ASSOCIATION OF COLLEGES

International Activity in Colleges

The 2018 Association of Colleges Survey

The Association of Colleges

1. The Association of Colleges (AoC) is the national voice for further education, sixth form, tertiary and specialist colleges in England. AoC members make up 93% of the 266 colleges in England incorporated under the Further and Higher Education Act 1992.

2. Colleges transform 2.2 million lives each year. They help people to make the most of their talents and ambitions and drive social mobility; they help businesses improve productivity and drive economic growth; they are rooted in and committed to their communities and drive tolerance and well-being. They are an essential part of the education system.

3. AoC supports colleges in the development of their international activity and represents college interests to governments both at home and overseas. We are members of the World Federation of Colleges and Polytechnics[1] and a founding member of EUproVET[2]. In line with the aims of AoC's strategic plan 2017-2020[3], our international goals are to:

    - Set the agenda for positive policy changes
    - Develop a high profile and strong reputation for colleges
    - Deliver expert support, advice and intelligence for members

4. Brexit means a new era for the UK's relationships and trade with other countries. There is rising global demand for technical training as world economies develop their future workforce. The UK Skills Partnership (of which AoC and the devolved nation college networks are board members), has been established to bring together and to promote the UK's skills sector. However, as the UK prepares to leave the European Union (EU), it is more important than ever that colleges can be outward-facing, and that students and staff can connect with other countries.

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[1] https://wfcp.org/
[2] http://www.euprovet.eu/index.html
[3] https://www.aoc.co.uk/system/files/AoC%20Strategic%20Plan%202017-20.pdf

The 2018 international survey

5. AoC conducted its second annual survey of college international activity at the end of the 2017/18 academic year. This report provides data for 2017/18 and comparisons with the 2016/17[4] report. There is growing interest in the scale and nature of international activity in colleges but very little data available, a point highlighted by the MAC international student report published in September 2018[5]. AoC's international survey provides baseline data about college international work in order to:

    - Inform our members
    - Inform our stakeholders
    - Inform Government policy regarding international education

6. AoC staff designed the survey to be a stocktake of international work at colleges, asking 32 questions relating to EU/non-EU activity and AoC's international services. Our definition of international activity was any kind of programme, project or work involving partners or students outside of the UK.

7. We issued the survey to all colleges in AoC membership. For the first time, AoC worked in partnership on the survey with the college networks in Scotland, Wales and Northern Ireland, who helped AoC to gather data on a UK level. The survey is currently issued at the end of each academic year by which time most annual international activity (with the exception of summer schools) has been completed. If you missed the 2018 survey or have comments for the 2019 edition, please contact Emma Meredith.

2018 survey headlines

8. The survey results were in the main consistent with the 2016/17 survey results. Some variations in the figures, whether positive or negative, can most likely be explained by different colleges responding to the 2017/18 survey versus the 2016/17 survey. In general, the variations were not great enough to signal any substantial change from 2016/17 to 2017/18.

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[4] https://www.aoc.co.uk/sites/default/files/AoC%20international%20survey%20report%202017_0.pdf
[5] https://www.gov.uk/government/publications/migration-advisory-committee-mac-report-international-students

9. Some clear and valuable messages emerged. The top 10 headlines were:

Student Recruitment

i. Student recruitment (including summer schools) is still the mainstay of college international work, accounting for at least 75% of all activity and income[6]

ii. The average annual number of Short-term study visas students at colleges increased from 57 in 2016/17 to 93 in 2017/18

iii. 84% of college Tier 4 sponsors issue fewer than 50 Confirmation of Acceptance for Study (CAS) per year. The average number of Tier 4 students enrolled at a college is 24

iv. More than a third of colleges have experienced student visa refusals on the grounds of credibility

v. The average international tuition fees for a one-year full-time college course are £6,938

International development

vi. China remains the most important market for college international activity, three times more significant than any other country

vii. Europe plays a central role in college international activity; the Erasmus+ programme is the third most important activity; the recruitment of European students fifth most important; 8 out of the top 20 international markets for colleges are in Europe

viii. The average college income from non-EU international activity in 2017/18 was £723,280

ix. College engagement in professional training and TNE is low – if the UK is to grow international skills exports, colleges need more support and better information to take advantage of opportunities

x. Colleges want to work collaboratively to deliver international work

[6] Excluding major TNE/overseas campus operations

Sample size and nature

10. AoC issued the survey to college principals and international contacts (where applicable) in all AoC member colleges. Our partner organisations in Wales, Scotland and Northern Ireland circulated the survey to their members. Responding to the survey was voluntary.

Type	Number of college responses 2017/18	Total number of colleges	Percentage response within type	Comparison response numbers 2016/17
England				
General Further Education College	47	179	26%	
Sixth Form College	12	61	20%	
Specialist College	0	26	0%	
Total England	**59**	**266**[7]	**22%**	**84**
Total Scotland	**3**	**26**	12%	0
Total Wales	**5**	**14**	36%	2
Total Northern Ireland	**3**	**6**	50%	1
Other/Academy Conversion	**2**	N/A	N/A	3
Total responses UK	**72**	**312**	**23%**	**90**

11. Almost a quarter of all UK colleges responded to the survey, and 22% of colleges in England. Whilst not all colleges engage in international work, AoC is confident that the vast majority of our internationally active members submitted a response. Whilst the number of responses for England was lower than in the 2016/17 survey, college mergers in the intervening year meant the response base was lower.

12. Within England, the highest response rates as a percentage of colleges within regions were from the East Midlands, the South East and the South West. This mirrors the pattern of international activity within England, where a strong number of colleges in the southern half are involved in international activity. There was a good response from the Northern Irish sector to the survey, and the Welsh and Scottish responses helped to build a profile of the UK's overall international activity.

13. Of the 72 colleges who responded, 82% are actively involved in international work, an increase of 14% on 2016/17 data. This can be

[7] Correct at time of publication. Responses to the 2017/18 survey may include responses from colleges that have subsequently merged

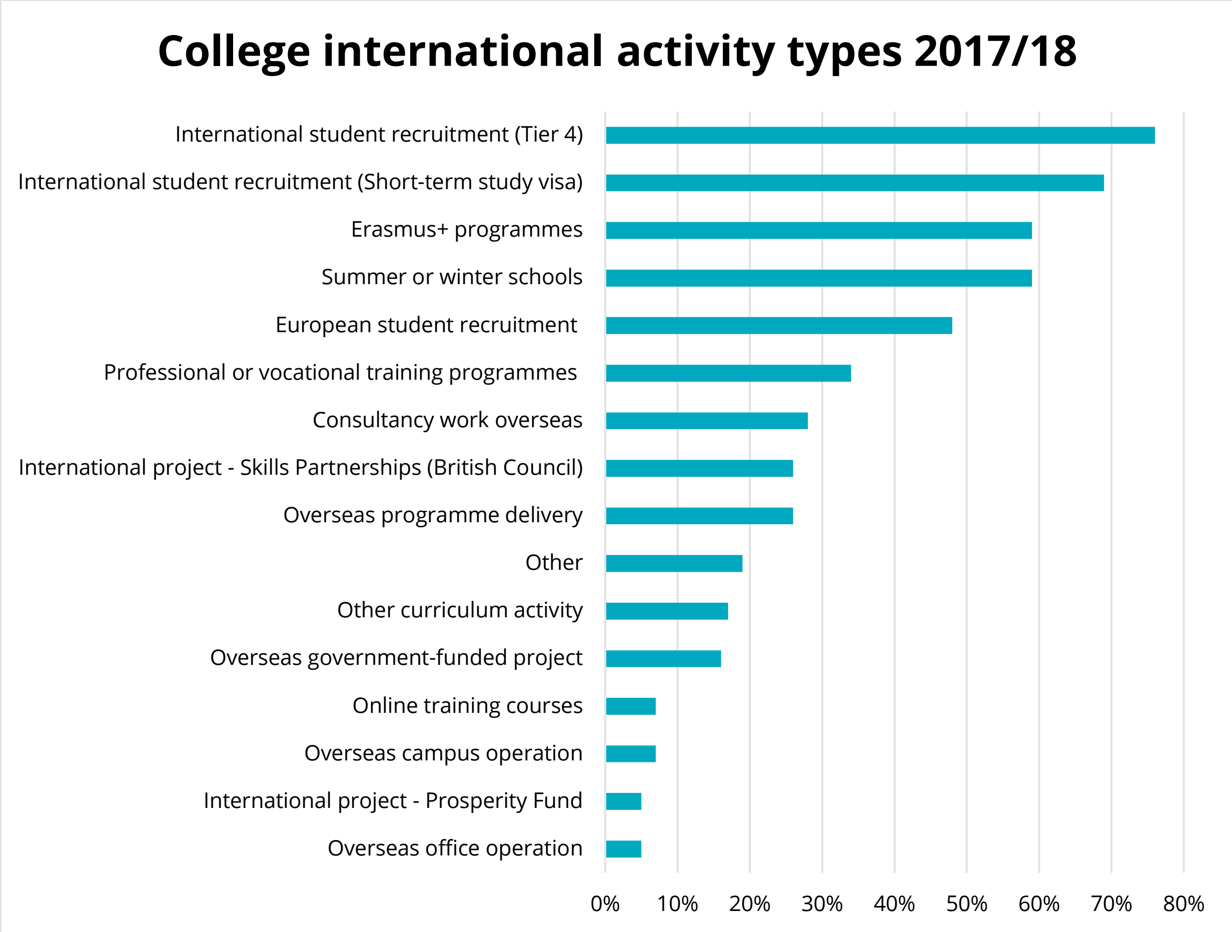
explained partly by the inclusion of new responses from devolved nation colleges. However, only 10% of colleges who stated they were not delivering international activity said they had previously done so in the past 5 years. Following the progressive downturn in international student numbers at colleges due to student visa restrictions[8], many colleges stopped their international work, particularly between 2011-2015. It can be assumed that the number of colleges working internationally has now stabilized. Fewer colleges drop out once committed.

14. For the first time, AoC asked whether colleges felt they had the right capacity and capability to deliver international work, regardless of whether they were already working internationally. 49% said they delivered international work and that they had the right capacity and capability to do so. 35% said they delivered international work but did not always have the capacity to respond to opportunities or to deliver them. Whilst some colleges have developed international strategies, the sector needs more support to meet international skills demand and to overcome obstacles to bid for and win international opportunities. Issues around staff capacity/availability and the provision of student accommodation were some of the most cited obstacles. Colleges may focus on one type of international activity such as student recruitment or international projects, but they lack the resource to focus effectively on both.

Range and nature of college international activity

15. Colleges are involved in over 20 different types of international activity, highlighting the breadth and range of the sector's capacity, particularly in the delivery of international partnership projects. Question 7 in the survey asked colleges to indicate the type of international activity their college engages in. Responses were broadly the same as the 2016/17 survey, showing that the type of international work colleges conduct is stable:

[8] Section 3.1, https://www.gov.uk/government/publications/immigration-statistics-year-ending-june-2018/why-do-people-come-to-the-uk-3-to-study



16. Student recruitment is still the frontrunner of college international activity. Infilling international students into college courses provides a scalable revenue base from where it may be possible to develop other types of international activity. The contribution that international students make to colleges cannot be overlooked. The survey did not ask colleges how many students infill into college courses and how many join bespoke classes. However, it is known that some colleges do still offer standalone international classes for EFL or university foundation courses.

17. 76% of colleges surveyed stated that they recruit Tier 4 students, and 69% recruit students on Short-term study visas. The figures are broadly consistent with the 2016/17 survey; college mergers, legacy sponsors and new colleges applying for Tier 4 licences mean that the number of colleges listed on the Home Office Register of Tier 4 sponsors is always in flux[9].

18. There was an increase in the number of colleges operating summer or winter schools, up by 13% to 59% of colleges that responded to the

[9] At the time of publication, 147 publicly-funded colleges or colleges with HEI status were listed: https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/752754/2018-10-31_Tier_4_Register_of_Sponsors.pdf

question. This growth can partly be explained by the range of colleges that responded to this year's survey and the activity that they typically engage in. It is also likely that the UK's place as the home of the English language, and colleges broadening their international offer outside of Tier 4 mean that successful summer schools can provide a reasonable source of income.

19. The importance of the UK's relationship with the EU sits behind the summer school figures, the EU recruitment figures and also the 59% response rate for the Erasmus+ programme;

- The UK Government has provided reassurances about Erasmus+ funding until 2020 and the end of the current programme cycle. This has allowed college Erasmus+ programmes to continue largely business as usual
- The final Brexit deal should confirm the UK's future involvement in Erasmus+ and other programmes until they end in 2020. Government ministers have spoken publicly about the benefits of student mobility but have been unable to make a firm commitment whilst negotiations continue
- Clarification is also needed regarding the UK's approach to EU27 students looking to study in the UK after 2020, and whether the entry clearance regulations and tuition fee arrangements that currently apply to non-EU students across the four nations will also apply to EU students. How and why EU27 students come to the UK after 2020 is likely to change.

20. The data suggests that college international activity is mainly delivered in the UK not overseas, although consultancy delivered overseas went up by 10% from 2016/17 to 28% in 2017/18. Colleges have the technical expertise to help other countries to develop their skills systems, and education is a 'soft' and successful export for the UK[10]. Some colleges already work extensively and successfully overseas, with a minority offshoring the bulk of their international provision. However, colleges will need more support and better information to take advantage of opportunities beyond inbound student recruitment.

21. Questions 8 and 9 asked about Tier 4 licences. Consistent with the 2016/17 survey, 84% of college Tier 4 licence holders issue fewer than 50

10 https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/630741/UK_Revenue_from_Educational_Exports_2010-14.pdf

CAS per year. Concern over the likelihood of visa refusals remains a real risk for colleges when issuing CAS, driving down student numbers. The small numbers of CAS now issued by the sector is unlikely to pose a risk to UK immigration control, and the restrictions placed on FE colleges should be lifted to allow student numbers to grow.

22. Question 10 was new and asked about visa refusals on the grounds of credibility. More than a third of colleges had experienced visa refusals for credibility reasons in the last twelve months on both Tier 4 and Short-term study visas. International recruitment at colleges is unlikely to grow until there is a better understanding at entry clearance posts overseas of college courses and college students, and until there is a student immigration system that places more trust in institutions' admissions decisions.

Student numbers and income

23. There is no firm data on the number of international students in colleges. Colleges are not required to collect data on student nationality, and Home Office student visa statistics do not separate out the publicly-funded college sector from the private college sector. AoC has written to the Home Office suggesting this should be changed to allow better monitoring of trends. The APPG International Students inquiry report[11], published November 2018, recommended that Government should accurately track data on education as an export and as an economic value.

24. Survey questions 11 to 15 asked colleges to report student numbers against a number of headings. As the survey is not a comprehensive census the data is incomplete. The most helpful figures are for average numbers of non-UK students studying at colleges, which provide some indication of scale until such a time as data collection is conducted on a more official basis:

[11] http://www.exeduk.com/wp-content/uploads/2018/11/APPG-Report-FINAL-WEB-1.pdf

	2017/18 average (2016/17 average)	Number of responses 2017/18
Q11. How many international (non-EU) students are studying at your college in the academic year 2017/18, across **all visa types**?	288 England only 262 UK combined (121)	47 England only 58 UK combined
Q12. How many international (non-EU) students are studying at your college in the academic year 2017/18 on **Tier 4 visas**?	23 England only 24 UK combined (26)	45 England only 56 UK combined
Q13. How many international (non-EU) students are studying at your college in the academic year 2016/17 on **Short-Term Study (STS) visas**?	93 England only 94 UK combined (57)	48 England only 59 UK combined

25. The overall number of international students studying at colleges increased from 2016/17 to 2017/18, particularly in the Short-term student visa category; up from 57 on average to 94. This route has become increasingly important to college international activity as it can be used to recruit international students whether a college holds a Tier 4 sponsor licence or not. For example, college Tier 4 sponsors in England that receive an Ofsted grade 3 or 4 are no longer able to recruit Tier 4 students as they do not meet the Home Office's Educational Oversight measure. Many colleges in this category are subsequently obliged to reposition their international activity through the Short-term study visa route.

26. The 2017/18 increase in international student numbers could reflect the high-volume international activity of the colleges that responded to the survey i.e. summer school groups, English language students (increasing numbers of juniors) and teachers/professionals being trained via short courses. In essence, higher numbers suggest international activity where larger numbers of students study for shorter periods. Whilst the increase in international FE numbers is positive, it does not automatically equate to an increase in income.

27. Only a small number of colleges have overseas campus operations or a presence in key TNE markets such as Saudi Arabia and China. Financial and operational barriers to international export prevent colleges from taking on large-scale risks. Colleges are more likely to run smaller partnership projects where they deliver programmes in-country as part of a dual curriculum initiative or progression pathways leading to a course in the UK. AoC estimates that there up to 10,000 international students enrolled in UK college TNE programmes.

28. There is no official data on the number of EU27 nationals studying at colleges in England. We estimate the figure to be around 2%. However, colleges in parts of England that have seen higher EU immigration enrol much greater numbers of EU27 students, for example in subjects such as ESOL (English for Speakers of Other Languages). AoC's survey reported an average figure of 384 EU27 students per English college, an increase on the 2016/17 survey figure of 353 (which included several Welsh colleges).

29. For the UK as a whole, the number of EU27 nationals reported to be studying in colleges more than doubles against the figure for England alone. This increase can most likely be explained by Republic of Ireland students who cross the border to study in Northern Ireland, and by the different fee treatment of EU27 nationals in Scotland compared to England. Clarification about the status of EU27 students post-Brexit is critical for all colleges, but for Northern Irish colleges in particular.

30. The survey asked colleges to report income from their international activity. Colleges also report income from international students in their annual financial statements. For England alone, the 2016/17 college financial statements reported £37m in non-EU international income. This figure excludes overseas college/TNE operations, which double the income value.

31. Over £39m in non-EU international income was reported by respondents to the 2017/18 AoC survey. The figure will be substantially higher when overseas college operations are taken into account. For 2016/17, AoC's survey recorded the average college international income to be £838,753 and for 2017/18, £723,280 (UK combined) and £669,825 (England only). This reduction in income is partly due to TNE income that is often recorded separately to UK-based delivery, but perhaps also because colleges have progressively recruited fewer Tier 4 students and more Short-term study visa students, who pay less and take shorter courses. However, it is reasonable to assume that the average UK college that is active internationally generates in the region of £700k annually, outwith any significant TNE activity.

32. Question 18 asked colleges to provide their estimated income from EU students paying Home tuition fees. Responses from English colleges suggested that the average income (£92,979) was slightly lower than in 2016/17 (£105,948) but fewer responses to the question were received. Responses received for the UK combined show that EU income increases

dramatically when devolved nation colleges are included.

International provision

33. Responses to question 19 highlighted that the average international tuition fees for a one-year full-time college course are £6,938, with the highest fees not exceeding £13,000. International tuition fees at colleges are amongst the most affordable in the UK education sector.

34. Colleges were asked to describe the main course level that their international students study at:

Q20. What are the main course levels that your international (non-EU) students study at? (Please tick all that apply)	Number of responses	Percent
Level 3 (SCQF level 6)	45	83%
Level 4	17	31%
Level 5	16	30%
Level 6	5	9%
Range of English language proficiency levels (e.g. Beginners to Advanced)	22	41%
Professional qualification level e.g. ILM, CIM	0	0%
Other	3	6%
Total	**54**	

35. Level 3 (SCQF Level 6) was the most popular (83% of respondents), consistent with the 2016/17 survey; colleges play an important role in providing pathways and access to higher education. Changes to Tier 4 visa regulations mean it has become more difficult to attract students from traditional markets to higher vocational courses delivered in the UK. Colleges have instead looked to deliver these qualifications in-country or focus on other types of provision.

36. 41% of respondents recruit international students to their ESOL/EFL provision. There was a fall in responses for provision at Level 6, however as more colleges apply for taught degree awarding powers and register their HE provision with the Office for Students, it can be expected that the higher course levels may feature more strongly in future surveys.

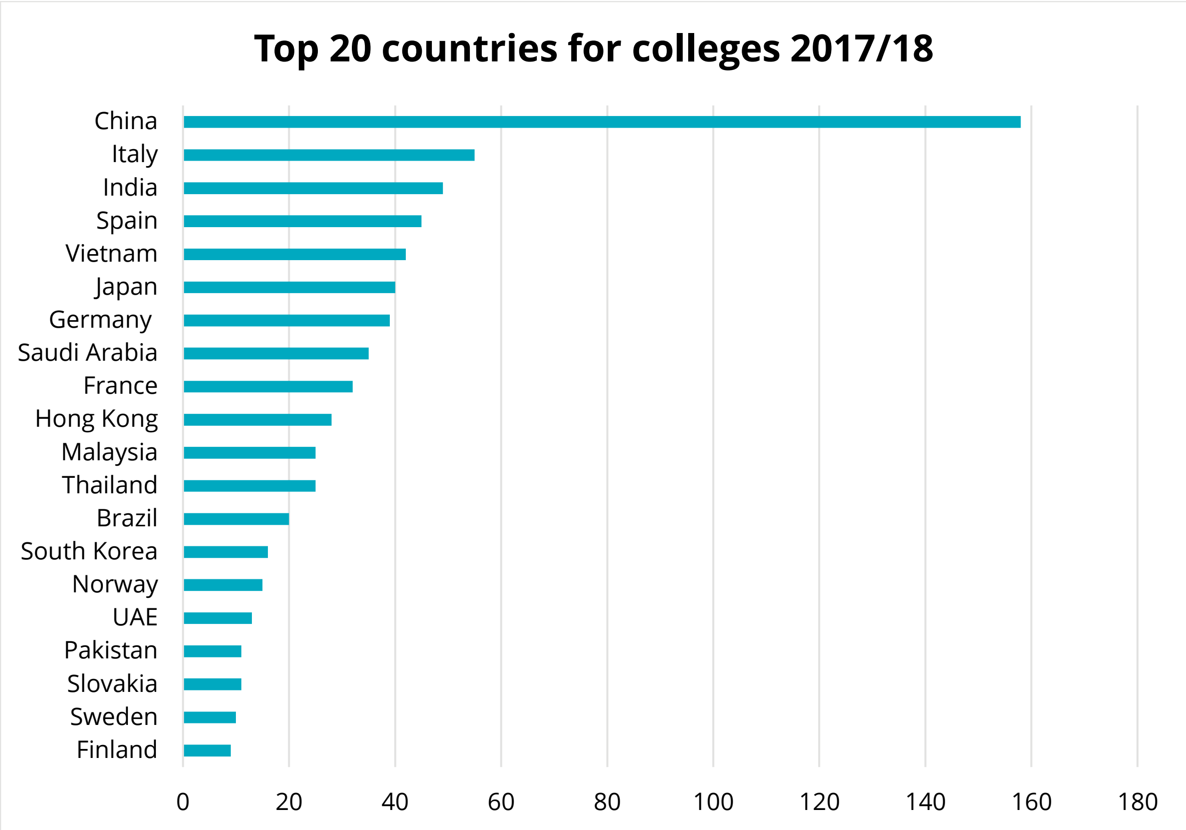
37. Colleges were asked to list the top 5 curriculum areas most important to their international work. There was a significant mix of course areas,

highlighting the breadth of provision in the college sector. A-levels, ESOL/EFL courses and Business/Engineering courses came out top. Teacher training was clearly popular, and whilst some foundation provision was still offered, A levels featured more strongly. Private pathway providers have assumed a strong place in the competitive pre-university market whilst universities have taken back in-house their foundation provision.

38. The survey highlighted some niche areas of vocational provision including footwear manufacturing, rail, fire and rescue management, aviation, renewables, oil and gas and football training.

International markets

39. Question 22 asked respondents to list and rank the top 5 countries which were most important to the college's international work:



40. Colleges named over 60 different countries that they engage with internationally. China, Italy and Spain retain their positions from the

2016/17 survey with India and Vietnam moving up the table. China slightly increased its position.

41. The change in the top five countries could be an impact of Brexit, with colleges either beginning to look beyond the EU for business or EU countries choosing other destinations over the UK due to uncertainty about Brexit. The top five EU countries were Italy, Spain, Germany, France and Slovakia. Spain and Italy have long been strong English language markets, with Italy's 'PON' programmes sending many Italian students abroad each year. It is unclear why India has moved up the list when no major vocational programmes or initiatives attractive to UK colleges have necessarily been offered in the market. Difficulties around student visas over the last 6 years mean India had dropped off the target list for student recruitment.

College and AoC services

42. Colleges were asked about the services that they offer students. 74% of respondents offer homestay accommodation (an increase of 9% from 2016/17), 22% offer on-campus residences and 82% employ staff with dedicated responsibility for international work.

43. Colleges were also asked to confirm whether they had the capability and capacity to deliver programmes in the area of Special Education Needs and Disability (SEND). This is an area of increasing interest overseas and one that UK colleges have strengths in. 57% of respondents confirmed that they could deliver SEND activity.

44. Colleges were asked in questions 26-32 to comment on AoC services and networking events, to provide contact data and to offer other comments. Consistent with the 2016/17 survey, the majority of respondents would like AoC to represent the sector in international issues, to provide international market intelligence and to provide commercial opportunities that colleges can bid for. Since the 2016/17 survey, AoC has done the following to ensure these services continue to be delivered:

- Updated the AoC international webpages to provide better information, including a members-only resource section
- Included commercial opportunities in AoC's international briefings, often forwarded from stakeholders such as Department for International Trade (DIT) and the British Council

- Arranged for guest speakers from key stakeholders such as the Home Office, DIT, UKCISA and English UK to attend AoC network meetings (offered free of charge) to provide FE-specific updates to members

45. Two-thirds of survey respondents wanted AoC to provide advice, policy guidance and college networking events/groups. As a membership organisation, fulfilment of the above is part of AoC's core service. The survey responses also offered helpful direction for AoC in that:

    - 57% of respondents want consortium working to bid for major international opportunities
    - 55% want AoC to provide training

    The UK Skills Partnership provides a collaborative framework to help the FE sector bid for international opportunities. However, AoC will take an action from the survey results to prioritise greater facilitation of networking and college consortium working.

    AoC organized bid-writing workshops in 2017 and 2018, and a mental health workshop in partnership with UKCISA in 2017. AoC will take an action from the survey results to offer colleges more opportunities for training.

46. Aside the AoC International Special Interest Group, where membership is upon application, on average 15% of survey respondents had attended an AoC international event or networking group. A core group of colleges regularly attend events. Cost, time or even event relevance may be factors preventing other colleges from joining AoC events. AoC also asked if colleges would like to see more events organized by webinar, over which there was still a preference for in-person events.

47. Taking into account the responses received and average attendance at in-person events, AoC has decided to reduce the number of targeted network groups we offer and to move to a twice-yearly Policy Day, involving external speakers and delivered in workshop format. We will also look to offer ad-hoc events and training in addition to thematic webinars.

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