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Private providers of higher education in the UK: mapping the terrain

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Executive summary

This working paper reports on the findings of a web-based survey of private providers of higher education operating in the UK in 2017. The research was motivated by the current lack of reliable information on the private higher education sector, a deficit that is likely to continue even under the more inclusive system of oversight to be introduced by the Office for Students.

Our findings indicate that there are some 813 private providers in operation in the UK – a significant increase on the 732 and 674 recorded in 2014 and 2011 respectively.

There appears to be a degree of volatility in the private provider sector: 50 per cent (363) of private providers identified by prior research conducted in 2014 had ceased to operate, at least as HE providers, three years later. Of these, 165 were listed as dissolved at Companies House, 70 had simply vanished without trace, and a further 128 were still in operation but no longer providing courses at HE level, or possibly never had.

The vast majority of private providers, 88 per cent, operate exclusively in England. Private providers range from a few large-scale colleges and private universities with 1000+ enrolled students to small scale providers offering courses in addition to their principle business.

The majority of private providers, some 64 per cent, are for-profit enterprises. For-profit private providers tend to be younger than not-for-profit private providers, and more vulnerable to market exit. For-profit enterprises accounted for 61 per cent of all

private providers identified in 2014 but 90 per cent of all those providers found to have closed down between 2014 and 2017.

Around half of all private providers offered level 6 qualifications, frequently identified as diplomas: only one in five offered traditional Bachelor degrees. Many private providers offered sub-degree qualifications, such as higher national certificates and diplomas, or non-degree post graduate qualifications at level seven, which were often highly vocational.

There is a high degree of subject specialisation apparent: 64 per cent of providers offered courses in only one subject area. The subjects offered by private providers show a heavy bias towards business and administration, with this type of course offered by 56 per cent of all private providers. Twenty percent of private providers offered courses in subjects allied to medicine, most notably health and social care, while 14 percent offered courses in creative arts and design subjects including fine arts, film, music dance and acting.

Only 26 per cent of the not for-profit providers offered Business and Administration, while 72 per cent of the for profit providers offered subjects in this area. Conversely, there is a far greater prevalence of Historical and Philosophical studies amongst the not for-profit providers at 24 per cent, compared to a near total absence in the for-profit sector, less than one per cent. The high prevalence of courses in the category of Historical and Philosophical studies amongst not for profit providers is largely accounted for by the inclusion of theological schools in this subject category.

There is evidence of innovation in delivery, such as accelerated courses, but this is only a small proportion of the teaching; most is structured in a traditional manner.

Reliable information about the number and characteristics of students at alternative providers is limited to those on designated courses (that is, courses for which eligible students may take out government-backed student loans): there were 58,735 students at alternative providers on designated courses for the academic year 2016/17, representing slightly over two per cent of the total number of students in UK higher education (2,564,470).

The data on designated courses also indicate that these private providers are, in some respects, helping to widen participation. Students at these alternative providers tend to be older, and more likely to be from an ethnic minority. There is also a greater prevalence of male students on designated courses at alternative providers compared to public institutions, although in both cases the majority of students are female.

Less than forty per cent of providers have had any kind of external inspection of the quality of their provision. Around nine in ten providers claim some form of oversight or validating arrangement with external institutions, including 34 per cent of providers

with links to (mainly post-92) universities and over 40 per cent with links to professional bodies reflecting the vocational nature of much of the private provider sector.

The official system of higher education oversight is about to be restructured: for the first time both public and private providers will be subject to the same regulatory regime. However, this is likely to include less than 20 per cent of the current private providers in operation, although it will probably include the largest and most significant institutions. Providers that lie outside the new framework will continue to remain an unknown quantity, unregistered, and essentially unregulated. Students at unregistered private providers face a disadvantage: they are not covered by the kind of student protection plans recognised providers are required to have in place.

The private provider sector as currently configured is unlikely to provide a more general alternative to the public system of standard undergraduate higher education envisaged by the government. Many providers are small scale, concentrating on sub-degree or postgraduate qualification across a narrow band of subjects - often characterised as being popular but with low overheads. This means private providers are as likely to compete amongst themselves as with the public sector.

Introduction

The vast majority of higher education in the UK has traditionally been delivered by universities and colleges operating as part of the public sector. In recent years, however, the UK government has sought to foster the growth of private higher education provision, setting out plans in the 2016 White Paper, *Success as a Knowledge Economy*, to “make it quicker and easier for new high quality challenger institutions to enter the market and award their own degrees” (DBIS 2016: 6). More private higher education provision is expected to stimulate competition within the sector, leading to “a greater choice of more innovative and better quality products and services at lower cost.” (DBIS 2016: 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 higher education (DBIS 2016: 9).

Currently, very little is known about the scale and nature of most private higher education provision in the UK. Unlike public providers, most private providers are not required to submit data returns to government except in relation to students on “designated courses” for which government-backed student loans are available to eligible students (HESA 2018). A number of surveys of private providers have been commissioned in recent years (Fielden 2010; Hughes et al 2013; Shury et al 2016), but these have suffered from low response rates – less than forty percent – resulting in a partial and potentially misleading picture of the private higher education sector. To date there has been no empirically informed appraisal of the benefits and drawbacks of private higher education provision. Concerns have been raised about the quality of some private providers in light of low course completion rates, and some private providers have been criticised for their role in allowing ineligible students to access government-backed student loans (Hunt, Callender and Parry 2016; NAO 2017; PAC 2018). There has also been at least one example of a relatively high profile private provider in receipt of student loan funding going into administration which raises questions of the potential risks to students caused by sudden provider closures (Boyd & Kernohan, 2018). It is unclear, however, whether these concerning cases are anomalous or are indicative of the inherent riskiness of certain kinds of private provision. Although evidence from elsewhere, such as the US, indicates market exit is an inherent feature of the private for-profit sector (Hunt, Callender, & Parry, 2016).

Given the intention to rapidly scale up this part of the UK higher education sector, this working paper provides a timely description and analysis of the current private provider landscape. We draw on data from an online survey of the websites of private providers operating in the UK carried out by researchers at the Centre for Global Higher Education in 2017 and supplemented with information from Companies House, the Charities’ Register, the Quality Assurance Agency, and the

Higher Education Statistics Agency. Section 2 describes the research methodology in more detail.

Section 3 reports the number of private providers of higher education active in the UK in 2017 according to our data and looks at some of their characteristics as organisations, including legal status, date of foundation, whether courses are “designated” such that eligible students are entitled to access government-backed student loans, and geographical location. We compare our dataset to previous surveys of the private provider landscape to offers some estimates of the number of entries to and exits from the private provider sector in recent years.

Section 4 examines the nature of the courses offered by private providers, including course attributes such as qualification level, subject of study, course duration, mode of study, method of delivery, and tuition fee rates.

Section 5 focuses on the characteristics of students attending courses offered by private providers. For all providers in our dataset we report on the numbers marketing their courses at international students and offering courses for which non-EEA international students can obtain tier 4 visas. Drawing on HESA data, we also explore the gender, ethnicity and age profiles of students currently studying at the subset of private providers offering designated courses.

Finally, section 6 considers a number of direct and indirect measures of private provider quality. We report on the numbers of private providers whose courses are validated or accredited by an external organisation or body, and we report of the prevalence and outcomes of external inspections by the Quality Assurance Agency (QAA). For private providers offering designated courses we also look at degree completion rates.

Research methodology

Research design and sampling frame

The absence of official oversight of much of the private HE sector means there has been no systematic recording of private providers entering or exiting the sector, nor any comprehensive record of the scale and nature of the education they provide. Three previous studies have attempted to provide a picture of the private provider landscape (Fielden 2010; Hughes et al 2013; Shury et al 2016), using questionnaire methodologies which were dependent on the active co-operation of providers. All three studies suffered from responses rates of below 40 per cent making it difficult to draw reliable conclusions about the composition of the sector as a whole or inferences about its future development. The present research replaces this under-performing questionnaire methodology in favour of an approach designed to maximise coverage of all private providers identified as operating in the UK HE sector. This entailed, first, the development of a long-list of possible private

providers; second, a process of cleaning the long-list to remove incorrectly included entries and produce a final list; and third, the collection of data for each private provider on the final list drawing on information available in the public domain, particularly providers' websites.

The starting point for our population list was the list of 732 private providers which Shury et al. (2016) had developed by identifying and combining pre-existing lists that were likely to contain names of private providers. Continuing Shury et al's strategy, we supplemented this initial list with further lists such as government registered apprenticeship providers, professional bodies, and educational institutions' lists of accredited providers (see Table 1 for a comprehensive list of sources).

Table 1: Sources for final list of private providers 2017

Sources for final list of private providers	
1	2014 list of private providers (Shury et al., 2016)
2	HEFCE UG & PG approved providers alternative (Hefce, 2017a)
3	PFE Education Oversight (PFE, 2107)
4	Accreditation Service for International Schools, Colleges & Universities: (ASIC, 2017)
5	Home Office Tier 4 approved providers from 2017 pdf list:(GOV.UK, 2017b)
6	QAA Educational oversight - Programme of reviews (QAA, 2017):
7	Listed Bodies (GOV.UK, 2017a)
8	BAC UK list of providers (Gould, 2017)
9	ABCC – correspondence colleges (ABCC, 2017)
10	Attendance list of Independent Higher Education conference 2016
11	List of professional associations in the UK, each entry checked for any associated accredited providers (31 August, 2017): https://en.wikipedia.org/wiki/List_of_professional_associations_in_the_United_Kingdom
12	Lists for UK approved apprenticeship providers. England: Education Skills Funding Agency (ESFA, 2017)
13	Lists for UK approved apprenticeship providers. Scotland: Skills and Development, Scotland, (SDS, 2017)
14	Lists for UK approved apprenticeship providers. Northern Ireland: Department for Education (DfE NI, 2017).
15	Lists for UK approved apprenticeship providers. Wales: Welsh Government (GOV.WALES, 2017).
16	A Saatchi Gallery maintained list of active Art and Design Schools (Saatchi Gallery, 2017).
17	All institutions that had Tier 4 sponsorship entitlement removed between 2010 - 2014: https://www.gov.uk/government/publications/tier-4-sponsors-whose-status-appeared-as-revoked-from-2010-to-2014

From these sources a longlist of 1439 possible private providers were identified. After removing duplicates, and organisations subsequently identified as non-private providers, non-HE providers, overseas institutions, or now-defunct, we arrived at a final total of 813 private providers.

Data collection

Data was systematically collected from the websites of each of the 813 private providers included in our final list. The data collection was designed inductively. The websites of groups of ten providers, selected randomly from the list during its construction, were visited, and data collection fields were developed for items of information which were likely to reliably appear on provider websites in a form that was readily enterable into a database. From this scoping work it was also possible to discern areas where there was likely to be little or no information on provider websites, such as details about those teaching on the provider's programmes, and areas requiring interpretive judgements, such as the mission of the institution. The information collected through the web-based survey included the following:

- **Information about provider:** name; website address; whether provider was still in existence; title of institution; type of provision (FE; FE & HE; HE only); address including post code; countries in UK provider operates in; number and location of sites operated; year of foundation; total number of students & full-time students (where indicated); charity registration number; company registration number; any parent company.
- **Details of courses offered:** the subjects and qualification levels offered by the provider. For each provider, details of example courses were collected, using the course offered at the highest educational level as an illustrative case. The data gathered for each example course included: qualification type and level, subject, method of delivery; mode of study; duration; tuition fee; validating/accrediting body, if any; plus a free-text box for any additional comments.
- **Operational details:** data collected included whether international students were targeted; reference to obtaining a visa; claims of tier 4 sponsorship; any institutional partners or validating institutions/bodies; any reference to a review conducted by an external organisation; plus an open ended section for any further institutional points of interest.

Fixed lists of response options were used where appropriate, for example in relation to subjects offered¹, qualification levels², and validating bodies³. These fixed options removed a degree of ambiguity, and ensured what was entered was recorded in a consistent fashion.

Data collection took place between August and mid-October 2017. Four data collectors were trained to gain familiarity with the questionnaire and the terminology used, and had a 'practice run' through several providers' websites. The data collection itself involved visiting each of the providers' websites, examining the pages and recording the relevant data, where available, using an online questionnaire created using the *Opinio* software, which fed the responses directly into a database. Additionally, a WebCrawler was used to make a digital copy each provider's website.

Most validated/accredited courses were clearly described in terms of subject, qualification level and validating/accrediting body. Non-validated/non-accredited courses also often made reference to the level at which the course was pitched, e.g. Masters level. Any problematic issues were referred to the project leader for resolution. Where information could not be found, such as the number of students enrolled, the response option was left blank.

To ensure a high degree of data quality, a comprehensive examination of the entire data set was undertaken once the data for every listed provider had been entered. This involved listing every provider under each of the JACS 3.0 principle subject codes (N=19) and in each case checking the providers offered at least one level four course under the subject title. The data set was also checked for the existence of any duplicate entries.

Data collected from provider websites was supplemented with information from each provider's entry at Companies House (the UK register of companies) and/or their entry on the Charities' Register as applicable. This information included the provider's company and/or charity number; for companies we also recorded legal structure (e.g. private limited company); and any indication that the company had liquidated or otherwise terminated. A subsequent data gathering exercise involved

¹ The list of subjects was taken directly from the HESA/ UCAS maintained classification of academic subjects and modules, the Joint Academic Coding of Subjects 3.0 (JACS3): <https://www.hesa.ac.uk/support/documentation/jacs/jacs3-principal>.

² The list of qualifications was compiled from, the Register of Regulated Qualifications, covering England and Northern Ireland: <https://register.ofqual.gov.uk/> (see also: <https://www.gov.uk/what-different-qualification-levels-mean/list-of-qualification-levels>). Qualifications in Wales from Qualifications in Wales (QiW): <https://www.qiw.wales/>. Scottish qualification from the Scottish Qualifications Authority: <https://www.sqa.org.uk/sqa/58062.3806.html>

³ The list of validating institutions with degree awarding powers was taken from the HEFCE maintained list of Recognised Bodies: <https://www.gov.uk/check-a-university-is-officially-recognised/recognised-bodies>. This list was supplemented with accrediting bodies BTEC/ Pearson/ Excel and City & Guilds, and an 'Other' option.

adding to the database information about the outcomes of all providers' QAA inspections since 2014, where applicable.⁴ We also added data collected by the Higher Education Statistics Agency for providers offering "designated" courses (Hefce, 2017b).

The private provider landscape

This section examines the prevalence of private higher education institutions and providers across the UK in 2017. It offers details of all active providers, rather than reporting on a self-selected sample of the total. This places the findings concerning the private HE sector on a secure foundation, for the first time. The findings themselves do not depart radically from previous research, but differ in terms of enhanced reliability and increased detail. We are also able to offer new evidence on the degree of volatility, or provider exit, within the private HE sector.

The number of private providers

Our web-based survey identified a total of 813 private higher education providers active in the UK in 2017. This figure is higher than the figures of 732 and 674 recorded in 2014 and 2011 respectively (Shury et al 2016; Hughes et al 2013). Taking these numbers at face value, it would appear that there was a 20% increase in the number of private providers over a period of six years, although it should be noted that both of the older figures are thought to be underestimates.

Provider size

The websites of private providers rarely gave an indication of provider size. Previous research by Fielden suggested that the most common category of private provider was the small private college accredited by a UK university to offer their awards (Fielden 2010). This was re-stated by Fielden and Middlehurst (2011) who reported the private provider sector as being largely composed of small scale providers with no more than a handful of providers catering to more than 2,000 students. The 2011 survey commissioned by BIS also found that most providers were small scale: of those identified only 27 were representative of larger providers; only 35 had 1000 students or more, and only five 5,000 or more (Hughes, Porter, Jones, & Sheen, 2013).

Date of foundation

There were 586 institutions with foundation date information: the mean age across the sector was 32 years (s.d. 38), with a range between under a year to 374 years old. This captures both recently founded institutions and included Royal Academies and other institutions with royal charters that have existed for hundreds of years. The median age across all providers was 19 years and the modal age six years. These data are explored in more detail when considering differences in age by legal status of provider, below.

⁴ <http://www.qaa.ac.uk/reviews-and-reports>

Organisational titles

Table 2 indicates the titles the private HE providers have adopted. Around half of all providers use titles which make direct reference to educational provision (academy; college; institute; school; University; University College). The single most common organisational title used by more than a quarter of all private providers is Ltd (Limited), usually used as a suffix to a company name which does not directly indicate that it is an education provider.

Table 2: Organisational titles

Title	Frequency	Percentage
Academy	55	7
Centre	41	5
College	172	21
Company	28	4
Institute	44	5
Ltd (Limited)*	267	33
Other**	95	12
School	101	12
University	5	<1
University College	4	<1

*Examples: Access Skills Ltd; OLC Europe Ltd; Quest Professional Ltd.

**Other indicates there was no pre or suffix, or terms such as "Training" or "Federation" were used.

Five providers held the legally protected title of University, and a further four held the title of University College, also legally protected. All nine of those providers have degree awarding powers, as does one further provider, as shown in Table 3 below. Other than the University of Buckingham, which was the first private provider in the UK to be granted university status and concomitant degree awarding powers in 1983, the earliest any other providers were granted university status and degree awarding powers was in 2010 and 2006 respectively.

Table 3: Private Universities and University Colleges in the UK to 2017

Institution	Founded	Title granted	Degree Awarding Powers	Parent/ partner company	Status
University of Buckingham	1973	1983	Permanent (1983)	-	Not for-profit
University of Law	1962	2010	Provisional (2006)	Global University Systems	For-profit
Ashridge Executive Education	1959	-	Provisional (2008)	Hult International Business School	Not for-profit
BPP University	1976	2010	Provisional (2007)	Apollo Global ⁵	For-profit
London Institute of Banking and Finance ⁶	1879	2013*	Provisional (2010)	-	Not for-profit
Regents University	1984	2013	Provisional (2012)	-	Not for-profit
University College of Estate Management	1919	2015	Provisional (2013)	-	Not for-profit
Arden University (formerly RDI)	1990	2015	Provisional (2014)	Global University Systems	For-profit
University College of Osteopathy	1917	2017	Provisional (2016)	-	For-profit
AECC University College formally known as the Anglo-European College of Chiropractic	1965	2017	Provisional (2016)	-	Not for-profit

Organisation types

Identification of the companies' legal status in their Companies House/ charities register records indicates a majority of private providers were structured as for-profit enterprises, see Table 4. Sixty five percent of providers (N= 534) were registered as for profit companies⁷, a small minority of which also held charitable status, while 31 percent were recorded as not-for-profit enterprises (N= 249), the majority being designated charities.

⁵ Apollo Global was itself acquired by a private equity company in 2017.

⁶ London Institute of Banking and Finance was from 2013 the University College of Banking and Finance, it adopted its current title in 2016: it is still a university college.

⁷ All but one were listed as private limited companies. The exception, listed as a public limited company (PLC) which indicates a larger scale for profit enterprise, was not one of the private universities, but rather a large scale commercial firm with attendant HE provision.

Table 4: Company type and charitable status

Company structure	Frequency	Rounded %
For-profit without charitable status	521	68
For-profit with charitable status	13	2
Not-for-profit without charitable status	70	6
Not-for-profit with charitable status	179	22
Missing data	30	3.7
Total	813	100

Table 5 indicates that for-profit private providers are substantially younger than their not-for profit counterparts: 65 per cent of private limited companies are less than 20 years old and almost 40 per cent no more than eleven years old. This is unlike any category of not for profit providers: the greatest proportion of 20 years or less amongst this category was 33 per cent.

Table 5: Frequency (and percentage) of providers by company structure and age

Company structure	11 years or less	12 to 19 years	20 to 35 years	36 years or older
For-profit without charitable status	133 (39)	96 (28)	82 (24)	33 (10)
For-profit with charitable status	2 (15)	1 (8)	3 (23)	7 (54)
Not-for-profit without charitable status	9 (16)	17 (29)	8 (13)	24 (41)
Not-for-profit with charitable status	13 (8)	20 (13)	42 (27)	81 (52)
Total	157 (28)	134 (24)	135 (23)	145 (26)

Designated status

A significant restriction on private providers is whether they have been granted institutional or specific course designation; that is, the right to enrol students with publicly backed tuition fee loans. Designated providers are officially enumerated, subjected to quality assessment and students' details recorded (National Audit Office, 2014, 2017). This segment of the sector is now regularly reported on. The Higher Education Statistical Agency (HESA) produces annual statistical summaries from the records of publicly funded students – those on designated higher education courses – studying at alternative providers (e.g. HESA, 2018). Despite returning such data being mandatory for alternative providers with publicly funded students HESA (*ibid*) only reported data from 96 out of 115 such providers in 2016/17 (HEFCE, 2017).

Of the 115 private HE providers eligible to enrol publicly funded students in 2017 (HEFCE, 2017a), most had specific course designation (109) and only a minority had total institution designation (six). The total number of designated providers in our database was slightly smaller than the HEFCE figure, at 110. The difference was

because one provider was no longer in business; one was identified as publicly funded by the QAA; one did not offer a recognised UK qualification or equivalent; one was an overseas provider; and there was an instance of effective doubles.

There is an over representation of not-for profit institutions among private providers with course designation: not-for-profit providers make up 52 per cent (57) of private providers with course designation compared to 28% of private providers overall. This is at least partly due to the fact that many for-profit enterprises are running courses that do not qualify for public subsidies, such as professional qualifications. Eighty-five per cent (93) of the providers in our dataset with designated status have some external association with a validating or accrediting organisation. Others, with their own degree awarding powers for example, do not, or no longer, require such an association.

Tier 4 licence status

A Tier 4 licence issued by the Home Office allows providers to sponsor international (non-EEA) students to study full-time at their institution: international students are identified as originating from outside the European Economic Area (EEA), and, if they remain a year or more, are classified as immigrants. Examining the previous research, Fielden and Middlehurst (2017) concluded that although the sector had grown, not least due to access to public funds via government-backed tuition fee loans, in one respect it had contracted. International students had been a target group for private providers: Fielden (2011) had identified this type of provision as area that had experienced rapid growth, and the 2014 BIS survey found 45 per cent of providers surveyed had a Tier 4 sponsor licence (Shury et al 2016). However, a political drive to stem immigration numbers led to the removal of Tier 4 licences from a number of HE providers, with a clear targeting of private providers initiated under the Coalition government (2010-2015). Fielden (2011) had already noted the increased attentions of the UK Border agency towards the “more dubious institutions” (Fielden, 2011, p.5). By 2015/16 a HESA survey found 88 per cent of the students at the 63 private providers in their survey were UK-domiciled.

In our data, only 56 providers had information on their website about student numbers, and often these were vague with no distinctions drawn between domestic/international or full/part time students. Eleven per cent of the providers in our data (88) claimed on their website to have Tier 4 status. A further 20 per cent (166) made reference to Tier 4 on their website, and 21 per cent (167) made no mention of Tier 4 but clearly targeted international students on their website. Of the 88 total claiming to have Tier 4 sponsorship, 78 were providers identified in the BIS 2014 survey: consequently, the present research only identified an additional 11 providers with Tier 4 licence from the previous 2014 list of HE providers.

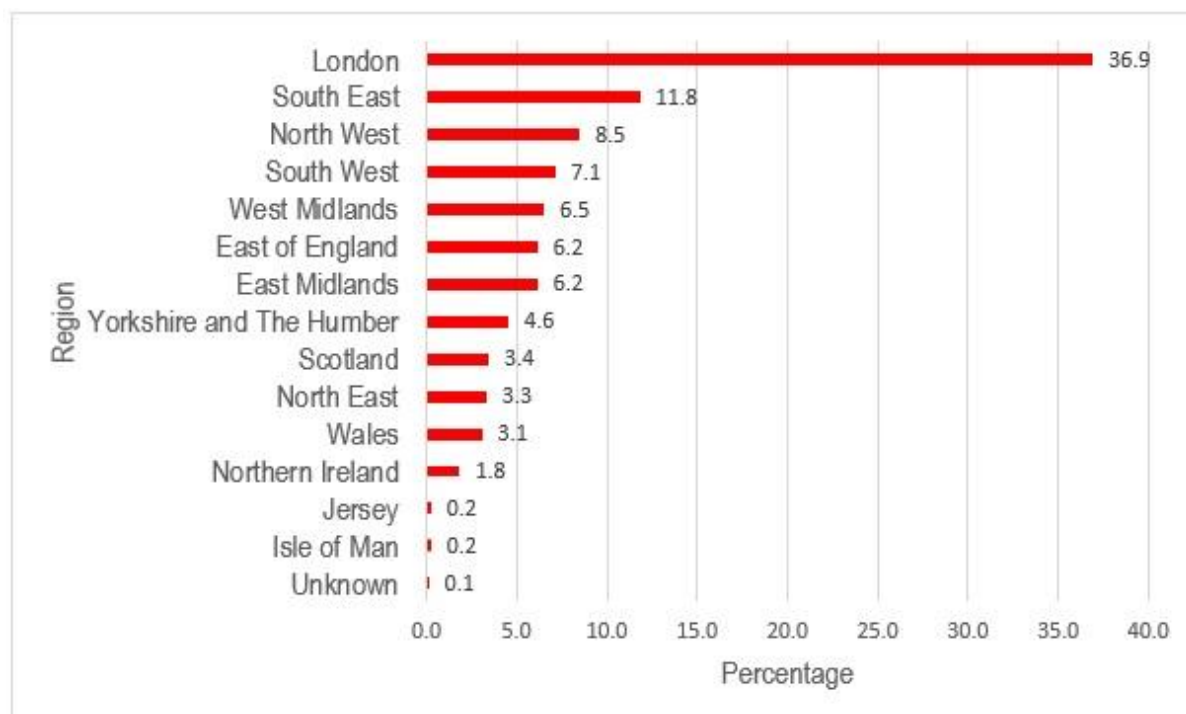
Geographical location

Table 6: Single and Multi-country provider locations

Location	Frequency	Percentage
England only	712	88
Scotland only	25	3
Wales only	19	2.4
Northern Ireland only	14	2
England & Scotland	17	2
England & Wales	7	< 1
England & Northern Ireland	4	< 1
Scotland & Wales	1	< 1
England & Scotland & Northern Ireland	2	< 1
Scotland & Wales & Northern Ireland	8	1
Jersey or Isle of Man	4	< 1
Total	813	100.0

Private providers are overwhelmingly located in England, with what amounts to a token presence in the rest of the UK, see Table 6. The 2011 survey commissioned by BIS reported that half of all providers identified were located not just in England, but the capital (Hughes, et al 2013). The high concentration of providers located in London was also a feature of our dataset, taken with the south east almost fifty per cent are located here.

Figure 1: Percentage of private providers by UK region



Seventeen per cent of the providers in our data (141) had more than one site, although around half of these (63) had only two. Some large scale owners of single institutions offer provision at multiple sites, such as BPP which has 22 different sites throughout the UK.

There are a small number of organisations which own and run multiple providers. The largest of these is the Netherlands-based Global University Systems (GUS). GUS owns at least ten UK private educational institutions, including the University of Law, and Arden University which had previously been known as Resource Development International Ltd (RDI) and specialises in on-line delivery (Ames, 2015). Two other significant multi-provider owners are included in our dataset. The Irish based Further Learning own a set of five providers all sharing the prefix “British Academy” which provide courses in digital marketing, photography, and interior, garden, and fashion design: these all appear to share the same location, and specialise in online delivery. International News Syndicate (a British Virgin Islands registered company) owns three institutions all with the pre-fix title of “The British College of...” and suffixes of “Interior Design”, “Journalism”, and “Professional Styling”.

Volatility in the sector

The research conducted for BIS in 2014 found that, of the 674 providers identified in 2011, 114 (17%) were excluded from the 2014 list as they were duplicates; further education colleges; had never offered HE or had ceased offering HE; were overseas institutions or had ceased to operate, although a breakdown of these figures was not provided. (Shury et al 2016).

The present research found that 50 per cent (363) of providers identified in 2014 had ceased to operate, at least as HE providers, three years later (Table 7). Of those providers identified in 2014 which were no longer in operation in 2017, 165 (45%) were listed as dissolved at Companies House; and 70 (19%) had simply vanished, leaving no trace. Additionally, 128 (35%) were still in operation but no longer providing courses at HE level, or possibly never had.

Table 7: 2014 Total Alternative Providers and 2017 Status

Company status	Frequency	Rounded %
Operational	369	50
Discontinued: companies house record	165	23
Discontinued: no further record	70	10
Operational, no HE provision	128	17
Total	732	100

Private limited companies, i.e. for-profit enterprises, accounted for 61 per cent of all private providers identified in 2014 but some 90 per cent of those found to have been discontinued by 2017 according to Companies House records.

The data indicates that there is a considerable degree of churn apparent in the sector. Most of the losses confirmed by Companies House data were associated with for-profit institutions. These tend to be more recently founded. These may be newer arrivals offering similar subjects at similar levels, amounting to a greater concentration in an already crowded market increasing competition and the likelihood of market exit.

Courses offered by private providers

This section examines the actual educational provision available through private providers. Specifically, the qualification level, subject of study, course duration, mode of study, method of delivery, tuition fee level, and whether or not courses are “designated” such that eligible students are entitled to access government-backed student loans.

Qualification level

Previous research conducted in 2011 found that over half of the providers surveyed offered postgraduate courses, and that similar proportions offered courses at first degree and sub-degree level (Hughes, Porter, Jones, & Sheen, 2013). Similarly, over half the sample of providers responding to the 2014 survey offered postgraduate courses, and 37 per cent offered first degrees (Shury et al 2016).

The data for 2017 in Table 8, indicates more than half of all private providers offered qualifications at levels 4 and 5, equivalent to Higher National Certificate and Higher National Diploma respectively. Additionally, almost half of all private providers offered level 6 qualifications: only one in five offered traditional Bachelor degrees with honours, qualifications at this level were frequently identified as diplomas. Many private providers offer post graduate qualifications at level seven, these are often highly vocational.

Table 8: Frequency and percentage of providers offering specific qualification levels

Qualification level	Frequency	Percentage
Level 4	467	58
Level 5	428	53
Level 6 (inc. Bachelor with honours)	386	48
Bachelor with honours	160	20
Level 7	349	43
Level 8	47	6

Subject areas

A high degree of subject specialisation was apparent in prior research into private higher education provision. The 2012 survey found that only 35 per cent of providers offered a range of subjects, and that a further 30 per cent specialised in business, administration, accountancy, or IT, while the final third showed a degree of specialisation in other areas such as theology, arts, alternative or complementary medicine, aviation, engineering and science subjects (Hughes, Porter, Jones, & Sheen, 2013). Similarly, specialist business & management and arts providers made up almost half the achieved sample of private providers in 2014 (Shury et al 2016).

The high prevalence specialisation is confirmed in our data for 2017, which shows that most providers (64 per cent, N=523) offered courses in only one major subject area.⁸ A further 24 per cent (197) offered courses in only two major subject areas, while just 12 percent (20) had provision spanning three or more subject areas.

The prevalence of specific subjects, defined by the 3.0 Joint Academic Coding Scheme (JACS), in our 2017 data. These data appear in Table 9.

Table 9: Frequency and percentage of subjects offered across the private sector

JACS Subject Title	Frequency	Percentage
Business & administrative studies	458	56
Subjects allied to medicine	166	20
Creative arts & design	110	14
Education	89	11
Historical & philosophical studies	67	8
Computer science	60	7
Biological sciences	56	7
Engineering & technology	45	6
Social studies	43	5
Agriculture & related subjects	35	4
Architecture, building & planning	30	4
Law	29	4
Combined	25	3
Mass communications & documentation	16	2
Veterinary science	13	2
Languages	12	1
Physical sciences	10	1
Medicine & dentistry	5	< 1
Mathematical sciences	1	< 1

⁸ Major subject areas refers to the JACS 3.0 principle (two digit) code level, a total of 19 subject categories.

As Table 9 indicates well over half of providers offer business and administration courses. The second most commonplace subject area offered is “subjects allied to medicine”, many of which are courses in health and social care.

There are many officially recognised business and management courses on available for accredited provision. The Office of Qualifications and Examinations Regulation (Ofqual) register, an independent body reporting directly to Parliament responsible for the regulation of qualifications, examinations and assessments in England, shows 353 business management courses alone at level four or above available to learners. There are a further 224 health and social care courses at level four or above.

Legal qualifications, long a staple of the private sector, including those required to practice as either a solicitor or barrister, are only offered by four per cent of providers, but they are concentrated in the hands of a few large scale multi-site providers, including two private Universities, University of Law and BPP. These are both accredited by the Solicitors Regulation Authority and the Bar Standards Board. Fourteen of 48 sites offering the Common Professional Examination (CPE) or Graduate Diploma in Law (GDL), qualifications required for solicitors are those of private providers. Eight of the fourteen sites at which the Bar Professional Training Course can be studied, necessary to qualify as a barrister, are run by two private providers (Bar Standards Board, 2018).

The tendency to provide courses in just one subject area was common to both for-profit (61 per cent) and not-for-profit providers (65 per cent). However, the subject areas offered by for-profit and not-for-profit providers differed significantly. As Table 10 shows, while 72 per cent (375) of for-profit providers offered courses in Business and Administration, this was the case for only 26 per cent (67) of the not-for-profit providers. Conversely, there is a far greater prevalence of Historical and Philosophical studies courses amongst the not-for-profit providers at 24 per cent (63), compared to a near total absence in the for-profit sector, at less than one per cent (4). The high prevalence of courses in this subject area amongst not-for-profit providers is largely accounted for by the inclusion of theological schools in this subject category.

Table 10: Percentage of subjects offered across the private sector by provider status

JACS Subject Title	For profit (%: N = 846)	Not for profit (%: N = 390)
Business & administrative studies	72	26
Subjects allied to medicine	19	23
Education	13	7
Creative arts & design	11	20
Computer science	8	5
Engineering & technology	6	6
Law	5	1
Agriculture & related subjects	5	1
Social studies	5	6
Architecture, building & planning	4	3
Combined	3	3
Biological sciences	3	16
Veterinary science	2	2
Mass communications & documentation	2	3
Medicine & dentistry	1	1
Physical sciences	1	3
Languages	1	2
Historical & philosophical studies	1	24
Mathematical sciences	0	1

According to the 2014 survey of private providers, business studies were concentrated at the sub-degree (Higher National Certificate/ Diploma) and post graduate level; arts and humanities occurred more frequently at the degree level (Shury et al 2016).

The pattern of subjects offered across designated courses – the subset of courses for which eligible students can access government-backed loans – is similar to that for private providers overall, The HESA data for designated courses at private providers indicates that 45 per cent (26,355) of students were enrolled on business & administrative courses. This was also the most popular subject area in the public sector, although with only 14 per cent (220,035) enrolment. The second most popular subject area among designated courses at private providers was creative arts and design, accounting for 18 per cent (10,295) of enrolments. The figure from the public sector was eight per cent (175,700). Only 10 per cent (6060) of students on designated courses at private providers were studying any kind of science subject at all, compared with the public sector figure of 46 per cent (1,064,700).

There is a clear concentration in the private sector of vocational subjects such as business and administration which are low cost and easy to run. Conversely science subjects are largely absent, what is there is accounted for by popular and

inexpensive courses in subjects such as psychology. The relatively high enrolment rates in creative arts and design also conforms to this pattern, but may also reflect the long standing presence of creative arts and design in the private sector: for much of the 20th century, for example, acting was only available at private providers (Committee of Enquiry into Professional Training for Drama, 1975).

Modes of study

Table 11 indicates most of the courses offered are full-time. The rate of full time study in the public sector is 22 per cent. Although the data reported in Table 11 is partial it indicates a greater prevalence of part-time students in the private sector.

Table 11: Mode of study of highest level course provider offers

Mode of study	Frequency	%
Full-time	321	47
Part-time	183	27
Not stated	173	26

Modes of delivery

Table 12 indicates that the highest level courses are taught face-to-face. This evidence does not indicate wide-spread uptake of on-line delivery.

Table 12: Mode of delivery of highest level course provider offers

Mode of course delivery	Frequency	%
Based mainly in the workplace	59	9
Combined face-to-face & Distance learning	81	12
Distance or online learning	91	14
Face-to-face	387	58
Not stated	47	7

Course duration

Duration of highest level course data appears in Table 13, a year being the most frequent. There is little sign of accelerated courses, although these do exist. The University of Buckingham, for example, has been offering accelerated two year degree programmes for over 40 years (University of Buckingham, 2018).

Table 13: Duration of highest level course provider offers

Duration of course	Level 4	Level 5	Level 6	Level 7	Level 8
Less than one year	41	18	29	18	0
Less than one year accelerated	1	1	0	2	0
One year	14	12	40	88	2
One year accelerated from two	0	1	0	1	0
Two year	5	34	11	44	5
Two year accelerated from three	0	0	7	1	0
Three year	2	2	53	31	18
Four years or more	0	2	5	11	16
Other	9	27	15	67	4
Total	72	97	160	263	45

Tuition fee rates

Data from the CGHE project collected during the 2016/17 period for the highest level course across all identified private providers are shown in Table 14.

Table 14: Average and other descriptive figures for course fees by course level

Course	N	Mean	SD	Median	Mode	Minimum	Maximum	Missing
Level 4	39	3980	10030	1250	600	300	60,000	84
Level 5	49	4592	3529	3740	6000	444	16,500	105
Level 6	119	7734	7574	6000	9000	410	54000	57
Level 7	156	7321	6305	5998	6000	785	52000	148
Level 8	25	8791	11507	5950	1650	1650	59100	22

Taking the most popular subject areas in the private sector: the annual fees for business and administration courses at level 6 ranged from £6,000 for a year-long top up degree in business to £9,250 for a fashion-based Business BA. The average across level 6 business courses was £7,795, and the modal value was £9,000. At level 7 the range of annual fees was far greater ranging from £3,800 to study part-time at one institution, to £52,000 to study an MBA full-time at another. The average fee for a full time course at level 7 was £7,797, and the mode £9,000.

Creative arts and design courses showed a similar pattern at level 6: a wide range of fees, and fees approximating the ceiling imposed on designated courses in the public sector. The minimum annual fee for a full time course was £6000 (for a one year top-up BA in Music) and the maximum was £54,000 (for a BA in Fashion Communication). The modal value across creative art and design at level 6 was £9,000, and the average £11,200. At level 7 the fees averaged £14,500 per year, with a minimum of £6,000 (for an MA in Interior Design), to a maximum of £24,000 (an MA in Art and Business).

Private providers able to offer designated courses have the fee loan set at £6,000, this can exert a pressure to set a ceiling of £6,000 on the amount the courses cost

the student, exposing the institution to less risk, government backed tuition fee loans not being subject to default. In the absence of this pressure tuition fees can vary greatly from several hundred pounds to well over £50,000. The more expensive are often predicated on the reputation of the provider, if not in education then the profession they are offering education in, such as Conde Nast (media) or Le Cordon Bleu.

Students attending private providers

Number of students

Because private provider websites rarely indicated enrolment numbers, our 2017 dataset cannot address the question of total number of students participating in higher education at private providers. Previous studies estimated the total number of students enrolled with private providers to be 160,000 in 2011 (Hughes et al 2013) and between 245,000 and 295,000 in 2014 (Shury et al 2016).

Information about student numbers is available for the smaller subset of private providers which offer designated courses for which eligible students can access publicly backed student loans. The data for 2016/17 indicates that there were 58,735 students on designated higher education courses at private providers in the academic year 2016/17. This represents slightly over two per cent of the total number of students in UK higher education: 2,564,470 (HESA, 2018a).

Demographic characteristics

HESA also collects some demographic data on students enrolled on designated courses at private providers. This data indicates that the composition of the student body at private providers is distinct from the public sector in several respects.

As Table 15 shows, students on designated courses at private providers are more equally balanced in relation to gender composition than is the case among public providers of higher education they tend to be older, and are more likely to be from an ethnic minority. These patterns mirror those of the 2014 survey commissioned by BIS (Shury et al 2016).

Table 15: Student Characteristics at Public and Designated Private Providers 2016/17 (%)

Institution	Gender		Ethnicity		Age		Disability	
	Male	Female	White	BME	Under 30	30 +	Disability	No disability
Public	43	57	77	23	80	20	12	88
Private	48	52	50	50	60	40	10	90

Quality of private providers

Finally, this section considers a number of direct and indirect measures of private provider quality. We report on the numbers of private providers whose courses are validated or accredited by an external organisation or body, and we report of the prevalence and outcomes of external inspections by the Quality Assurance Agency (QAA). For private providers offering designated courses we also look at degree completion rates.

Ofqual lists thousands of courses available from independent institutions such as City and Guilds, institutions that set both the curriculum and examinations. Educational institutions can, through arrangement, become accredited teaching providers.

Validation, in contrast, involves an educational institution designing its own courses at a specific level, such as bachelor's degree, but requiring them to be externally validated in the absence of their own degree awarding powers. This requires a specific (commercial) arrangement with an external institution that possesses degree awarding powers.

Professional associations can licence the teaching of courses, such as the Bar licensing certain providers to teach the barristers qualifying exam the Bar Professional Training Course. Profession organisations may also recognise courses as partly or completely meeting their qualifying criteria for membership.

External bodies

Although less than forty per cent of providers have had any kind of external inspection around 87 per cent of providers claim on their website their institution has some association, or arrangement with external institutions, 34 per cent of which are with universities. Only 13 per cent make no claim about whether they have been inspected or have external associations.

There is little evidence of ancient universities (Oxford, Cambridge, St. Andrews, Glasgow, Aberdeen and Edinburgh) or much in the way of Russell group involvement: these combined only account for eight per cent of external organisations involvement. The principal activities are led by post 92 institutions, and older universities outside the Russell Group. However, of greatest significance is the involvement of professional bodies, accounting for over 40 per cent of the validating/ accrediting involvement, again indicating the vocational nature of much of the private sector, see Table 16.

Table 16: Validating or Accrediting Body for Highest Level Qualification Offered (N = 813)

Institution	Frequency	Percentage
British Accreditation Council	4	<1
Ancient Universities	10	1
Russell Group excl. Ancients	31	4
Pre 92 Non-Russell Group	59	7
Post 92 Former Polytechnics	124	15
Post 92 Other: Non-former polytechnics	54	7
Private	10	1
Pearson: BTEC, or Edexcel:	65	8
City & Guilds	14	2
Other inc. employers, networks, professional bodies	339	42
No claim	103	13

External associations

The total external associations, of private providers with other educational providers for what-ever reason appears in Table 17. It clearly mirrors the relationships that appeared in Table 16.

Table 17: Total External Associations

Institution	Frequency	Percentage
British Accreditation Council	6	1
Ancient Universities	12	1
Russell Group excl. Ancients	48	5
Pre 92 Non-Russell Group	86	9
Post 92 Former Polytechnics	159	17
Post 92 Other: Recent	70	7
Private	11	1
BTEC: Edexcel: Pearson	88	9
City & Guilds	35	4
Other inc. employers, networks, professional bodies	441	46

External reviews

Table 18 presents data concerning any organisation that had claimed it had been the subject of an external review via their website: 313 (39 per cent). The QAA is by far the most common review organisation, mentioned by one in ten providers (n=163). However, the data indicates that most providers 500 (61 per cent) have not undergone any form of external review.

Table 18: Review Bodies Providers Claimed to Have Been Reviewed By

Review Body	Frequency	Percentage
Accreditation Body for language Services	0	-
Accreditation Body for International College: ASIC	33	2.3
Accreditation UK	4	< 1
Bridge School Inspectorate	0	-
British Accreditation Council BAC	52	< 1
Department for education	1	< 1
Dept for the Economy: NI	25	1.7
HEFCE	4	< 1
HEFCWales	0	-
HM Inspectorate of education in Scotland	1	< 1
Home Office	25	1.7
Independent Schools Inspectorate	21	1.5
Ofsted	69	4.8
Open & Distance Learning Quality Council	25	1.7
Private Further Education - PEF	17	1.2
Quality Assurance Agency for Higher Education: QAA	163	11.3
School Inspectorate Service	7	<1
Scottish Funding Council: SFC	1	< 1
Professional Body	93	6.5

Academic performance of students

The figures for designated courses at private providers for 2016/17 indicate that 17,604 students obtained a qualification: of these 14 per cent (2470) obtained a taught master's degree, 37 per cent (6645) a first degree, and 30 per cent (5290) an HND/HNC. Forty-three per cent (7765) of the qualifications obtained were in business and administration studies; followed by law at 19 per cent (3420) and creative arts and design at 17 per cent (3053).

There are marked differences between private and public providers with respect to students' levels of academic performance. Among those obtaining a first degree, 58 per cent of students at private providers obtained a first or upper second class degree, compared to a substantially higher 75 per cent of students at public institutions.

Drop-out rates

Further data from HESA identified that half of the 10 providers with the highest drop-out rates for first degrees were private providers (HESA, 2018b). It is often contended that private providers face greater drop-out rates because of the greater prevalence of non-traditional students. HESA incorporates this information into a benchmark figure for each institution, effectively an expected drop-out rate; only one of the 10 private providers with the highest drop-out rates had a rate below their

bench-mark, although several others closely approximated their bench-mark figure (Baker, 2017).

Discussion

The findings of the present research show a high degree of consistency with the findings of previous research. The principle difference is the scale of the coverage: the present research reports on all private providers identified, and consequently offers a more reliable characterisation of the sector.

The volatility of the sector was identified in BIS in 2014: 166 providers, active in 2011, had ceased to operate as HE providers by 2014 (Shury et al., 2016). The volatility of the sector is also apparent in the present research: there were 165 providers positively identified as having ceased to operate, and many more seemingly no longer active. The evidence presented here in terms of the institutions' legal structures, suggest the instability is associated with for-profit providers. The not-for profit element of the private HE sector demonstrates relative longevity. Despite a greater risk of market exit the for-profit institutes are far more numerous.

The scale of the private HE sector is broadly in line with previous estimates, the current total being 813, the most recent previous estimate being 732 in 2014; in this case the increase is less likely to be because of greater number of entrances to the market, but the inclusion of providers possibly missing from previous estimates, particularly those listed as apprentice providers.

Although private HE is found across the UK it is largely concentrated in England: 88 per cent of institutions operate exclusively in England, this may be partly due to a less favourable official attitude towards private HE outside England (Fielden & Middlehurst, 2017).

The institutions that populate the sector range from small scale and often specialist institutions, or at least institutions offering a narrow range of subjects, to Universities offering a wider array of subjects; yet even in these cases the provision shows the clear influence of the institutions' origins as colleges of tuition for professions, largely concentrating on law, accountancy, and business. The University of Buckingham being a notable exception. The University Colleges tend to show little divergence from their established specialisms.

The institutional diversity of the sector is partly captured in terms of the title the providers adopt: those titled University, University College, Academy, College, Institute or School account for 47 per cent of all identified providers. These might be considered the core of the private HE sector: institutions acting primarily or solely in the provision of education.

There also exist a great number of providers who are not only, or even primarily, concerned with education: for example, 29 per cent (235) of providers are identified only as Limited, with no indication that they are engaged in education: these may include apprenticeship providers, or consultancy services where education or training is in addition to their main business concern. While such providers proliferate, at least in England, there are relatively few multi-site or and fewer still multi-provider owners: the most notable of the latter is Global University Systems (GUS). So far, there is little evidence of new or even notably increased investment in the sector following the higher education reforms of 2017.

The subjects taught are largely characteristic of private HE globally, with high prevalence of business and administration courses. These subjects were predominantly the concern of for-profit institutions, indicating a great deal of competition over a narrow range of subjects. Future research will be directed as identifying the geographical spread – or concentration – of providers in this field along with a range of other features to further inform the nature of the competition.

The relative high frequency of art and drama provision, offered by both not for profit and for profit providers is evidence of the long-standing relationship between arts and the private HE sector: for much of the 20th century acting, for example, could only be studied in the private sector (Committee of Enquiry into Professional Training for Drama, 1975).

There is also a long history of private art schools, several current schools having been established decades ago, and a few others well before the 20th century, the Royal Academy of Arts, for example, was established in 1768. Additionally, there are a several art schools founded in the 21st century, as a direct response to the imposition of tuition fees. Schools established by the auction houses Christies and Sotheby's demonstrate an intersection between art and business.

The prevalence of biological sciences and history and philosophy in the private sector are both explicable by the presence of a single subject categorised under these headings according to JACS 3.0; in the former case psychology, the latter theology. Psychology is a subject typical of the private HE sector, popular and relatively inexpensive to run. Colleges specialising in theology have a presence throughout the UK.

There are clear areas in which the private sector makes little or no provision. There is no opportunity to study to be a doctor in the private sector, although dental training, often in terms of professional development, or post graduate qualifications is present, although on a very small scale.

Likewise, there has been little opportunity to study traditional engineering subjects. The recently founded Dyson Institute of Engineering and Technology – its first intake of undergraduate (total: 33) was in 2017 – has no apparent competitors in the private

HE field, and as a private HE centre for engineering, is quite possibly the first of its kind.

Irrespective of the subject the private HE sector appears to be structured as pre-degree or post graduate: only 20 per cent of all providers offer any type of standard undergraduate bachelor degree. This does not indicate that the private sector is primed to expand and compete with the established public sector providers in the area of first degrees. Consequently, if the government is looking to the private HE sector to provide additional places in this key area of HE, as the White Paper indicated, the sector as it is currently structured is unlikely to meet those expectations.

Furthermore, the highest level course characteristics do little to suggest the much vaunted innovation of the private sector is a ubiquitous feature: from these data it appeared there were only eight accelerated courses at the highest level the provider was offering.

The validating and accreditation arrangements appear critical to the private HE sector: most providers are involved in some pedagogic relationship with external bodies, universities for degree validation – principally post 92 universities - awarding organisations regulated by Ofqual, and other professional bodies for accredited qualifications. In terms of the highest qualification offered only 13 per cent of providers had no external association. The pedagogic, if not institutional, stability apparent in the sector, may be due to most providers having some sort of association with an external authority. Less than 40 per cent, however, have had any kind of official external inspection of the quality of their provision

This informal source of stability is about to be augmented by a further official source – a regulatory framework due to be imposed by the Office for Students on the higher education sector that will cover both public and a projected proportion of private providers. The new regulatory framework makes a series of distinctions between providers involving their potential access to public funds, rather than on the basis of their public or private status (Office for Students, 2018).

The first category is approved (fee cap) providers, these will have their fees (and loans) capped at £9,000 per annum (plus inflation where applicable) and are eligible for public grants for teaching and research. This is the most highly regulated category. It's estimated that of the likely 390 providers to fall into this category 57 will be private. The second category is approved providers, which will have uncapped fees but no entitlement to direct public funding for teaching or research, while their students will have restricted access to student finance. This category is projected to be composed entirely of 88 private providers (BIS, 2016). The proposed third category of basic providers was abandoned (Office for Students, 2018). These were to have been formally recognised but would have received no preferential treatment

and likely to have include 62 private providers out of a total of 102, the remainder being further education colleges (BIS, 2016).

As projected the official structures of oversight are likely to cover less than 20 per cent of the current private providers in operation, although it will include the largest and most significant institutions. Providers that lie outside the new framework will continue to remain an unknown quantity, unregistered, and essentially unregulated (Fielden & Middlehurst, 2017; Hillman, 2017; Grove, 2018). This does not just leave the private sector largely undocumented but also places fee paying students in a disadvantageous position, without external assurance or the security – however limited – offered by the student protection plan officially recognised providers are obliged to have in place.

In the absence of both reliable historical records and the likely ongoing deficit in knowledge about the private higher education sector, this research stands as the most reliable source of information concerning the private higher education sector across the whole of the UK.

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