

## PROJECT MANDATE

**Project Name:** HESA review of transnational higher education data

**Project Sponsor:** Rob Phillpotts

## PROJECT BACKGROUND:

*“There is no question that TNE is a dynamic and increasingly complex part of higher education internationalization and that new trends and developments need to be carefully monitored and analyzed.”*

(Knight, 2016, p. 35)

Transnational Higher Education (TNE) is growing rapidly,<sup>1</sup> with enrolments forecast to grow by 21 million by 2020.<sup>2</sup> There are multiple sources of information on the UK’s share of higher education exports, with regular reports commissioned by government, sector representative bodies and sector agencies, to investigate this phenomenon. HESA is launching a review to ensure the UK’s TNE data is fit for purpose.

This review is in two parts, the first is to make rapid improvements to the Aggregate Offshore record (AOR) for 2019/20. The second part is an investigation that meets the goal of specifying, principally, statutory users’ needs. This second part will therefore concentrate on requirements for the collection of personal data to meet public interests, the exercise of official authority, and compliance with legal obligations, but may also identify other potential legitimate interests for data on TNE. This second part will include determining the most appropriate approach to making individualised TNE data available, during 2020. As well as checking data availability, the fitness of existing statistical standards in the HESA data for TNE data collection will be examined. The review will also establish objectives for future outputs.

Internationalisation of education is not a new phenomenon. “[I]t was originally seen in the 1950s as an international development activity [... with] a more commercial and competitive approach

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<sup>1</sup> For example, UK HE sector TNE grew by 13% in one year from 2013/14 to 2014/15 (UK Higher Education International Unit, 2016, p. 6)

<sup>2</sup> (British Council, 2012)

[developing] in the last 20 years”<sup>3</sup> Over that period, increasing attention has been given to the role of internationalisation and globalisation in higher education<sup>4</sup>. The former Department of Universities, Industry and Skills argued<sup>5</sup> that the growth of TNE has been fuelled by the development of ICT and the need for internationally recognised qualifications. Motivations for the growing scope and scale of TNE range from the profit incentive to demand for education from emerging middle classes in many developing economies<sup>6</sup>. Intense interest in changing patterns of student mobility and course/institutional mobility mean we must now look again at the information we collect. The British Council reported that there is an exponential increase in the number of new TNE programmes being offered, new forms of partnership and delivery modes emerging and that TNE has become a significant component of the international higher education landscape.<sup>7</sup> HE Global (2016) argued that “Globalisation has enabled prospective students to go further afield for their studies and development which has affected the supply and demand of international education but also creating an increasingly competitive global marketplace for institutions that are adopting models to enhance their presence in an international market.” The characteristics of the higher education markets that are being instituted through globalisation are also of interest for practical business purposes and as objects of study.<sup>8</sup>

However, we don’t yet have the data we need to understand TNE fully. HESA’s annual Aggregate Offshore record is the official data collection for students studying wholly outside the UK, while registered at UK HE providers or registered on their programmes. However, the existence of research projects that regularly duplicate or extend the AOR<sup>9</sup> indicate it offers an insufficiently rich picture of TNE. High levels of institutional engagement with these projects indicate that there is demand for better data. There are also known gaps in information, for example, the ONS’s International Trade In Services survey (ITIS) excludes higher education.<sup>10</sup>

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<sup>3</sup> (Knight, 2016, p. 35)

<sup>4</sup> Aside from the rich academic literature on this topic, we note the significant investments that have been made in this area for example the establishment of the joint ESRC/HEFCE-funded Centre for Global Higher Education at UCL (<http://www.researchcghe.org>)

<sup>5</sup> (Drew et al., 2008)

<sup>6</sup> (Altbach & Knight, 2007, pp. 292–294)

<sup>7</sup> (Ilieva & Peak, 2016)

<sup>8</sup> (Robertson & Komljenovic, 2016)

<sup>9</sup> Cf (British Council, 2012; Drew et al., 2008; Mellors-Bourne, Fielden, Kemp, Middlehurst, & Woodfield, 2014; Quality Assurance Agency, 2019; UK Higher Education International Unit, 2016)

<sup>10</sup> See section 9 on types of transactions not covered (Office for National Statistics, 2017).

This is a matter of concern to policymakers<sup>11</sup> and industry figures, who believe that inadequate data may harm this important export market<sup>12</sup>. Judging from the topics of interest to the funders of research projects, we need to know more about the financial value of TNE, the subjects and disciplines taught, the nature of the provision and its relationship to the host institution or system, and the outcomes graduates achieve. This review aims to address these gaps in our understanding of the rapid evolution and growth of TNE, making short-term improvements for the 2019/20 collection, with a longer view to update or replace the AOR, to ensure we have the right data for the future.

TNE is changing rapidly. While TNE may principally serve students in accessing higher education where there are shortfalls in local provision, enterprising states are stimulating the development of “Education Hubs”, which as “both actors and reactors to the multiple dimensions and manifestations of globalization”<sup>13</sup>, attempt to harness “private sector” TNE to act as “a strategic asset in the race to attract new students, build a more robust knowledge economy, and supply the country with more knowledge workers.”<sup>14</sup> The UK’s substantial market share serves a similar purpose, by creating a route for overseas student mobility into the UK, particularly for postgraduate study.<sup>15</sup> Work is underway to make this complex international phenomenon susceptible to measurement against agreed standards and to resolve the “mass confusion within and among countries about what is actually meant by TNE in general and the different modes of TNE in particular”.<sup>16</sup> This work may result in new international standards being adopted by OECD, UNESCO or EUROSTAT. In the uncertain climate following the Brexit referendum, good data will be required to support the UK’s HE sector and its students and staff at home, in Europe and beyond, to navigate the emerging environment<sup>17</sup>.

Our current data tells us that TNE is changing rapidly – but our datasets are not adequate to understand the nature of that change adequately. Information about the UK’s TNE has been collected by HESA since 2007/2008 and it identifies, by HE provider, a headcount of students

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<sup>11</sup> (Department for International Trade & Department for Education, 2019) See also <http://exeduk.com/> for more information, and (APPG for International Students, 2016)

<sup>12</sup> (Pitman, 2017)

<sup>13</sup> (Knight, 2014, p. 83)

<sup>14</sup> (Kinser & Lane, 2015, p. 19)

<sup>15</sup> (Higher Education Funding Council for England, 2015, p. 10)

<sup>16</sup> (Knight, 2016, p. 36)

<sup>17</sup> (Department for International Trade & Department for Education, 2019, p. 27)

studying wholly overseas, by level and country.<sup>18</sup> While valuable, there are large gaps in our knowledge, for example:

- what qualifications are offered or achieved
- what subjects are offered or studied
- the individual characteristics of students
- patterns of study and attendance
- continuation rates and graduate outcomes
- the identities and locations of organisations with roles in the delivery and oversight of courses, and the nature of their relationship to UK HE providers
- what fees or other financial considerations are involved in TNE.

Data such as this is not only collected through research projects, but also by the QAA to support its TNE review method.<sup>19</sup>

What improvements do we need to make? The former Department of Business, Industry and Skills stated that “the categorisation of transnational education used in the current Aggregate Offshore Record is not useful for understanding patterns of transnational education provision. Institutions appear to be supportive of development of a more systematic nomenclature and categorisation of modes of transnational education to enhance sector-level data collection and improve comparability across the sector. Better definition of what constitutes an international branch campus is a particularly pressing need.”<sup>20</sup> There may be opportunities to address this by building on the work already undertaken to develop standard definitions for international branch campuses<sup>21</sup> and on the models of collaboration developing in TNE.<sup>22</sup> The QAA indicates that the “number of arrangements have grown as higher education providers have increased their participation in global higher education [... M]odels of delivery, and the range of other organisations involved in delivering and supporting learning opportunities, are likely to continue to expand and present new challenges”.<sup>23</sup> The growing diversity and complexity of TNE has led to “a move to it being partnership-led and many of the partnerships are multi-dimensional,

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<sup>18</sup> See the Aggregate Offshore Record coding manual for details (Higher Education Statistics Agency, 2019)

<sup>19</sup> (Quality Assurance Agency, 2019)

<sup>20</sup> (Mellors-Bourne et al., 2014, pp. 7–8)

<sup>21</sup> Work undertaken by the Observatory on Borderless Higher Education and C-BERT (Garett, Kinser, Lane, & Merola, 2016)

<sup>22</sup> (Hawawini, 2011). Concepts explored in detail in a Coursera MOOC (Olds & Robertson, 2014)

<sup>23</sup> (QAA, 2011, pp. 4–5)

typically transcending the boundaries between distance/online learning, branch campus, franchise and validation.”<sup>24</sup> These distinctions are not necessarily taxonomically discrete and present problems for data collection.<sup>25</sup> We seek to move the debate on classification forward and establish a new standard. Also, since the AOR is not an individualised student record, the data is high-level and tabular, which limits its extensibility and analysis. If increased data collection were justified, consideration should also be given to an individualised record to rectify these limitations.

In the decade since the UK’s HE sector started collecting data on TNE, the regulatory focus has also changed. In England, the Office for Students has indicated that it will “regulate such overseas activity on the basis that the obligations of the registered provider extend to students for whom it is the awarding body wherever and however they study”<sup>26</sup>. The OfS has also stated their clear intention to use individualised data, and not aggregate data, in order that they can better track student success<sup>27</sup>. The Higher Education Funding Council for Wales also have a keen interest in this provision, using it in their analysis of fee and access plans and the financial and forecast financial position of providers. They are also interested in understanding the provision offered in terms of risk to the provider and wish to maintain an oversight of this provision.

It is therefore timely to take a fresh look at our national needs for data and ensure our information assets are suitable for the many purposes to which they are put, looking at what can be achieved in the short term, and what enhancements can be made to ensure data is fit for the future. As part of this we will seek to balance the cost of supply, privacy impact and benefits, in particular when considering potential changes beyond the specific mandates of statutory customers.

## PROJECT PURPOSE:

HESA’s proposed review will therefore seek to answer the following questions:

- What are the main intended uses of better TNE data? What variables will need to be collected or derived to serve these uses? What published form(s) should it take?

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<sup>24</sup> (UK Higher Education International Unit, 2016)

<sup>25</sup> (Cook, 2015)

<sup>26</sup> (Office for Students, 2018b, para. 88) This point was extended to a level of detail in the OfS Data Strategy (Office for Students, 2018a, pp. 20–21)

<sup>27</sup> (Office for Students, Data Strategy 2018 to 2021)

- What measures should we take to reduce or avoid duplication between the AOR and other data collections about TNE?
- What data is required about TNE to serve public interests, the exercise of official authority, and to meet legal obligations (including confirmation of what data needs to be captured on an individualised basis)?
- What do other non-statutory users of TNE require and is there sufficient justification (and a lawful reason) for collecting it?
- What concepts (if any) need to be developed to help make better sense of TNE?
- What is the burden/cost on providers for supplying data (and determination of the most appropriate collection mechanism for the required data)?

## OBJECTIVES:

### Part 1)

To confirm availability of data and interim fitness for purpose of an enhanced Aggregate Offshore record, releasing a draft notification of changes by 2019-09-30

### Part 2)

To undertake an investigation to understand requirements, output objectives, and availability of data, reporting fully on findings by 2020-11-30

To establish the new or amended concepts required, and refine and consult on them to a standard suitable to support detailed design work, by 2020-11-30

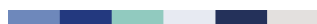
To undertake and report back on a consultation aimed at developing our understanding and testing initial ideas, reporting by 2020-06-30

To undertake a consultation aimed at obtaining steering group support for our proposals by 2020-09-15.

To develop an approach to detailed Design, including timescales that obtains steering group approval, and integrates with prevailing plans for Data Futures implementation as appropriate.

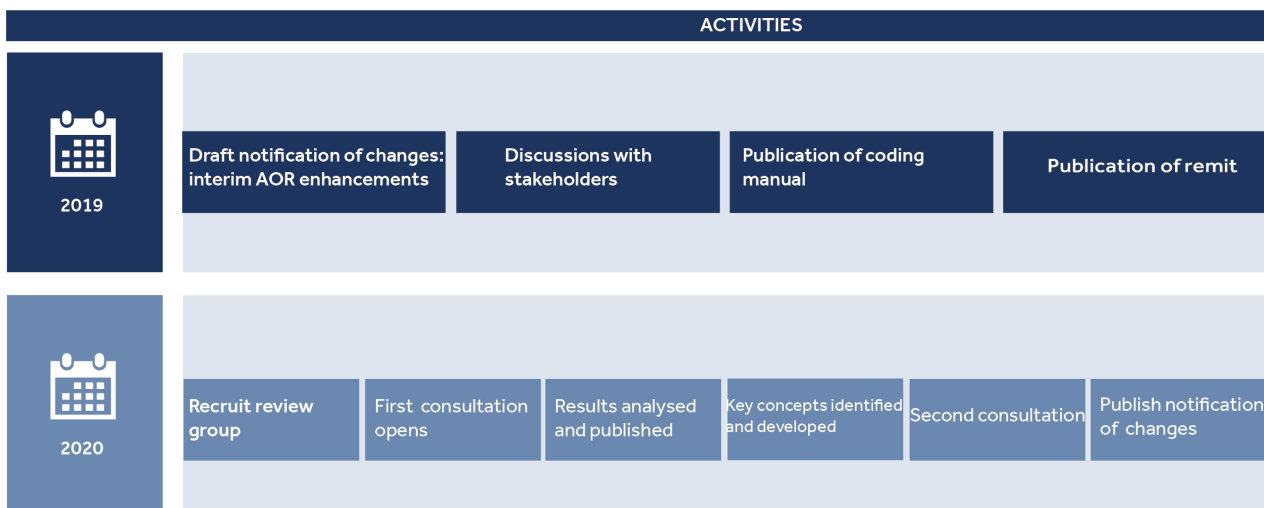
## BUDGET (ESTIMATED):

For the pre-business case phase of specifying needs, costs relate to travel and subsistence, smaller-scale meetings and catering, staff time (existing staff only) and will operate on a marginal costs basis (i.e. subsumed within existing operational budgets and resources)



## SCOPE OF THE PROJECT:

The review outline plan of activity is as follows:



## OUT OF SCOPE FOR THIS PROJECT:

Alignment of collection with the first year of Data Futures implementation.

A full Data Design and Technology Build for a significantly enhanced collection.

Data Requirements that require radical investment beyond that required to deliver the needs of Statutory Customers.

## ANY OTHER INFORMATION:

The Data Futures Student collection data model will (in part) frame what can be achieved with this project, should an individualised record be confirmed.

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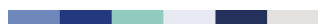
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