

students with greater flexibility over when and how they can commence their UK degree. Over 60 percent of all international students in UK higher education programs are studying outside the United Kingdom on transnational education courses (TNE). There is a clear link between TNE and onshore recruitment. Previous research has shown that a third of the non-EU first-degree entrants commence their course in England through the means of TNE programs that begin in another country. These proportions are higher for first-degree entrants from China, Malaysia, and Hong Kong, where more than half of the students started their UK degree in their home country or country of residence. Shorter duration of study in the United Kingdom, complemented with study at home, presents a cost-effective way of acquiring an international degree. This also means that TNE is widening access to UK education among students who may not have had the economic means to do so otherwise.

WHAT TO EXPECT IN THE COMING YEARS

There is a high degree of uncertainty around government policies that are likely to affect international students' study choices, such as the impact of Brexit on EU student demand; the impact of President Donald Trump's immigration policies; broader changes in the macroeconomic environment such as fluctuation in currency and commodity prices, particularly oil, which, among other things, influences some overseas government sources of investment in scholarships for international study. The latter has affected large scholarship schemes in Brazil, Iraq, Malaysia, and Saudi Arabia. Even if economic circumstances change, there is evidence that many countries that have been traditional sources of overseas scholarship-funded students are now placing greater emphasis on the development of their own institutions.

One example of a shift away from funding individual scholars toward institutional development programs with a focus on internationalization is Brazil's new Institutional Program for the Internationalization of Brazilian Higher Education and Research Institutions (Capes-PrInt). The program is funded by CAPES and seen as a successor to the Science Without Borders program. In addition, Thailand, Vietnam, and the Philippines are focusing on capacity building of domestic higher education institutions through policies aimed at attracting overseas providers to develop TNE in niche subject areas. This could be an opportunity for countries that engage in cross-border education. A strong argument in favor of greater support for the collaborative provision of education, such as double and joint degrees and supported distance/online learning, is the potential of such provision to widen access to tertiary education and

support local capacity building and faculty development. While the contribution of collaborative TNE to equitable access to quality education globally is still to be fully utilized, it is an area that is likely to see rapid growth in the future. ■

Private Higher Education in the United Kingdom

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The vast majority of higher education (HE) in the United Kingdom has historically been delivered by universities and colleges operating as part of the public sector. The titles "university" and "university college" are legally protected, as are degree awarding powers, and these, until recently, have been exclusively located in the public sector. The University of Buckingham, the first, and for decades the only private university, was not awarded the title until 1983.

Yet there has long been a private HE sector in the United Kingdom, made up of colleges of professional training and niche providers offering vocational subjects outside the universities' traditional remit. These range from qualifications necessary to practice law or accountancy to psychotherapy and chiropody. Private providers within the creative arts have also had a notable presence: from independent art and design schools to a complete monopoly of training for actors for much of the twentieth century.

Recently, the UK government has sought to foster the growth of the private HE sector. As expressed in the government's strategic white paper, *Success as a Knowledge Economy: Teaching Excellence, Social Mobility and Student Choice*, more private HE provision is expected to stimulate competition within the sector as a whole, leading to "a greater choice of more innovative and better quality products and services at lower cost" (p.8). Private providers are also seen by government to be more responsive to the changing skills needs of graduate employers, more flexible in the ways they deliver their provision to students, and well placed to meet continuing international student demand for a UK HE. To this end, the government has enacted legislation to make legally protected titles and degree-awarding powers easier

for private providers to access.

Despite these ambitions, much of the private sector remains an unknown quantity. In the absence of public funding, the private sector was not subject to any official regulation or even oversight, nor has there been any systematic data collected on private providers. There have been several attempts to document the private HE sector in the United Kingdom but, using questionnaire-based survey methods, they faced low response rates, which never exceeded 40 percent.

Our research replaced this underperforming approach with one designed to maximize coverage of all private providers in the United Kingdom: collecting data from the websites of every operational private provider, along with data from their entry in the UK business index Companies House and/or the Charities register. It allowed us to characterize the sector in terms of the kind of subjects taught, and the level of qualifications offered.

SIZE AND COMPOSITION OF THE SECTOR

Our survey identified a total of 813 private HE providers active in the United Kingdom in 2017. Of these, only some 115 were entitled to enroll students with publicly backed tuition fee loans, on what are termed “designated courses.”

Private providers were overwhelmingly located in England (88 percent), with what amounts to a token presence in the rest of the United Kingdom. Furthermore, there was evidence of the centripetal pull of the capital: 37 percent of all providers were located in the capital, London, and almost 50 percent of all providers were located in the southeast of England.

Five providers held the title of university, and a further four the title of university college. These were largely professional training colleges in subjects such as law, accountancy, estate management, banking, and all were of decades long standing. All nine of those providers had degree awarding powers, as did one other provider. Other than the University of Buckingham, the earliest any other providers were granted degree awarding powers was in 2006, and university status in 2010.

Sixty five percent of providers were registered as for-profit companies. These tended to be younger than not for-profit—the majority of for-profits were less than 20 years old, the majority of not for-profits over 20 years old. They also accounted for the greater proportion of failed providers: 23 percent of the 732 providers identified in 2014 had ceased to operate in 2017, 90 percent of which were for-profit.

QUALIFICATIONS AND SUBJECTS OFFERED

UK HE qualifications range from level four to level eight

(with a different but equivalent scale in Scotland), with traditional bachelor’s degree at level six. The private sector as a whole tended to concentrate on subdegree-level qualifications at levels four (58 percent of all providers) and five (53 percent). Forty-three percent also offered postgraduate qualifications, principally diplomas at level seven. Only 20 percent of providers offered the staple of university education: the bachelor level degree.

In terms of provision, there is a high degree of specialization evident: most providers (64 percent) offered courses in only one major subject area. A further 24 percent offered courses in only two major subject areas, while just 12 percent had provision spanning three or more subject areas.

The composition of the student body at private providers is distinct from the public sector in several respects.

The most frequently offered courses were in business and administration, offered by well over half of providers (56 percent). Cheap to run and popular, there is no shortage of officially recognized business and management qualifications available (the Office of Qualifications and Examinations Regulation lists 353 at level four or above). These courses are also a specialty for for-profit providers: almost three quarters of all for-profit providers offered courses in business and administration, whereas only a quarter of not for-profit providers did so.

Other areas commonly offered were “subjects allied to medicine” and creative arts and design. The latter was offered by twice as many not for-profit than for-profit providers, 20 as opposed to 10 percent.

STUDENTS AT PRIVATE PROVIDERS

Information about student numbers is available for the smaller subset of private providers that offer designated courses: there were 58,735 students on designated HE courses at private providers in 2016–2017. This represents slightly over 2 percent of the total number of students in UK HE.

The composition of the student body at private providers is distinct from the public sector in several respects: they tend to be older, are more likely to be from an ethnic minority, and although women are the majority of students in both sectors, there are a greater proportion of male students in the private sector. Half of the 10 providers with the

highest drop-out rates for first degrees were private providers. It is often contended that private providers face greater drop-out rates because of the greater prevalence of nontraditional students.

CONCLUSION

The private HE sector in the United Kingdom has developed a distinct character that shows a degree of diversity. Many established niche and frequently not for-profit providers continue to offer education for professional qualifications: those recently elevated to university or university college status are largely drawn from this group. More recent for-profit providers often replicate each other's provision, frequently at subdegree level, and compete with one another for the same group of nontraditional students. These providers are undoubtedly meeting market demands, but do not yet appear to be providing an alternative to the public sector. Upscaling the sector has not been something internal or supported by UK based investment. A genuine alternative sector, as envisaged by the government, may only be realized by attracting international capital investment. ■

The Coming “China Crisis” in Higher Education

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Universities in major countries have come to depend on Chinese students for their increasingly important international student enrollments, and are to some extent dependent on these students to balance budgets and in some cases to fill empty seats. Significant numbers of postdocs, necessary to staff research laboratories and sometimes engage in teaching, also come from China. For a range of reasons, China's global higher education role is about to change significantly, with implications for the rest of the world.

One-third of the 1.1 million international students in

the United States are from China. Similar proportions are found in such major receiving countries as Australia (38 percent) and the United Kingdom (41 percent of non-EU students). This has created an unsustainable situation of overdependence. There are also major challenges relating to China's Confucius Institutes, Chinese participation in research in several host countries, and others. In short, there are a number of key points of conflict and crisis that are likely to affect China's higher education relations with important partners.

Not only does China have the world's largest enrollments, it is also by far the biggest exporter of students, with more than 600,000 studying abroad in 2017. Around 35 percent are graduate and professional students. For the first time, China is itself active in international higher education. More than 440,000 international students, the large majority from other Asian countries, are studying in China. The multibillion-dollar “Belt and Road” initiative has a significant higher education component.

AN APPROACHING CRISIS

The generally sunny relationships between China and the major receiving countries is already beginning to undergo a dramatic and highly negative set of changes. To briefly summarize the key points that combine to ensure an impending crisis:

- Within China, several important transformations are taking place. Demographic trends combined with the considerable expansion of China's higher education system mean that there will be greater opportunities for study in the country. Of specific importance for geographically mobile students, there is more access to China's best universities as billions have been spent upgrading the top 100 or more Chinese universities. At the same time, there are significant new restrictions on academic freedom and a “shrinking” of intellectual space in China. Ideology has reclaimed a more central place in academic life, and access to information, never fully available, is better monitored and controlled with new technologies. These developments may push in opposite directions. Some students may find fewer reasons to study abroad to obtain access to high quality university, while tightened censorship may push some to leave. Also, within China, academic collaboration arrangements with foreign universities are slowing. Last summer, 234, or one-fifth, of its international university partnerships were closed, including more than 25 with American institutions—many of which were inactive anyway. Finally, the idea of “liberal education,”