ASSOCIATION OF COLLEGES

International Activity in Colleges

The 2020 Association of Colleges Survey

January 2021

Contents

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 238[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 work with businesses to 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 is a board member of the World Federation of Colleges and Polytechnics[3] and a founding member of EUproVET[4]. We support colleges in the development of their international activity by:

    i. Setting the agenda for positive policy change
    ii. Promoting the quality reputation of colleges
    iii. Delivering support, advice and intelligence to our members
    iv. Representing college interests and assets to governments both at home and overseas

4. In 2020, the far-reaching consequences of the coronavirus pandemic changed our daily lives, dominated the news and pushed Brexit down the headlines. Early in 2021, Covid-19 shows little sign of abating but mass vaccination programmes are underway. The pandemic has largely grounded international travel, posing a major challenge to traditional models of international study, mobility and partnership. As a result of the pandemic, the international education sector has been forced to consider long overdue questions about sustainability, the environment and use of technology in its practices.

5. This report describes the impact of the pandemic on college international work for the 2019/2020 academic year. During 2020 AoC published a range of Covid-19 publications mapping the pandemic's effect on Further Education (FE) in

[1] As of December 2020
[2] https://www.collegecommission.co.uk/
[3] https://wfcp.org/
[4] http://www.euprovet.eu/index.html

areas such as digital skills, mental health and college finances. Our Rebuild[5] paper provided a series of recommendations for a skills-led UK economic recovery.

The 2020 international survey

6. As the UK emerged from the first Covid-19 lockdown in summer 2020, AoC conducted a survey of college international activity for the 2019/20 academic year. Set against a backdrop of temporary campus closures, online teaching and evolving government guidelines, it was also a time where colleges showed their flexibility, innovation and resilience. This report provides data for the academic year and comparisons with the three previous surveys[6].

7. Despite growing interest in the UK's international skills offer, very little data is available about its scale. The UK Government's 2019 International Education Strategy[7] sets out a specific and welcome objective to improve the accuracy of education export data, including from parts of the education sector where information is minimal. AoC's international survey provides baseline data about college international work in order to:

   i. Inform our members
   ii. Inform our stakeholders
   iii. Inform government policy regarding international education and export

8. The survey was designed to provide a stocktake of international work at colleges, asking 36 questions relating to overseas 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. Specific questions were included to map the impact of Covid-19 on college international work.
9. The survey was issued to all colleges in AoC membership on a voluntary response basis between June to July 2020, to capture international activity for the full 2019/2020 academic year. For the third year in a row, AoC worked in

---

[5] https://www.aoc.co.uk/sites/default/files/REBUILD%20-%20A%20skills%20led%20recovery%20plan%20%28full%20doc%29%20FINAL_1.pdf
[6] https://www.aoc.co.uk/sites/default/files/AoC%20International%20Survey%20Report%202019.pdf
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
[7] https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/799349/International_Education_Strategy_Accessible.pdf

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 2020 survey or have comments for the 2021 edition, please contact Emma Meredith.

2020 survey headlines

10. The 2020 survey shows results that that are consistent with previous years in addition to new findings that are Covid-specific. Ten headline points from the survey are:

    i. Covid-19 meant respondents were on average 19% down on their forecast international income. The pandemic also impacted college international staffing and marketing capacity. The international income shortfall rose to 39% when major TNE activity was discounted from the figures.

    ii. Erasmus+ - to be replaced by the Turing scheme from 2021 - was the most significant form of international activity reported by colleges.

    iii. China remains the most important country for college international activity – listed almost three times more than any other country. It is also the top target market for new opportunities.

    iv. Tier 4 recruitment dropped. No college that responded to the survey had issued more than 50 CAS (Confirmation of Acceptance for Studies) to international students.

    v. Colleges provide a pipeline to HE; respondents said that more than half of their overseas students progressed to HE.

    vi. 73% of respondents expect fewer EU students under the post-Brexit immigration scheme than before freedom of movement ended.

    vii. Study at Level 3 is still the most popular amongst FE international students, but study at Level 6 and above appears to have risen.

    viii. Online training as a form of college international activity quadrupled from 2019 to 2020.

    ix. A levels, English language courses and teacher-training are FE's key areas of strength for the international market.

x. Colleges want to work collaboratively to win international business.

Sample size and nature

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

Type	Number of responses 2019/20	Total number of colleges	Percentage response within type
England			
General Further Education College	34	168	20%
Sixth Form College	7	51	14%
Specialist College	4	25	16%
Total England	***45***	***244[8]***	***18%***
Total Scotland	**1**	**26**	4%
Total Wales	**4**	**14**	29%
Total Northern Ireland	**4**	**6**	67%
Other	**2**	N/A	N/A
Total responses	***56***		

12. Almost a fifth of UK colleges responded to the survey, and just under a fifth of colleges in England. Whilst some colleges might operate student exchanges, 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:

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

13. Within England, the highest response rates as a percentage of colleges within regions were from the South East, North East, East Midlands, Yorkshire and the Humber and the South West. In these regions, there are 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.

[8] Correct at time of data collation.

14. 88% of respondents stated they were actively involved in international work and went on to complete the survey (all or most of the questions). 29% of colleges that declared no current international activity had worked internationally in the past five years - broadly the same figure as in 2019.

15. Between 2011and 2015, student visa policy changes led to a progressive downturn in FE international students[9] and some colleges exited international work altogether. Student recruitment in the college sector has never fully recovered. Home Office 'Educational Oversight' rules mean that if a college's Ofsted grade drops to three or four, the college must stop all recruitment through the visa system now known as the Student route[10].It remains the case that only colleges that have the right infrastructure can really make a strategic commitment to international work in a challenging regulatory and operating environment.

16. AoC asked colleges whether they felt they had the right capacity and capability to deliver international work, regardless of whether they were already working internationally. More colleges answered yes in 2020 than in previous years, up from 46% to 57% - perhaps reflecting that international activity is well embedded and established in their institutions. 5% of respondents said that they were considering delivering international work as a result of Covid-19:

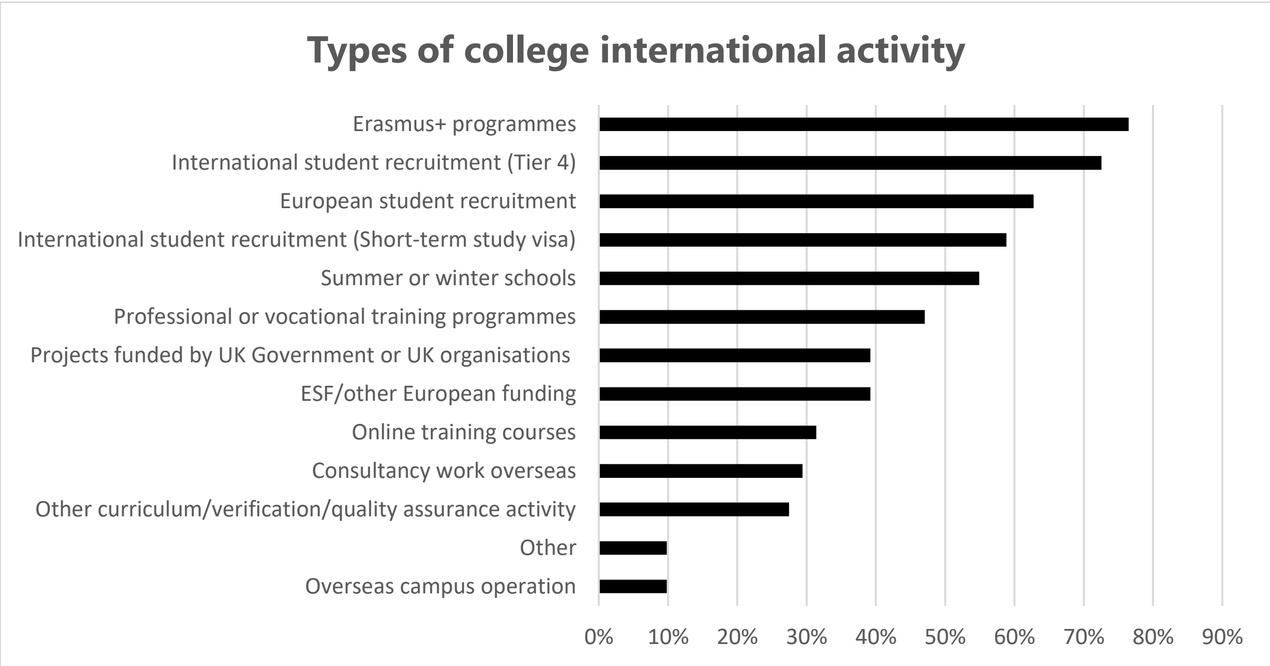
Q5. Do you feel your college has the right capacity and capability to deliver international work?	Number of responses	Percent
Yes, and we are already delivering international work	32	57%
We are delivering international work, but don't always have the capacity to respond to opportunities or to deliver them	17	30%
We aren't delivering international work, but are considering doing so in the light of Covid-19	3	5%
No, we aren't delivering international work, and wouldn't have the capacity to do so	4	7%
Total	**61**	**100%**

17. Actions 17 and 18 of the UK Government's 2019 international education strategy aim to support the UK skills sector to take its offer internationally. AoC believes that curriculum staff capacity, bid-writing expertise, financial barriers and consortium working are common obstacles that still deter colleges from realising their export potential.

[9] 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
[10] The survey was conducted before the Student route launched in October 2020. The term 'Tier 4' was used in the survey questionnaire and therefore will be used in this report.

Range and nature of college international activity

18. Colleges are involved in over a dozen different types of international activity, highlighting the breadth of the sector's expertise and export possibility:



19. Since the first AoC annual international survey in 2017, student recruitment had not moved from the top activity spot. In 2020 however, Erasmus+ edged slightly ahead. Over 100 colleges took part in the 2014-2020 Erasmus+ programme cycle, drawing down €99.7m in funding. It is perhaps not surprising therefore that in 2020 Erasmus+ should top the chart. Ongoing uncertainty about UK participation in Erasmus+ beyond 2020 meant there was heightened publicity and campaigning about the programme.
20. It is also possible that AoC's 2020 survey received a particularly strong response from colleges engaged in Erasmus+, both in England and in the devolved nations. Colleges had taken steps to ensure their Erasmus+ participation given future uncertainty. In Wales, colleges have taken part in Erasmus+ through consortia projects managed by Colleges Wales. In Scotland, the importance of Erasmus+ to the college sector was highlighted in the 2020 International Ambitions Report[11] commissioned by College Development Network (CDN) Scotland. Despite Covid-19 disruption to Erasmus+ mobilities in 2020, colleges remain committed to resuming placements and travel for their students and staff as soon as it becomes safe to do so.

[11] https://www.cdn.ac.uk/wp-content/uploads/2020/09/International-Ambitions-Report.pdf

21. Closely behind Erasmus+ in the activity table are various types of international student recruitment. Infilling international students into college courses or offering standalone ELT classes provide a scalable revenue base from where it may be possible to develop other types of international activity. It also reflects the longstanding relationships with international agents and partners that colleges have maintained in a tough operating environment. The financial, academic and cultural contribution that international students make to colleges should not be underestimated.

22. The direct recruitment of EU/EEA/EFTA[12] students to a range of college courses remained an important component of international work for some colleges. This will evolve differently in the post-Brexit UK as EU nationals are subject to new immigration rules and from August 2021 are no longer eligible for Home fees and funding. It remains to be seen whether this change will prove a challenge or a new opportunity. What is known is that some programmes that colleges have traditionally offered to EU nationals are at risk now the UK has departed the union and freedom of movement has ended. For example, European students have often spent a senior high school year at an English college, following the A level syllabus but without taking the exams. This type of programme or part-time Masters-level study will not be viable under the UK's new immigration rules for EU nationals.

23. The percentage of respondents delivering online training almost quadrupled from 2019 to 2020. Colleges looked to move ELT classes and some summer schools online to salvage a very difficult international travel situation during the pandemic. Others also began to look at developing new online products for the international market in the longer term.

24. Professional/vocational training and funded projects also scored more highly in the 2020 survey than in 2019. These are areas of opportunity for colleges that with the right support, including from government, could unlock greater possibilities overseas.

25. Questions 8 and 9 asked about Tier 4 sponsor licences. 71% of survey respondents that are active internationally are student sponsors, a drop from 82% the previous year. 6% were legacy sponsors as opposed to only 2% in 2020. Although the Home Office is phasing out legacy sponsor status, the issue remains that some colleges become legacy sponsors because of the double educational oversight referred to in section 15 above. More colleges may apply

[12] For ease of reading, further references to EU, EEA or EFTA countries, students or partners in this report will be abbreviated to 'EU'.

to become student sponsors if they wish to recruit EU students now freedom of movement has ended.

26. Consistent with previous AoC international surveys, college Tier 4 licence holders generally issue fewer than 50 CAS per year. This year 100% of respondents replied that this was the case. Concern over the likelihood of visa refusals remains a real risk for colleges when issuing CAS, which drives down student numbers. It is also more difficult to recruit within the current visa regime from some countries where there is demand for vocational education.

27. In 2020, Covid-19 will no doubt have played a greater role in driving down student numbers as the pandemic first hit China in the winter before moving into other parts of Asia, becoming widespread in Europe by March. Colleges with January, spring and early summer starts in 2020 are likely to have been particularly affected as UK visa centres overseas were temporarily closed and countries shut their borders, restricting overseas travel.

28. Question 10 asked about visa refusals on the grounds of credibility. In 2019, a quarter of respondents stated that they had experienced credibility refusals versus a third of respondents in the 2017/18 survey. In 2020, this figure dropped to less than a fifth. This is a positive sign even if colleges overall sponsored fewer students, as outlined in section 26 above. There are several possible reasons for this improvement. It could be that more students were recruited from countries perceived as 'lower risk', that there is a better understanding within the visa application process of FE, or simply that fewer college applicants went through the system, perhaps because of Covid-19.

29. Colleges have a role to play in delivering the 2019 international education strategy's student number target; 600,000 international students per year to be hosted in the UK by 2030. Although this target is largely expected to be delivered by the university sector, colleges provide a pathway to university and further UK study, as section 47 of this report will discuss. Home Office figures show applications to FE account for around 5% of the total sponsored UK study visa applications, compared to 86% for higher education[13]. Steps are already being taken to look at how the UK promotes its whole international education offer internationally. Joint working is taking place between UK education associations and through the Department for International Trade (DIT) Education Sector Advisory Group[14].

[13] https://www.gov.uk/government/publications/immigration-statistics-year-ending-september-2020/why-do-people-come-to-the-uk-to-study
[14] https://www.gov.uk/government/groups/education-sector-advisory-group

Student numbers and income

30. There is no firm data on the number of international students in colleges nor on the college sector's contribution to export. Colleges are not required to collect data on student nationality and Home Office student visa statistics still do not separate out the publicly funded college sector from the private college sector. In essence therefore, there is no formal, central mechanism for colleges to report their international information.

31. The most recent government data for education export and transnational education activity (TNE) is from 2018[15]. It details further education's contribution as 1.2% of the total, the smallest contributor by education sub-sector and dropping from 1.4% of the total in 2017[16]. College revenue from non-EU fee and living cost income has dropped by 64% since 2010. This sits at odds with the growing demand for skills education around the world that colleges are well placed to provide.

32. AoC's survey questions 11 to 20 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 student numbers and average income. However, it should be noted that the average can be significantly different to the minimum and maximum numbers reported against each survey question.

33. This year's survey recorded little difference between the figures for England and the rest of the UK. The main exceptions were:

- EU27 student numbers – a higher average for the whole of the UK versus England only, reflecting some differences in fee treatment and population spread of EU nationals across the UK.
- Non-EU students on visas - higher in England which reflects English colleges' greater involvement in international student recruitment than can be the case in devolved nation colleges.
- TNE numbers - higher in England which reflects English colleges' well-established involvement in progammes such as Saudi Arabia's Colleges of Excellence.

---

15 https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/944966/SFR_education_exports_2018_FINAL.pdf

16 https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/850263/SFR_Education_Exports_2017_FINAL.pdf

	2019/20 average	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 2019/20, across **all visa types**?	193 England only 159 UK combined	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 2019/20 on **Tier 4 visas**?	13 England only 12 UK combined	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 2019/20 on **Short-Term Study (STS) visas**?	42 England only 36 UK combined	66 England only 70 UK combined	93 England only 94 UK combined	57

34. International student numbers were down across the board in the 2019/20 academic year, no doubt in part at least as a result of Covid-19. AoC's international survey data indicates that the average number of international students in colleges, including Tier 4 students, has steadily and worryingly declined since our 2017/18 report. Individual survey responses highlighted that the maximum number of Tier 4 students recruited by any individual college dropped significantly between 2019 and 2020. AoC's autumn 2020 survey of colleges[17] had mapped that 50% of colleges recruiting international students said their enrolments were down for the 2020/21 academic year. The impact of Covid-19 will be felt across at least two if not three or more academic years, assuming international student recruitment ever returns to its pre-Covid model. Indeed, Home Office data for the year ending September 2020 shows that the number of Tier 4 grants to Chinese nationals, by far the most important source country for international students in the UK, was less than half of what it was in the same period in 2019[18].

35. AoC is aware from its member engagement throughout 2020 that short-term study groups and summer schools had to be cancelled due to the UK spring lockdown and Covid-related travel restrictions, including quarantine

[17] https://www.aoc.co.uk/sites/default/files/AoC%20Survey%20-%20Colleges%20Students%20and%20Covid-19%20%28November%202020%29.pdf
[18] See footnote 13

requirements. Summer schools and short-term study typically attract EU students, non-visa nationals and those requiring a Short-term study visa. AoC's survey data showed that average Short-term study visa numbers across survey respondents halved between academic year 2018/19 and 2019/20. Home Office data shows that the number of Short-term student visas granted in the year ending September 2020 was 71% lower than in the year ending September 2019[19].

36. Question 14 asked colleges about their TNE activity. TNE is generally education delivered in a country other than the country in which the delivery institution is based. An example of a much smaller TNE venture in FE is a college that trains the equivalent of one class of students overseas. A small number of colleges are engaged in this activity on a very large scale in Saudi Arabia and others on a much smaller scale elsewhere. The college activity in Saudi Arabia was encouraged by the Department for International Trade's predecessor, UKTI, and involved consortia of colleges, sometimes working with companies, and in one case operating alone, bidding for long-term contracts in which they operated vocational colleges in the kingdom. There are thousands of Saudi students enrolled in colleges operated by four consortia with English college involvement and AoC estimates the total value of the income is £70 million a year.
37. Question 15 asked about the number of full-time and part-time EU students enrolled at colleges. No official data is collected about EU27 nationals studying at colleges in England; AoC estimates the figure to be around 2%[20]. Our 2020 survey reported over 20,000 EU nationals studying in UK colleges against 53,000 in 2018/19. It is very difficult to provide a meaningful or accurate year-on-year figure for the EU student population. The drop in numbers for the 2019/20 academic year partly may be because of Covid-19 as some students chose to return to their home country before lockdown. However, it seems unlikely to be the sole explanation. Other factors include:

i. Variations in regional populations of EU nationals.
ii. Different types of student recruitment from the EU.
iii. EU27 nationals leaving/arriving before Brexit and the end of freedom of movement.
iv. Different colleges responding to AoC surveys each year.

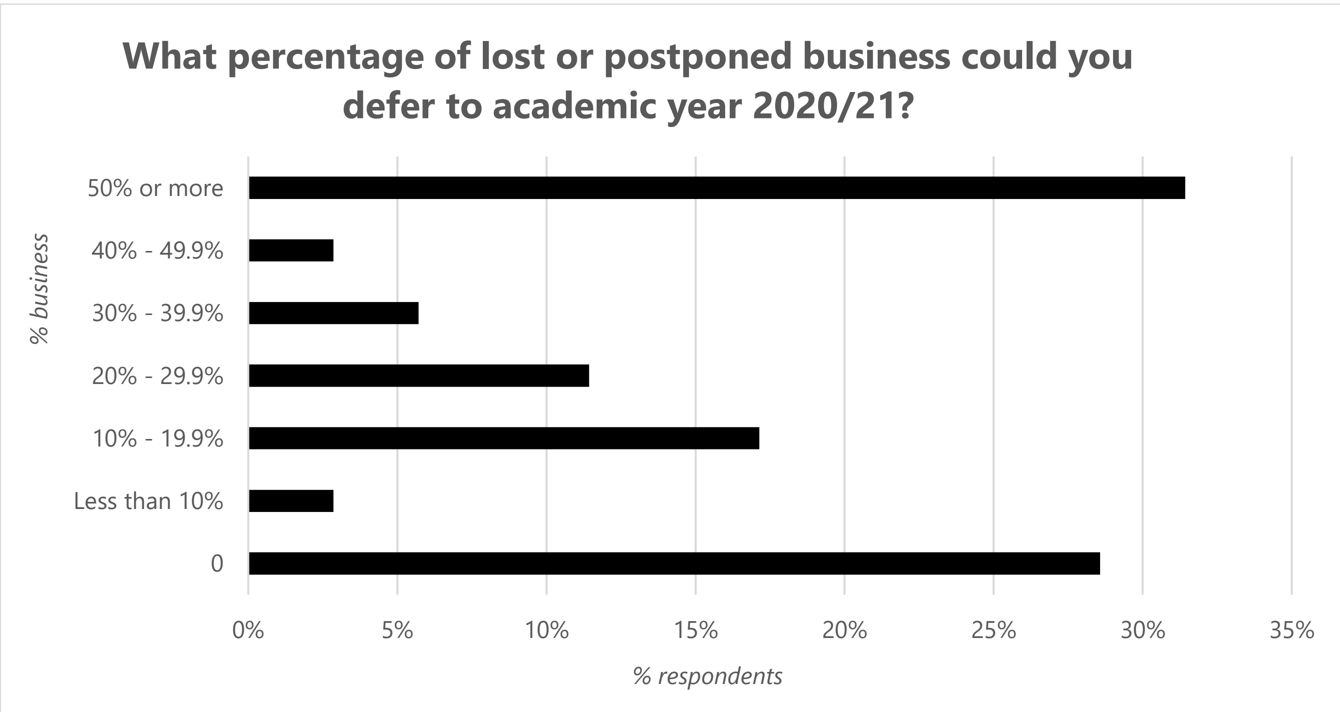
38. Question 16 asked colleges about the anticipated impact of the end of freedom of movement between the UK and the EU. 73% of respondents that currently enrol EU students felt that the introduction of the UK's new points-based immigration system in 2021 would mean fewer EU students than before Brexit. Only 2% expected more EU students than before Brexit and 19% estimated no

[19] See footnote 13
[20] https://www.aoc.co.uk/funding-and-corporate-services/brexit/eea-students-in-colleges

change. 21% thought that some of their programmes that attract EU students would no longer be possible under the new immigration system, and 4% stated they were ineligible for a student sponsor licence so would be unable to recruit EU students to some programmes. 52% of respondents thought that the end of freedom of movement would mean a loss of income.

39. Questions 17 to 19 asked colleges about the impact of Covid-19 on their forecast international income. Colleges were asked to interpret 'international income' according to their own college definition of international activity. Adjusted for the coronavirus outbreak and including all types of reported international income, respondents reported a 19% international income shortfall, rising to 39% when substantial TNE activity was subtracted from the figures.

40. Colleges were also asked what percentage of lost or postponed international business from 2019/20 they could defer to academic year 2020/21. Whilst 31% of respondents could defer 50% or more - a positive outcome - 29% of respondents could not defer any. College business overseas is another financial casualty of Covid-19 alongside income losses from other sources (e.g. apprenticeships) and rising health and safety costs:

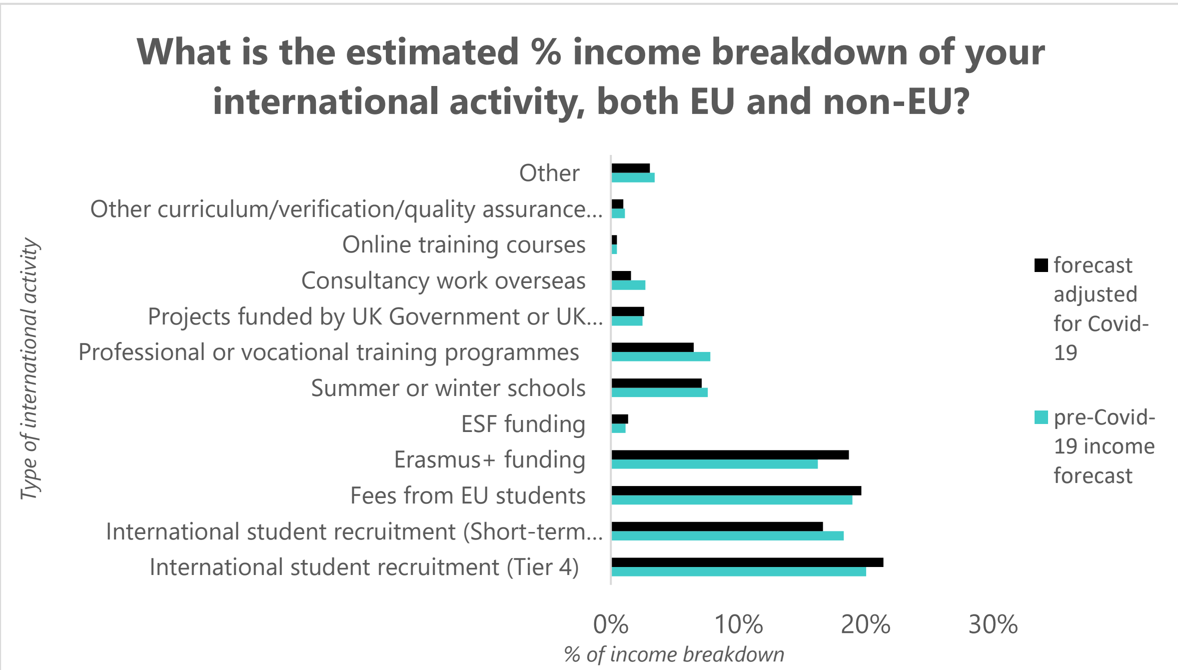


41. Average college international income (excluding large-scale TNE ventures) was forecast to be £742k p.a. for academic year 2019/2020 pre-Covid. With TNE taken into account the figure doubles to £1.48m, akin to the figure reported in AoC's

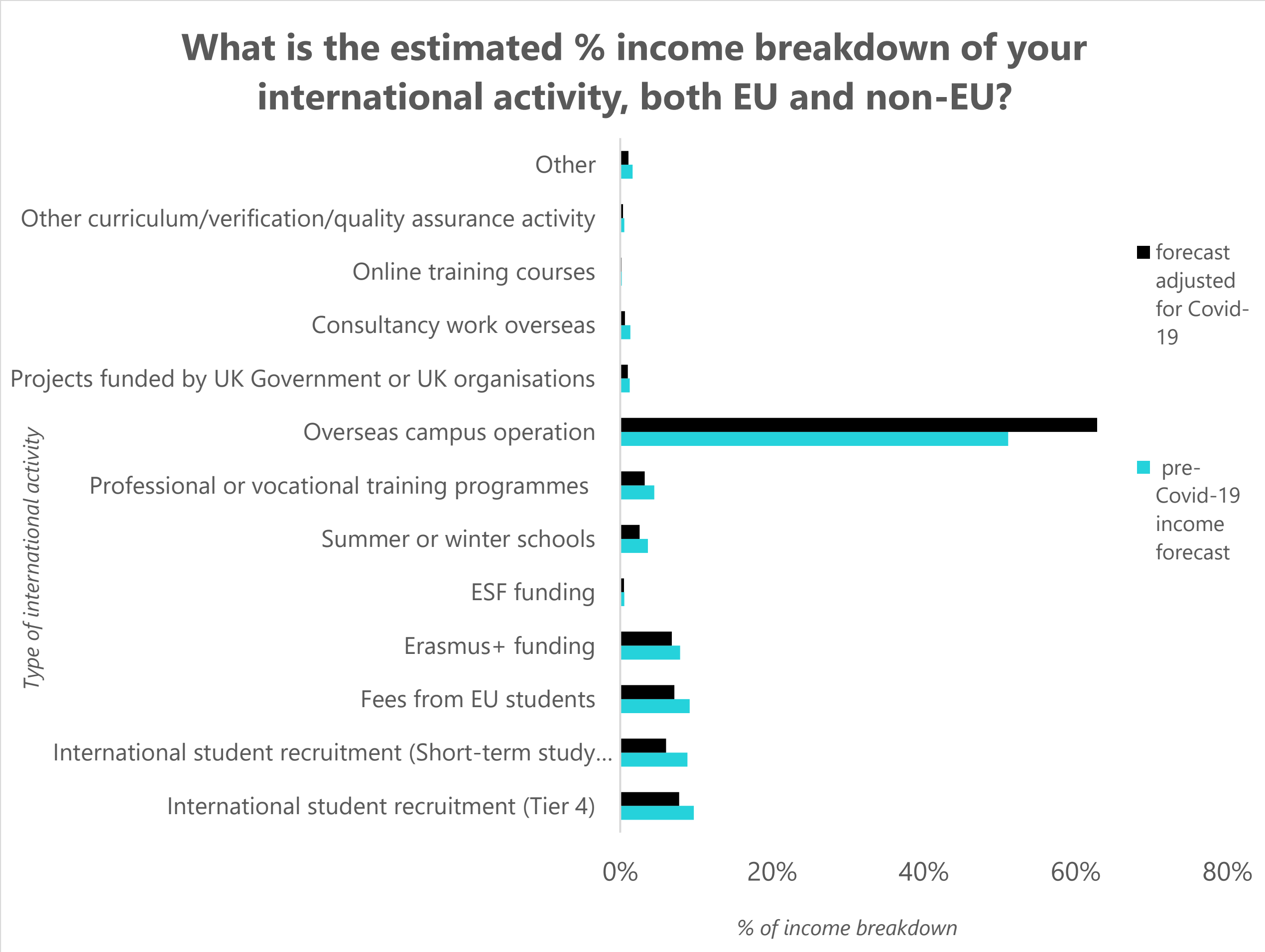
2018/19 survey. However, for a more accurate picture of the sector's total income from non-UK sources, a comprehensive exercise analysing college annual financial statements would be needed.

42. Question 20 mapped the impact of Covid-19 on the breakdown of international income. The contribution from different income categories adjusts up or down to the business impact of Covid-19. The contribution by overseas campus operations shows a clear increase. Colleges operating campuses overseas were able to switch to online learning for their TNE students in the same way as for their domestic learners. This will have created challenges, opportunities and innovation not covered by our international survey report, but which would be interesting to explore. However, it is worth noting that from AoC's survey data, TNE appears to have played a more important role in the delivery of international income during Covid-19. TNE was less likely to be impacted by international travel restrictions in the same way as inbound summer schools or short-term study groups.

43. There was little variation in the data between England and the UK in terms of international activity breakdown. Erasmus+ was a little more prominent when the devolved nations were included. When TNE is discounted, different forms of international student recruitment lead the chart, as per 2018/19:



When TNE is included, it is the leading activity in terms of contribution to overall international income:



International provision

44. Question 21 calculated the average UK tuition fees for a one-year full-time college course; £7,347 against £7,917 in 2019. The 2020 average for England only versus the UK was just slightly higher at £7,739. International tuition fees can go up to £14k for some college courses but international fees in FE are probably amongst the most affordable in the UK education sector. For the 2021/22 academic year, colleges will need to decide what tuition fees to charge newly arriving EU students as from August 2021, they will no longer be eligible for Home fees and funding.

45. Colleges were asked to provide a breakdown of course levels that their international cohorts choose:

Q22. Regulated Qualifications Framework (RQF) course level	Number of responses 2019/20	Percent 2019/20	Percent 2018/19	Percent 2017/18

Level 3 (SCQF level 6)	35	73%	83%	83%
Level 4	20	42%	43%	31%
Level 5	19	40%	38%	30%
Level 6	14	29%	19%	9%
English language proficiency levels (e.g. Beginners to Advanced)	19	40%	43%	41%
Professional qualification level (e.g. ILM, CIM)	5	10%	10%	0%
Other	6	13%	10%	6%
Total	**48**			

46. Level 3 (SCQF level 6) remains the most popular although it has dropped by ten percentage points in comparison with the previous year. Level 6 (SCQF level 9) has increased by 10 percentage points to 29%. Given the summer 2021 launch of the new Graduate route the college higher education offer to the international marketplace may become more prominent. All other course levels stayed broadly same. Level 2, level 7 and short courses were also listed by colleges as part of their international offer.

47. The survey also asked what percentage of non-EU international students progressed to HE courses at college or university. The results show that almost two thirds of respondents see 75-100% of their international students progressing to higher education, a slight increase on the previous year. Overall, 76% of respondents said that more than 50% of their non-EU international students progress to HE courses. Colleges are an important pipeline to university and to further study:

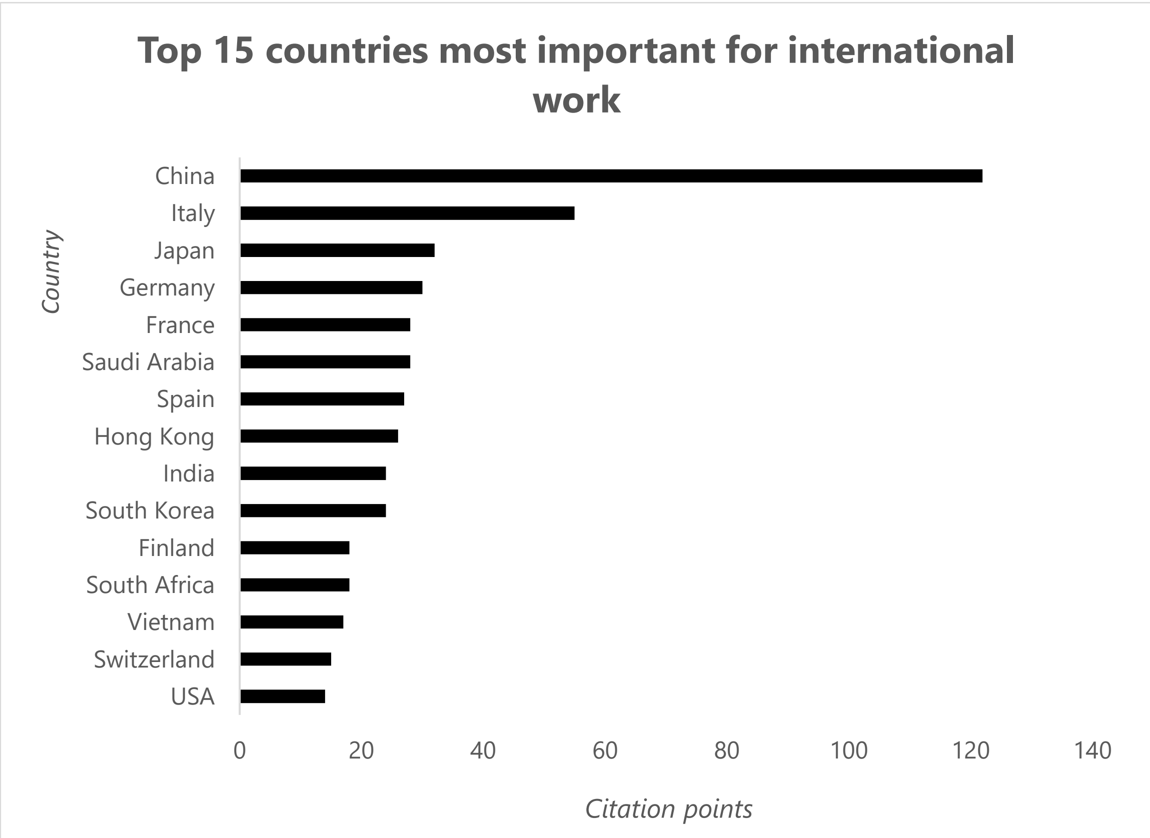
Q23. What % of your non-EU international students progress to HE courses, whether at college or university?	Number of responses	Percent 2019/20	Percent 2018/19
Less than 5%	5	16	23%
5%-14%	0	0	6%
15%-24%	0	0	0%
25%-49%	3	9	0%
50%-74%	4	13	10%
75%-100%	20	63	61%
Total	**32**	**100%**	**100%**

48. Questions 24 asked colleges to list the top five areas of strength or specialization that they can offer the international market. A wide range of areas were listed, showing the breadth of provision in the college sector. A levels, English language courses and teacher training came out top, as per the

2019 international survey. The results revealed some niche areas of vocational provision attractive for export, including in SEND, sports, rail and equine.

International markets

49. Question 25 asked respondents to list and rank the five countries of most importance to their college's international activity. Colleges identified over 60 different countries or regions that they partner with. The table below highlights the most cited:

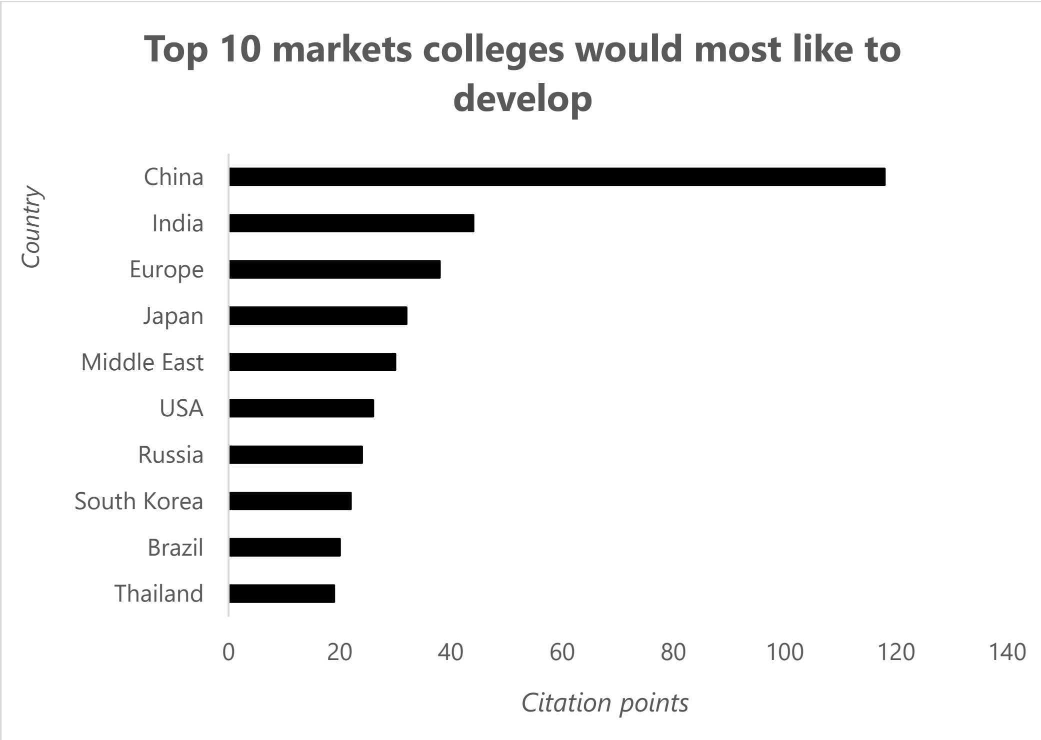


50. There is no change to the top two spots versus the 2019 survey and little change in the overall list of countries taking the top places. However, Japan takes third place and India drops down the table to ninth place. Switzerland and the USA are new entrants to the table which may reflect partnership opportunities previously advertised to colleges that have now been taken up. In terms of continents, Europe and Asia remain dominant.

51. 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. Now that the UK has completed its departure from the EU and the new points-based immigration system is in force, more movement in the table of college partner countries is possible.

52. Colleges were also asked to list up to five overseas markets they would most like to develop, and the services that they would be offering these markets. Again, over 60 countries and regions were identified, with the top 10 as follows:



53. China tops this table in addition to the table in section 49 above, emphasizing the perceived scale of opportunity. Second-placed India is perhaps not a surprise as colleges have seen fewer tangible opportunities in India in recent years and Indian student recruitment became much harder following immigration system changes from 2008 onwards. Europe (or the EU specifically) is likely to emerge post-Brexit as a new target region, offering a different set of commercial and partnership opportunities. Thailand had dropped out of the top 15 current target markets for colleges hence it is positive to see it included as market for development, in addition to Russia. A separate exercise to this report would be to match the countries above to the UK Government's export priority list, particularly the countries that the first UK International Education Champion, Sir Steve Smith (appointed in 2020)[21], will focus on.

[21] https://www.gov.uk/government/news/universities-minister-sets-out-support-for-international-students

54. In terms of subjects or services to offer to partners in these countries, colleges said they would most like to develop their offer in A levels, consultancy, student recruitment and teacher-training. Summer schools also featured on the list of potential products. These areas of activity reflect the core offer of most colleges working internationally.

55. Regarding support to develop these opportunities, colleges listed:

    i. Help with overseas agents and partners, including ways to access prospective agents/international partners and pricing.
    ii. Access to funds to support international travel.
    iii. Collaboration and consortium working.
    iv. A greater number of opportunities made available directly to colleges.
    v. Continued dialogue with government departments and support from government, for example around trade missions and promotion of the FE sector.
    vi. Post-Brexit transition support.
    vii. Enhanced marketing and sales support.

    Any review of the how the UK promotes its international education offer and any subsequent reviews of the UK international education strategy should take the above points into account.

College services and the impact of Covid-19

56. Colleges were asked about their accommodation provision. 72% of respondents offered homestay, along similar lines to the two previous surveys. Fewer colleges than the previous year reported on-campus residences (22% in 2020) and 86% of colleges responding had staff with dedicated responsibility for international work. This shows the high level of international student support provided by colleges. It also highlights the vital and often unsung role that homestay hosts play in providing safe, local and affordable student accommodation that would otherwise be unavailable. International students support regional economies and in many parts of the country, the college is the main local provider of further and higher education.

57. AoC asked colleges three additional questions about the impact of Covid-19 on their ability to provide an international service and to support their international students. The first asked colleges to specify the areas of their international operation impacted by Covid-19:

Has Covid-19 impacted the following at your college?	Responses	Percent
International team staffing levels	20	45%
Expertise within the international team	4	9%
Accommodation provision for international students	18	41%
Support for international students	16	36%
International partnerships	34	77%
Erasmus+ mobility placements	29	66%

58. It is not surprising that in the table above the impact of Covid-19 has been most keenly felt on college international partnerships. AoC is aware of how colleges have tried to sustain partnerships and facilitate planned activity with their overseas partners during a very difficult time. Partnerships all over the world were impacted by Covid-19, particularly for short training or language courses. In Europe, Covid-19 put a stop to many outbound and inbound Erasmus+ placements from February-March onwards. Prior to Covid-19, concerns had already been reported from college partners in Europe about the impact of Brexit.

59. During the March lockdown some colleges had to furlough staff. Any staff furloughed in international departments would affect the resources available to provide student support and international business development. Temporary college closures and social distancing measures meant colleges also had to find new, usually online ways in which to support and integrate their international students. A third of survey respondents cited an impact on international student support, reflecting how face-to-face meetings and the social and cultural programmes normally provided by colleges were halted. Colleges have had to adapt many procedures since the onset of the pandemic.

60. Accommodation issues arose most likely as some students left their accommodation before lockdown to return home. Some homestay hosts were unable to take in international students, for example where they had their own health concerns. Both accommodation income and also international fee income will have been lost as a result of cancelled student travel to the UK.

61. At the time of issuing the survey, the UK was still in lockdown and travellers from certain countries were required to quarantine for 14 days upon arrival. In summer 2020, the UK began to have 'travel corridors' in place with some countries. Students arriving outwith travel corridor locations needed to quarantine on arrival in the UK. AoC asked colleges whether they were able to make appropriate arrangements for their international student arrivals that needed to quarantine. 38% of respondents said they could make appropriate arrangements, 23% said they could for some students and 40% said they could

not. In line with government guidance, education providers put extra measures in place to accommodate international students required to quarantine. Additional costs - to students, colleges or both - will have been incurred as a result. International students often plan their overseas study well in advance and it will have been very important to some to try to arrive for the 2020/21 academic year.

62. As reported in section 23 of this report, online provision saw an uplift, forced to some degree by Covid-19 and partial college closures during lockdown. AoC asked colleges whether Covid-19 had allowed them to develop online products for the international market:

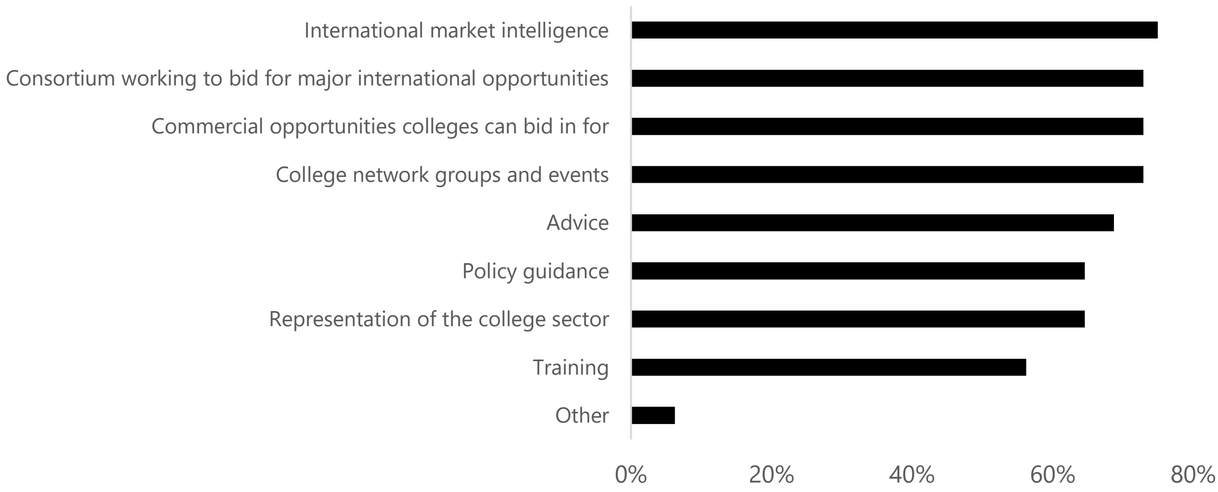
Has Covid-19 allowed your college to develop online products for the international market?	Responses	Percent
Yes, this is new to us	16	32%
Yes, but we already had some online provision in place	12	24%
Not yet, but we are considering it	15	30%
No	7	14%

There are no real upsides to the coronavirus pandemic, but it has brought about greater adoption by colleges of online tools which can be used in the international marketplace.

AoC services

63. The survey concluded with two questions about AoC's services, to help us direct our work and support member colleges. Colleges were asked which aspects of AoC's international work were most relevant to their overseas activity:

Services that colleges would most like AoC to provide



64. The provision of international market intelligence leads the way closely followed by consortium working, commercial opportunities and college network groups and events in joint next place. AoC continues to include commercial opportunities and market updates in our weekly briefings, and to work closely with DIT, the UK Skills Partnership and the British Council to identify and communicate this information to our members.

65. Representation of the college sector dropped slightly against the 2019 survey however some respondents completed this section whose national representative association is not AoC. As first and foremost a policy and representation organization, AoC will continue to look at how we can help colleges to develop their international activity, particularly where AoC can work in partnership with others to do so.

66. The survey indicates that AoC maintains a good level of engagement with our members who are active internationally:

Q34. Please indicate whether you have accessed any of the following support services from AoC for your international work over the last year:	Yes	No
Attended AoC international meeting or event	78%	22%
Emailed/telephoned/met with AoC for advice or support	69%	31%
Read the AoC international briefing	93%	7%
Accessed the AoC international webpages	84%	16%
College international Jiscmail network	50%	50%

67. AoC's weekly international briefing is the main communication tool for international policy and opportunity updates to members. This survey reports a very positive read-through rate of the briefing.

68. Given that in-person meetings with colleges were not possible during the coronavirus lockdown, AoC moved to an online format, setting up a monthly forum for members to discuss operational issues relating to Covid-19. AoC also ran a number of webinars and events with external stakeholders such as DIT and the Home Office. In 2019, AoC set up a Jiscmail forum for members, creating a peer group of international practitioners who can post queries and comments to the group via email. These networks also encourage partnership-working amongst colleges which in turn can lead to collaboration on other projects. Accessing the AoC international webpages jumped 13 percentage points in comparison with the 2019 survey.

Recommendations

69. In the 2019 edition of this report, AoC made three recommendations:

    i. That the Home Office should split out public from private sector FE in its data.
    ii. That a separate audit should be conducted of English colleges' export potential.
    iii. That the Home Office Educational Oversight rules should be amended to allow Tier 4 sponsors to continue recruiting students, subject to monitoring requirements.

70. All three recommendations remain valid for action. Since the 2019 report, AoC has continued to raise Educational Oversight concerns with the Home Office on behalf of members, pending a change to the rules. In January 2020, CDN published its International Ambitions report exploring the export potential of Scottish colleges, supported by the Scottish Government, SDI and British Council Scotland.

71. Based on the findings of the 2020 AoC international survey, it is recommended that:

    i. Agencies involved in the promotion of the UK's international education sector – for example government departments and the British Council - should dedicate greater material support and focus to UK FE. This would be a positive step towards addressing the decline in international FE students, the financial impact of Covid-19 and the objectives of the 2019 UK international education strategy.

ii. The new Turing scheme should match the benefits that the Erasmus+ scheme provides to colleges. As the top cited international activity in this report, Erasmus+ will be a hard act to follow. The Turing scheme should not lead to a rupture of college partnerships in Europe nor fewer FE students and staff able to take part.

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