

# **The shape of global higher education**

**International trends and opportunities for  
engagement**

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# OVERVIEW

- International higher education
- Trends in global mobility and future forecasts
- Shifting policy environments
  - Does national policy effect student flows?
  - Importance of maintaining an understanding of the policy environment in current/potential partner countries
- About the UK HE system and UK HE institutions – opportunities and challenges

# INTERNATIONAL HIGHER EDUCATION

## Mobility

Students

Staff

Researchers

But also....

Programmes and providers

("International Programme & Provider Mobility" or  
"Transnational Education" - IPPM/TNE)

## Collaboration and Partnership

Teaching, Course content and delivery

Research

# GLOBAL DEMAND (FOR TERTIARY ED)

- ◆ Five million globally mobile students today
- ◆ Global demand keeps growing - six million projected by 2027
- ◆ India will demand over 14 million **extra** tertiary education places by 2027
- ◆ Largest % growth in demand over next decade will be from countries in SSA
- ◆ But nature of mobility (and access) is changing

Source: "Forecasting international student mobility to 2027" British Council, 2018

# 2015 TO 2027 FORECASTS

- Policy neutral
- 56 countries
- Forecasting demand for tertiary education (and indicating demand for international mobility)
- British Council and Oxford Economics
- Economic growth (GDP (PPP) per capita); population of 18-22 yr olds

# SIGNIFICANT 18-22 POPULATIONS TO 2027

## Largest growth in 18-22 yr old populations to 2027

Nigeria

India

Ethiopia

Pakistan

Kenya

Angola

Egypt

Indonesia

Iraq

Philippines

## Largest decline in 18-22 yr old populations to 2027

Poland

Japan

US

Malaysia

Germany

Thailand

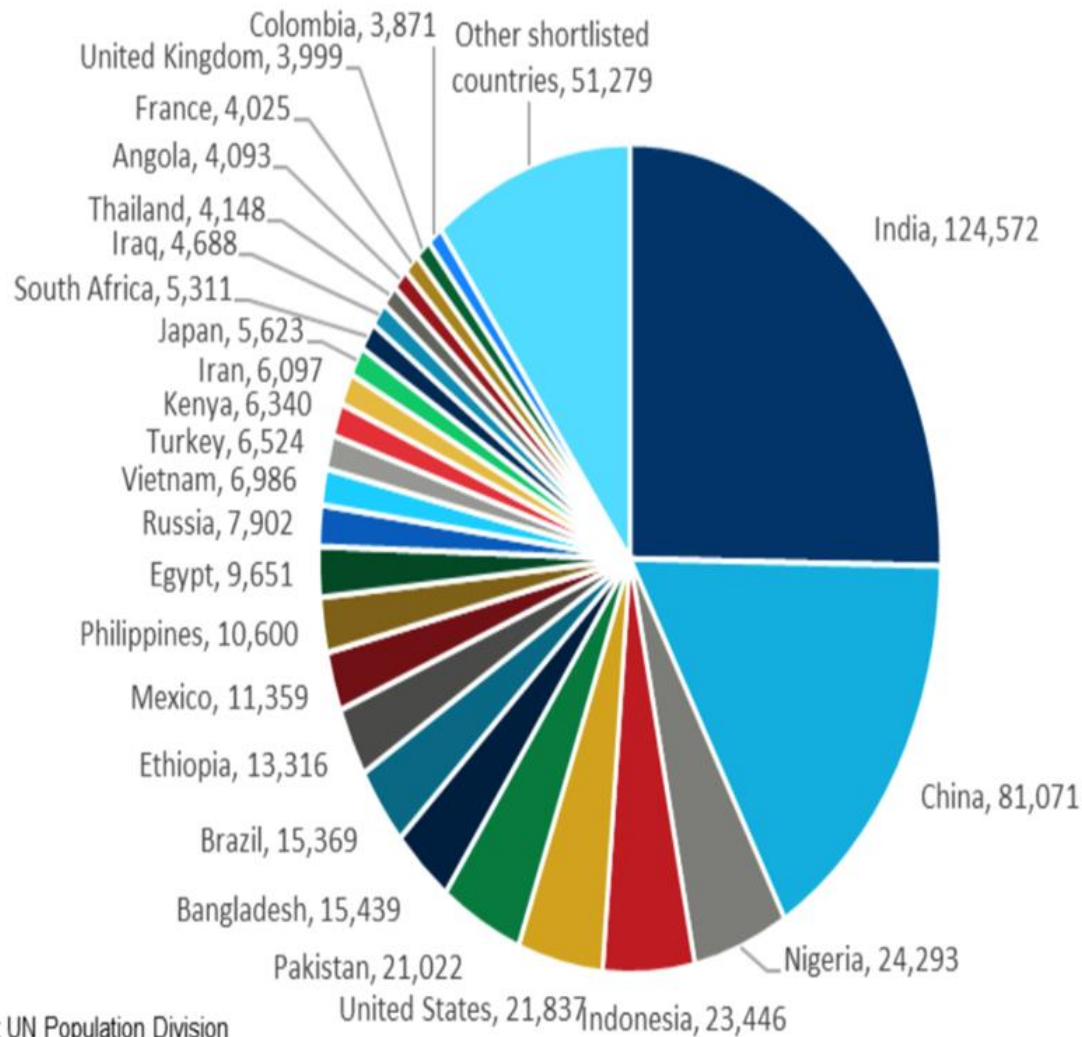
South Korea

Vietnam

Brazil

China

# 18-22 YR POPULATIONS IN 2027



Source: UN Population Division

Note: The 'other shortlisted countries' category includes persons from 31 individually small markets

# FORECASTED TERTIARY ENROLMENTS

## Growth in tertiary enrolments (absolute, 2015-2027)

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India

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China

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Indonesia

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Ethiopia

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Nigeria

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Pakistan

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Bangladesh

---

Egypt

---

Philippines

---

Iraq

## Highest tertiary enrolments (2027)

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China

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India

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US

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Indonesia

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Brazil

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Russia

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Turkey

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Iran

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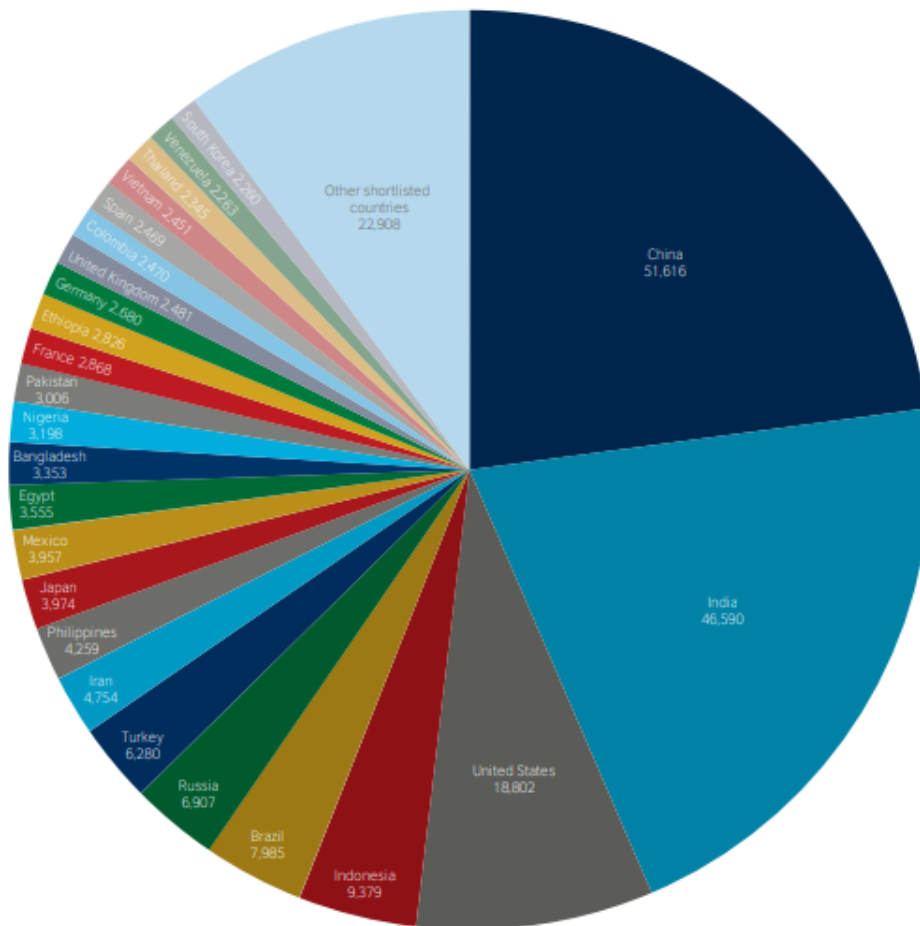
Philippines

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Japan

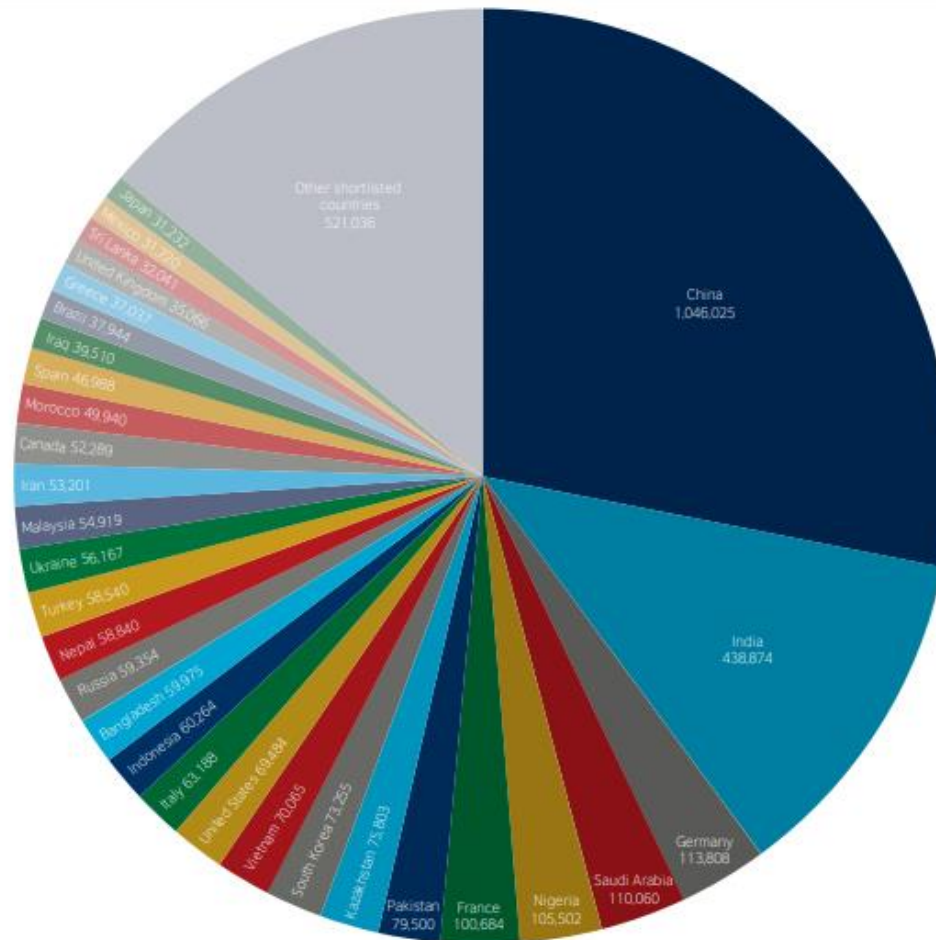


# FORECAST DISTRIBUTION OF ENROLMENTS (000'S, 2027)



Source: UNESCO  
 Note: The 'other shortlisted countries' category includes 31 individual smaller markets

# WHERE MOBILE STUDENTS WILL COME FROM IN 2027



Source: UNESCO

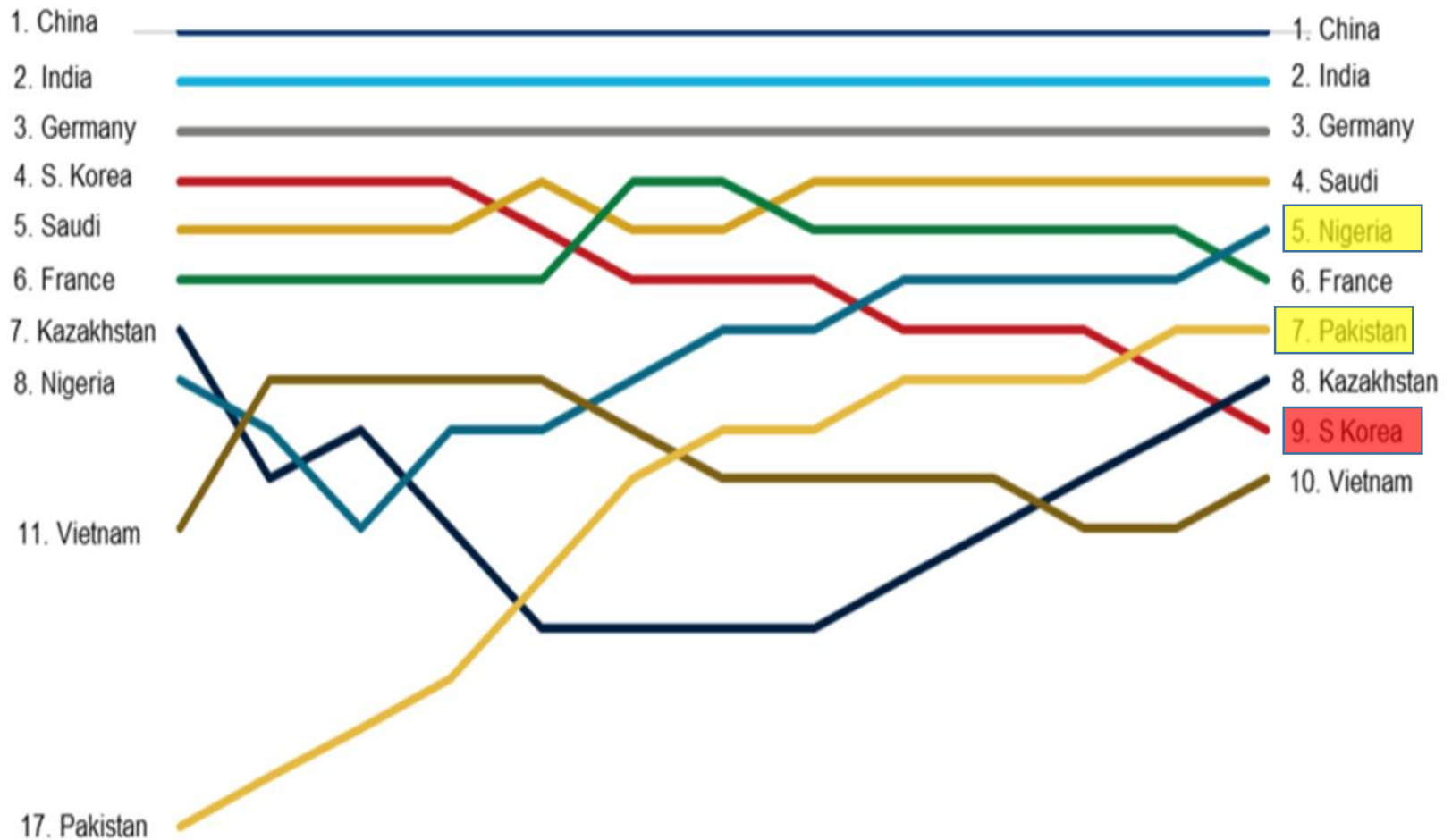
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# SOURCES OF OUTBOUND STUDENTS 'RANKED' 2015-2027



Source: British Council, Oxford Economics

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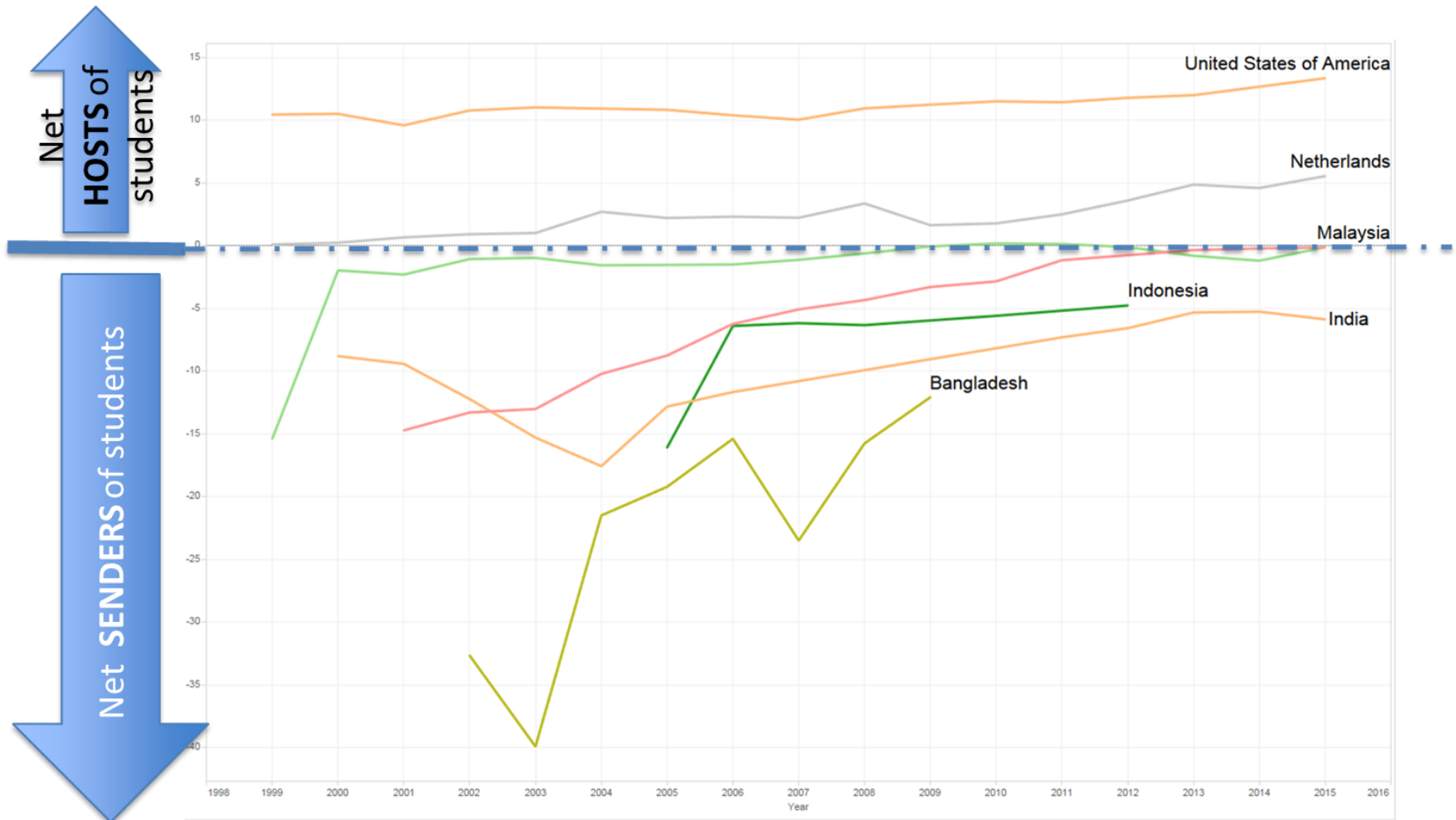


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# SUMMARY SO FAR

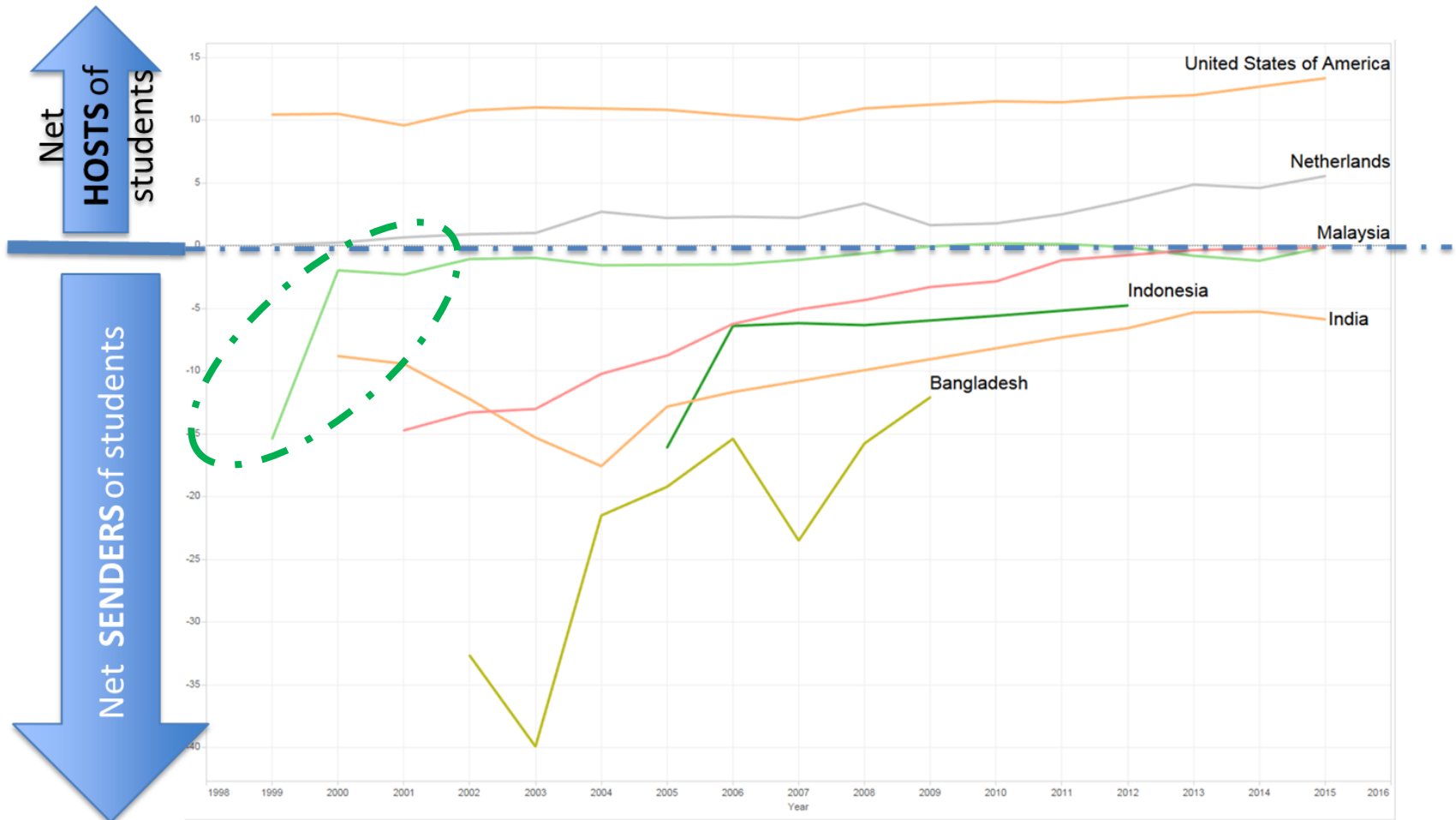
- Economic and demographic projections to forecast demand for HE
- Stopped short of predicting bilateral flows
- What are the latest trends in global mobility?
  - Increasing competition / choice for students
  - Increase in intra-regional mobility
  - Increase in (global) TNE/IPPM
  - Increase in short term mobility

# INBOUND AND OUTBOUND FLOWS OF STUDENTS (RELATIVE)



British Council analysis of data from UNESCO Institute for Statistics, extracted 30 June 2017

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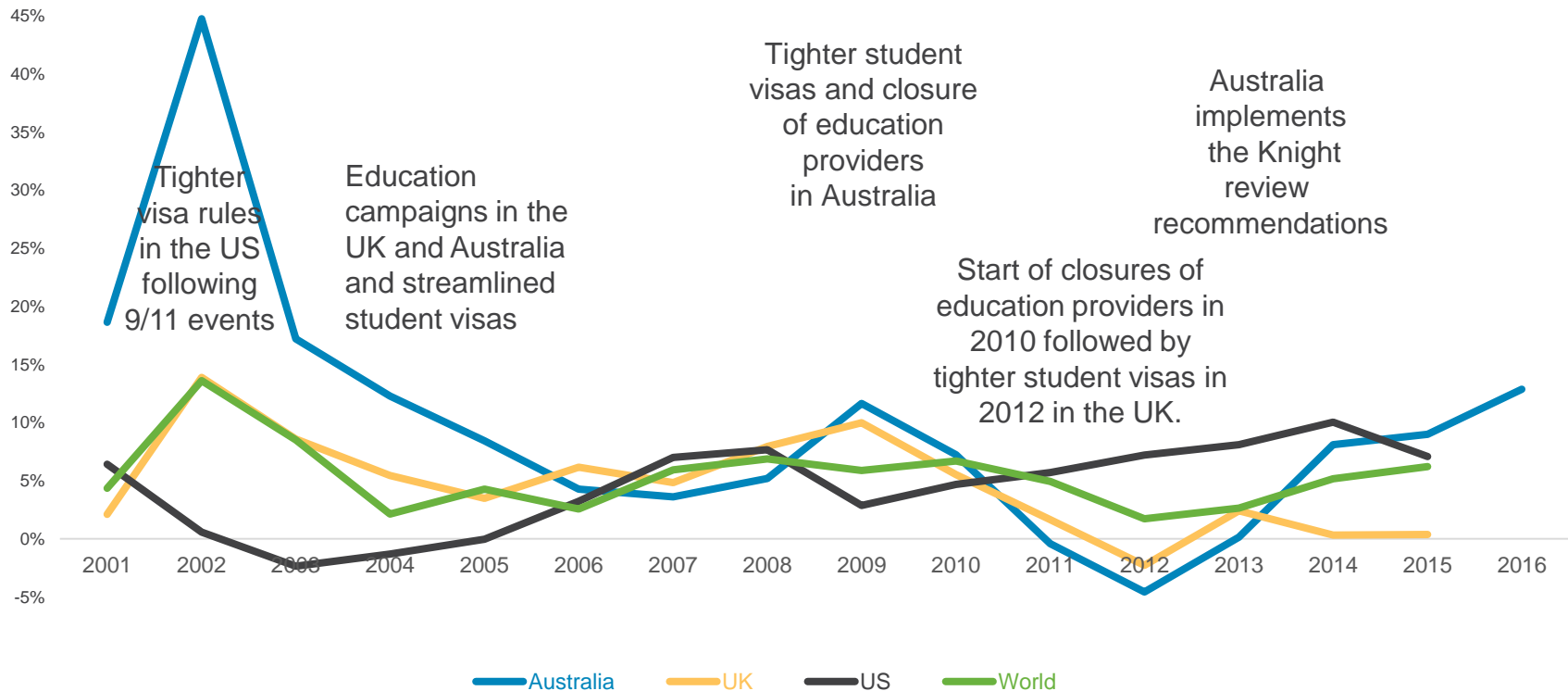
British Council analysis of data from UNESCO Institute for Statistics, extracted 30 June 2017



# ROLE OF NATIONAL POLICIES

- To what extent does national policy environment influence/shape mobility patterns?  
(and other dimensions of international IHE)?

# ANNUAL GROWTH IN INTERNATIONAL ENROLMENTS: AUS, UK, US (2000-16)



Source: Ilieva, J. (2017), Do political events in a host country affect international education engagement?; <http://aiec.idp.com/aiec2017-past>

# MOBILITY TO THE UK

International students in the UK grew by 31.4% between 2006 and 2010 and by 2.3% between 2010 and 2015

- Source: UUK (2017), Patterns and Trends in UK higher education;  
[www.universitiesuk.ac.uk/facts-and-stats/data-and-analysis/Documents/patterns-and-trends-2017.pdf](http://www.universitiesuk.ac.uk/facts-and-stats/data-and-analysis/Documents/patterns-and-trends-2017.pdf)

The world's international student mobility increased by 22% between 2010 and 2015

source: UNESCO institute for statistics

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# THE SHAPE OF GLOBAL HE - STUDY

- Index based methodology to evaluate countries' regulatory environments with regard to international higher education (IHE).
  - 37 measures
  - 43 countries/territories (some countries assessed in 2016 and 2018)
  - 1,776 descriptive fields
- Factual - refers to government guidelines and the legal framework in countries

<https://www.britishcouncil.org/education/ihe/knowledge-centre/global-landscape/shape-global-higher-education-volume-3>

# WHY HAVE WE DONE IT?

To gain a greater understanding of global policy environment for HE

Institution level – To support UK HEIs in strategic international HE engagement

National level - To identify areas for international engagement between different countries' higher education systems

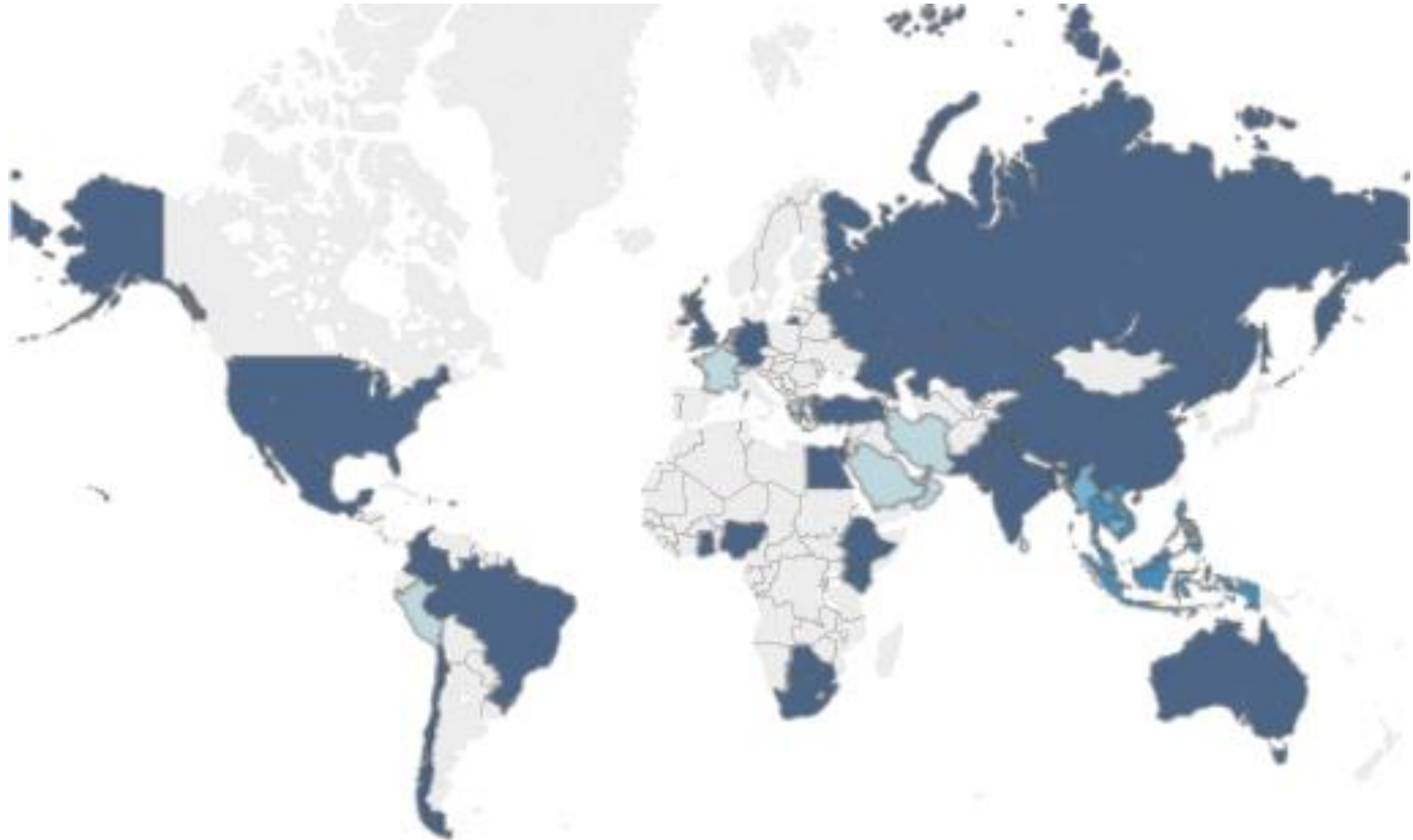
# National-level perspective

**Table 1:** Structure of the National Policies Framework

Overview of categories and indicators	Weight
<b>1. Openness and mobility</b>	<b>0.33</b>
1.1 IHE strategy	0.25
1.2 Student mobility policies	0.25
1.3 Academic mobility and research policies	0.25
1.4 Programme and provider mobility	0.25
<b>2. Quality assurance and degree recognition</b>	<b>0.33</b>
2.1 International students' quality assurance and admissions	0.33
2.2 Quality assurance of academic programmes	0.33
2.3 Recognition of overseas qualifications	0.33
<b>3. Access and sustainability</b>	<b>0.33</b>
3.1 Student mobility funding	0.33
3.2 Academic mobility and research funding	0.33
3.3 Sustainable development policies	0.33
<b>Total</b>	<b>1.00</b>



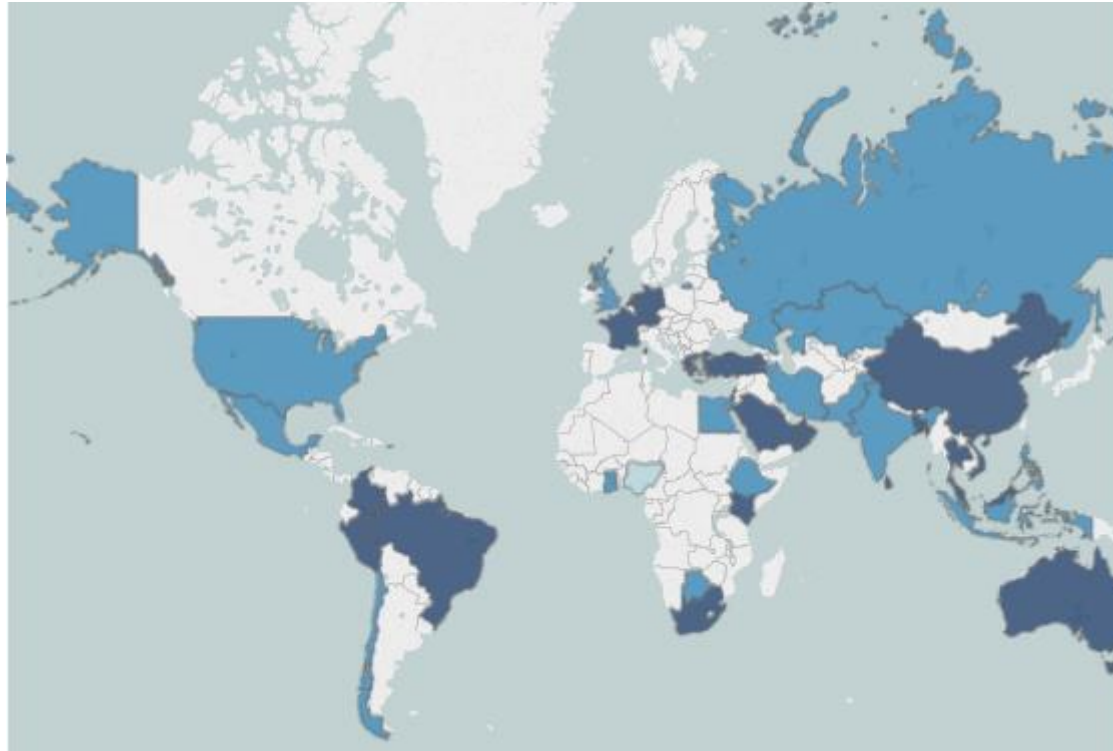
# COUNTRIES COVERED





# UNDERSTANDING NATIONAL POLICIES

Are procedures for foreign students to obtain visas clear, transparent and consistent?



Key: Dark blue = YES; Lighter blue = NO; White = country not studied

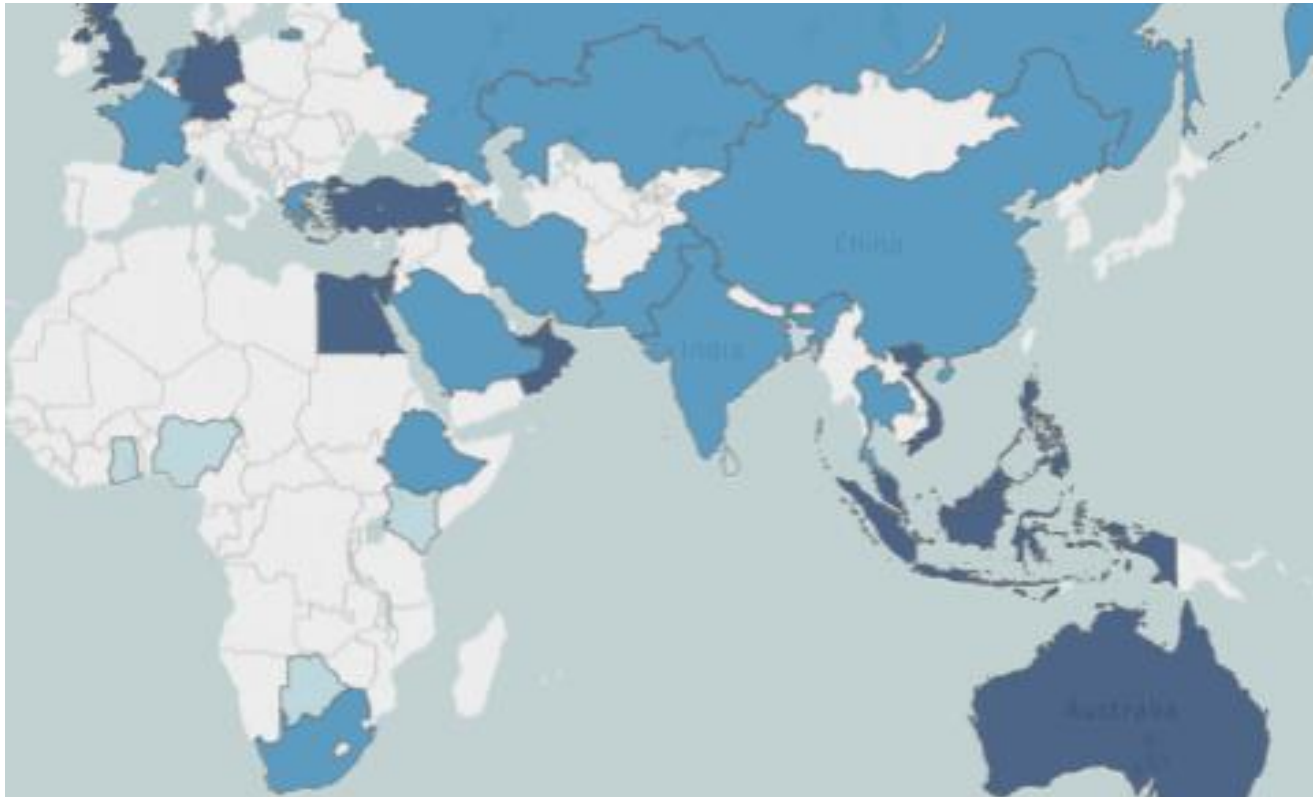
Source: British Council – Global Gauge of HE policy

<https://www.britishcouncil.org/education/ihe/knowledge-centre/global-landscape/global-gauge>



# UNDERSTANDING NATIONAL POLICIES

Is research produced via international collaboration included in the national research assessment/review?



Key: Dark blue = YES; Lighter blue = NO; White = country not studied

Source: British Council – Global Gauge of HE policy

<https://www.britishcouncil.org/education/ihe/knowledge-centre/global-landscape/global-gauge>



# UK HIGHER EDUCATION OVERVIEW

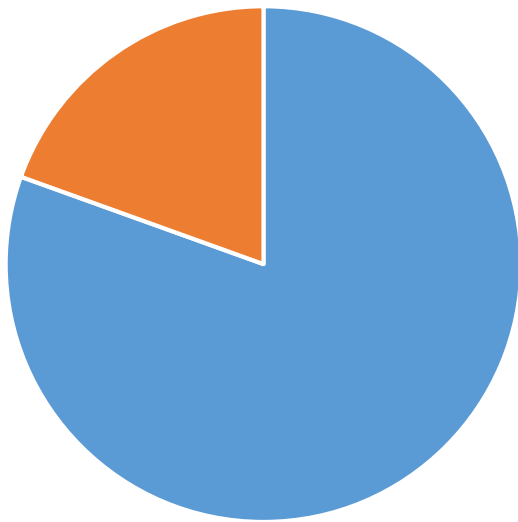
- Diversity of institutions in terms of size and missions
- Fully autonomous in teaching, admissions and management
  - Research funding is competitive and concentrated (**Research Excellence Framework - REF**)
  - Teaching is funded by fees and student loans (**Teaching Excellence Framework - TEF**)
- Evolution of regulatory approach from directive/oversight to policy/regulation

# SIZE OF UK HE SECTOR

- 166 public Higher Education Institutes (HEIs) in the UK
- 134 HEIs in England plus 6 private universities
- 19 in Scotland
- 9 in Wales
- 4 in Northern Ireland
- 200+ Further Education Colleges offer some HE

# STUDENT POPULATION (2016/17)

Under Graduate  
1,766,285



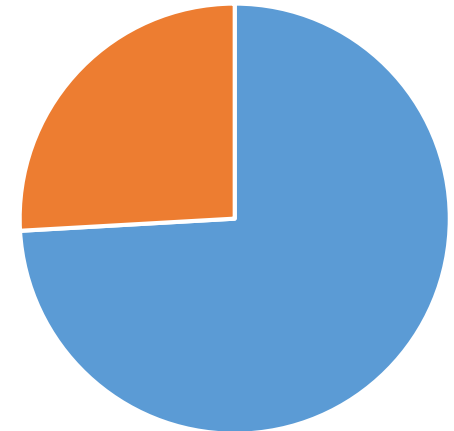
■ Full Time ■ Part Time

Post Graduate  
Taught 439,075



■ Full Time ■ Part Time

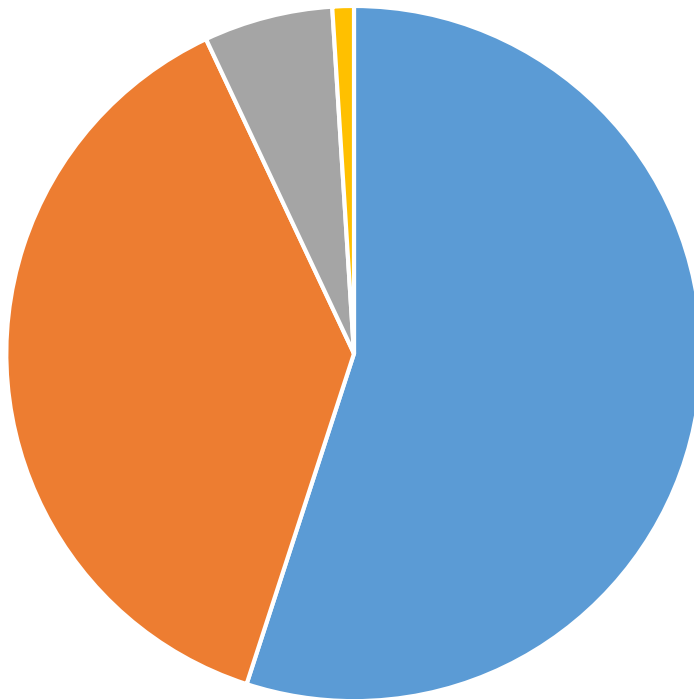
Post Graduate  
Research  
112,520



■ Full Time ■ Part Time

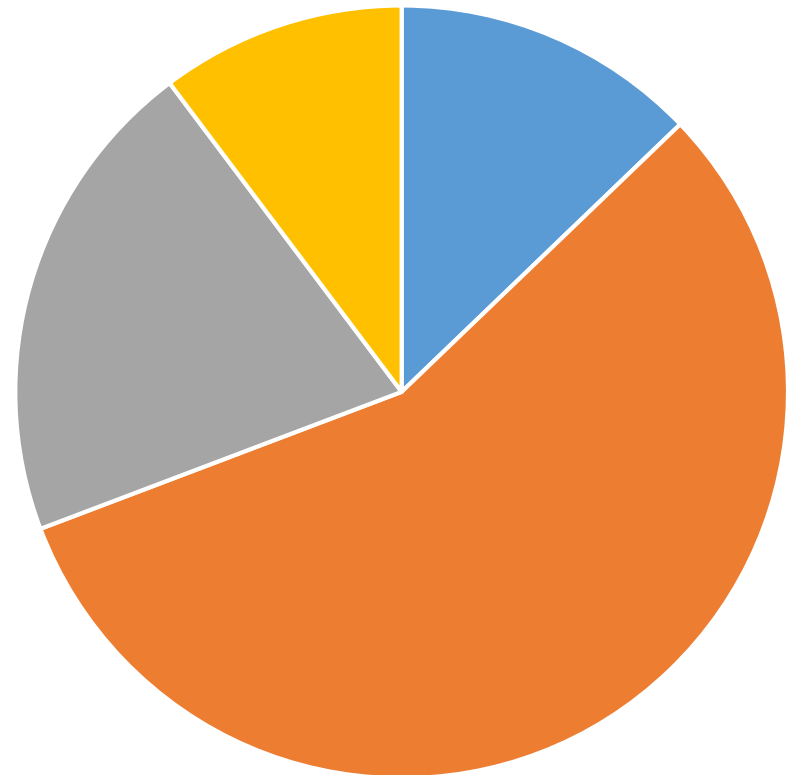
# SECTOR INCOME

Total Expenditure £31.2bn



- Staff Costs
- Other Operating Costs
- Depreciation
- Interest and Other Finance Costs

Total Income £33.2bn

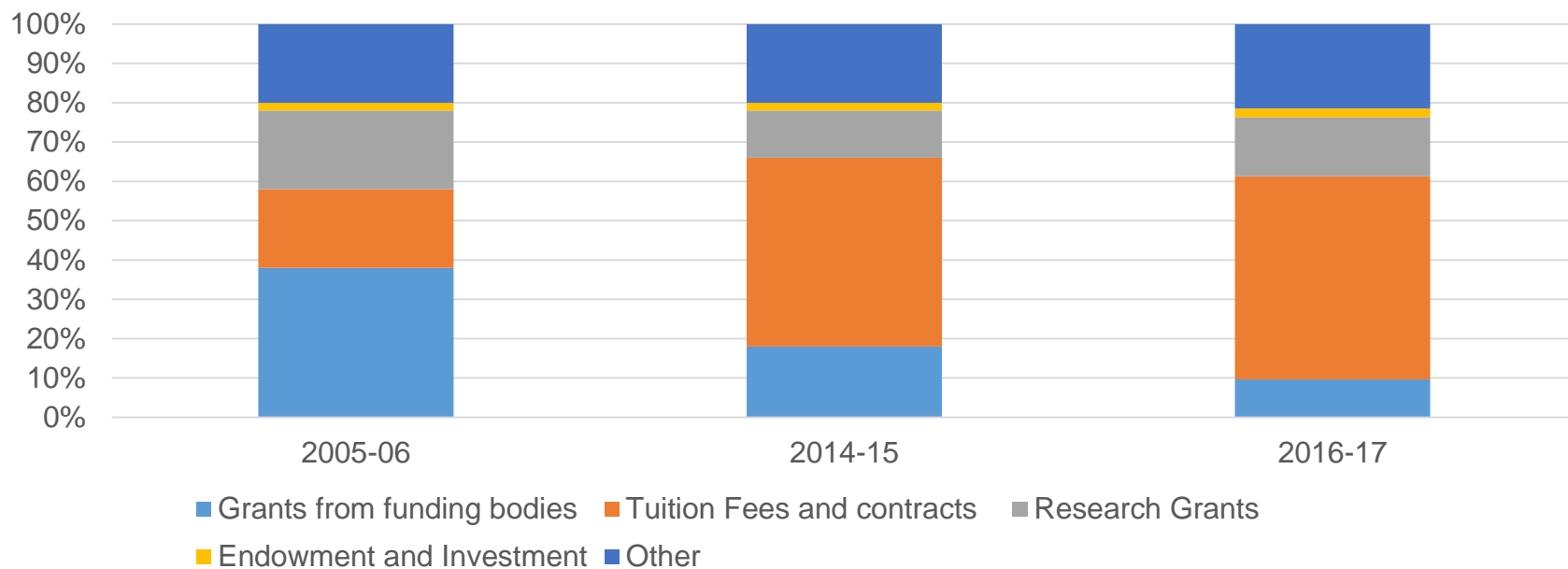


- Teaching - UK Govt.
- Teaching
- Research - UK Govt.
- Research - Other

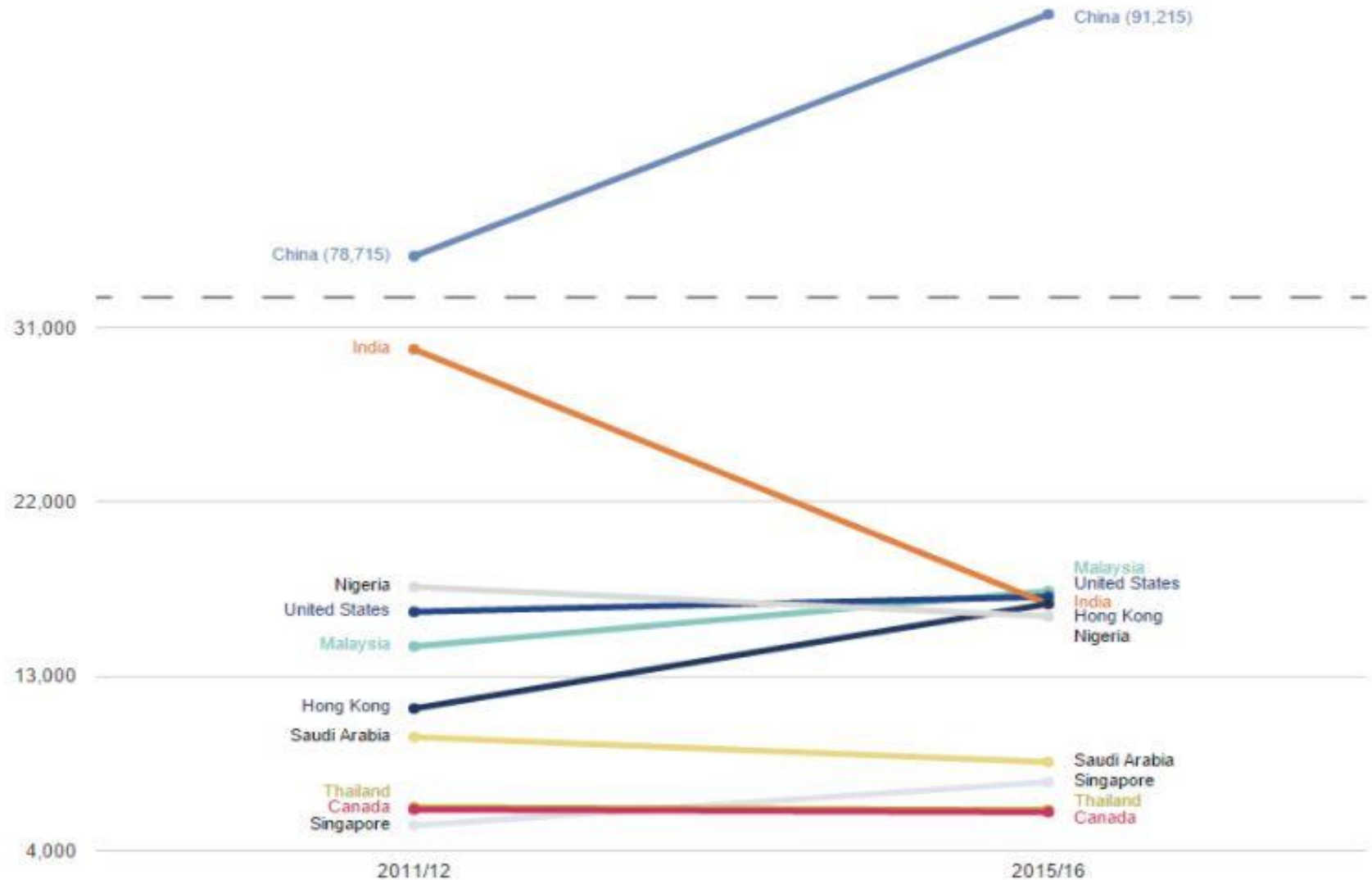


# CHANGES IN INSTITUTIONAL INCOME

## University Income

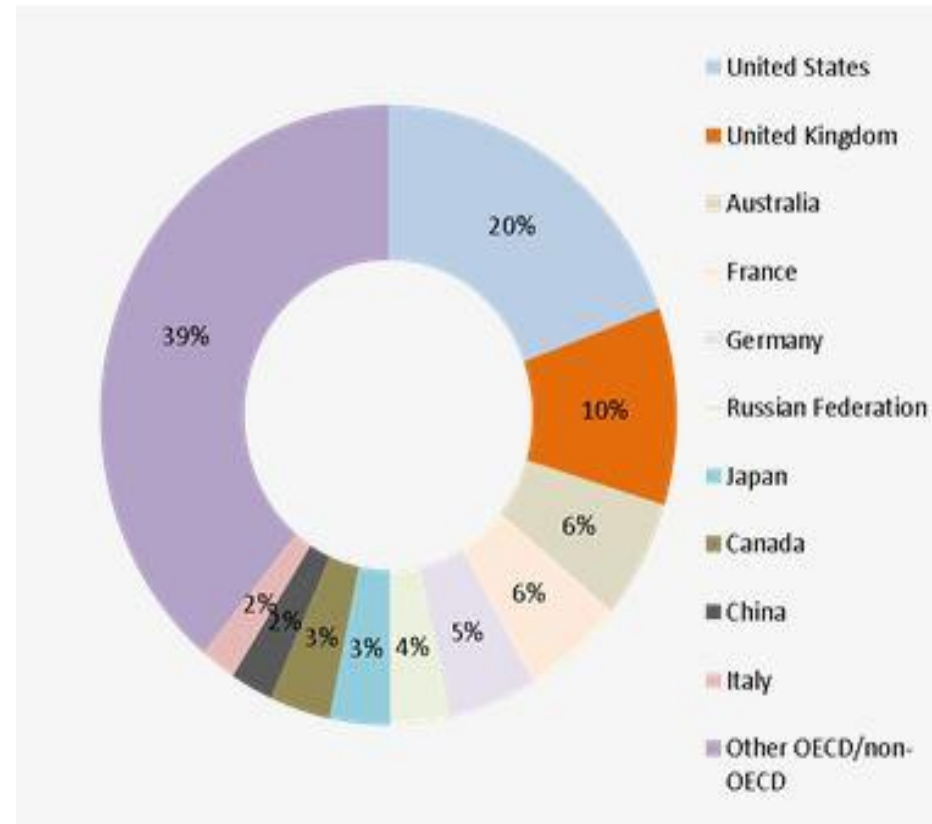


# TOP 10 INTERNATIONAL STUDENTS



# UK HE INTERNATIONAL

- 1 in 5 (19%) students in the UK are international
- 1 in 5 £ (21%) of research grants and contract come from overseas
- 1 in 4 (28%) of all academic staff are international
- 1 in 2 (48%) articles have an international co-author
- 2 in 3 (63%) academics have an international affiliation
- 3 in 4 of UK HEIs are engaged in TNE
- Second most popular destination for international students



# SUMMARY

- Shape of mobility is changing:
  - More choice for students
  - More intra-regional mobility
  - More flexibility of programme delivery
- National level policies can play an important role in supporting international HE engagement
  - Mobility of staff and students
  - Mobility of programmes and providers
  - Collaboration in research

# USEFUL LINKS

1. YouTube animation: [https://www.youtube.com/watch?v=r\\_dh0rBLai8](https://www.youtube.com/watch?v=r_dh0rBLai8)

2. Summary reports

<https://www.britishcouncil.org/education/ihe/knowledge-centre/global-landscape/shape-global-higher-education-vol-2>

<https://www.britishcouncil.org/education/ihe/knowledge-centre/global-landscape/shape-global-higher-education-volume-3>

3. Global gauge: interactive higher education policy monitor capturing 43 countries' policy priorities

[www.britishcouncil.org/education/ihe/knowledge-centre/global-landscape/global-gauge](http://www.britishcouncil.org/education/ihe/knowledge-centre/global-landscape/global-gauge)

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