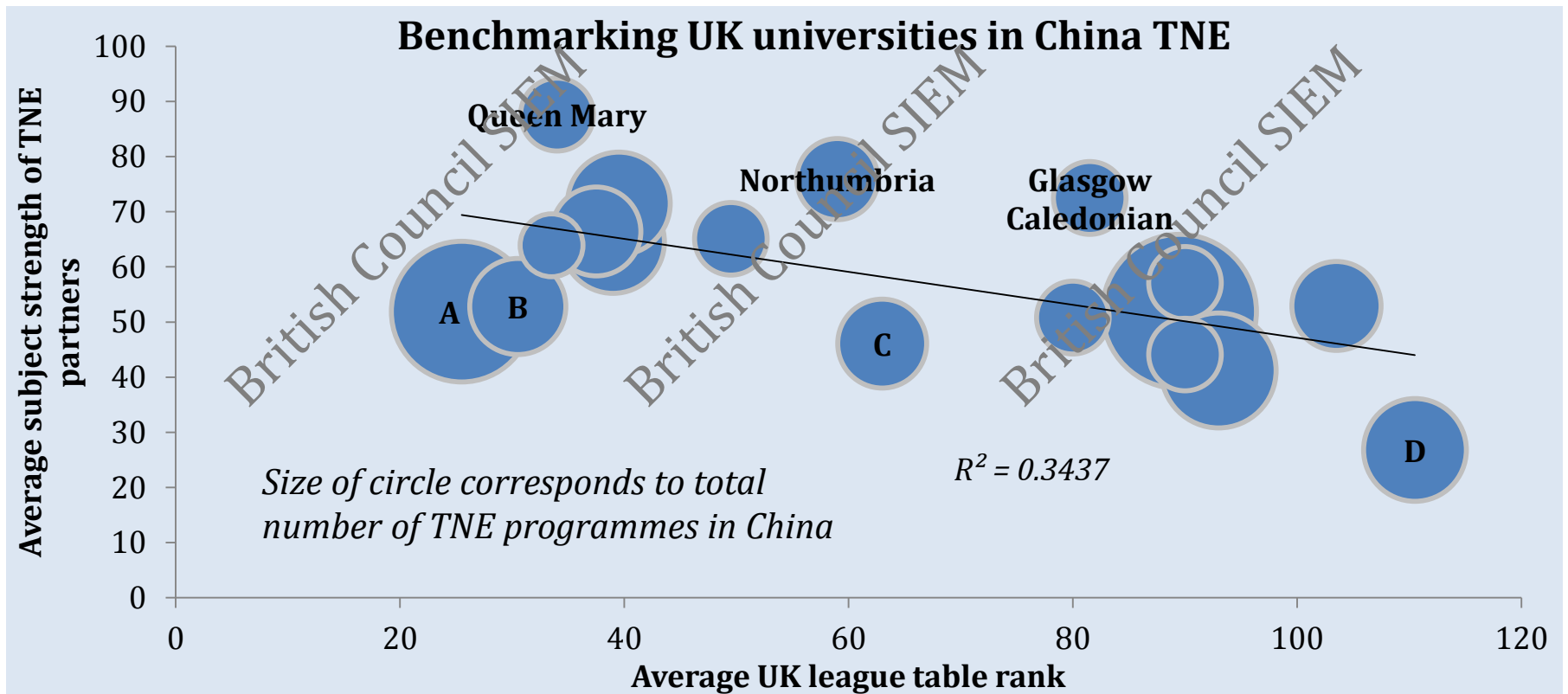
- ❖ There is a correlation between the ranking of a UK university and the strength of its partners in China, although there are also large variations in performance and outcomes.
- ❖ It is therefore possible to form partnerships with top Chinese universities even if your UK league table ranking is comparatively low.



Source: Guardian and CUG league tables, Ministry of Education, British Council SIEM: note: UK league table rank based on average of Guardian and CUG tables.

VI. Benchmarking: China

- ❖ There is a correlation between the ranking of a UK university and the strength of its partners in China, although there are also large variations in performance and outcomes.
- ❖ It is therefore possible to form partnerships with top Chinese universities even if your UK league table ranking is not high – e.g. Glasgow Caledonian outperforms Russell Group.



Source: Guardian and CUG league tables, Ministry of Education, British Council SIEM: note: UK league table rank based on average of Guardian and CUG tables.

VI. Benchmarking: Main recommendations

- ❖ The strength of local institutions is at least as important as (and probably far more so) the ranking of UK HEIs in determining the ability to recruit qualified local students. Thus it is crucial to determine the strength of the local partner in the subject of the TNE programme in question.
- ❖ Overall, some UK HEIs have managed to secure much stronger TNE partnerships in China than others. The league table rankings of these universities is only a small determinant of outcomes, however, suggesting that it is possible for any UK HEI to form TNE programmes with strong(er) local partners in China. This requires a thorough understanding of the recruitment plans of each potential Chinese partner institution.
- ❖ Benchmarking and improving TNE performance in China will increasingly require UK HEIs to think beyond mobility and consider their joint research footprint, tuition fees and, most importantly, the quality of the students which they recruit to their programmes. All of these considerations will require the strongest local partner possible.

Questions?

*British Council's **Services for International Education Marketing (SIEM)** team helps UK institutions refine their internationalisation strategies to succeed in East Asia and around the globe. Please get in touch if you would like to learn more.*

jazreel.goh@britishcouncil.org.cn

jeremy.chan@britishcouncil.org.cn

kevin.prest@britishcouncil.org.cn

This presentation contains information sourced either by the British Council itself or in collaboration with its research partners and is of a general nature. While the British Council makes every effort to ensure that the information provided in the presentation is accurate and up to date, the British Council makes no warranty (whether express or implied) and accepts no responsibility for the accuracy or completeness of the presentation. The British Council does not assume any legal liability, whether direct or indirect, arising in relation to reliance on the presentation. Any references to third party organisations in this presentation are not an endorsement by British Council of those organisations.

www.britishcouncil.org/siem

© British Council 2014

The British Council is the United Kingdom's international organisation for cultural relations and educational opportunities.