ASSOCIATION
OF COLLEGES

International Activity in Colleges

The 2019 Association of Colleges Survey

February 2020

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. Members make up 95% of the 244[1] colleges in England incorporated under the Further and Higher Education Act 1992. AoC works closely with our partner associations in the devolved nations, particularly through the Independent Commission on the College of the Future[2].

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[3] and a founding member of EUproVET[4]. In line with the aims of AoC's strategic plan 2017-2020[5], our international goals are to:

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

4. Brexit ushers in a new era for the UK's international relationships and trade. There is rising global demand for technical training as world economies develop their workforce, yet UK FE represents only 1.4% of British education exports[6]. The UK Skills Partnership (of which AoC is a board member), has been established to bring together and to promote the UK skills sector. However, as the UK leaves the European Union (EU), it is more important than ever that colleges are empowered to be outward-facing, and that students and staff can connect with other countries and cultures.

---

[1] As of February 2020
[2] https://www.collegecommission.co.uk/
[3] https://wfcp.org/
[4] http://www.euprovet.eu/index.html
[5] https://www.aoc.co.uk/system/files/AoC%20Strategic%20Plan%202017-20.pdf
[6] UK revenue from education related exports and transnational education activity 2017: https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/850263/SFR_Education_Exports_2017_FINAL.pdf

The 2019 international survey

5. AoC conducted a survey of college international activity for the 2018/19 academic year. This report provides data for 2018/19 and comparisons with data from the two previous surveys[7]. There is growing interest in the scale and nature of international activity in colleges but very little data available. The UK Government's 2019 International Education Strategy[8] includes a specific and welcome objective to improve the accuracy of education export data, including from parts of education where information is minimal. 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. The survey was designed to provide a stocktake of international work at colleges, asking 31 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. The survey was issued to all colleges in AoC membership on a voluntary response basis. For the second year in a row, AoC worked in partnership with the college networks in Scotland, Wales and Northern Ireland who helped AoC to gather data on a UK level. If you missed the 2019 survey or have comments for the 2020 edition, please contact Emma Meredith.

2019 survey headlines

8. The survey results are in the main consistent with the two previous years' results. Whilst it is not possible to provide fully comparable data, any variation in the 2018/19 results was not great enough to signal substantial deviation from the two prior surveys. In fact, the survey signals that despite some minor developments, international activity in the college sector is largely static.

---

[7] https://www.aoc.co.uk/sites/default/files/AoC%20International%20Survey%20Report%202018_1.pdf
https://www.aoc.co.uk/sites/default/files/AoC%20international%20survey%20report%202017_0.pdf

[8] https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/799349/International_Education_Strategy_Accessible.pdf

9. Five headline points from the survey are:

   i. Student recruitment (EU and non-EU) retains its position as the mainstay of college international work. Recruitment from the EU strengthens but colleges must still play safe with Tier 4; 84% of survey respondents issue fewer than 50 CAS per year.

   ii. China remains the most important market for college international activity, almost three times more significant than any other country. However, this does not mean that FE is over-reliant on the market.

   iii. A college education is competitive and affordable; average international tuition fees are £7,957.

   iv. Colleges provide a pipeline to HE; 71% of respondents said more than half of their international (non-EU) students progressed to HE.

   v. Despite some signs of growth in vocational training and the natural maturity of some TNE ventures, policy and regulation are preventing colleges from realizing their export potential.

Sample size and nature

10. AoC issued the survey to college principals and international contacts (where applicable) in all AoC member colleges:

Type	**Number of college responses 2018/19**	**Total number of colleges**	**Percentage response within type**
England			
General Further Education College	45	171	26%
Sixth Form College	6	54	11%
Specialist College	1	26	4%
Total England	***52***	***251[9]***	***21%***
Total Scotland	**4**	**26**	15%
Total Wales	**3**	**14**	21%
Total Northern Ireland	**1**	**6**	17%
Other	**1**	N/A	N/A
Total responses UK	***61***	***297***	***20%***

[9] Correct at time of data collation, August 2019

11. A fifth of all UK colleges responded to the survey, and a fifth of colleges in England. Whilst not all colleges engage in international work or employ staff and resources dedicated to international activity, AoC is confident that the core colleges working internationally completed the survey. Furthermore:

- College mergers in England mean that the number of available responses decreases each year
- The same colleges do not always complete the survey each year

12. Within England, the highest response rates as a percentage of colleges within regions were from the South East, East Midlands, Yorkshire and the Humber and the South West. In these regions, there are specific colleges with a high level of international activity. Responses from the devolved nations helped to build an indicative profile of the UK's overall international activity.

13. Of the 61 colleges that responded, 80% are actively involved in international work and went on to complete the survey (all or most of the questions); similar levels to the 2017/18 survey. Several colleges that have no current international activity but who are assumed to have engaged previously also provided input. 33% of colleges that declared no current international activity had worked internationally in the past 5 years. However, the corresponding figure for the 2017/18 survey was only 10%. Between 2011-2015, student visa policy changes led to a progressive downturn in international students[10] and some colleges exited international work altogether. It is likely that recent college mergers in England will have influenced the number of colleges in a position to work internationally at the present time. Equally, Tier 4 Educational Oversight rules mean that if a college's Ofsted grade drops to 3 or 4, the college must exit Tier 4 recruitment. Only colleges that have the right infrastructure can make a strategic commitment to international work in a challenging regulatory and operating environment.

14. AoC asked whether colleges felt they had the right capacity and capability to deliver international work, regardless of whether they were already working internationally. The answer remains broadly consistent with the 2017/18 survey. 46% of respondents said yes against 49% in 2017/18:

---

[10] Section 1.1, Figure 1: https://www.gov.uk/government/publications/immigration-statistics-year-ending-september-2019/why-do-people-come-to-the-uk-to-study

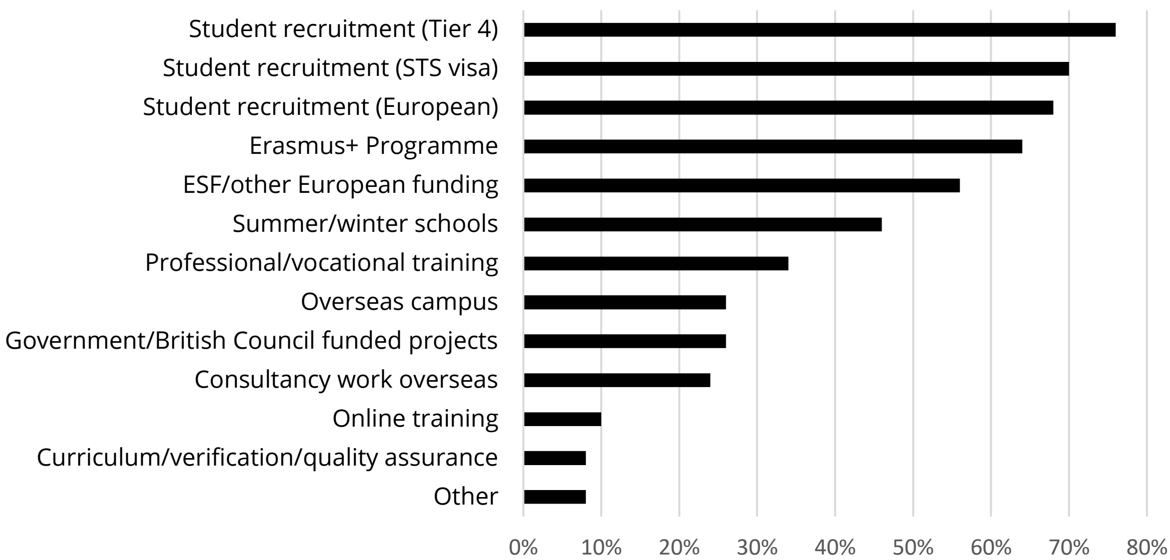
Q5. Do you feel your college has the right capacity and capability to deliver international work?	Number of responses	Percent
Yes, and we are already delivering international work	28	46%
We are delivering international work, but don't always have the capacity to respond to opportunities or to deliver them	20	33%
We aren't delivering international work, but would have the capacity to deliver	5	8%
No, we aren't delivering international work, and wouldn't have the capacity to do so	8	13%
Total	**61**	**100%**

15. Actions 17 and 18 of the UK Government's international education strategy aim to support UK skills organisations to take their offer internationally. Curriculum staff capacity, bid-writing expertise and financial barriers are common obstacles that deter colleges from export. As the foreword of the Government's strategy states: *'UK education is punching above its weight, but below its potential'*. The table above shows that this is certainly true for UK FE as 41% of colleges indicated that given the capacity and the support, they could do more internationally.

Range and nature of college international activity

16. Colleges are involved in over 15 different types of international activity, highlighting the breadth of the sector's expertise and future export potential:

Types of college international activity



17. Since the first AoC annual survey in 2017, student recruitment has not moved from the top activity spot; 76% of respondents recruit Tier 4 students with European student recruitment (70%) and Short-term study (STS) visa recruitment (68%) following closely behind. Infilling international students into college courses or offering standalone EFL classes provide a scalable revenue base from where it may be possible to develop other types of international activity. Whilst this is not the strategy at every FE college, the financial, academic and cultural contribution that international students make to colleges cannot be overlooked.

18. 58 colleges on the Home Office Tier 4 Register of Sponsors now hold the Tier 4 'privileges' conferred by registration with the Office for Students (OfS)[11]. This was a positive move away from differentiation between education providers in the Tier 4 system. However, it still means that international students at more than half of all college Tier 4 sponsors cannot work part-time or extend their visas in-country. Without either a 4-year compliance track record and HE provision, these benefits are not available.

19. A small increase was noted in the number of colleges involved in the Erasmus+ Programme, up 5 percentage points from 2017/18 to 64%. The UK's National Agency for Erasmus+ publishes official statistics[12] for the programme in which over 100 UK colleges have taken part during the 2014-2020 funding cycle. In October 2019, AoC published a report on the impact of Erasmus+ in colleges[13]. As the report recommends, the programme brings a range of personal development benefits to college students and the UK should continue to buy in to Erasmus+ from 2021 onwards.

20. The recruitment of European students reported a higher figure (70%) than the previous year's survey (48%). It is very difficult to provide a like-for-like comparison as the number of EU27 nationals in FE varies by college and region. Some UK regions have high numbers of EU nationals living locally. What can be assumed from the figures is that:

---

[11] The Tier 4 Register of Sponsors dated 19th December 2019 lists 122 publicly-funded colleges or colleges with HEI status: https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/752754/2018-10-31_Tier_4_Register_of_Sponsors.pdf

[12] https://www.erasmusplus.org.uk/results-and-statistics

[13] https://www.aoc.co.uk/sites/default/files/Erasmus%2B%20college%20impact%20report%202019.pdf

- EU27 students form an important part of the student body
- To help colleges plan post-Brexit, clarification will be needed on the fee and immigration status of new EU students for the academic year 2020/21 and beyond[14]

21. There was a small uptake in all other forms of international activity aside student recruitment and Erasmus+. This was most noticeable in the professional and vocational training category which increased by 12 percentage points to 46% against 2017/18. It is difficult to judge whether more colleges are engaging in vocational training overseas or whether a core set of colleges are simply doing more activity. However, it is a step in the right direction. UK college expertise lies in vocational training and this is an area of export potential.

22. Questions 8 and 9 asked about Tier 4 sponsor licences. 82% of survey respondents active internationally are Tier 4 sponsors. Consistent with the two previous AoC international surveys, the majority of college Tier 4 licence holders (84%) issue fewer than 50 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 number of Tier 4 students recruited by colleges do not pose a risk to UK immigration control. AoC would like some of the Tier 4 policy restrictions[15] placed on FE colleges to be lifted to allow international student numbers to grow, especially from countries where there is a clear demand for skills education.

23. Question 10 asked about visa refusals on the grounds of credibility. A quarter of respondents stated that they had experienced credibility refusals versus a third of respondents in the 2017/18 survey. There are several possible reasons for this improvement including the profile of countries that the students were recruited from. AoC is aware that the Government's points-based immigration system from 2021 may review the requirement for credibility interviews. There is no 'typical' FE student and greater trust should be placed in institutions' admissions decisions.

---

[14] AoC Brexit position paper, January 2020: https://www.aoc.co.uk/sites/default/files/AoC%20colleges%20and%20brexit%20position%20paper%2031.1.20.pdf

[15] As highlighted elsewhere in this report, restrictions include part-time working rights for international students at colleges, the ability for students to extend their visas in-country and the educational oversight rules.

Student numbers and income

24. 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. Survey questions 11 to 18 asked colleges to report student numbers and income against certain headings. As the survey is not a comprehensive census the data is incomplete. Until student data is collected on a more official basis, the most helpful figures are for average numbers of non-UK students studying at UK colleges.

25. This year's survey reported little difference between the figures for England and the rest of the UK. The main exceptions were EU27 student numbers (reflecting some differences in fee treatment and populations of EU nationals across the UK) and TNE numbers (reflecting English FE's well-established involvement in Saudi Arabia's Colleges of Excellence scheme):

	2018/19 average	2017/18 average	2016/17 average
Q11. How many international (non-EU) students are studying at your college in the academic year 2018/19, across **all visa types**?	223 England only 215 UK combined	288 England only 262 UK combined	121
Q12. How many international (non-EU) students are studying at your college in the academic year 2018/19 on **Tier 4 visas**?	17 England only 18 UK combined	23 England only 24 UK combined	26
Q13. How many international (non-EU) students are studying at your college in the academic year 2018/19 on **Short-Term Study (STS) visas**?	66 England only 70 UK combined	93 England only 94 UK combined	57

26. The data also indicated the maximum and minimum number of non-EU international students by college. The survey showed that there are individual institutions recruiting international students across all visa types into the low thousands or recruiting a couple of hundred Tier 4 students. However, the table above evidences that this is not the norm across the sector. The maximum number of Tier 4 students by college was higher in the rest of the UK than it was in England.

27. Home Office data[16] for the year ending September 2019 records a 9% drop in sponsored study visa applications for FE. For the same period, applications rose to the highest level on record for HE (universities) and increased for English language and independent schools. Even though the Home Office figures do not separate out public from private sector FE, AoC's data reinforces the notion that Tier 4 student intakes are static or declining in colleges.

28. Short-term study visas are widely used in FE for short courses therefore there is a continuous turnover of visas throughout the year. Some nationalities (e.g. Brazilian, Japanese) are non-visa nationals. They do not need a visa to enter the UK for courses of fewer than 6 months but will be counted and monitored as part of the overall college international intake.

29. Question 14 asked about TNE (transnational education) numbers. The definition of TNE is broad and captures education delivered in a country other than the country in which the (awarding) institution is based. 11 colleges reported that they offer programmes overseas on a transnational basis and 96% of college TNE students were in ventures delivered by English colleges. Large TNE college ventures are significant financial and logistical operations, enrolling several thousand students offshore. Small TNE college ventures are training the equivalent of one class of students. At the time of writing Department for Education (DfE) is looking into the value of UK TNE, including at colleges.

30. Question 15 asked about the number of full-time and part-time EU students enrolled at colleges. There is no official data for EU27 nationals studying at colleges in England; AoC estimates the figure to be around 2%[17]. It is very difficult to provide a meaningful year-on-year average number of EU students currently studying in colleges because of:

    - Variations in regional populations of EU nationals
    - Devolved approaches to the treatment of fees
    - Different types of student recruitment from the EU
    - EU27 nationals leaving/arriving before Brexit

    Our survey reported over 35,000 EU nationals were studying in English colleges and over 53,000 in UK colleges. Brexit will gradually impact the number of EU nationals studying in FE. As freedom of movement ends, EU

[16] See Home Office statistics in footnote 10

[17] https://www.aoc.co.uk/funding-and-corporate-services/brexit

nationals will enter the UK through mainstream immigration routes and may no longer have the same access to financial support for education.

31. Questions 16 to 18 asked colleges to record the income from their international activity. The questions covered non-EU international income (e.g. student recruitment, TNE) and EU income (e.g. Erasmus+, ESF funding and EU students). UK colleges reported over £100 million in EU and non-EU international income combined. In England, non-EU income was more than 3 times higher than EU income. For the UK as a whole, non-EU income was nearly 2.5 times higher than EU income.

32. For a more accurate picture of the sector's income from non-UK sources, a comprehensive exercise analyzing college annual financial statements would be needed. AoC's survey figures are an underestimate as college accounts in England for 2017/18 (the latest available figures) indicate over £150m in income excluding some TNE activity. Indeed Erasmus+ funding is largely 'money in money out' and is not always included in commercial income figures.

33. Based on AoC's survey data, the average income for UK colleges (EU and non-EU combined, across all activity types) is £1.4 million and £1.2 million for colleges in England only. The averages are higher than the figures reported in previous AoC surveys as they are more likely to include income from a small number of large-scale TNE ventures.

34. Colleges were asked to declare their income breakdown by activity type. 25% of activity comes from non-EU student recruitment:

Activity	UK *(34 respondents)*	England only *(29 respondents)*	Percentage points difference
International recruitment Tier 4	15%	15%	0%
International recruitment STS visa	10%	10%	0%
Fees from EU students	10%	13%	-3%
Erasmus+ funding	12%	8%	+4%
ESF funding	15%	8%	+7%
Summer or winter schools	8%	11%	-3%
Professional/vocational programmes	7%	5%	+2%
Overseas campus operation	5%	8%	-3%
Projects funded by UK Government/ organisations e.g. Prosperity, British Council Skills Partnerships	1%	0%	+1%
Consultancy work overseas	1%	1%	
Online training courses	0%	0%	
Other curriculum/verification/quality assurance activity	1%	1%	
Other	15%	21%	-6%

International provision

35. Question 19 calculated the average tuition fees for a one-year full-time college course; £7,917. College tuition fees are amongst the most affordable in the UK education sector.

36. Colleges were asked to list the breakdown of course levels that their international cohorts choose:

Q20. Regulated Qualifications Framework (RQF) course level	Number of responses 2018/19	Percent 2018/19	Percent 2017/18
Level 3 (SCQF level 6)	35	83%	83%
Level 4	18	43%	31%
Level 5	16	38%	30%
Level 6	8	19%	9%
Range of English language proficiency levels (e.g. Beginners to Advanced)	18	43%	41%
Professional qualification level e.g. ILM, CIM	4	10%	0%
Other	4	10%	6%
Total	**42**		

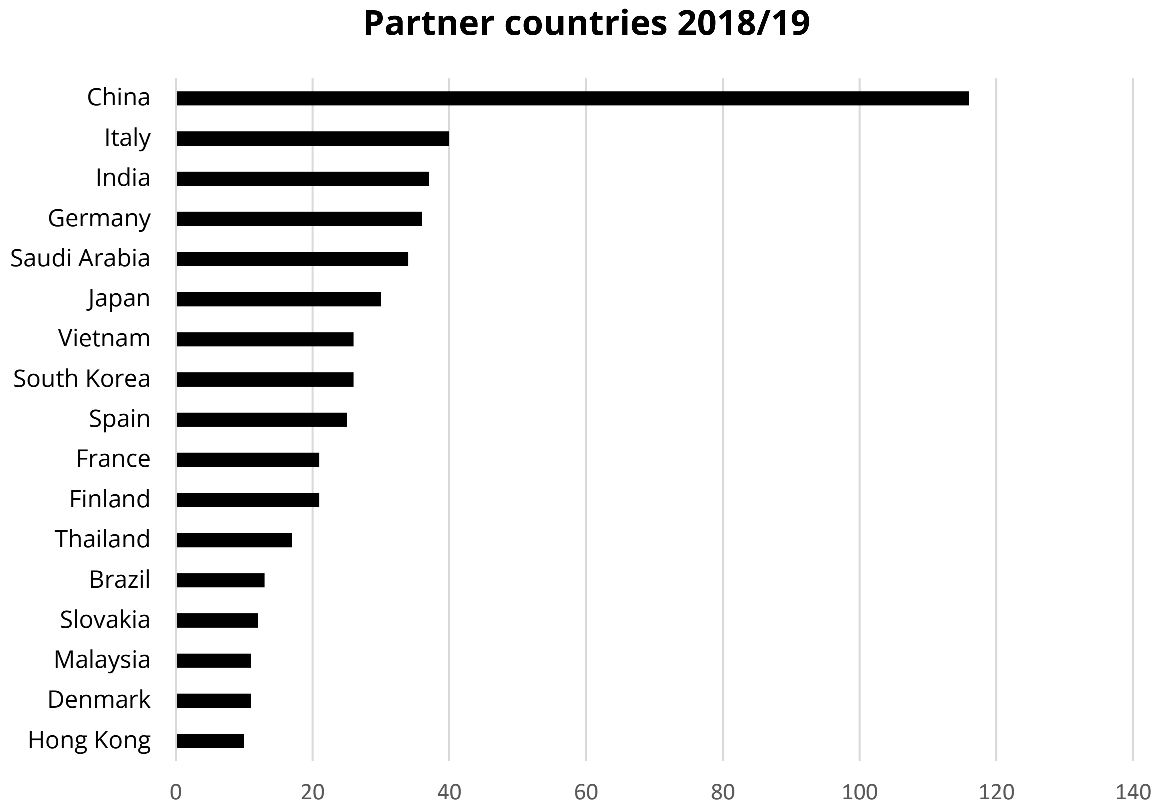
37. The data shows an increase in the popularity of higher level and professional courses with Level 3 (SCQF Level 6) remaining the most popular. This pattern is consistent with the two previous international surveys and highlights the important role that colleges play in providing pathways and access to higher education. For the first time the survey also asked what percentage of non-EU international students progressed to HE courses at college or university. The results show that whilst some students come to the UK for standalone courses (e.g. summer schools, short training or taster programmes), progression from FE to HE is significant:

Q21. What % of your non-EU international students progress to HE courses, whether at college or university?	Number of responses	Percent
Less than 5%	7	23%
5%-14%	2	6%
15%-24%	0	0%
25%-49%	0	0%
50%-74%	3	10%
75%-100%	19	61%
Total	**31**	**100%**

38. Questions 22 and 24 asked colleges were asked to list the top 5 areas of strength, specialization and curriculum most important to their international work. A wide range of areas were listed, showing the breadth of provision in the college sector. A-levels, ESOL/EFL courses and teacher training came out top. The results revealed some niche areas of vocational provision attractive for export, including in SEND, maritime, logistics and early years education.

International markets

39. Question 22 asked respondents to list and rank the five countries of most importance to their college's work. Colleges identified 60 different countries that they partner with and the table below highlights the most cited:



40. China and Italy retain their top spots for the third year in a row and India takes third place for the second year in a row. Japan holds but Germany and Saudi Arabia move up the chart, pushing down Spain and Vietnam.

41. It is not surprising that China again tops the chart. The scale of the opportunity in China is very attractive to UK FE given the country's increasing commitment to vocational education, vast geography and a growing middle class. China is by a considerable stretch the biggest sender of international students to the UK as a whole. In the year ending September 2019, there were 119,697 Tier 4 visas granted to Chinese nationals studying in the UK education system[18]. UK colleges are not necessarily over-reliant on partnerships in China, but they are very important for student recruitment, teacher training and TNE in FE. As the UK completes its departure from the EU and the new points-based immigration system comes into force, more movement in the table of college partner countries can be expected.

[18] See Home Office statistics in footnote 10

College and AoC services

42. Colleges were asked about their accommodation provision. 73% of respondents offered homestay, along similar lines to the 74% of respondents in the 2017/18 survey. An increase of 8 percentage points was noted both in the volume of colleges that declared on-campus residences (up to 30%) and staff with dedicated responsibility for international activity in their college (up to 90%). For colleges in some parts of the country, homestay hosts provide safe, local and affordable student accommodation that would otherwise be unavailable. International students support regional economies.

43. Question 26 gauged college capability and capacity to engage in special education needs and disability (SEND) programmes. This is an area of increasing interest overseas and one that some UK colleges specialise in. 75% of respondents confirmed that they could deliver SEND activity, up 18 percentage points from 2017/18.

44. For the first time AoC looked at the correlation between college international activity and WorldSkills competitions. 69% from 51 respondents engage both in skills competitions and international work. Participation in WorldSkills competitions brings many benefits to college staff (e.g. teaching methodologies) and students (i.e. personal development, technical skill enhancement). Whilst only a small number of competitors make the UK squad for the international WorldSkills finals, it is true that engagement in skills competitions, like engagement in international work, exemplifies an outward-facing mentality.

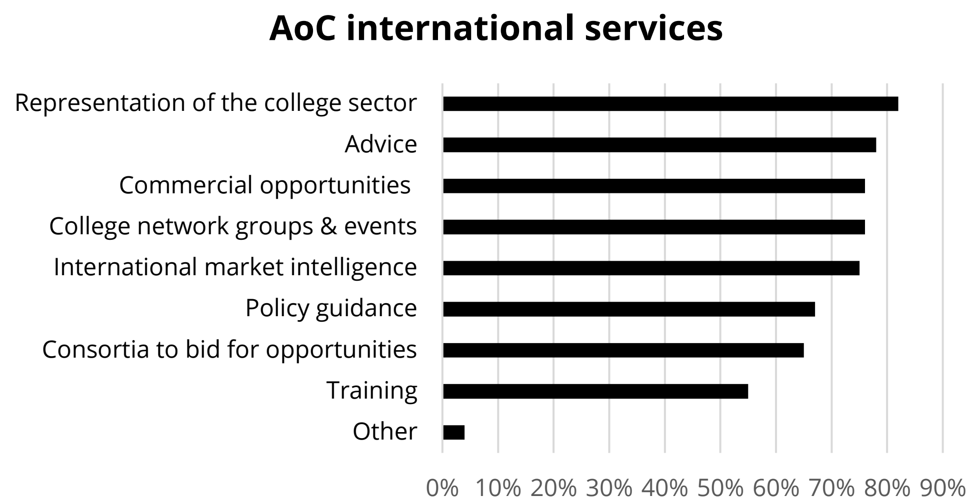
45. The survey concluded with two questions about AoC's services, to help us direct our work and support member colleges. In 2018/19 AoC reviewed our international network groups and events for members. We provide:

    - 2 free international policy workshops per year with invited stakeholders from Government and partner associations
    - 3 meetings per year of the International Special Interest Group
    - Weekly international briefings for members
    - New Jiscmail facility for international staff in colleges

46. The survey indicates that AoC maintains a good level of engagement with our members who are active internationally, and that our international briefing is seen by colleges:

Q29. Please indicate whether you have accessed any of the following support services from AoC for your international work over the last year:	Yes	No	Total
Attended AoC international meeting or event	76%	24%	100%
Emailed/telephoned/met with AoC for advice or support	71%	29%	100%
Read the AoC international briefing	94%	6%	100%
Accessed the AoC international webpages	71%	29%	100%

47. Colleges were asked to rank AoC's international support in terms of relevance to their overseas activity. Policy guidance, advice and networking scored more highly in 2018/19 than in 2017/18. Facilitation of international market intelligence and consortium working dropped slightly but there are other organisations specializing in these areas and AoC's core focus is education policy, representation of and support to colleges. We hope that our work continues to meet colleges' expectations each year:



Recommendations

48. **Improved data capture**
Now in its third year, this survey provides baseline information that AoC is pleased to have seen referenced in a number of UK Government and stakeholder publications[19]. However, there is still insufficient data about college international activity and no formal mechanism to capture it. This renders international education, export and immigration policy very difficult

[19] e.g. http://www.exeduk.com/wp-content/uploads/2018/11/APPG-Report-FINAL-WEB-1.pdf; https://www.gov.uk/government/publications/migration-advisory-committee-mac-report-international-students

to inform for the college sector. AoC is committed to working with officials to explore ways of generating better information for FE.

In line with the objectives of Government's international education strategy, more and better international activity data is needed for colleges. A first step would be to split out Home Office public and private FE figures.

49. **Export potential audit**
UK FE makes up only 1.4% of UK education exports compared to more than 15% from comparable sectors in Canada and Australia. International activity in colleges is static yet the global demand for skills training is rising. Some colleges are deterred from starting international work due to concerns over risk, cost and lack of experience. In 2020 it is anticipated that some of the devolved nation college sectors will see funded commissions that scope the international capacity and potential of their colleges.

UK Government and/or organisations that promote UK education should fund and deliver an audit into the export potential of the 244 colleges in England. The audit should identify the barriers to export and college training/support needs. When combined with the commissions expected in the devolved nations, the UK would possess a clear overall picture of FE's export readiness to deliver on the Government's international education strategy.

50. **Amendment to Tier 4 Educational Oversight**
Each year the Educational Oversight rules cause colleges in England to exit Tier 4. Home Office policy states that colleges inspected by both Ofsted and OfS (Office for Students) must hold current and valid inspections by both bodies at specified grades. For example, it is not possible to keep recruiting HE international students if a college achieves grade 3 in Ofsted. Failure to meet these requirements can place college income, international partnerships and even college jobs at risk. EU27 students will enter the Tier 4 immigration route from 2021 therefore the rules will impact a greater number of potential college applicants.

The Home Office should amend its Educational Oversight guidance to allow Tier 4 sponsors that drop to Ofsted grade 3 to continue recruiting Tier 4 students, introducing additional monitoring requirements for them until their grade improves.

www.aoc.co.uk
Association of Colleges
2-5 Stedham Place, London WC1A 1HU
T: 020 7034 9900
E: enquiries@aoc.co.uk
@AoC_info
Association-of-Colleges