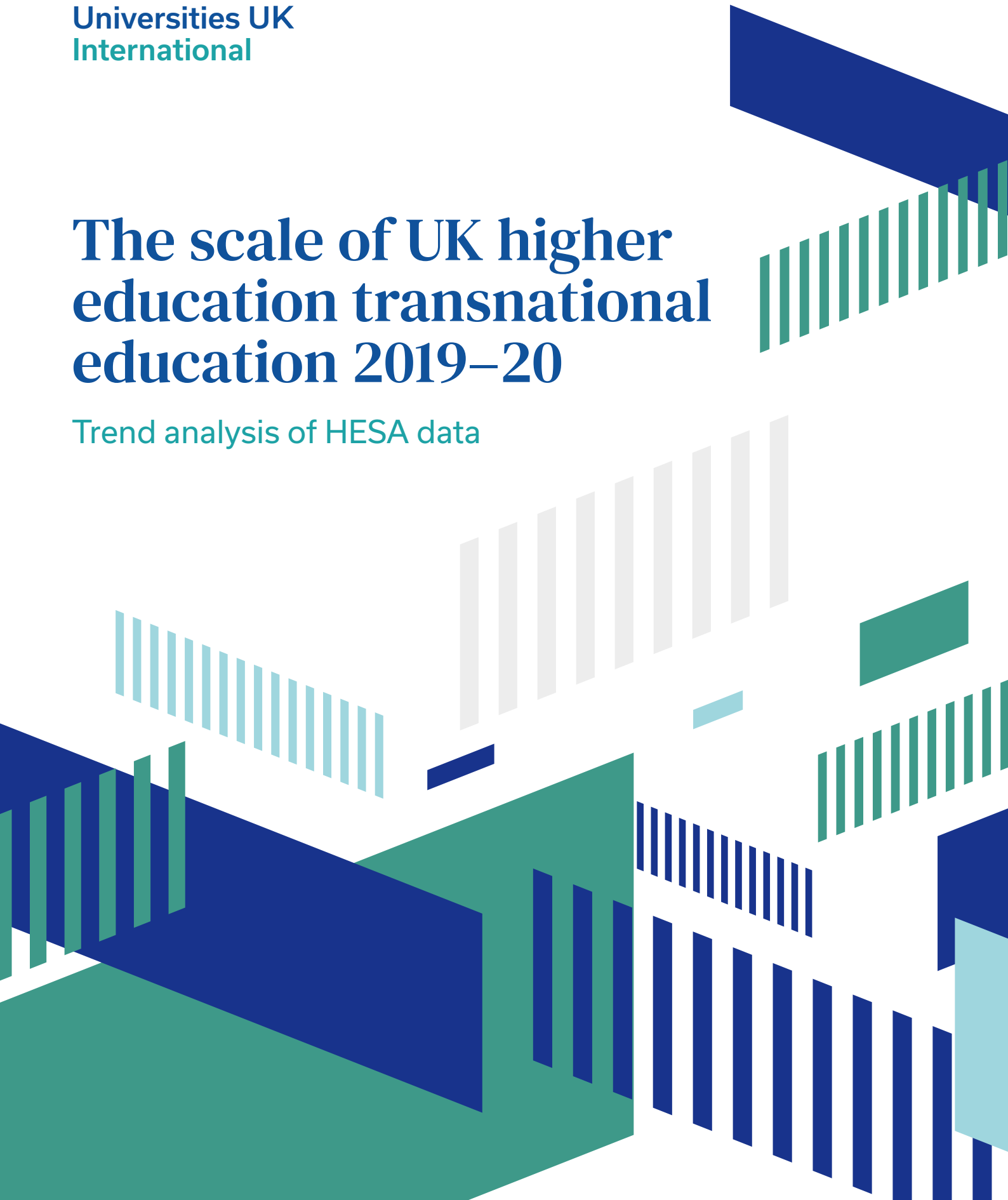




Universities UK
International

The scale of UK higher education transnational education 2019–20

Trend analysis of HESA data



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Universities UK International

Universities UK International (UUKi) represents UK higher education institutions (HEIs) globally and helps them flourish internationally. To do this we actively promote UK HEIs abroad, provide trusted information for and about them, and create new opportunities through our unique ability to act at sector level. We draw on UK university expertise to influence policy in the UK and overseas, delivering information, advice and guidance to facilitate mutually beneficial collaboration between UK HEIs and a broad range of international partners.

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Executive Summary

In 2019–20, 453,390 students were studying for awards of 156 UK providers in 225 countries and territories through transnational education (TNE).

This fifth edition of *The scale of UK higher education transnational education* provides a snapshot analysis of where, at what level, and through what type of provision TNE students studied during the 2019–20 academic year, and a longitudinal overview of trends in TNE from 2015–16. This edition also includes analysis of diversification trends, provision by mission group or sector representative organisation and by nation in the UK. It also includes separate sections for students reported in distance, flexible or distributed learning, and in the different categories of on-site provision.

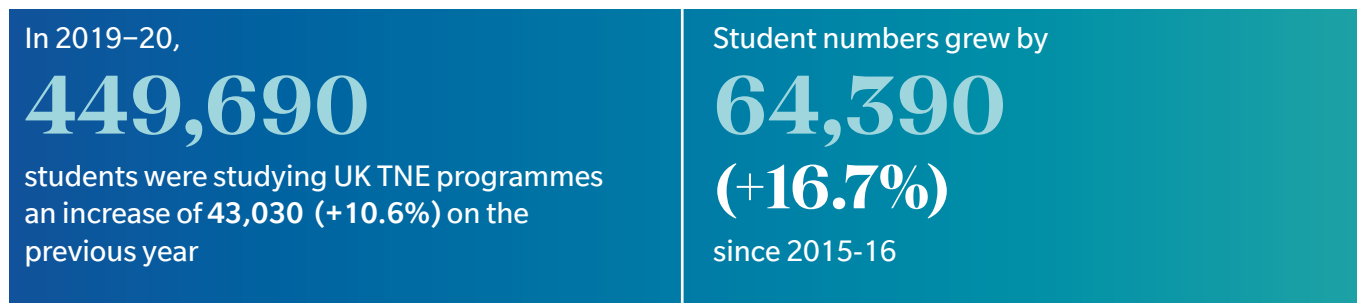
Overview

The UK's HE TNE provision in 2019–20:

- **156** higher education providers reported students studying through TNE, more than ever before.
- **82.9%** of all UK higher education providers in the HESA student record delivered TNE degree programmes, and **17.9%** of providers in the HESA Alternative Provider student record delivered TNE degree programmes¹. **20** providers reported **59.8%** of UK TNE students.
- **453,390** students were studying on UK TNE programmes (or **449,690** excluding Oxford Brookes).
- The total number of reported UK TNE student numbers decreased by **213,425** students (**-32.0%**) from 2018–19 largely due to changes in reporting by one provider.
- **39.1%** of students were studying through collaborative provision, followed by distance, flexible or distributed learning (**31.2%**), registered at an overseas partner organisation (**21.7%**), and overseas campus (**6.9%**). Distance, flexible or distributed learning experienced the greatest proportional growth from 2018–19 (**17.5%**).
- **68.3%** were studying at undergraduate level. The number of students studying at postgraduate level increased by **21.2%** from 2015–16.
- **83** providers reported more than **1,000** students in TNE, compared to **69** in 2015–16.
- New headcount categories collected by HESA from providers in England and Wales show that in 2019–20, only **6.2%** of students were dormant and only **4.0%** of students withdrew from their course, while **67.6%** of students were continuing study and **22.2%** of students successfully completed their course.

Historically Oxford Brookes University has accounted for over a third of all TNE students. In 2019–20 Oxford Brookes changed their reporting practices.

Excluding Oxford Brookes University:



1. These figures are based on the 170 higher education institutions and the 78 alternative providers who reported to HESA in 2019–20.

Insights by region

The UK's HE TNE provision in 2019–20:

- UK TNE was reported in **225** countries and territories.
- Overall, Asia hosted **50.3%** of students, followed by the European Union (**16.5%**), the Middle East (**13.1%**), Africa (**10.7%**), North America (**5.1%**), non-EU Europe (**3.2%**), Australasia (**0.6%**) and South America (**0.6%**).
- In 2019–20 China was the country hosting the most TNE students (**49,800, 11.0%**), followed by Malaysia (**49,375, 10.9%**), Sri Lanka (**30,825, 6.8%**), Singapore (**27,885, 6.2%**) and Hong Kong (**22,400, 5.0%**). Together, the top 5 host territories accounted for **39.9%** of all students.
- Students registered with an overseas partner organisation are prevalent in the Middle East (**41.8%** of the regional total) and Asia (**31.4%**), while distance, flexible or distributed learning is the main type of delivery in Australasia (**98.8%**), South America (**82.6%**) and North America (**81.2%**).
- Most students in overseas campuses are located in Asia (**63.2%** of the global total) and the Middle East (**26.3%**).

1. Introduction

In 2019–20, 156 UK higher education providers reported 453,390 students studying through transnational education (TNE) in 225 territories worldwide.

The Scale of UK TNE 2019-20 is the fifth in a series of reports produced by UUKi that analyse trends in UK Transnational Education (TNE) provision by provider, location, type and level using the latest data available.

The analysis in this report is based on the Higher Education Statistics Agency (HESA) Aggregate Offshore Record (AOR), a dataset of students studying wholly outside the UK while registered at UK higher education providers (HEPs) or registered on their programmes. The AOR represents one of the world’s most comprehensive datasets of students located in a country other than that where the awarding provider is located.

This year’s edition includes some novelties and changes from previous reports, stemming from new data categories, changes in reporting practices and contextual factors.

1

Although the announced major review of the AOR has been paused,² HESA introduced four new headcount categories for providers based in England and Wales:

- number of students continuing their study,
- dormant students,
- students who have successfully completed their course, and
- students who have withdrawn.

This report includes analysis of the number of students in each new category, the proportion per type of TNE and the distribution in each world region.

“ HESA introduced four new headcount categories for providers based in England and Wales.”

2

Oxford Brookes University has historically been an outlier in the AOR, accounting for over a third of all TNE students. This was mainly due to one single programme, a BSc (Hons) Degree in Applied Accounting taught in partnership with the Association of Chartered Certified Accountants (ACCA). In 2019–20 Oxford Brookes changed their reporting practice to reflect the point at which students engage directly with their component of the programme. The longitudinal analysis in this report excludes Oxford Brookes where appropriate to reflect sector-wide trends more accurately over time.

“ In 2019–20 Oxford Brookes changed their reporting practice to reflect the point at which students engage directly with their programme.”

2. <https://www.hesa.ac.uk/innovation/records/reviews/aggregate-offshore-return-review>

3

This report provides much more analysis at provider level, besides the headcount of students (that is, the number of providers reporting students by location, level or category). It's important to highlight that 14 providers reported students to the AOR for the first time in 2019–20. They are newly registered with the Office for Students, the regulator for higher education in England. These providers were previously described as 'alternative providers' by HESA. They have contributed 5,695 students to the headcount, or 13.2% of the total increase in student numbers since 2018–19 (when Oxford Brookes University is excluded). This report does not provide a separate analysis of students reported by these new providers but they represent an important addition, as the number of reporting providers has been relatively stable in the past.

“ It's important to highlight that 14 providers reported students to the AOR for the first time in 2019–20.”

4

Distance, flexible or distributed learning is an increasingly important component of UK providers' TNE portfolio. Our report, *Building the global reputation and delivery of UK transnational online higher education*,³ estimated that, as a result of the pandemic, there could be in excess of 400,000 students studying at least partly online across borders in 2020–21. Although data on this cohort will not be available until 2022, we have chosen to conduct a separate analysis of the distance, flexible or distributed learning category, and the other categories that we have considered belong mainly to 'on-site' forms of provision. In order to limit how much this extends the length of this report, our country analysis is incorporated into the new sections, rather than divided by world region as it was in previous reports.

“ There could be in excess of 400,000 students studying at least partly online.”

The present report focuses on the AOR data covering students on TNE programmes between 2015–16 and 2019–20. It is divided into four sections. The first section analyses sector-wide figures by student numbers, type of provision, level of study and the new headcount category. The second section focuses on providers, highlighting diversification trends, location of provider, and mission group or sector representative organisation. The third section provides regional and country insights. The fourth and final section disaggregates and analyses data for students reported in the distance, flexible or distributed learning, and in other categories of on-site provision.

3. <https://www.universitiesuk.ac.uk/universities-uk-international/insights-and-publications/uuki-publications/building-global-reputation-and-delivery>

Provider overview

Oxford Brookes University

The BSc Applied Accounting programme offered by Oxford Brookes Business School at Oxford Brookes University and the Association of Chartered Accountants (ACCA) provides students with a unique opportunity to earn a BSc (Hons) Applied Accounting alongside their professional qualification.

This is a global partnership enabling ACCA students from a wide range of backgrounds to participate. There are in excess of 33,500 alumni of the programme. Historically, a large number of ACCA/Oxford Brookes students were included in the AOR (accounting for over a third of all TNE students for a decade). In 2019–20 Oxford Brookes changed its reporting practices to reflect the point at which students engage directly with the component of the programme directly managed by Oxford Brookes University. This change has led to a reduction of 256,450 in the total number of students reported by Oxford Brookes appearing in the AOR from 2018–19 to 2019–20. The longitudinal analysis in this report excludes Oxford Brookes where appropriate to reflect more accurately sector-wide trends over time.

There are in excess of **33,500** alumni of the programme

Apart from the relationship with the ACCA, Oxford Brookes University also has a variety of other institutional and faculty TNE partners across the world delivering different awards at both undergraduate and postgraduate level to a wide range of students. Programme areas span across all areas of the university, from Business Management, Rehabilitation and Creative Writing to Architecture, Palliative Care and Law. Countries where Oxford Brookes has a presence include China, Sri Lanka, Greece, Hong Kong, Malaysia, the Cayman Islands, Germany, Gibraltar, Singapore, Myanmar, the Republic of Ireland and Kenya. As a core part of its 2035 strategy, Oxford Brookes is committed to growing and sustaining a strong network of partners with whom it can widen access to university awards and undertake work such as research and knowledge exchange.

A note on definitions

Higher education TNE is the delivery of degrees in a country other than where the awarding provider is based. It can include, but is not limited to, branch campuses, distance learning, online provision, joint and dual degree programmes, double awards, ‘fly-in’ faculty, and mixed models traditionally referred to as blended learning.

For the purposes of this report, UK HE TNE students are learners enrolled in a higher education degree programme which leads to a UK qualification but is based in a country outside the UK. This includes joint, double and dual awards. In this report, we use the word ‘students’ to represent these UK HE TNE learners, unless otherwise stated.

Data about TNE is collected annually by HESA via the AOR. Aggregate Offshore Record data has been collected since 2007–08 from UK higher education providers who subscribe to HESA. Universities provide data in their AOR return about ‘students that are studying wholly outside the UK who are either registered with the reporting provider or who are studying for an award of the reporting provider’. Following HESA’s definitions, this report uses the term ‘higher education providers’ to refer to the UK universities and institutions covered by the AOR.⁴

HESA collects data which relates to five categories or types of TNE provision and providers are responsible for returning data against these. The categories are broad, and universities may not always categorise their programmes by the same definitions used by HESA. **Table 1** shows these categories, how they are referred to in this report, and an example for each. These examples are not exhaustive, and there are many other ways that TNE programmes operate which may be included in each category.

4. For 2018–19 and earlier years, the AOR includes all publicly funded higher education providers in the UK and the University of Buckingham. From 2019–20, coverage expanded to include all English providers registered with the Office for Students (OfS) in the Approved (fee cap) and Approved categories, and all publicly funded higher education providers in Wales, Scotland and Northern Ireland. See <https://www.hesa.ac.uk/support/definitions/offshore>

From 2019–20, HESA introduced four new headcount subcategories for providers in England and Wales with the intention of “enabling OfS and HEFCW to better deliver regulatory oversight of transnational education using the AOR and publish improved reporting on transnational education for students and other stakeholders”.⁵

The four new headcount fields are:

- **Headcount of students who successfully completed** – This headcount is of those students who completed the course or programme they were registered on, or one of an equivalent or higher level in the reporting year.
- **Headcount of students who are in continuing study** – This headcount is of those students who are continuing study.
- **Headcount of dormant students** – This headcount is of students who are registered but did no study.
- **Headcount of students who have withdrawn** – This headcount is of students who left the provision without successful completion.

In accordance with HESA’s Standard Rounding Methodology:

- data has been **rounded to the nearest 5**
- any number **lower than 2.5** has been **rounded to 0**
- percentages have been suppressed where totals are **less than 25**

Neither the Higher Education Statistics Agency Limited nor HESA Services Limited can accept responsibility for any inferences or conclusions derived by third parties from data or other information supplied by HESA Services.

Table 1: Types of TNE Provision

Type of provision terminology in AOR	Terminology in this report	Example of provision
Students registered at the reporting provider	Studying overseas for UK HEP award at overseas campus of reporting provider	Overseas campus Overseas standalone or joint campus
	Distance, flexible or distributed learning for UK HEP award where the location of the student is known to be overseas	Distance, flexible or distributed learning Programmes delivered online
	Other arrangements including collaborative provision	Collaborative provision. Joint and dual degrees, franchised provision
Students studying for an award of the reporting provider	Registered at overseas partner organisation	Registered at overseas partner organisation. Validation and other models where the majority of teaching is delivered in-country
	Any other student studying overseas for an award of the reporting provider	Other arrangement. Multiple UK or international partners delivering a combination of other types of provision

5. <https://www.hesa.ac.uk/collection/c20052/a/headcountscs>

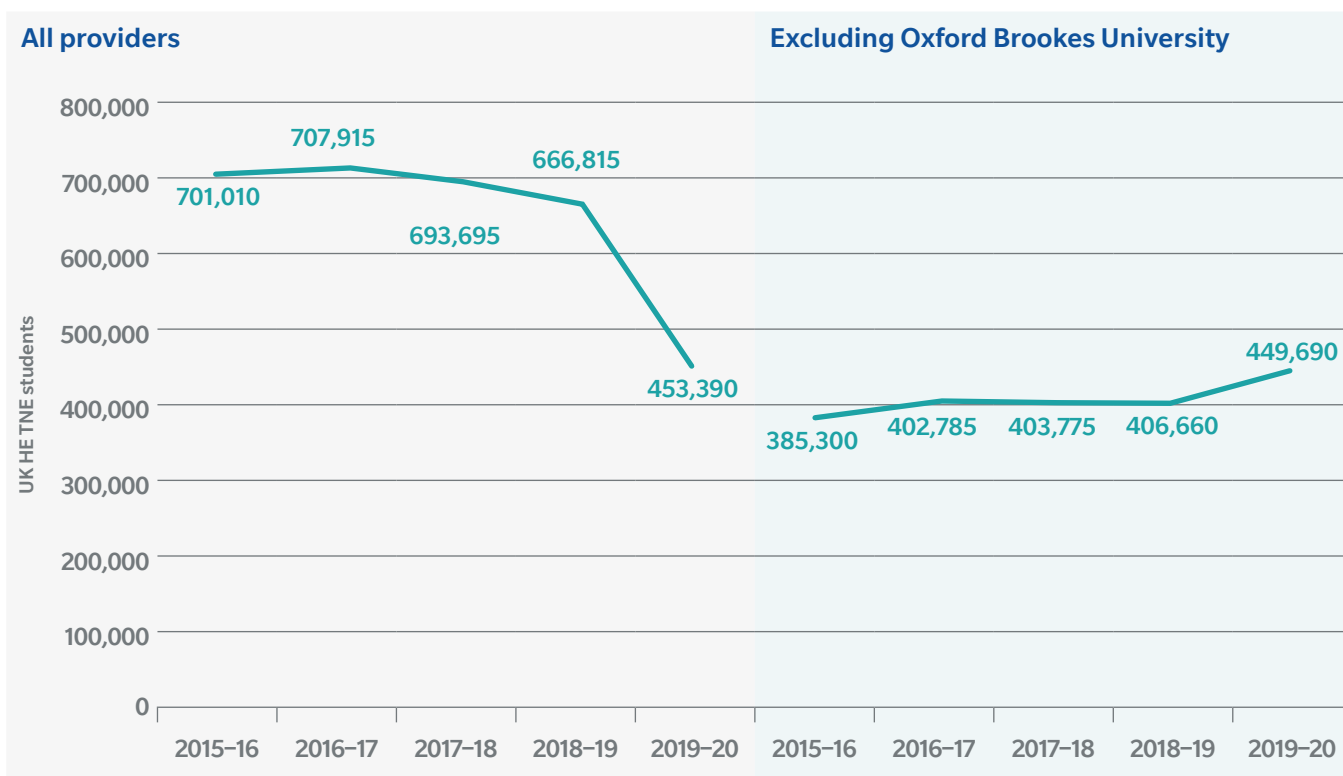
2. Overview

In 2019–20, 156 UK higher education providers reported 453,390 students learning through transnational education (TNE) in 225 territories worldwide.

HESA AOR data shows a decrease of 213,425 students (–32.0%) compared to 2018–19. This decrease is largely due to changes in reporting by one provider, Oxford Brookes University, as noted in the introduction. If this provider is excluded, then there was an increase of 43,030 students (10.6%) between 2018–19 and 2019–20, and of 64,390 (16.7%) since 2015–16. The annual rate of growth accelerated to 10.6% from just 0.7% the year before.

One hundred providers (64.1%) reported increases in student numbers, while 54 (34.6%) reported decreases and two (1.3%) reported no change. Eleven providers reported increases of more than 1,000 students, while five reported decreases of more than 1,000 students. Between 2018–19 and 2019–20, the mean growth in student numbers among providers that reported an increase was 545 students and the median increase among this group was 23.6%.

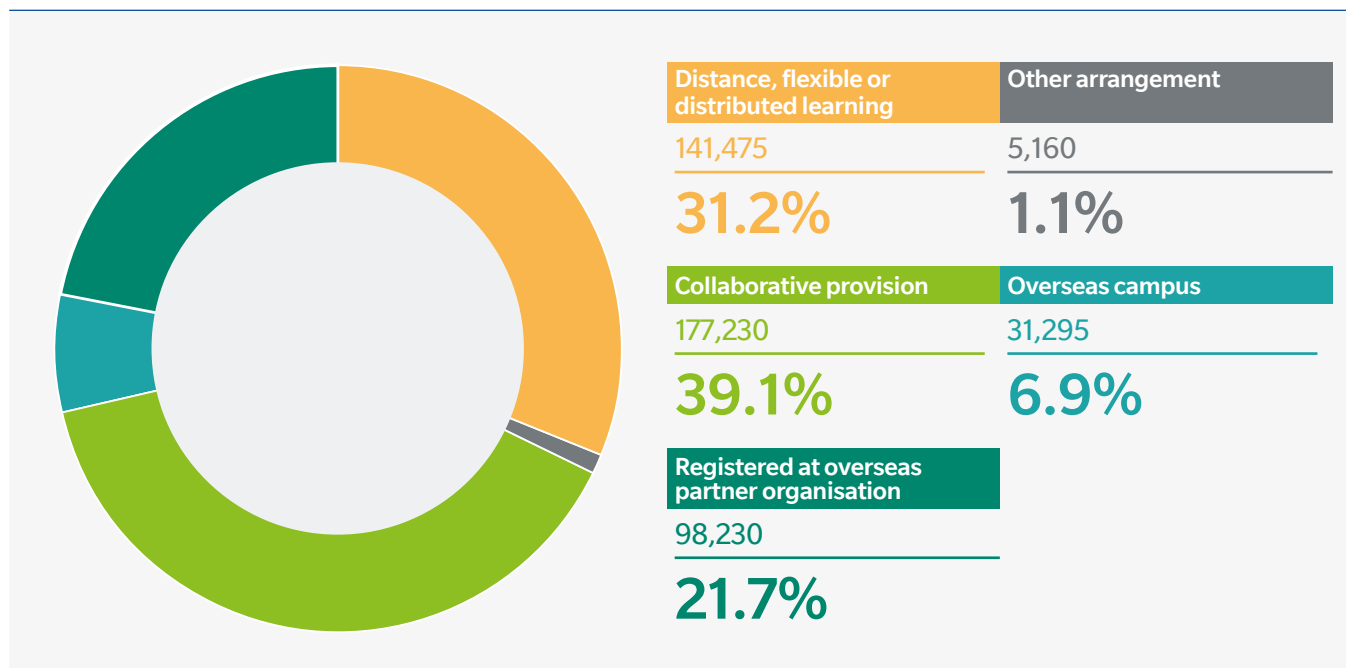
Figure 1: UK TNE student numbers, 2015–16 to 2019–20



Type of provision

In 2019–20, 39.1% of UK TNE students were studying through collaborative provision (up from 24.7% in 2018–19), 31.2% were studying through distance, flexible or distributed learning (up from 18.1%) and 6.9% were studying at overseas campuses (up from 4.3%). The decrease in students registered at overseas partner organisations from 52.1% to 21.7% (and the corresponding increase in other types of provision) is due mainly to the change in reporting by Oxford Brookes University.

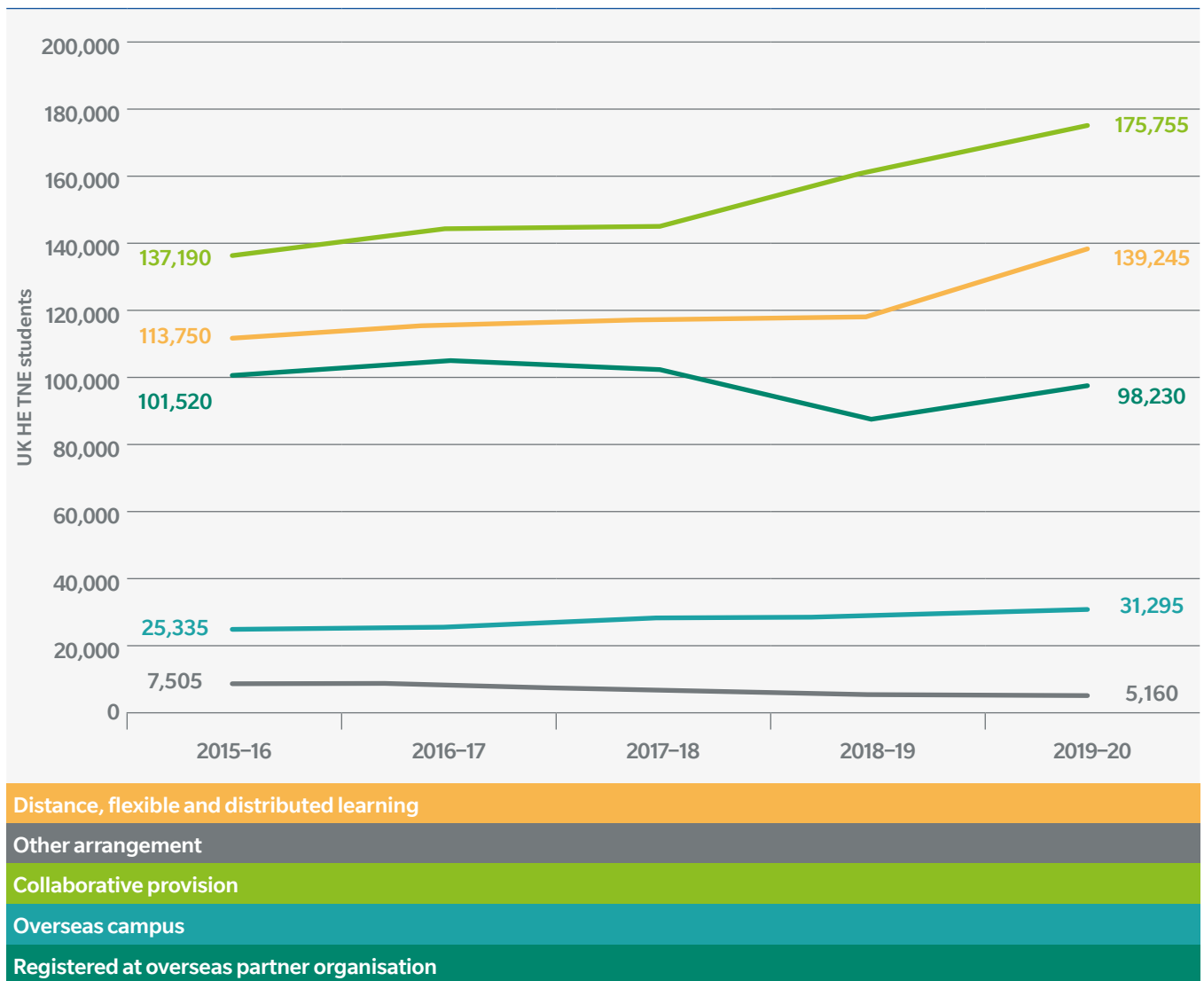
Figure 2: Proportion of UK HE TNE students by type of provision, 2019–20 (All providers)



When Oxford Brookes University students are excluded, 39.1% of UK TNE students were studying through collaborative provision (down from 40.1% in 2018–19), 31.0% through distance, flexible or distributed learning (up from 29.5%), 21.8% registered at an overseas partner organisation (the same as 2018–19), and 7.0% at overseas campuses (down from 7.1%).

As indicated in **Figure 3**, between 2015–16 and 2019–20, collaborative provision saw the largest increase in numbers, with 38,565 (28.1%) more students, followed by distance, flexible or distributed learning, with 25,495 (22.4%) more. Students registered at overseas campuses increased by 5,960 (23.5%), but those studying via other arrangements decreased by 2,345 (-31.2%) over the same period. There was a decrease of 3,290 (-3.2%) in students registered at an overseas partner organisation over this period, but more recently, between 2018–19 and 2019–20, numbers have increased by 9,430 (10.6%).

Figure 3: UK HE TNE student numbers by type of provision, 2015–16 to 2019–20 (Excluding Oxford Brookes University)



Level of study

Figure 4 shows that in 2019–20, 64.9% of UK TNE students were studying for first degrees, with an additional 3.4% in other undergraduate programmes, while 30.3% were studying postgraduate taught programmes and 1.4% postgraduate research programmes.

Figure 4: Proportion of UK TNE students by level of study, 2019–20 (All providers)

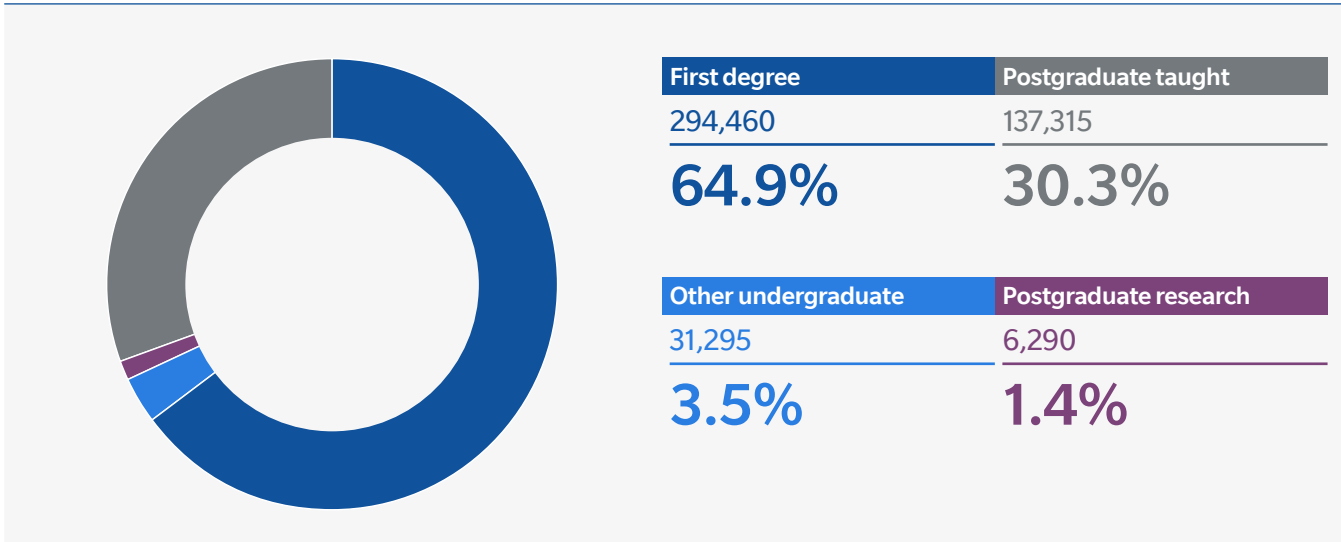
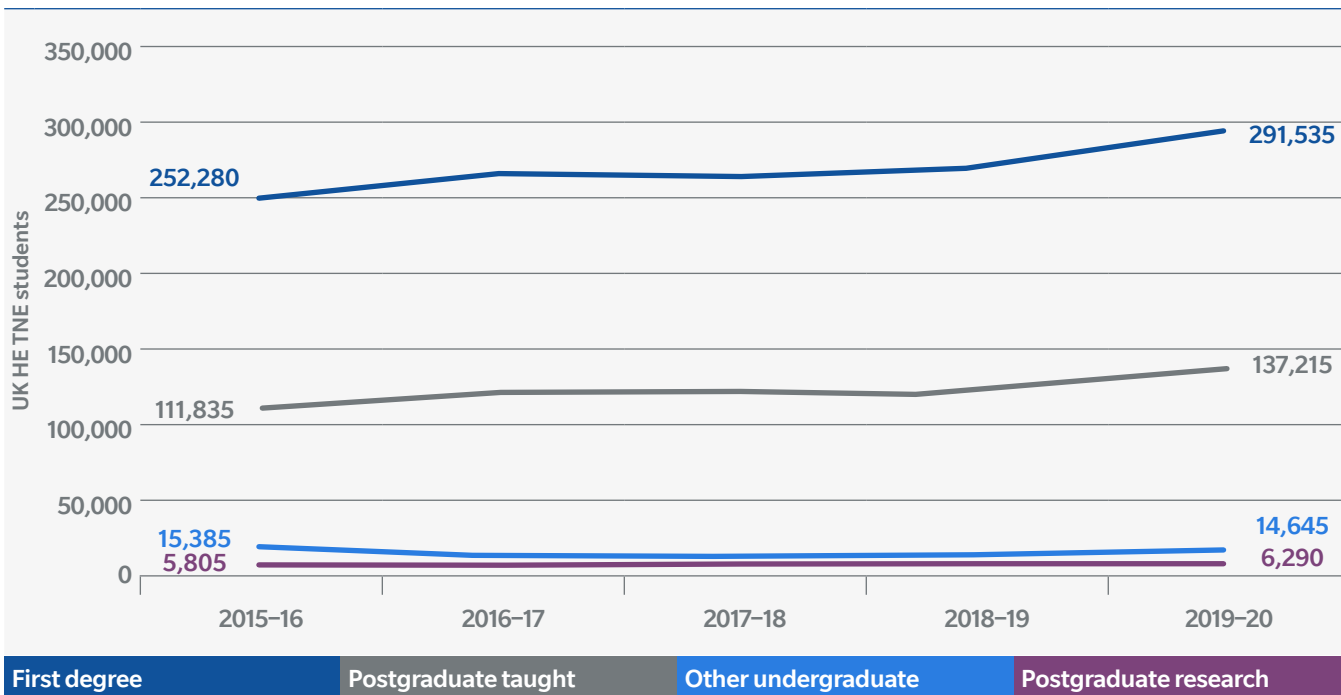


Figure 5 shows an increase of 39,255 (15.6%) in first degree programmes between 2015–16 and 2019–20. Numbers on other undergraduate programmes decreased by 740 (–4.8%). The number of postgraduate taught students increased by 25,380 (22.7%), while postgraduate researcher numbers increased by 485 (8.4%).

Figure 5: Number of UK TNE students by level of study, 2015–16 to 2019–20 (Excluding Oxford Brookes University)



New headcount categories

HESA introduced some modifications for the 2019–20 dataset, including the introduction of four new headcount categories for providers based in England (mandatory for all providers from 2019–20) and Wales (optional for 2019–20, mandatory from 2020–21). The categories are: number of students continuing their study, number of students dormant, number of students who have successfully completed their course, and number of students who have withdrawn.

Table 2 shows student numbers in the four new categories in which all English providers and four Welsh providers reported students in 2019–20, accounting for around 84.6% of all TNE student numbers. Students continuing to study form the largest category (67.6%), followed by those who successfully completed (22.2%), those who were dormant (6.2%) and those who withdrew (4.0%).

Table 2: UK HE TNE students by new headcount categories, 2019–20

Headcount category	Type of provision					Total
	Collaborative provision	Distance, flexible or distributed learning	Overseas partner organisation	Overseas campus	Other arrangement	
Continuing students	99,035	71,685	67,315	17,335	3,670	259,040
Dormant students	3,340	16,390	3,030	335	700	23,790
Successfully completed students	40,485	20,775	17,970	5,170	680	85,080
Withdrawn students	6,890	5,045	2,965	485	115	15,505

Figure 6 shows the distribution of students in the four new categories by type of provision. Continuing students form the largest category in all types of provision, ranging from 62.9% of those in distance, flexible or distributed learning to 74.3% of those at overseas campuses. Successful completion is the second largest category in collaborative provision (27.0%), overseas campuses (22.2%), students registered at an overseas partner organisation (19.7%), and distance, flexible or distributed learning (18.2%), but for those studying via other arrangements it is the third category (13.1%), after dormant students (13.5%). Dormant students are also a significant group in distance flexible or distributed learning (14.4%). The proportion of students who withdrew is low across the board, but higher in collaborative provision (4.6%) and distance, flexible or distributed learning (4.4%).

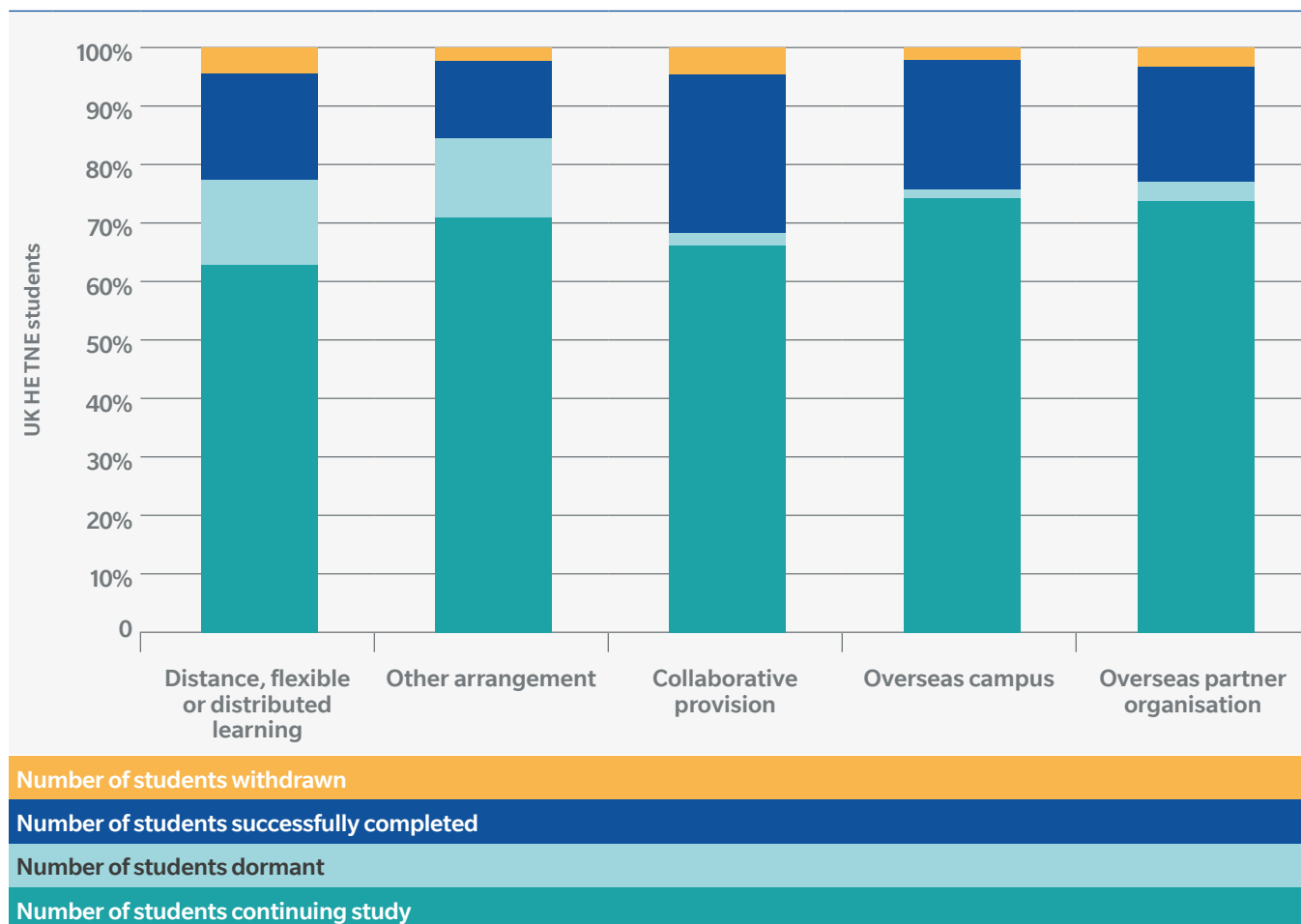
Figure 6: Proportion of TNE students in new headcount categories by type of provision, 2019–20

Table 3 shows the distribution of students in the four new categories by world region. Students continuing to study represent the largest category in all regions, though figures vary from 71.4% in Africa down to 55.9% in Australasia. Successful completions represent the second largest contingent in all regions, from 25.3% in Asia to 17.2% in non-EU Europe. Dormant student numbers tend to be significant in regions where distance, flexible or distributed learning is the main category of TNE, such as Australasia (17.9%), North America (14.6%) and South America (11.5%).

Table 3: Number of UK HE TNE students in new status categories, by world region, 2019–20

Headcount category	Region								
	Africa	Asia	Australasia	Middle East	North Africa	South America	EU	Other Europe	Total
Continuing students	29,160 (71.4%)	134,620 (66.3%)	1,180 (55.9%)	32,520 (70.1%)	11,205 (59.7%)	1,420 (65.1%)	39,655 (70.0%)	8,425 (68.2%)	258,185 (67.5%)
Dormant students	2,785 (6.8%)	10,975 (5.4%)	380 (17.9%)	2,250 (4.9%)	2,745 (14.6%)	250 (11.5%)	3,015 (5.3%)	1,350 (10.9%)	23,745 (6.2%)
Successfully completed students	7,125 (17.4%)	51,435 (25.3%)	405 (19.2%)	8,710 (18.8%)	3,435 (18.3%)	400 (18.3%)	11,205 (19.8%)	2,125 (17.2%)	84,840 (22.2%)
Withdrawn students	1,755 (4.3%)	5,885 (2.9%)	150 (7.0%)	2,910 (6.3%)	1,390 (7.4%)	110 (5.1%)	2,790 (4.9%)	460 (3.7%)	15,450 (4.0%)

Note: Regional percentages and totals exclude UK territories

3. Providers

Diversification

Figure 7 shows the distribution of student numbers between providers. Nine providers reported over 10,000 students in 2019–20 and a further 15 reported between 5,000 and 10,000. Fourteen more providers reported UK TNE students than the previous year, and a further six entered the group of those that report more than 1,000 students. Excluding Oxford Brookes University, student numbers in providers reporting more than 5,000 students increased by 12.6% between 2018–19 and 2019–20, while numbers in providers with fewer than 5,000 TNE students increased by 7.1%.

- **51.0%** of all UK TNE provision was reported by **14** providers.
- **132** providers accounted for less than **1%** of UK TNE provision each.
- **83** providers reported more than **1,000** TNE students in 2019–20, up from **78** in 2018–19.
- The median number of students was **1,128**, down from **1,220** in 2018–19.

Figure 7: UK HE TNE student numbers, 2019–20 (All providers)

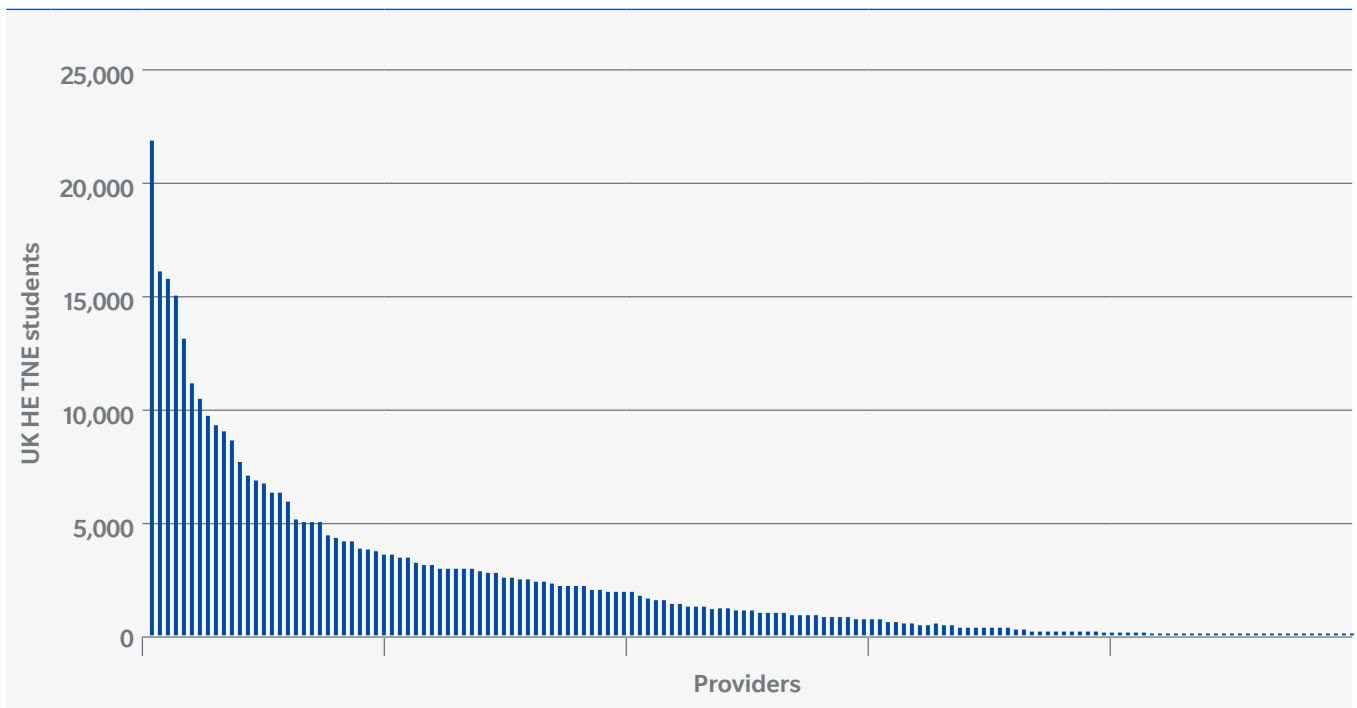
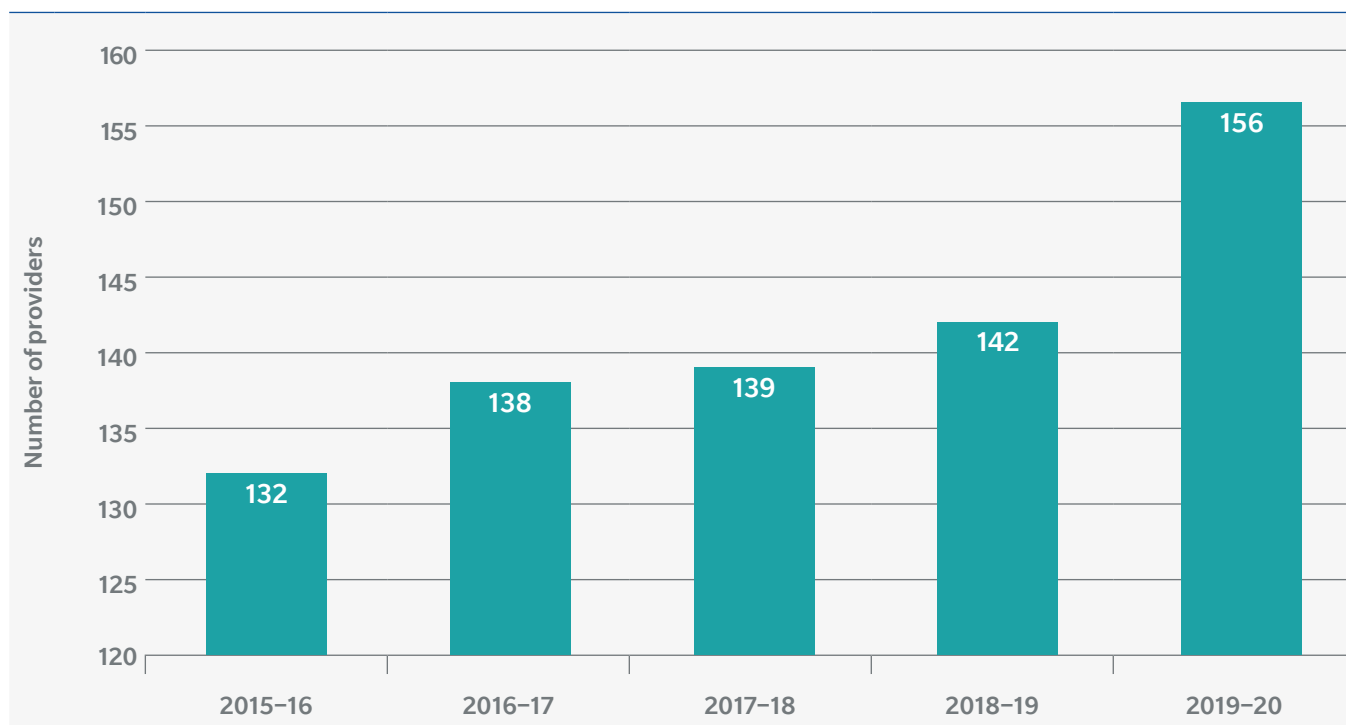


Figure 8 shows that 24 more providers reported UK TNE in 2019–20 than in 2015–16. The largest increase happened in the last reporting year, with 14 new providers. This is due to providers newly registered with the Office for Students in England reporting students to the HESA AOR for the first time in 2019–20.

Figure 8: Number of UK TNE students by level of study, 2015–16 to 2019–20



Location of UK provider

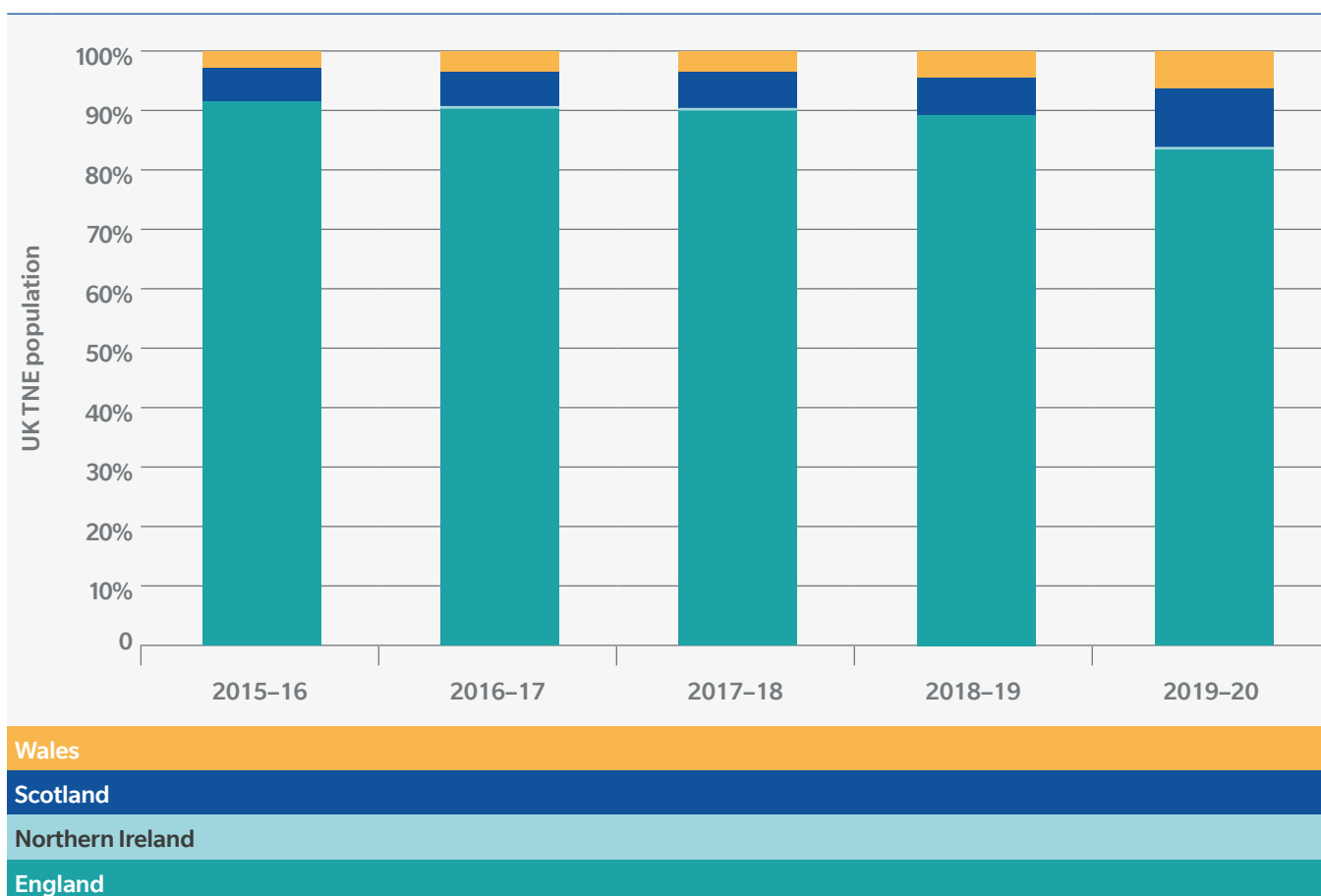
Table 4 shows that the majority of students (83.6%) were reported by providers located in England. This was followed by Scotland (9.7%), Wales (6.4%) and Northern Ireland (0.3%).

- 114 out of 137 providers in England and 14 out of 78 alternative providers reported TNE students. Provision fell by 261,745 students (–40.9%) between 2015–16 and 2019–20. Excluding Oxford Brookes University students, provision **increased** by 50,260 students (15.5%) between 2015–16 and 2019–20.
- Two out of four providers in Northern Ireland reported TNE students. Provision **fell** by 40 students (–2.6%) between 2015–16 and 2019–20.
- 17 out of 18 providers in Scotland reported TNE students. Provision **increased** by 5,805 students (15.1%) between 2015–16 and 2019–20.
- Nine out of nine providers in Wales reported TNE students. Provision **increased** by 8,360 students (40.9%) between 2015–16 and 2019–20.

Table 4: UK HE TNE students by country of provider, 2019–20

Category	England	Northern Ireland	Scotland	Wales
Number of providers reporting TNE students	128	2	17	9
Total number of TNE students	379,000	1,455	44,140	28,795
Proportion of UK's TNE student numbers	83.6%	0.3%	9.7%	6.4%
Percentage change from 2018–19 ⁶	12.9%	5.5%	3.6%	-4.8%
Percentage change from 2015–16 ⁷	15.5%	-2.6%	15.1%	40.9%

Figure 9 shows that the proportion of UK TNE students registered at providers beyond England has increased, in particular to the benefit of Scotland and, to a lesser extent, Wales.

Figure 9: Proportion of total UK TNE population by UK nation of provider 2015–16 to 2019–20

6. Percentage change figure for England excludes Oxford Brookes University.

7. Percentage change figure for England excludes Oxford Brookes University.

Mission group or sector representative organisations

Table 5 shows the number and proportion of providers in each mission group that report students in TNE. All universities affiliated to Million+ and the University Alliance reported UK TNE students in 2019–20. Of the 24 Russell Group universities, 23 reported TNE students, while for Guild HE institutions, the figure was 15 out of the 28 that returned data. Among non-aligned providers, 73 of 87 reported TNE students.

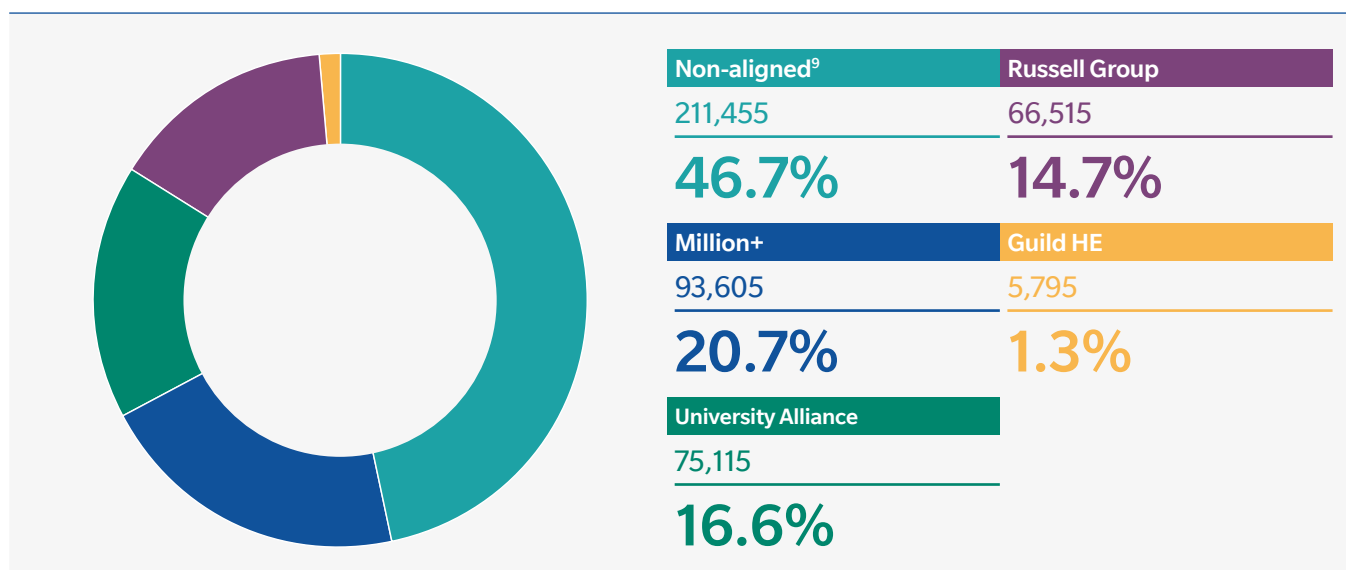
Table 5: Mission group or sector representative organisation of UK providers with UK HE TNE students, 2018–19

Mission group or sector representative organisation	2018–19				2019–20			
	Total members	Total delivering TNE	% of members	Number of TNE students	Total members	Total delivering TNE	% of members	Number of TNE students
GuildHE	28*	15	53.3%	4,380	28*	15	53.3%	5,795
Million+	22	22	100.0%	90,080	22	22	100.0%	93,605
Non-aligned ⁸	86	73	84.9%	188,350	87	73	83.9%	211,455
Russell Group	24	23	95.8%	60,985	24	23	95.8%	66,515
University Alliance	12	12	100.0%	329,780	12	12	100.0%	75,115

*Number of providers that returned HESA data out of GuildHE's 54 member institutions

Figure 10 shows that non-aligned providers reported the largest number of students in 2019–20, followed by universities affiliated to Million+, University Alliance, Russell Group and GuildHE. Between 2015–16 and 2019–20 student numbers increased in all groups; the largest increases took place in providers affiliated to University Alliance excluding Oxford Brookes (27.2%) and the Russell Group (26.8%), followed by Guild HE (16.6%), Million+ (15.2%) and non-aligned (7.4%). In the last year, the steepest increases took place among GuildHE (32.3%) and non-aligned (12.3%) providers.

Figure 10: Proportion of UK TNE students by mission group or sector representative organisation 2019–20



8. Excludes the aforementioned 14 'alternative providers' who reported to the AOR for the first time in 2019–20.

9. Excludes the 14 'alternative providers' who reported to the AOR for the first time in 2019–20.

Providers by type of provision

Table 6 shows the number of providers reporting students by type of provision. Distance, flexible or distributed learning was the most common category, with 132 providers reporting students in this category in 2019–20, up from 104 in 2015–16. The number of providers reporting students in collaborative provision increased to 96 in 2019–20 from 81 in 2015–16. Students at overseas campuses were reported by 25 providers in 2019–20, up from 19 in 2015–16. The number of providers reporting students at overseas partner organisations remained much the same throughout the period, starting and ending at 38.

Table 6: Number of providers by type of provision, 2015–16 to 2019–20

Category	2015–16	2016–17	2017–18	2018–19	2019–20	Change from 2015–16
Distance, flexible or distributed learning	104	107	110	117	132	+28 ↑
Collaborative provision	81	85	90	93	96	+15 ↑
Overseas partner organisation	38	40	36	37	38	0
Overseas campus	19	19	20	23	25	+6 ↑
Other arrangement	8	7	5	6	6	-2 ↓
Total	132	138	139	142	156	+24 ↑

Figure 11 shows the distribution of providers reporting students in on-site categories of TNE, by the number of countries and territories where they report students. 65 providers report students in fewer than five countries or territories. The number of providers reporting students tends to decline beyond 10 countries or territories. There are however seven providers that report students in more than 25 countries and territories.

Figure 11: Number of countries where on-site TNE is delivered per UK provider, 2019–20 (All providers)

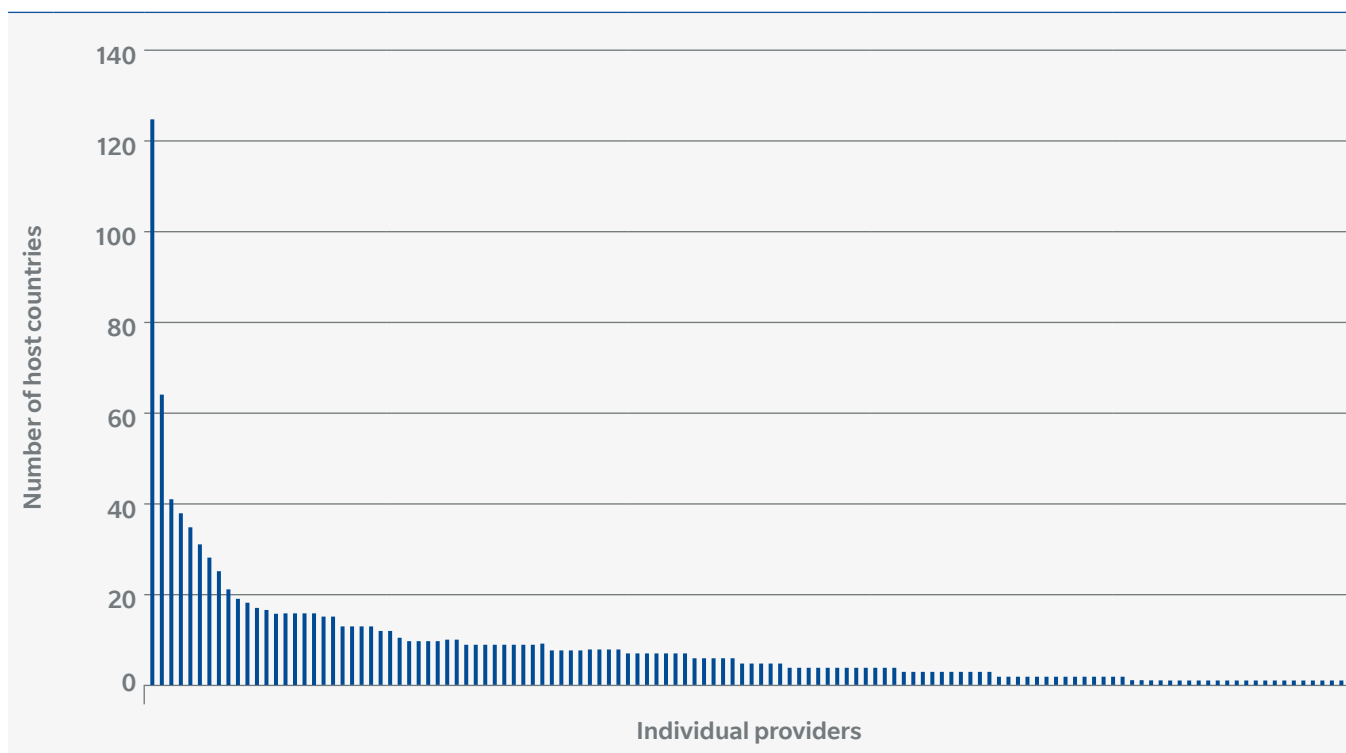
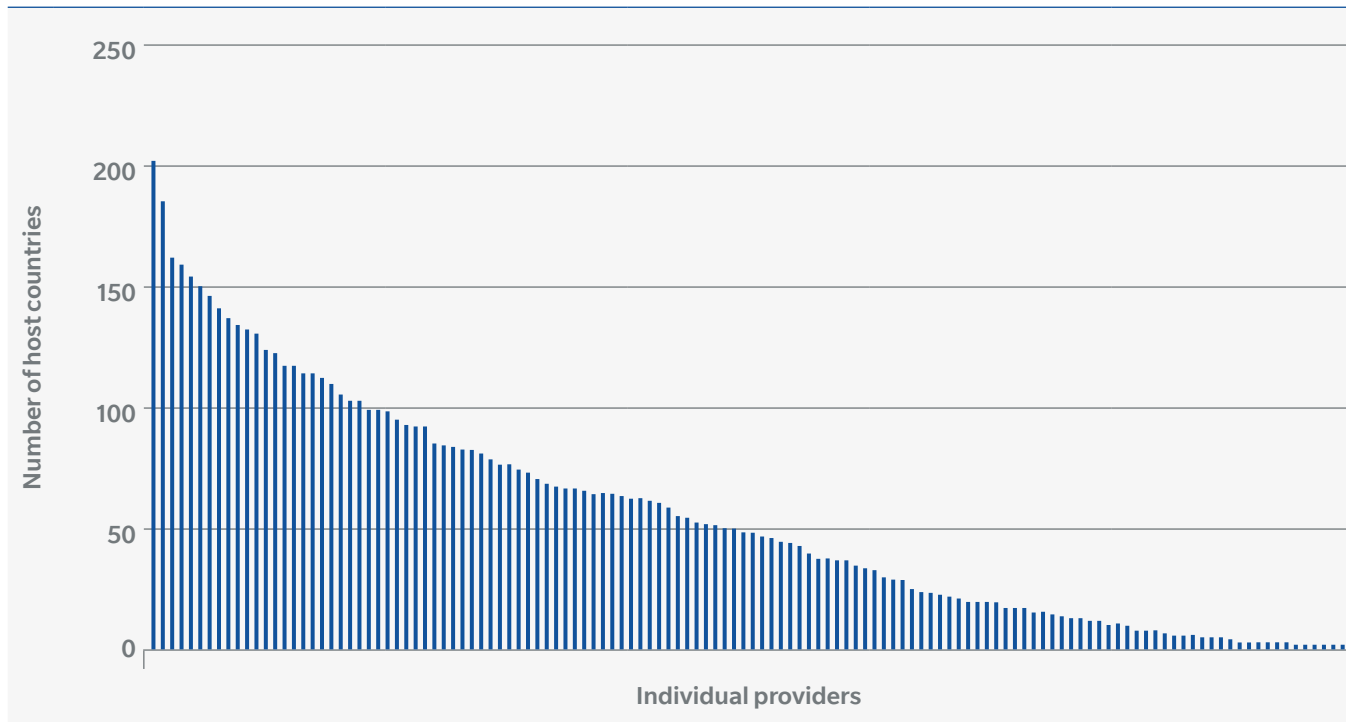


Figure 12 shows the distribution of providers reporting students in distance, flexible or distributed learning, by the number of countries and territories where they report students. Providers report students in a more diverse range of countries and territories in distance, flexible or distributed learning than in on-site categories of TNE. 28 providers report students in fewer than 10 countries or territories, but 23 providers report students in over one hundred countries and territories.

Figure 12: Number of countries where distance learning is delivered per UK provider, 2019–20 (All providers)



4. Regional insights

In 2019–20, UK TNE was delivered in 225 countries and territories around the world, with 50.3% of students studying in Asia, followed by the EU (16.5%), the Middle East (13.1%) and Africa (10.7%).

Key points

- Asia hosted **227,325** students, **50.3%** of the total.
- Excluding Oxford Brookes University, student numbers increased the most in Asia (**20,265**) followed by the European Union (**8,840**) between 2018–19 and 2019–20.
- Excluding Oxford Brookes University, student numbers increased across all world regions between 2018–19 and 2019–20, with the largest proportional increases taking place in South America (**23.2%**), non-EU Europe (**20.5%**) and North America (**16.7%**).
- Of the top 20 countries and territories, **17** saw increases in student numbers when Oxford Brookes University is excluded.
- The type of provision varies by region: Asia, Africa and the EU have a significant proportion of students studying through collaborative provision; studying with an overseas provider is predominant in the Middle East; and in Australasia, North America and South America distance, flexible or distributed learning is the prevalent mode of delivery.

UK TNE was delivered in

225

countries and territories

Asia hosted over

50.0%

of TNE students

South America saw a

23.0%

increase in TNE students

Regional overview

Figure 13 shows the percentage of UK TNE students in each world region when Oxford Brookes University’s figures are excluded. Asia hosted 50.2% of the total in 2019–20, up from 49.4% in 2015–16. Between 2015–16 and 2019–20, the proportion of students in the EU increased the most, from 13.2% to 16.6%, while in North America it increased from 3.0% to 5.1%, in non-EU Europe from 3.0% to 3.2% and in Australasia from 0.4% to 0.6%. Over the same period, the proportion studying in the Middle East and Africa.

Figure 13: Proportion of UK TNE students by region of study, 2015–16 and 2019–20 comparison (Excluding Oxford Brookes University)

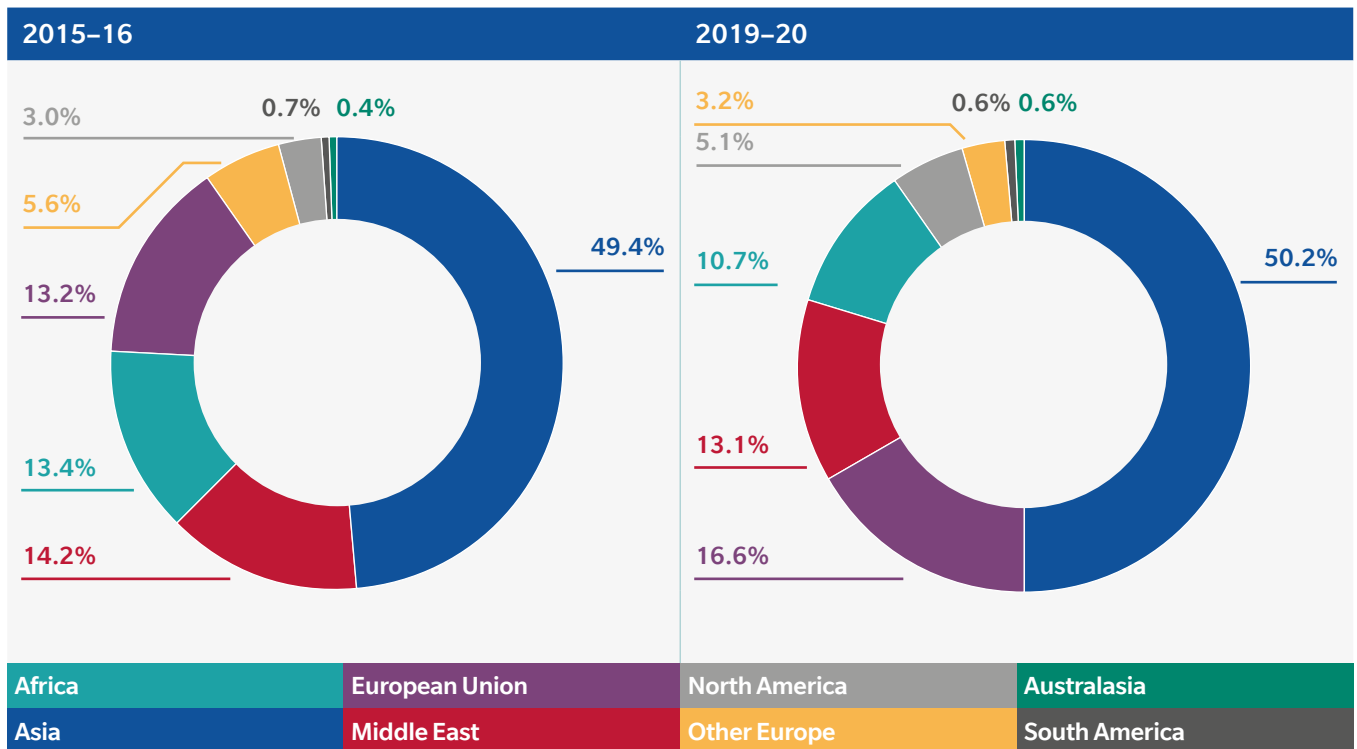


Figure 14 shows the change in student numbers in each world region between 2015–16 and 2019–20. Student numbers increased in all world regions in this period except in Africa, where they decreased by –7.2% (although they increased by 5.3% in the last academic year) and in Australasia, where they decreased by –18.6%. Asia hosted the largest number of students, increasing by 18.6% between 2015–16 and 2019–20. The second largest number was reported in the EU with an increase of 46.0%. In the last year there were significant increases in South America (23.3%), non-EU Europe (20.5%) and North America (16.7%).

Figure 14: UK HE TNE student numbers by region of provision, 2015–16 to 2019–20 (Excluding Oxford Brookes University)

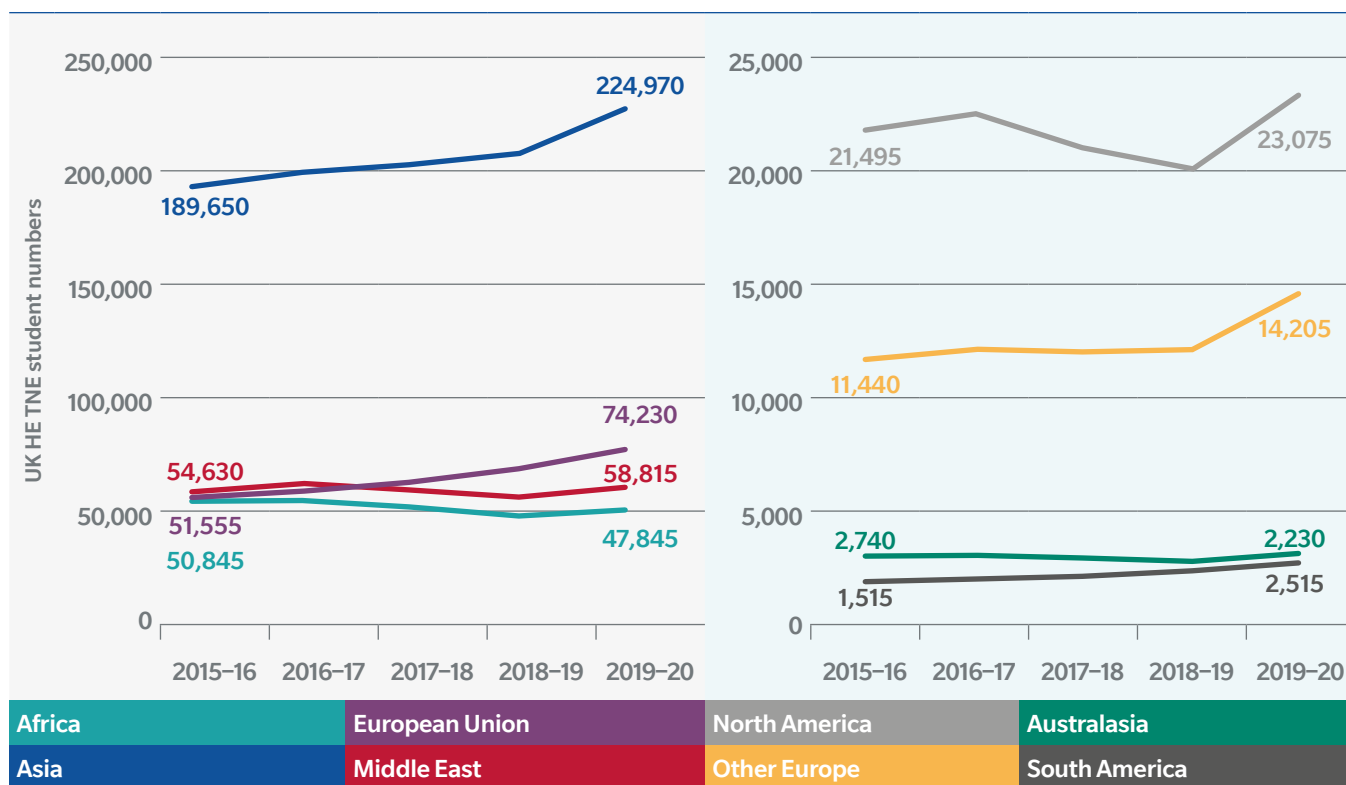


Table 7 shows how student numbers increased across all world regions between 2018–19 and 2019–20. The EU, North America, non-EU Europe and South America increased their share of the total, while Asia, Africa and the Middle East’s share decreased. Australasia remained the same.

Table 7: Proportion of UK HE TNE students by region of provision, 2018–19 to 2019–20 (Excluding Oxford Brookes University)

Region	2018–19		2019–20	
	Student numbers	% Total	Student numbers	% Total
Africa	45,455	11.2	47,845	10.7
Asia	204,705	50.5	224,970	50.2
Australasia	2,485	0.6	2,830	0.6
Middle East	53,845	13.3	58,815	13.1
North America	19,765	4.9	23,075	5.1
Europe (non-EU)	11,785	2.9	14,205	3.2
EU	65,390	16.1	74,230	16.6
South America	2,040	0.5	2,515	0.6

Note: Percentages exclude UK territories.

Table 8 shows the top 20 countries and territories by student numbers in 2019–20, the percentage change from the previous year and the proportion of the global total in each. The top eight countries and territories account for 52.7% of the total number of students. The largest variations took place in Nepal (42.4%), Germany (34.6%), Switzerland (26.9%), Sri Lanka (21.8%) and Pakistan (21.5%). There were slight decreases in Singapore (-2.7%), Egypt (-2.6%) and Cyprus (EU) (-1.4%).

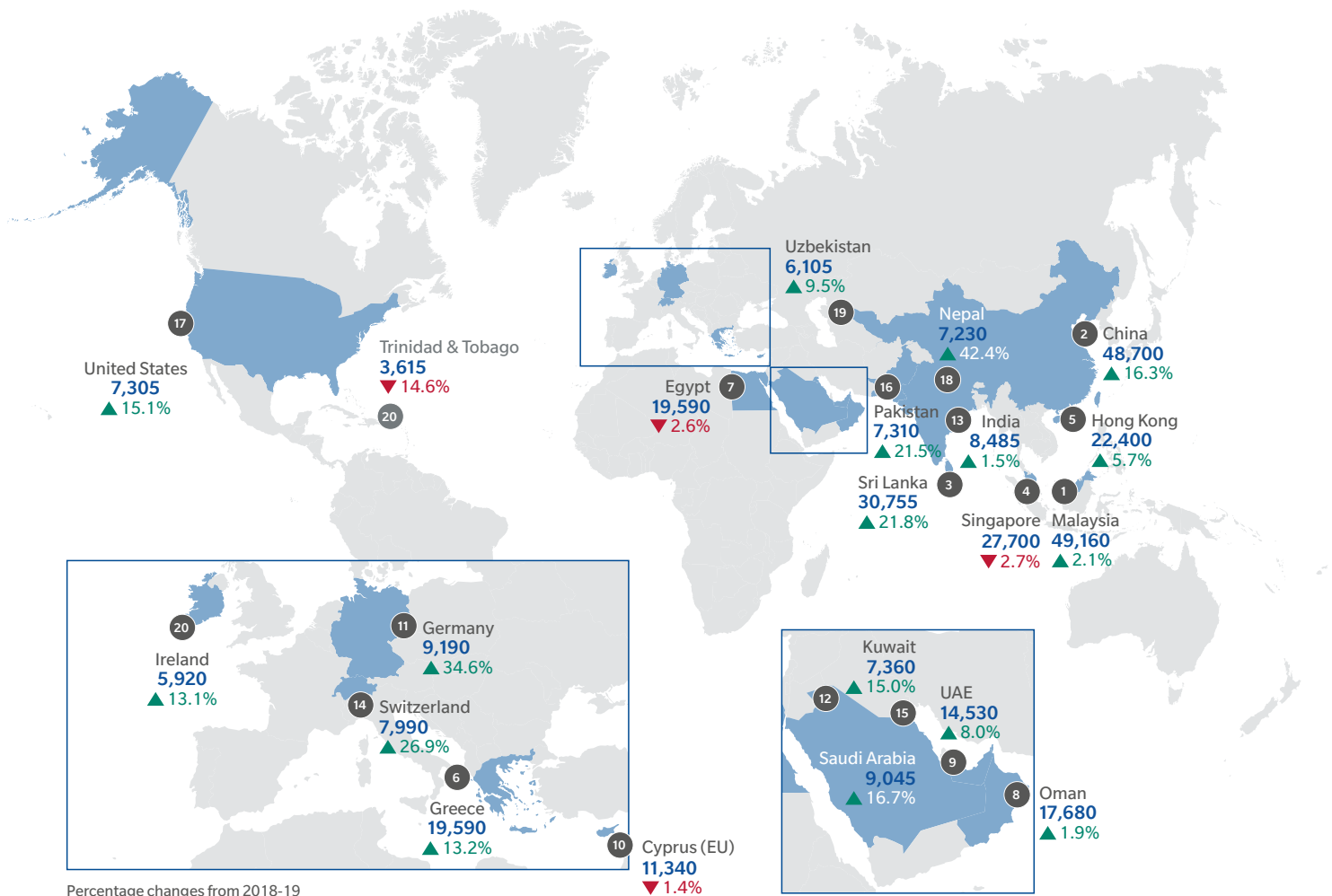
Table 8: Top 20 countries and territories for UK HE TNE students, 2019–20
(Excluding Oxford Brookes University)

Rank	Country or territory	Student numbers	% Change from 2018–19	% of Total
1	 Malaysia	49,160	2.1 ↑	11.0
2	 China	48,700	16.3 ↑	10.9
3	 Sri Lanka	30,755	21.8 ↑	6.9
4	 Singapore	27,700	-2.7 ↓	6.2
5	 Hong Kong	22,400	5.7 ↑	5.0
6	 Greece	19,590	13.2 ↑	4.4
7	 Egypt	19,590	-2.6 ↓	4.4
8	 Oman	17,680	1.9 ↑	3.9
9	 United Arab Emirates	14,530	8.0 ↑	3.2
10	 Cyprus (EU)	11,340	-1.4 ↓	2.5
11	 Germany	9,190	34.6 ↑	2.0
12	 Saudi Arabia	9,045	16.7 ↑	2.0
13	 India	8,485	1.5 ↑	1.9
14	 Switzerland	7,990	26.9 ↑	1.8
15	 Kuwait	7,360	15.0 ↑	1.6
16	 Pakistan	7,310	21.5 ↑	1.6
17	 United States	7,305	15.1 ↑	1.6
18	 Nepal	7,230	42.4 ↑	1.6
19	 Uzbekistan	6,105	9.5 ↑	1.4
20	 Ireland	5,920	13.1 ↑	1.3

Note: Percentages exclude UK territories.

World map

Figure 15: All modes of provision, (Excluding Oxford Brookes University) 2019 – 20

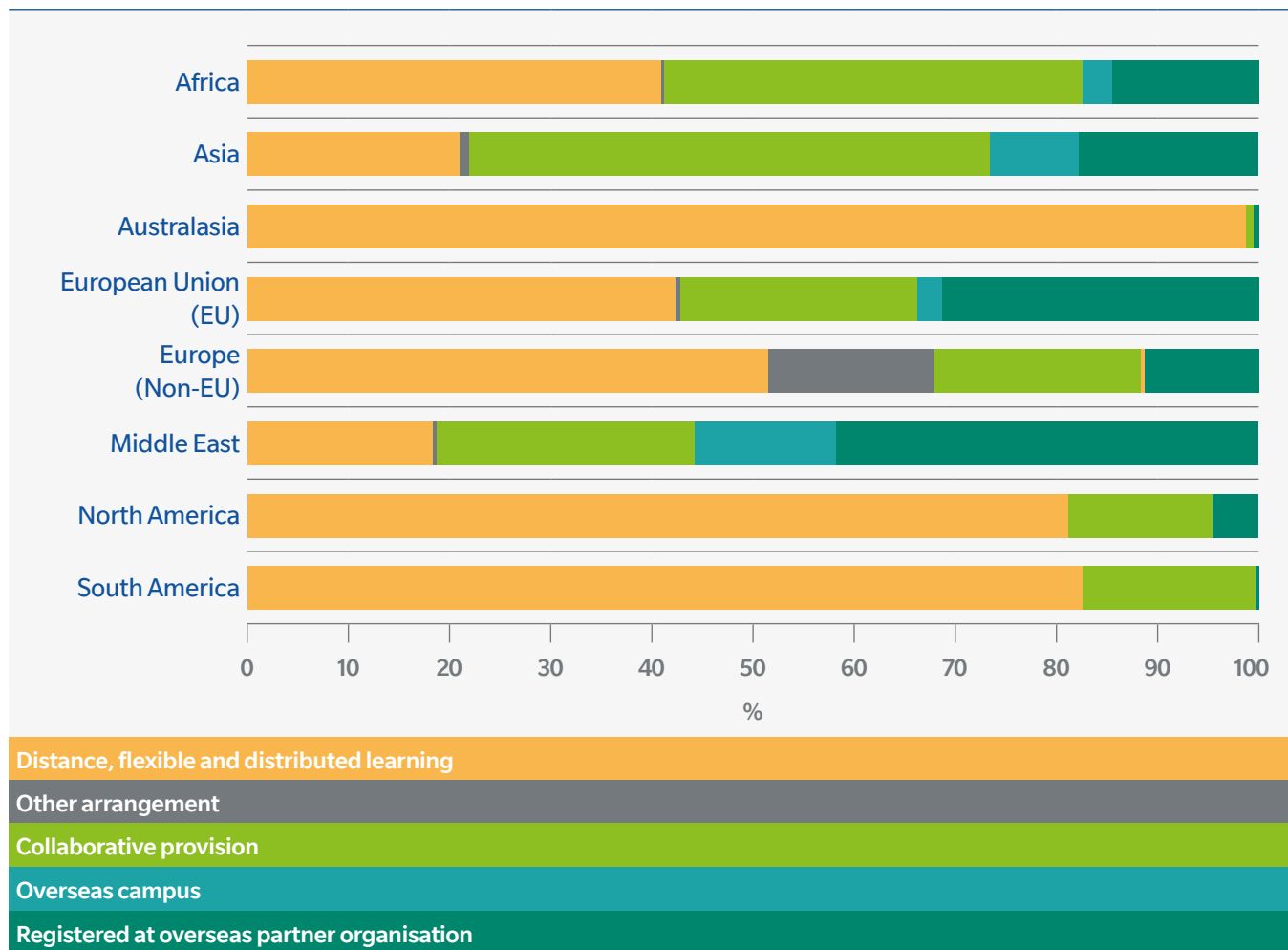


Percentage changes from 2018-19
 Data source: HESA aggregate offshore record (2019–20)

Type of provision by region

Figure 16 shows the distribution of students by type of TNE study and region of study in 2019–20. Distance, flexible or distributed learning was the main type of TNE provision in Australasia (98.8%), South America (82.6%), North America (81.2%), non-EU Europe (51.5%) and the EU (42.4%), and there were significant numbers in Africa (40.9%) and Asia (21%). Collaborative provision was important across the board, but especially in Asia (52.6%) and Africa (41.4%). Students registered at an overseas partner organisation were prevalent in the Middle East (41.8%) and there were also significant numbers in the EU (31.4%). There was substantial overseas campus provision in the Middle East (13.9%).

Figure 16: Proportion of UK HE TNE students by region of study and type of provision, 2019–20 (All providers)



Tables 9 to 13 show the top host countries and territories by type of provision in 2019–20. Among all students registered at overseas campuses (**Table 9**), with overseas partner organisations (**Table 10**) and studying via collaborative provision (**Table 11**), half or more were located in Asian countries and territories.

Provision in distance, flexible or distributed learning (**Table 12**) and other types of provision (**Table 13**) were more evenly spread. The concentration of students in fewer territories was more marked in overseas campuses and those registered at an overseas partner organisation.

Table 9: Top 10 host countries and territories of students studying at an overseas campus, 2019–20











Rank	Country or territory	Number of students
1	 Malaysia	9,805
2	 China	8,720
3	 United Arab Emirates	7,040
4	 Hong Kong	1,100
5	 Qatar	875
6	 Mauritius	850
7	 Germany	840
8	 Ghana	500
9	 Belgium	305
10	 Bahrain	210

Table 10: Top 10 host countries and territories of students registered at an overseas partner organisation, 2019–20











Rank	Country or territory	Number of students
1	 China	14,955
2	 Malaysia	10,830
3	 Greece	9,780
4	 Saudi Arabia	7,095
5	 Kuwait	6,920
6	 Oman	5,085
7	 Sri Lanka	4,970
8	 Singapore	3,655
9	 Egypt	3,405
10	 Austria	2,505

Table 11: Top 10 host countries and territories of students studying through collaborative provision, 2019–20











Rank	Country or territory	Number of students
1	 Malaysia	23,380
2	 China	22,525
3	 Sri Lanka	22,045
4	 Egypt	15,235
5	 Singapore	13,755
6	 Hong Kong	12,670
7	 Oman	11,915
8	 Greece	8,835
9	 Nepal	5,970
10	 Uzbekistan	5,060

Table 12: Top 10 host countries and territories of students studying through distance, flexible or distributed learning, 2019–20





















Rank	Country or territory	Number of students
1	 Singapore	10,195
2	 Cyprus (EU)	9,365
3	 Pakistan	7,770
4	 United States	6,970
5	 Hong Kong	6,300
6	 Malaysia	5,085
7	 Canada	4,940
8	 South Africa	4,790
9	 United Arab Emirates	4,660
10	 Germany	4,360

Table 13: Top 10 host countries and territories of students studying through other types of provision, 2019–20

Rank	Country or territory	Number of students
1	 Switzerland	2,350
2	 Uzbekistan	1,015
3	 India	705
4	 Ireland	280
5	 Malaysia	275
6	 Bahrain	260
7	 Singapore	160
8	 Zimbabwe	105
9	 Pakistan	••
10	 Mauritius	••

Level of study across regions

Table 14 shows the top host countries and territories by level of provision in 2019–20 and the percentage of provision at each level in each country. Of the top 20 host countries of undergraduate students, only in Ireland (48.2%) and Switzerland (34.3%) did undergraduate students account for less than half of the TNE student population. On the other hand, in 10 of the top 20 host countries of postgraduate students, postgraduate students account for less than half of the TNE student population. Seven countries feature in the top 10 for both undergraduate and postgraduate provision.

Sri Lanka hosted the largest population of postgraduate students, despite postgraduate provision only accounting for 34.6% of its total TNE student population. Postgraduate students made up the largest proportion of provision in Nigeria (84.0%), Cyprus (83.5%), and Austria (83.2%). Undergraduate students made up the largest proportion of provision in Uzbekistan (96.4%), Kuwait (95.1%), Egypt (93.0%), and Nepal (92.0%).

Table 14: Top 20 host countries for UK HE TNE students by level of study, 2019–20




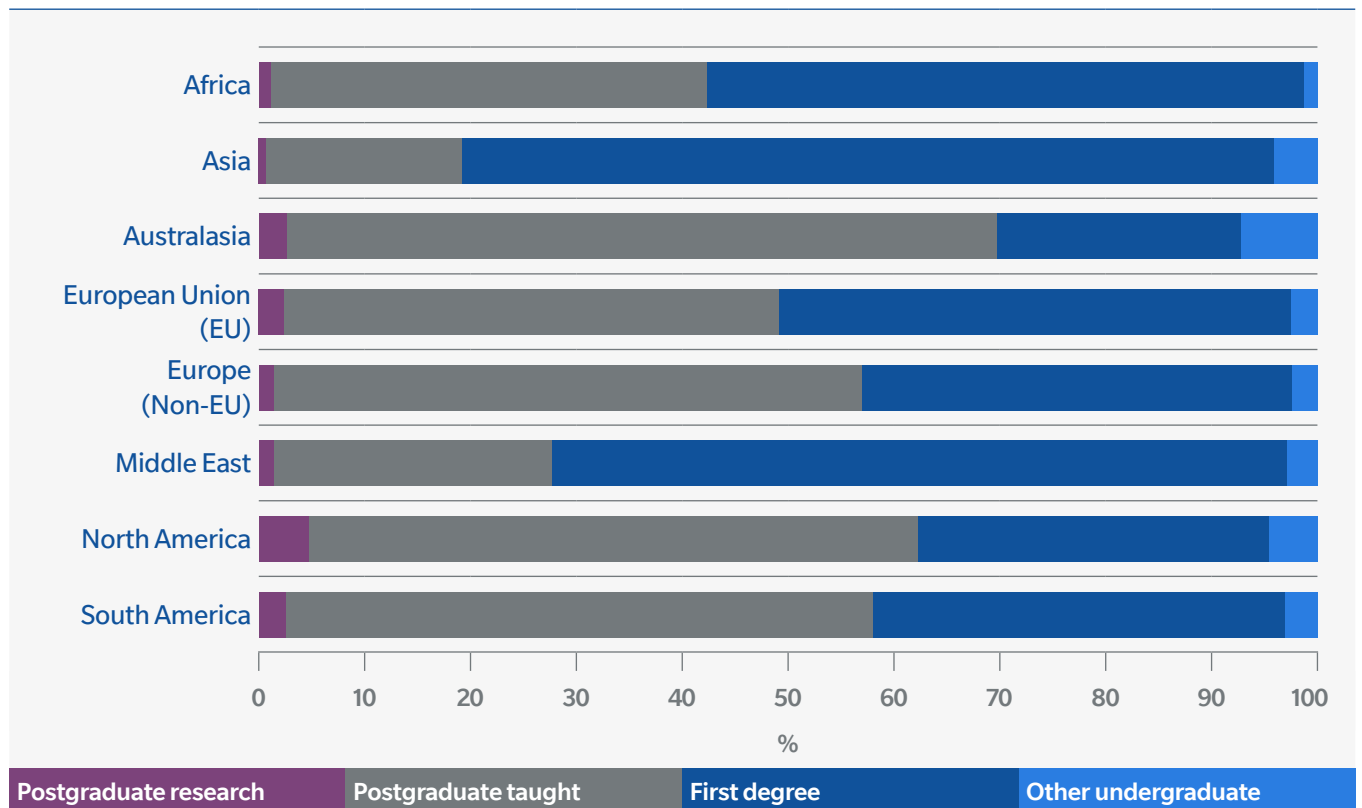
Rank	Undergraduate			Postgraduate		
	Country or territory	Number of students	% Undergraduate	Country or territory	Number of students	% Postgraduate
1	 China	43,400	87.2%	 Sri Lanka	10,655	34.6%
2	 Malaysia	42,590	86.3%	 Cyprus (EU)	9,470	83.5%
3	 Singapore	23,090	82.8%	 UAE	7,680	51.9%
4	 Sri Lanka	20,170	65.4%	 Malaysia	6,790	13.7%
5	 Egypt	18,220	93.0%	 China	6,395	12.8%
6	 Hong Kong	17,125	76.5%	 Switzerland	5,295	65.7%
7	 Oman	15,110	85.3%	 Hong Kong	5,275	23.5%
8	 Greece	14,940	75.7%	 United States	4,965	67.7%
9	 Saudi Arabia	7,450	82.0%	 Singapore	4,795	17.2%
10	 UAE	7,120	48.1%	 Greece	4,785	24.3%
11	 Pakistan	7,100	89.9%	 Germany	4,285	46.3%
12	 Kuwait	7,005	95.1%	 Canada	3,735	71.3%
13	 Nepal	6,655	92.0%	 Nigeria	3,725	84.0%
14	 Uzbekistan	5,890	96.4%	 South Africa	3,460	69.9%
15	 India	5,605	65.9%	 Ireland	3,075	51.8%
16	 Germany	4,965	53.7%	 India	2,905	34.1%
17	 Spain	3,545	77.2%	 Austria	2,650	83.2%
18	 Vietnam	3,075	81.4%	 Trinidad & Tobago	2,600	48.4%
19	 Ireland	2,860	48.2%	 Oman	2,585	14.7%
20	 Switzerland	2,765	34.3%	 Ghana	2,430	62.1%

Figure 17 shows the distribution of students by level of provision in each world region in 2019–20. First degrees were the main form of provision in Africa (56.4%), Asia (76.7%), the EU (48.4%) and the Middle East (69.4%). Postgraduate taught degrees were the most popular choice in Australasia (67.0%), non-EU Europe (55.6%), North America (57.6%) and South America (55.5%). Postgraduate research was more significant in North America (4.7%) and other undergraduate studies in Australasia (7.2%) than in other regions, although both categories represent a relatively small proportion of students.

Figure 17: Proportion of UK HE TNE students by region and level of study, 2019–20 (All providers)

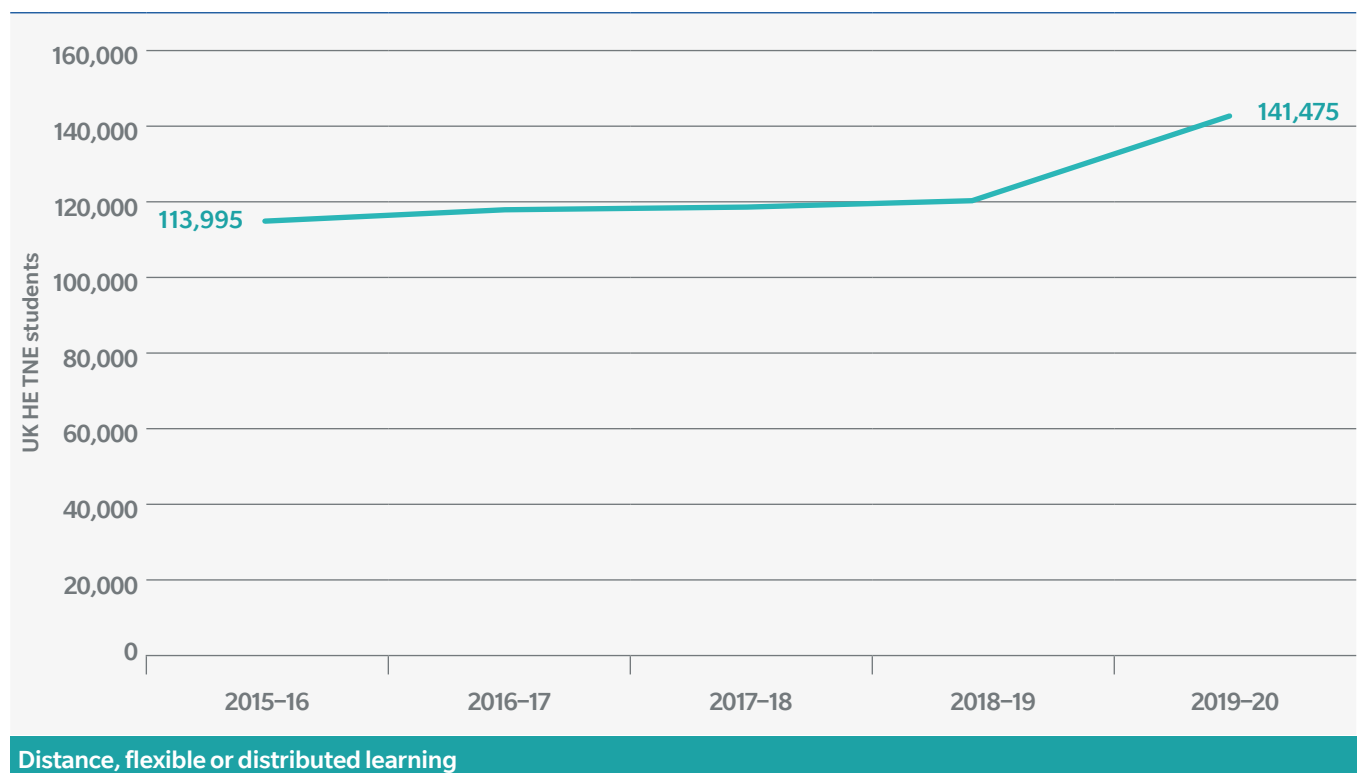


5. Distance and online learning – global analysis

The following section focuses on the data on students studying via distance and online learning.

Figure 18 shows that the number of students reported in the distance, flexible or distributed learning category increased by 27,480 (24.1%) between 2015–16 and 2019–20. Of those, 21,110 new students were reported in the last year, representing an increase of 17.5%.

Figure 18: UK HE TNE distance and online learning student numbers, 2015–16 to 2019–20 (All providers)



Top 40 countries and territories

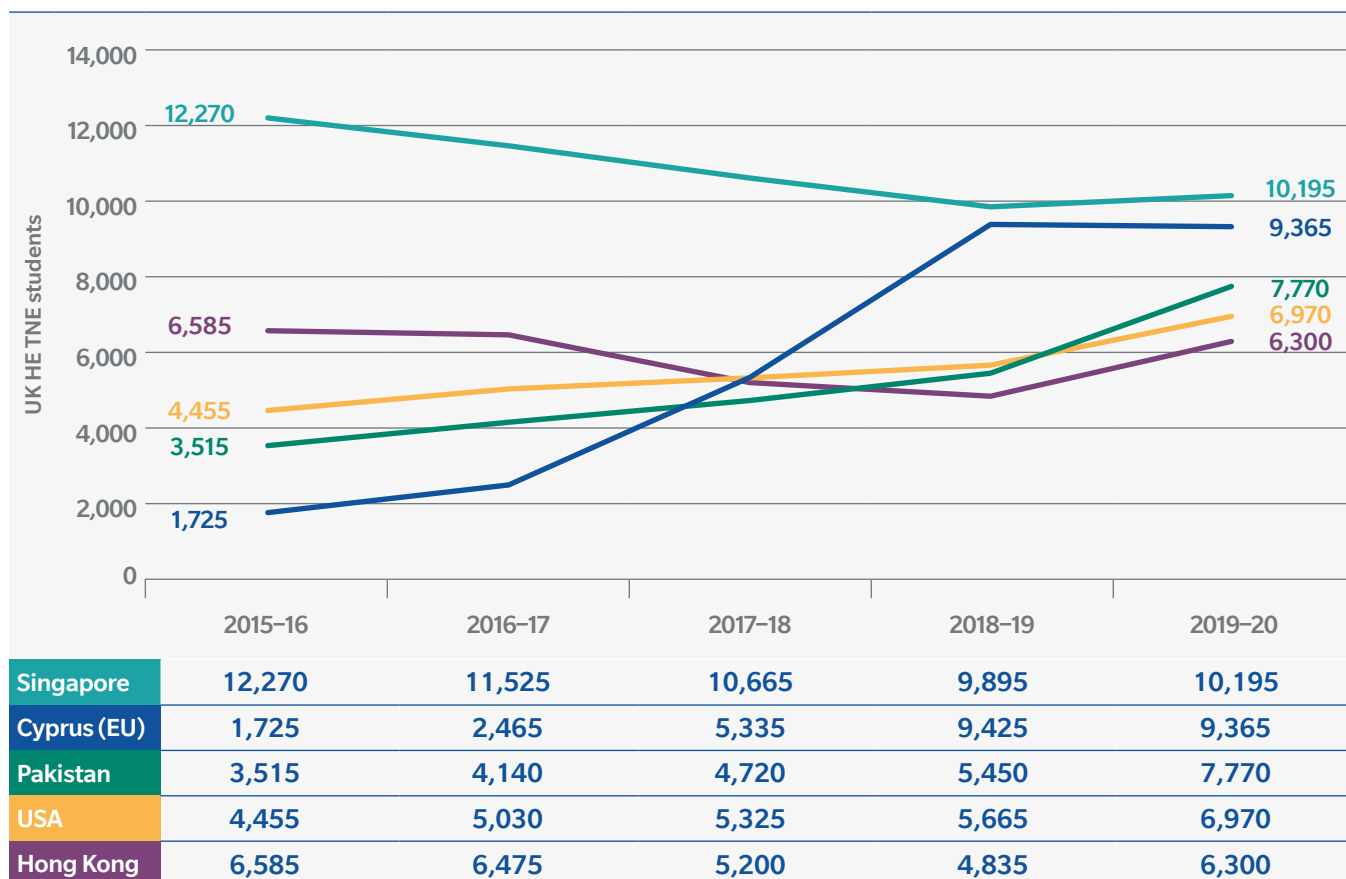
Table 15 shows the top 40 countries and territories hosting students via distance, flexible or distributed learning in 2019–20, the percentage change from the previous year and the percentage of the total hosted. The top 12 countries and territories hosted over half of all students studying in this way. The largest increases took place in Pakistan (with an increase of 2,320), Hong Kong (1,465), the United States (1,305), Germany (1,045) and the United Arab Emirates (970), while Sri Lanka (-145) and Cyprus (EU) (-60) experienced small decreases. While student numbers were lower, percentage increases were nevertheless significant in Mauritius (49.8%), Bangladesh (37.0%), France (36.2%), Spain (31.7%) and Zimbabwe (31.6%). Of the 10 countries with the largest increase in total number of students studying through distance, flexible or distributed learning between 2018–19 and 2019–20, four were located in Asia, two in North America and one each in the EU, the Middle East, Africa, and non-EU Europe.

Table 15: Top 40 countries and territories for UK HE TNE distance and online learning students, 2019–20

Rank	Country or territory	Number of students 2018–19	Number of students 2019–20	% change from 2018–19	% of Total
1	 Singapore	9,895	10,195	3.0 ↑	7.2
2	 Cyprus (EU)	9,425	9,365	-0.6 ↓	6.6
3	 Pakistan	5,450	7,770	42.5 ↑	5.5
4	 United States	5,665	6,970	23.0 ↑	4.9
5	 Hong Kong	4,835	6,300	30.3 ↑	4.5
6	 Malaysia	4,180	5,085	21.7 ↑	3.6
7	 Canada	4,040	4,940	22.3 ↑	3.5
8	 South Africa	4,040	4,790	18.6 ↑	3.4
9	 UAE	3,690	4,660	26.4 ↑	3.3
10	 Germany	3,315	4,360	31.6 ↑	3.1
11	 Ireland	3,435	3,955	15.2 ↑	2.8
12	 Sri Lanka	3,950	3,805	-3.6 ↓	2.7
13	 Nigeria	3,430	3,735	8.8 ↑	2.6
14	 India	3,220	3,690	14.6 ↑	2.6
15	 China	3,095	3,595	16.2 ↑	2.5
16	 Switzerland	2,495	3,120	25.2 ↑	2.2
17	 Trinidad & Tobago	2,170	2,395	10.3 ↑	1.7
18	 Australia	1,985	2,255	13.5 ↑	1.6
19	 Russia	2,005	2,175	8.3 ↑	1.5
20	 Bangladesh	1,520	2,080	37.0 ↑	1.5
21	 Saudi Arabia	1,755	1,865	6.1 ↑	1.3
22	 Kenya	1,430	1,690	18.1 ↑	1.2
23	 France	1,205	1,640	36.2 ↑	1.2
24	 Spain	1,215	1,600	31.7 ↑	1.1
25	 Netherlands	1,285	1,495	16.2 ↑	1.1
26	 Ghana	1,215	1,435	18.4 ↑	1.0
27	 Qatar	1,090	1,330	21.8 ↑	0.9
28	 Italy	1,075	1,260	17.5 ↑	0.9
29	 Malta	1,230	1,250	1.7 ↑	0.9
30	 Japan	955	1,075	12.7 ↑	0.8
31	 Mauritius	635	955	49.8 ↑	0.7
32	 Greece	765	955	7.8 ↑	0.7
33	 Egypt	885	955	24.4 ↑	0.7
34	 Belgium	855	915	6.9 ↑	0.6
35	 Jamaica	760	875	14.8 ↑	0.6
36	 Zimbabwe	590	775	31.6 ↑	0.5
37	 Zambia	685	700	2.5 ↑	0.5
38	 Austria	595	670	12.8 ↑	0.5
39	 Thailand	525	630	20.6 ↑	0.4
40	 Denmark	585	615	5.1 ↑	0.4

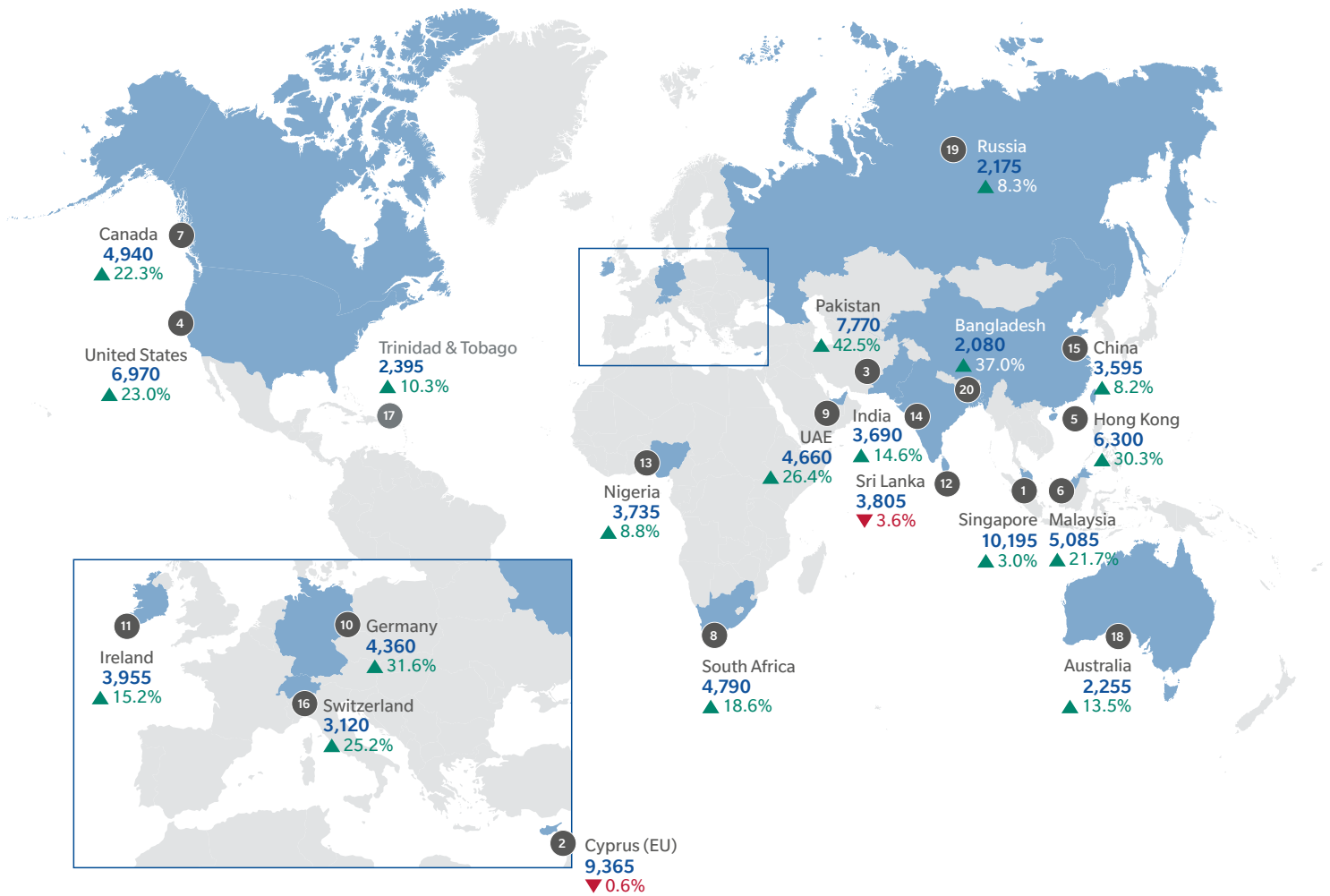
Figure 19 shows the change in student numbers between 2015–16 and 2019–20 in the top five countries and territories where providers reported students studying through distance, flexible or distributed learning. Student numbers increased in Cyprus (EU) (442.8%), Pakistan (121.0%), and the United States (56.4%). Student numbers decreased in Singapore (-16.9%) and Hong Kong (-4.3%), although student numbers in those territories increased by 3.0% and 30.2% respectively between 2018–19 and 2019–20.

Figure 19: Top five countries and territories for UK HE TNE students through distance learning, 2015–16 to 2019–20 (Excluding Oxford Brookes University)



World map

Figure 20: Distance learning (All providers) 2019 – 20



Percentage changes from 2018-19

Data source: HESA aggregate offshore record (2019–20)

Number of providers

Figure 21 shows that the number of providers reporting students studying through distance, flexible or distributed learning increased by 28 (26.9%) between 2015–16 and 2019–20. The largest increase happened between 2018–19 and 2019–20, with 15 added providers (12.8% increase), 13 of which were reporting to the AOR for the first time, having previously been categorised by HESA as ‘Alternative Providers’.

Figure 21: Number of providers with distance learning UK HE TNE students, 2015–16 to 2019–20

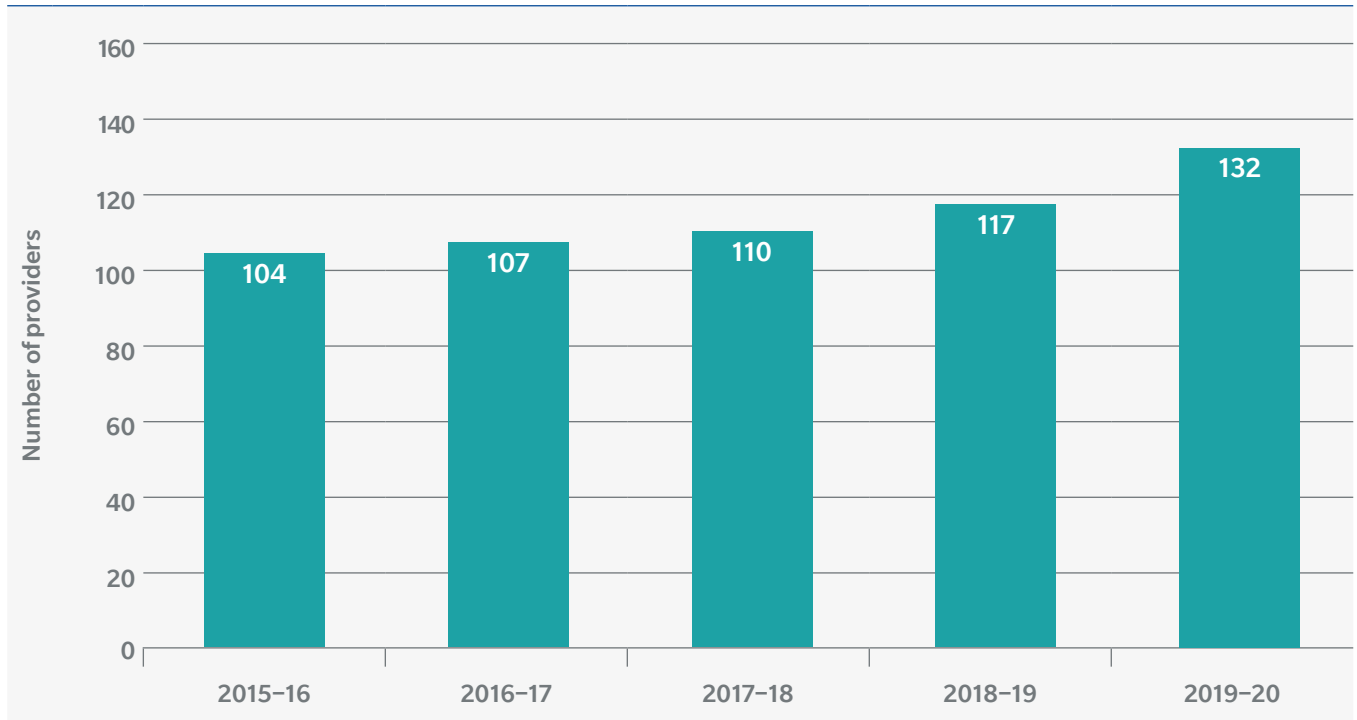












Table 16 shows the number of providers reporting students studying through distance, flexible or distributed learning in 2019–20, the change from 2018–19 and the total number of students in each country or territory. The largest increase in providers reporting students took place in Germany and Canada, followed by the UAE, Ireland and the United States. Outside of the top 10 countries and territories, there were also large increases in the number of providers reporting students studying through distance, flexible or distributed learning in Zimbabwe (70 providers, an increase of 16), New Zealand (69 providers, an increase of 13), Syria (28 providers, an increase of 12) and Sudan (37 providers, an increase of 11).

Table 16: Top 10 host countries and territories by number of UK providers delivering distance learning TNE, 2019–20

Rank	Country or territory	Number of UK providers	% Change from 2018–19	Student numbers 2019–20
1	 United States	104	11 ↑	6,970
2	 Germany	101	15 ↑	4,360
3	 Canada	97	15 ↑	4,940
4	 Ireland	96	12 ↑	3,955
5	 United Arab Emirates	94	13 ↑	4,660
6	 Switzerland	90	7 ↑	3,120
7	 Nigeria	89	10 ↑	3,735
8	 France	88	5 ↑	1,640
9	 China	87	10 ↑	3,595
10	 South Africa	86	9 ↑	4,790

Level of study

Figure 22 compares level of study among those learning via distance, flexible or distributed learning with the figures for the overall TNE population, showing that postgraduate degrees – both taught and research – are a much more important part of the distance learning landscape. In 2019–20, 52.8% of students in distance, flexible or distributed learning were studying postgraduate taught degrees, against 30.3% overall, and 2.8% were studying postgraduate research degrees against 1.4% overall. Only 39.2% were studying first degrees, against 64.9% overall; however, 5.2% were studying other undergraduate degrees against 3.4% overall.

Figure 22: Proportion of UK TNE students by level of study, 2019–20

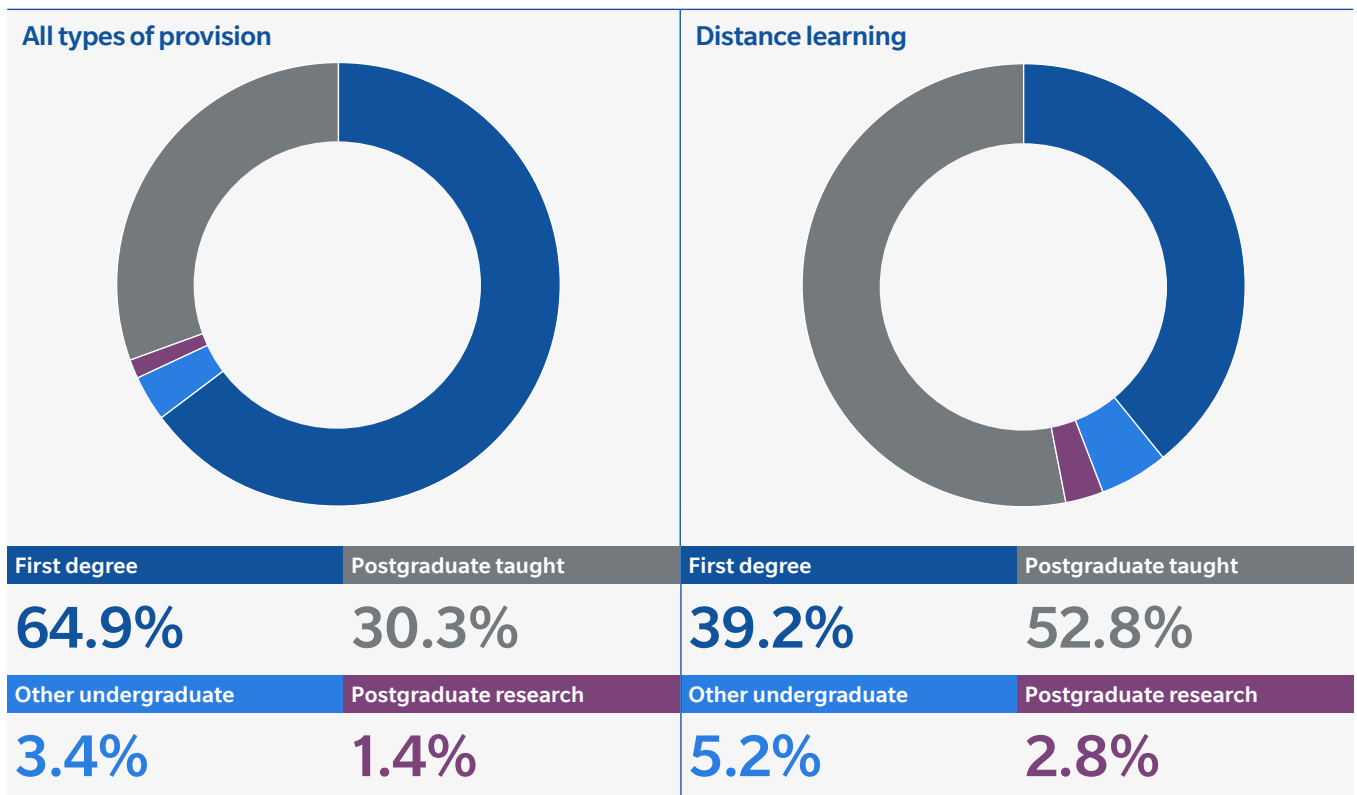


Figure 23 shows the number of students in distance, flexible or distributed learning by level of study from 2015–16 to 2019–20. The number of students in postgraduate taught programmes grew by 28.9%, with the largest annual increase (11.4%) occurring between 2018–19 and 2019–20. The number of students in first degree programmes grew by 21.9%, with the largest annual increase (26.1%) occurring between 2018–19 and 2019–20. The number of students in other undergraduate and postgraduate research programmes grew by 8.1% and 5.2% respectively across the whole period.

Figure 23: Number of UK TNE distance learning students by level of study, 2015–16 to 2019–20

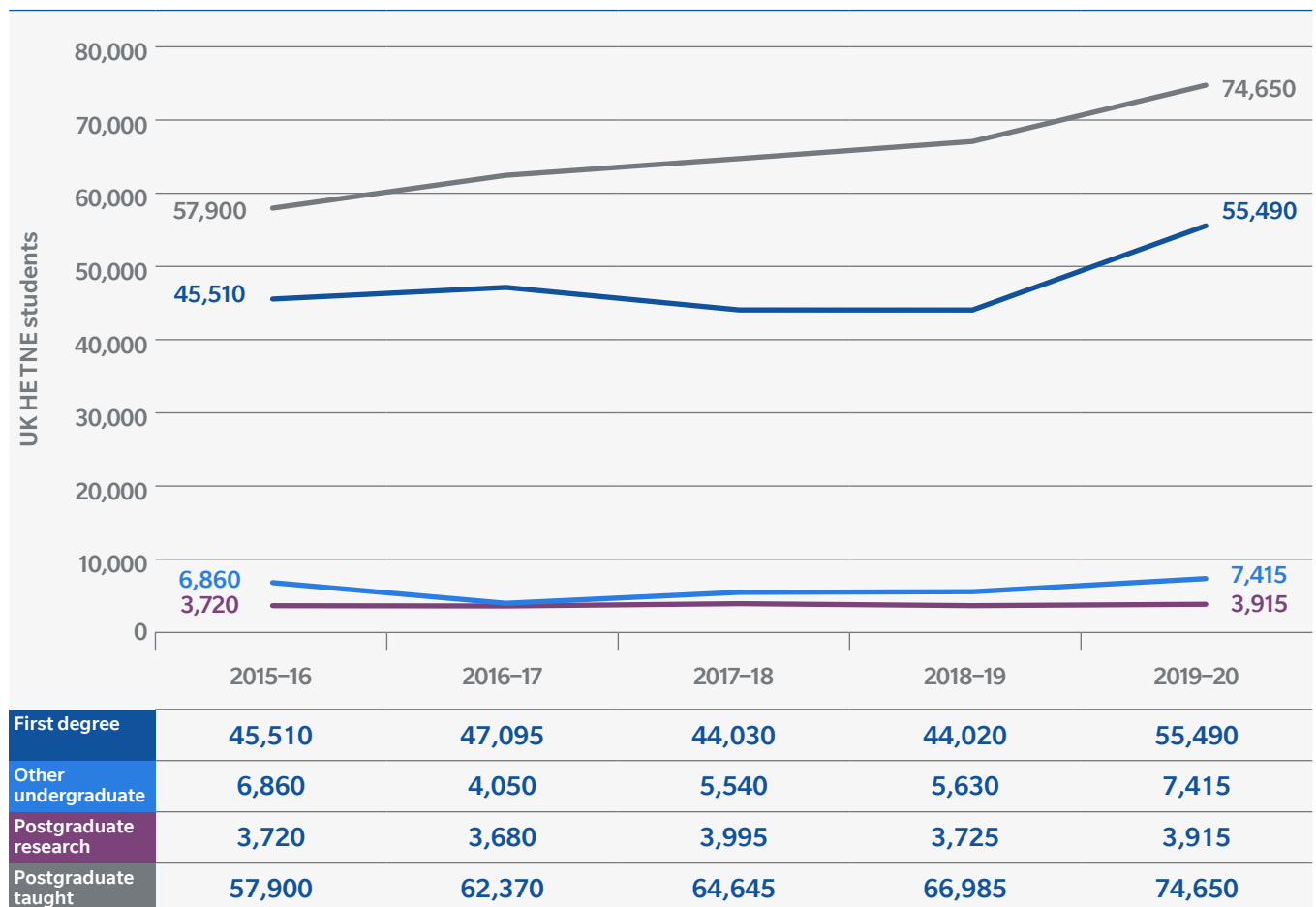


Table 17 shows the top 20 countries and territories hosting students in distance, flexible or distributed learning by level of study in 2019–20. At the undergraduate level, the top eight countries and territories accounted for 51.5% of all students in this category, while at the postgraduate level, the top 11 countries and territories accounted for 50.7%. Most countries and territories were among the top 20 at both levels: the exceptions were Bangladesh, Pakistan, Russia, Spain, Sri Lanka and Trinidad and Tobago, which were among the top 20 at undergraduate but not postgraduate level; and Cyprus (EU), France, Kenya, the Netherlands, Qatar and Saudi Arabia, which were among the top 20 at postgraduate but not at undergraduate level.

Table 17: Top 20 host countries and territories for UK HE distance learning TNE students by level of study, 2019–20

Rank	Undergraduate		Postgraduate	
	Country or territory	Number of students	Country or territory	Number of students
1	 Singapore	8,240	 Cyprus (EU)	8,970
2	 Pakistan	6,985	 United States	4,605
3	 Malaysia	4,155	 Canada	3,440
4	 Hong Kong	3,485	 United Arab Emirates	3,375
5	 Sri Lanka	2,970	 South Africa	3,300
6	 United States	2,360	 Nigeria	3,030
7	 India	2,080	 Germany	2,850
8	 Bangladesh	1,940	 Hong Kong	2,815
9	 Trinidad & Tobago	1,785	 China	2,780
10	 Russia	1,645	 Ireland	2,465
11	 Germany	1,510	 Switzerland	2,225
12	 Canada	1,500	 Singapore	1,955
13	 Ireland	1,495	 India	1,610
14	 South Africa	1,490	 Australia	1,565
15	 United Arab Emirates	1,285	 Saudi Arabia	1,505
16	 Switzerland	895	 Kenya	1,325
17	 China	815	 Qatar	1,075
18	 Spain	755	 France	985
19	 Nigeria	705	 Malaysia	930
20	 Australia	690	 Netherlands	920

Case studies

University of Manchester – Worldwide

In August 2017, the University of Manchester established University of Manchester Worldwide (UMW). UMW focuses on enhanced development resources for new online and blended TNE courses, including access to the four existing University of Manchester International Centres in Shanghai, Singapore, Dubai and Hong Kong.

These, along with the Manchester 'Centre' offer regional marketing, recruitment, course delivery support and host blended face-to-face activity. UMW aims to make a University of Manchester education available to students who are unable to join us on-campus, supporting learners' individual needs by empowering them to choose to study in a way that suits their individual circumstances and interests, balancing flexibility with tailored support.

The 2-year Masters in Educational Leadership in Practice, developed for the Manchester Institute of Education, is a flagship course for UMW. This flexible, blended course is taught from an applied perspective, following a practice-orientated learning approach allowing students to take their learnings directly into the workplace from day one.

The course launched globally from Manchester in February 2019, followed by cohorts in Dubai and Shanghai (Hong Kong and Singapore will have an intake in 2022). It currently has around 80 active students from the UK, Greece, Germany, Turkey, South Africa, Uruguay, Colombia, China, the UAE, and other Gulf Territories. Current and past students have highlighted the blended nature of the course, and the global network they engage with as key features which make the programme stand out.

This course is one of 11 launched by the University of Manchester since 2018 using this enhanced support model to develop new online and blended TNE education, and there are currently around 800 global students studying on courses across a range of academic subject from Financial Management to Health Education. As The University of Manchester continues to explore how blended learning can enhance the teaching and learning experience of all our students, UMW will play a key role both in expanding our off campus learning and in providing its expertise and services for the provision of innovative, blended on-campus courses.

The 2-year Masters in Educational Leadership in Practice course has around **80** students

SOAS – Masters in Global Diplomacy

The MA Global Diplomacy from the Centre for International Studies and Diplomacy at SOAS University of London provides world leading professional education in the realm of diplomacy and related fields.

The Global Diplomacy MA programme was established in 2013 with strong links to the Programme Director, Dr J Simon Rofe's scholarship *Global Diplomacy: Theories, Types and Models* as an example of research-inspired teaching.

Delivered jointly by SOAS and the University of London Worldwide, the programme lives up to its global title, having produced thousands of graduates around the world since its launch in 2013. It has enjoyed exponential growth as its reputation is recognised globally, with the external examiner commenting;

“ This online distance learning programme continues to innovative while maintaining a consistently high level of academic engagement and intellectual challenge.”

The programme team have worked closely with the UK's Foreign Commonwealth and Development Office (FCDO) as well as other diplomatic services and international organisations, such as those in the United Nations system, to further develop regional pathways in South Asia, MENA, East Asia, and most recently in North America and Europe.

The programme delivers high quality learning with 85% of students completing the MA in two years and 38% of students graduating with Distinction. Feedback from students demonstrates an overwhelmingly positive student experience with 96% rating the programme as either excellent or very good. The online format of the programme has also contributed to its success, with a 5-8% increase in student performance over the campus based equivalent course.

High quality learning with
38% of students graduating
with Distinction

Edinburgh Napier University – Global online

Less than 10 years since its establishment, Edinburgh Napier University's distance learning platform 'Global Online' has grown to provide 14 programmes and many more specialist routes, across a wide range of disciplines, to more than 5,500 students, with enrolments doubling in the past three years.

In addition to offering flexible and specialist programmes, where students can adjust their workload to balance their studies with work, family and other responsibilities; Global Online has expanded beyond traditional areas of Business, Engineering and Computing, to offer unique online programmes in areas such as Business and Enterprise in Sport, and Construction Project Management.

One of the platform's greatest successes, with enrolments growing over 350% in the past four years, has been the BSc Nursing Studies online programme, which allows registered Nurses around the world to develop their skills in areas of particular need within their societies. By improving accessibility to lifelong education, this programme has provided specialised career prospects for graduates, and strengthened the capacity of healthcare systems in countries most in need.

Global online now provides
14 programmes to more than
5,500 students

Global Online strengthens self-directed online learning through collaboration with the university's Global Online Support Centres and other partners. Support Centres provide face-to-face academic skills workshops to make sure students get the most out of their programmes, and local partners assist students to select programmes which best meet their academic and career goals.

The University of Warwick – Innovation in Global Learning

The University of Warwick is committed to excellence in teaching and learning and to provide all its students with a global learning experience.

The disruption of the pandemic offered the university an opportunity to innovate and to build on staff and students' international learning experience to enhance Warwick's pedagogic offering for all students. Illustrating this approach is the world-leading *Distance Learning MBA* (DLMBA) from Warwick Business School (WBS), ranked number one in the *Financial Times'* Online MBA ranking for four consecutive years.

WBS has long been at the cutting edge of technology-enhanced learning, providing flexible access to education for those whose circumstances are not conducive to full-time or on-campus study. DLMBA was launched in 1986, was the first in the UK and now reaches an alumni population of 8,664 people across 119 countries. The DLMBA experience, together with WBS's bespoke online platform and expertise in digital pedagogy, provided the foundation for the School's

rapid response to the pandemic with the creation of a new, entirely flexible, blended model for teaching delivery. This exploits the advantages that online delivery presents via a new combination of asynchronous content to engage students in their learning ahead of live online lectures and synchronous small-group teaching, where students apply their learning to real business issues. Now embedded across the School's entire teaching portfolio, this model is supported by a dedicated Teaching and Learning Enhancement team providing individualised support and guidance for faculty to develop high quality and innovative teaching and assessment.

With this imaginative recreation of taught content, student satisfaction with their teaching increased, even in the face of all the difficulties presented by the pandemic. WBS, and the university more broadly, seek to offer a post-pandemic pedagogical model that combines the best of the university's learning heritage, the innovations of the last twelve months, and the strengths of traditional teaching into a new global learning experience.

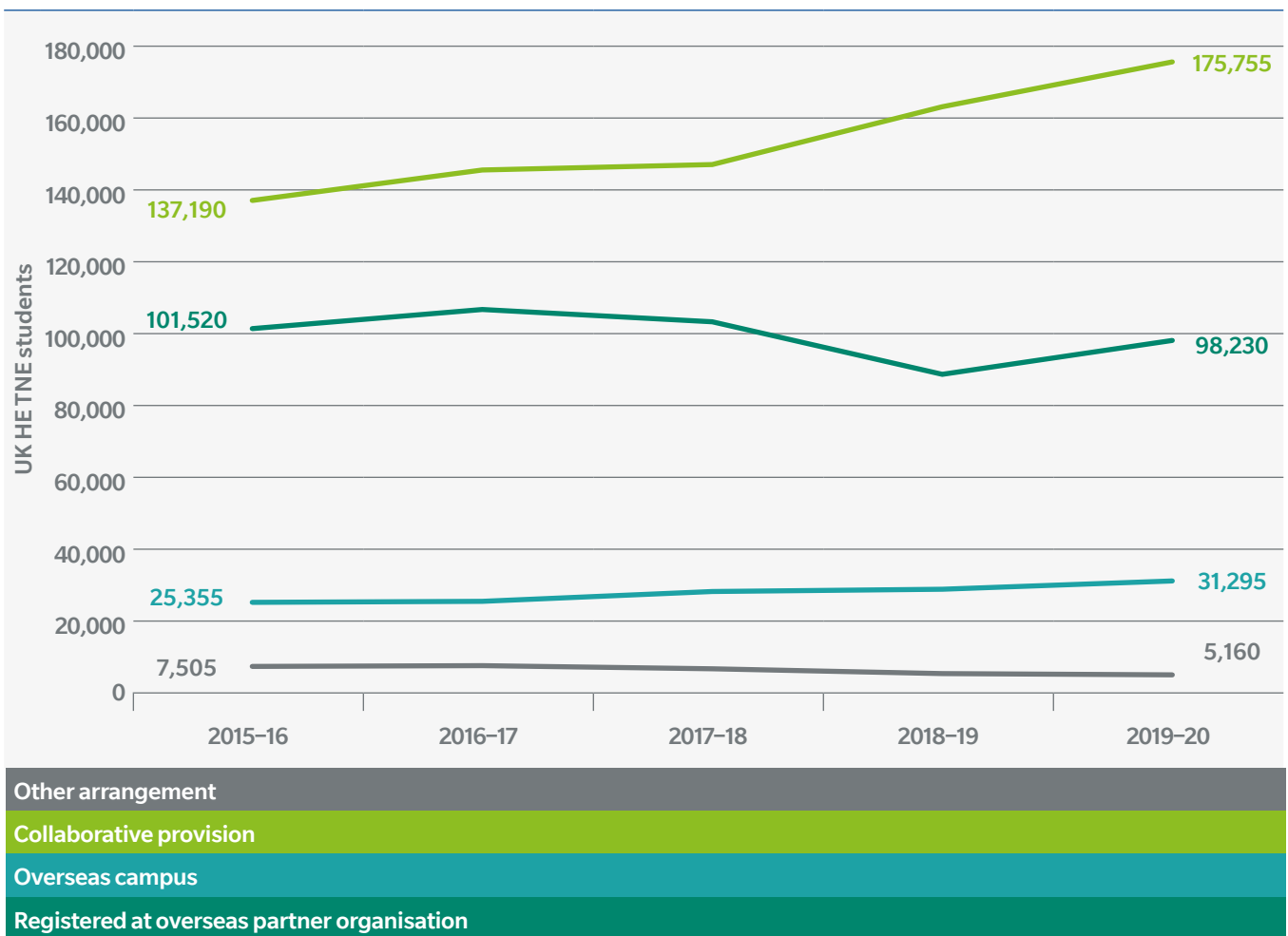
Distance Learning MBA
now reaches an alumni
population of **8,664** people
across **119** countries

6. On-site provision – global analysis

The following section focuses on on-site provision in its various forms.

Figure 24 shows that the number of students studying via collaborative provision increased by 38,565 (28.1%) between 2015–16 and 2019–20, while the number of students registered at an overseas partner organisation decreased by 3,290 (-3.2%) between 2015–16 and 2019–20, although there was an increase of 9,430 students (10.6%) between 2018–19 and 2019–20. Students at overseas campuses increased by 5,960 (23.5%), but the number of students studying via other arrangements decreased by 2,345 (-31.2%).

Figure 24: UK HE TNE student numbers by type of provision, 2015–16 to 2019–20 (Excluding Oxford Brookes University)



Top 40 countries and territories

Table 18 shows the top 40 countries and territories hosting students in the various categories of on-site provision in 2019–20, the percentage change from the previous year and the percentage of the total hosted, excluding Oxford Brookes University. The top eight countries and territories hosted almost two thirds of all students.

The largest increases took place in China (6,365), Sri Lanka (5,710), Greece (2,210), Nepal (2,145) and Germany (1,305), while Singapore (-995), Egypt (-710), Pakistan (-445), the United States (-335), India (-325) and Lebanon (-280) experienced the largest decreases in total student numbers. While student numbers were lower, percentage increases were nevertheless significant in Nigeria (267.5%), Qatar (61.1%), Hungary (56.7%), Belgium (32.3%), Switzerland (27.8%) and Vietnam (27.2%). Of the top 10 countries and territories with the largest increase in total number of students studying through the various categories of on-site provision between 2018–19 and 2019–20, four were located in Asia, three in the EU, two in the Middle East and one in non-EU Europe.

The top eight countries hosted around

two thirds

of all students

Largest increase

6,365

took place in China
since 2018–19

Nigeria saw a

267.5%

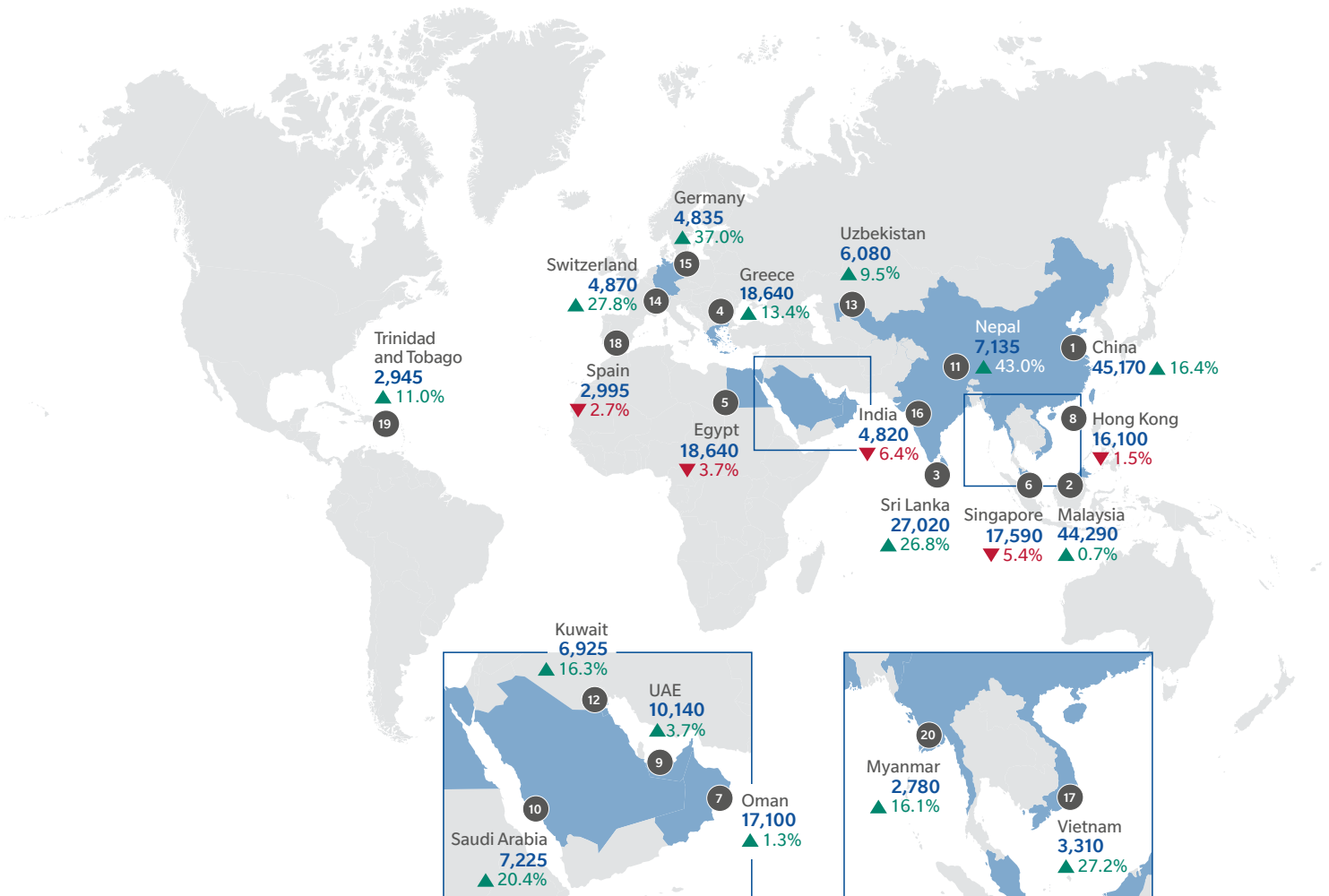
increase in on-site provision
since 2018–19

Table 18: Top 40 countries and territories by number of UK HE TNE on-site provision students, 2019–20 (Excluding Oxford Brookes University)

Rank	Country or territory	Number of students 2018–19	Number of students 2019–20	% change from 2018–19	% of Total
1	 China	38,805	45,170	16.4 ↑	14.6
2	 Malaysia	43,970	44,290	0.7 ↑	14.3
3	 Sri Lanka	21,310	27,020	26.8 ↑	8.7
4	 Greece	16,430	18,640	13.4 ↑	6.0
5	 Egypt	19,350	18,640	-3.7 ↓	6.0
6	 Singapore	18,585	17,590	-5.4 ↓	5.7
7	 Oman	16,885	17,100	1.3 ↑	5.5
8	 Hong Kong	16,350	16,100	-1.5 ↓	5.2
9	 UAE	9,780	10,140	3.7 ↑	3.3
10	 Saudi Arabia	6,000	7,225	20.4 ↑	2.3
11	 Nepal	4,990	7,135	43.0 ↑	2.3
12	 Kuwait	5,955	6,925	16.3 ↑	2.2
13	 Uzbekistan	5,550	6,080	9.5 ↑	2.0
14	 Switzerland	3,810	4,870	27.8 ↑	1.6
15	 Germany	3,530	4,835	37.0 ↑	1.6
16	 India	5,145	4,820	-6.4 ↓	1.6
17	 Vietnam	2,605	3,310	27.2 ↑	1.1
18	 Spain	3,075	2,995	-2.7 ↓	1.0
19	 Trinidad & Tobago	2,655	2,945	11.0 ↑	1.0
20	 Myanmar (Burma)	2,395	2,780	16.1 ↑	0.9
21	 Bahrain	2,255	2,600	15.3 ↑	0.8
22	 Austria	2,260	2,515	11.2 ↑	0.8
23	 Ghana	2,670	2,475	-7.3 ↓	0.8
24	 Mauritius	2,305	2,065	-10.4 ↓	0.7
25	 Cyprus	2,075	1,980	-4.7 ↓	0.6
26	 Ireland	1,805	1,975	9.5 ↑	0.6
27	 Hungary	1,195	1,870	56.7 ↑	0.6
28	 Maldives	1,885	1,840	-2.4 ↓	0.6
29	 Jordan	1,530	1,580	3.2 ↑	0.5
30	 France	1,405	1,450	3.1 ↑	0.5
31	 Lebanon	1,685	1,405	-16.8 ↓	0.5
32	 Qatar	850	1,370	61.1 ↑	0.4
33	 Botswana	1,145	1,340	17.1 ↑	0.4
34	 Italy	1,255	1,110	-11.6 ↓	0.4
35	 Russia	835	900	7.9 ↑	0.3
36	 Belgium	620	820	32.3 ↑	0.3
37	 Denmark	675	760	12.4 ↑	0.2
38	 Malta	605	755	24.3 ↑	0.2
39	 Netherlands	685	720	5.3 ↑	0.2
40	 Nigeria	190	700	267.5 ↑	0.2

World map

Figure 25: In-person modes of provision (Excluding Oxford Brookes University) 2019 – 20

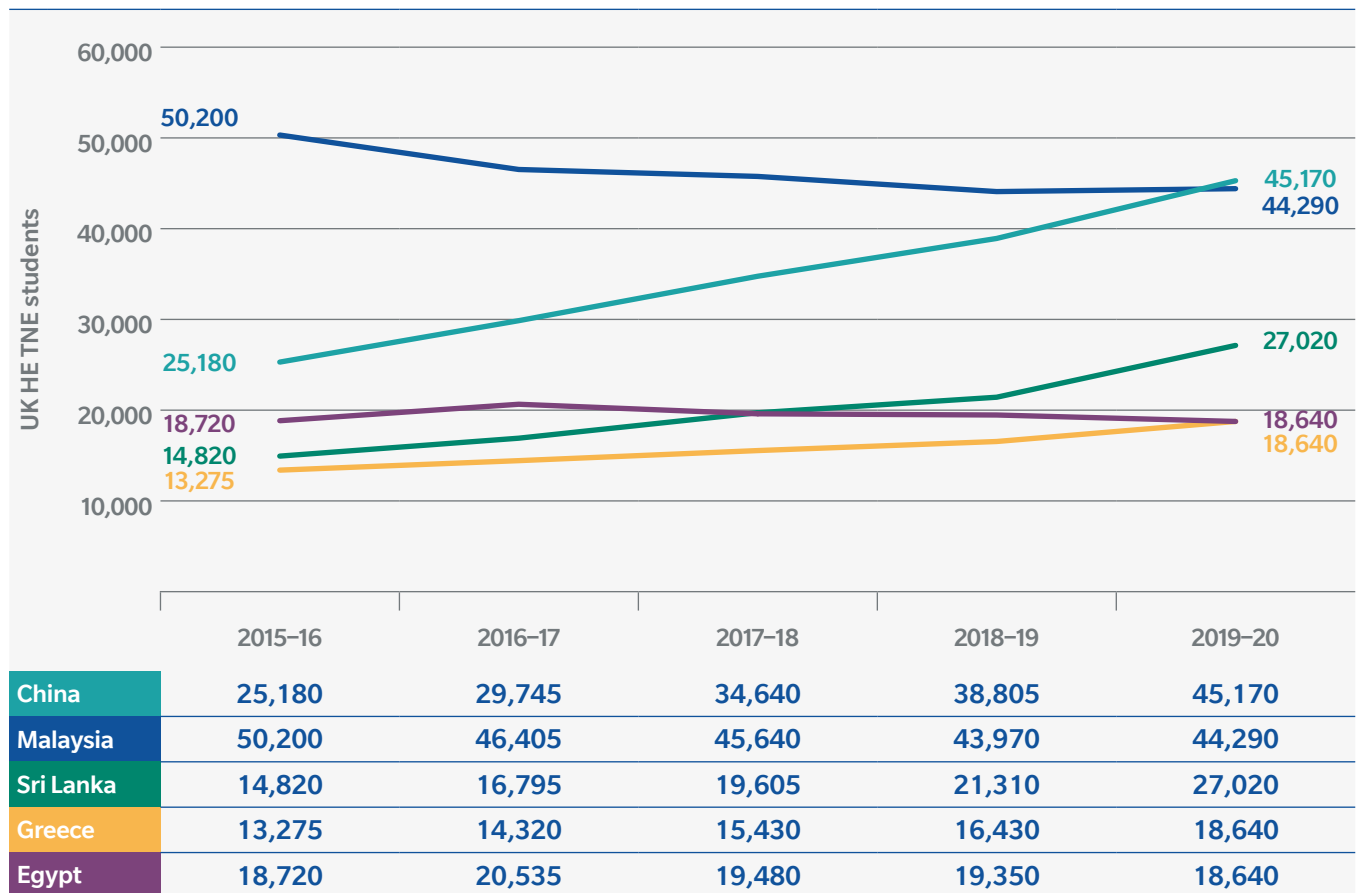


Percentage changes from 2018-19
 Data source: HESA aggregate offshore record (2019–20)

Top countries and territories by type of provision

Figure 26 shows the change in student numbers between 2015–16 and 2019–20 in the top five host countries and territories where providers reported students studying via on-site provision. Student numbers increased in Sri Lanka (82.3%), China (79.4%) and Greece (40.4%), but decreased in Malaysia (–11.8%) and Egypt (–0.4%). In 2019–20 China surpassed Malaysia as the country hosting the most students in on-site TNE.

Figure 26 : Top five countries and territories for UK HE TNE students through all forms of on site provision, 2015–16 to 2019–20 (Excluding Oxford Brookes University)



Focusing in on specific types of on-site provision, **Figure 27** shows the change in student numbers between 2015–16 and 2019–20 in the top five host countries and territories where providers reported students studying through other arrangements. There were increases in student numbers in Malaysia (133.9%), Ireland (121.4%) and Switzerland (86.7%) across this period, but numbers decreased sharply in India (-77.6%). In Uzbekistan, there was an overall increase of 5.8% across the period, although numbers decreased by -16.3% between 2018–19 and 2019–20.

Figure 27: Top five countries and territories for UK HE TNE students through other arrangement, 2015–16 to 2019–20

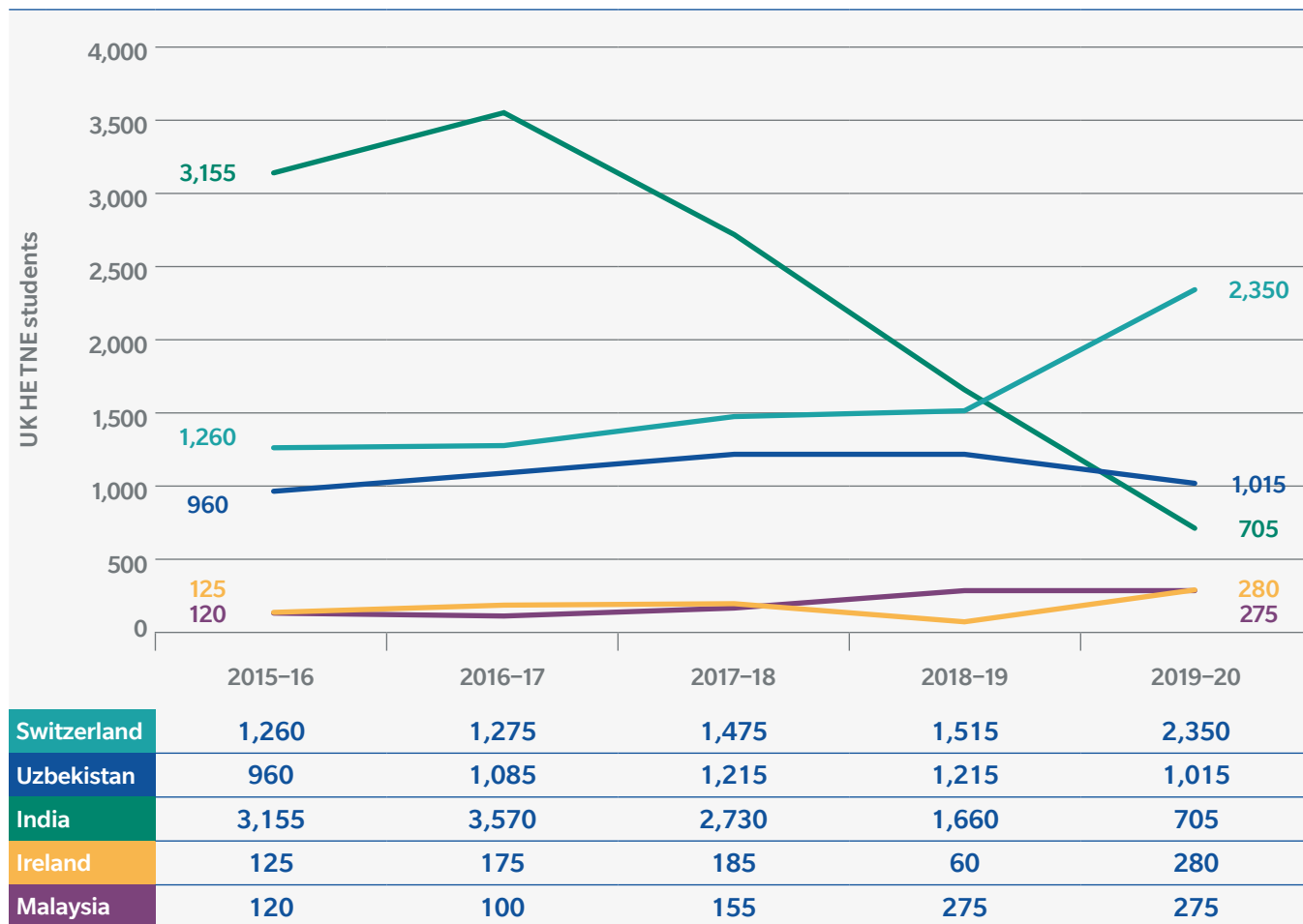


Figure 28 shows the change in student numbers between 2015–16 and 2019–20 in the top five host countries and territories where providers reported students studying through collaborative provision. Student numbers increased in China (133.3%), Sri Lanka (68.8%), Egypt (35.1%) and Singapore (15.8%), but decreased in Malaysia (-15.0%). Between 2018–19 and 2019–20 there were also slight decreases in Singapore (-6.1%) and Egypt (-3.7%).

Figure 28: Top five countries and territories for UK HE TNE students through collaborative provision, 2015–16 to 2019–20

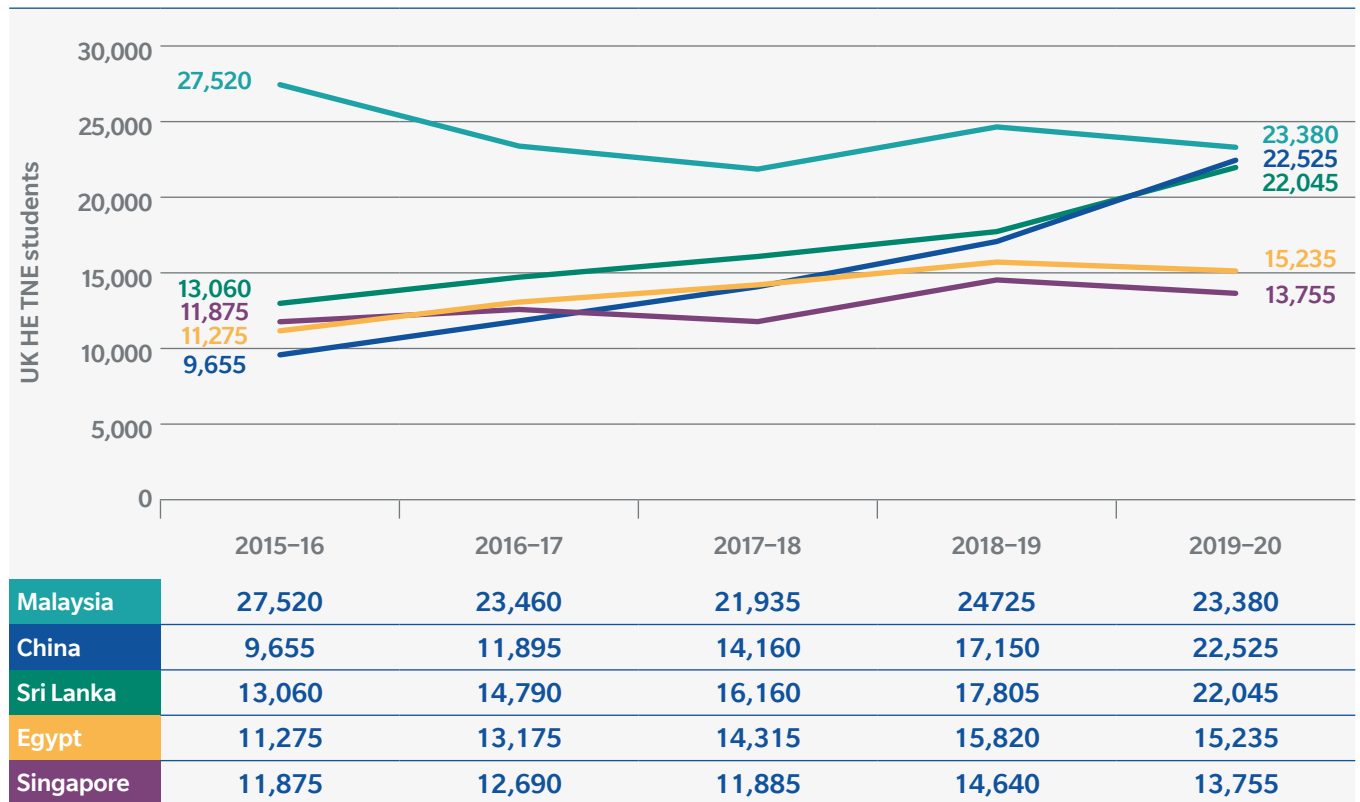


Figure 29 shows the change in student numbers between 2015–16 and 2019–20 in the top five host countries and territories where providers reported students in overseas campuses. Student numbers increased in Qatar (601.6%), Honk Kong (356.8%), China (31.9%) and Malaysia (27.8%). Student numbers decreased in the UAE (-4.6%), although they increased slightly (1.2%) between 2018–19 and 2019–20.

Figure 29: Top five countries and territories for UK HE TNE students through overseas campuses, 2015–16 to 2019–20

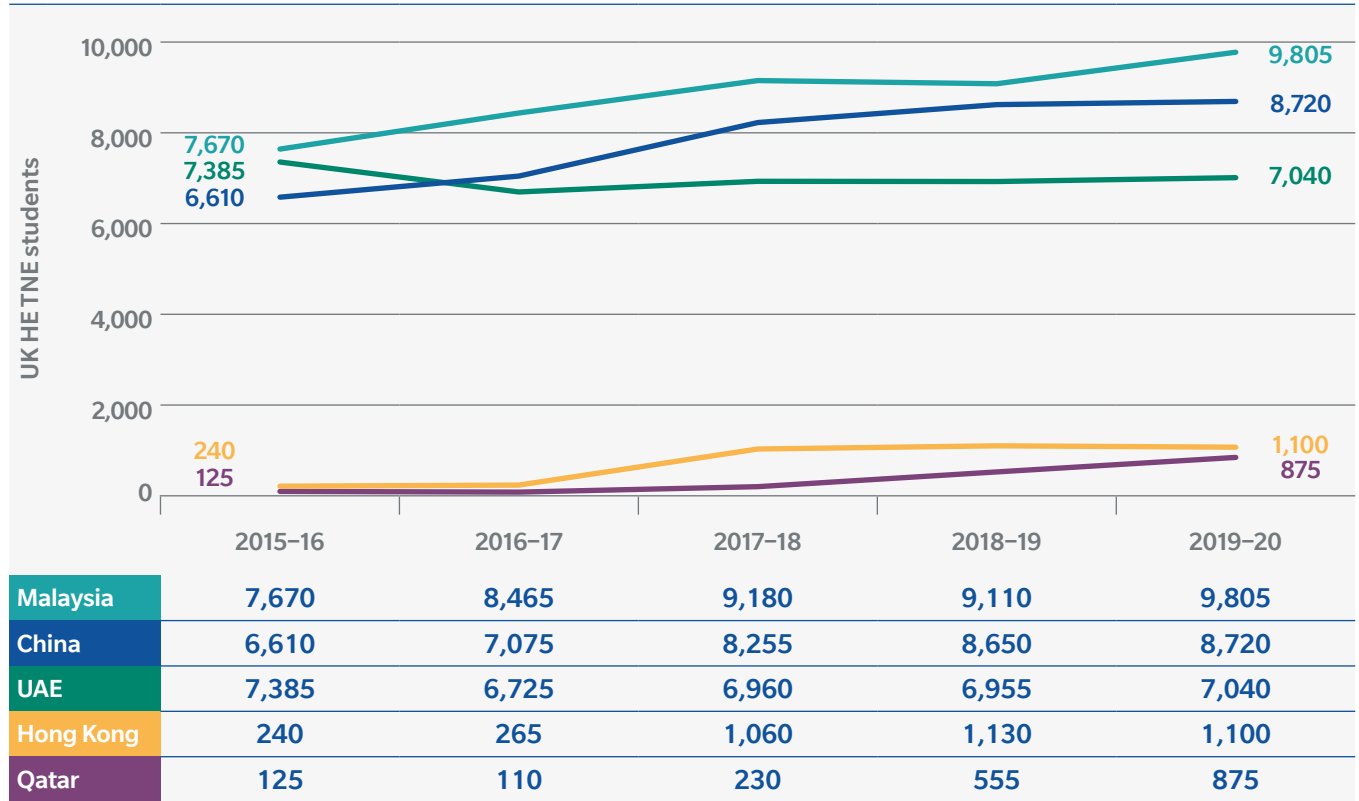
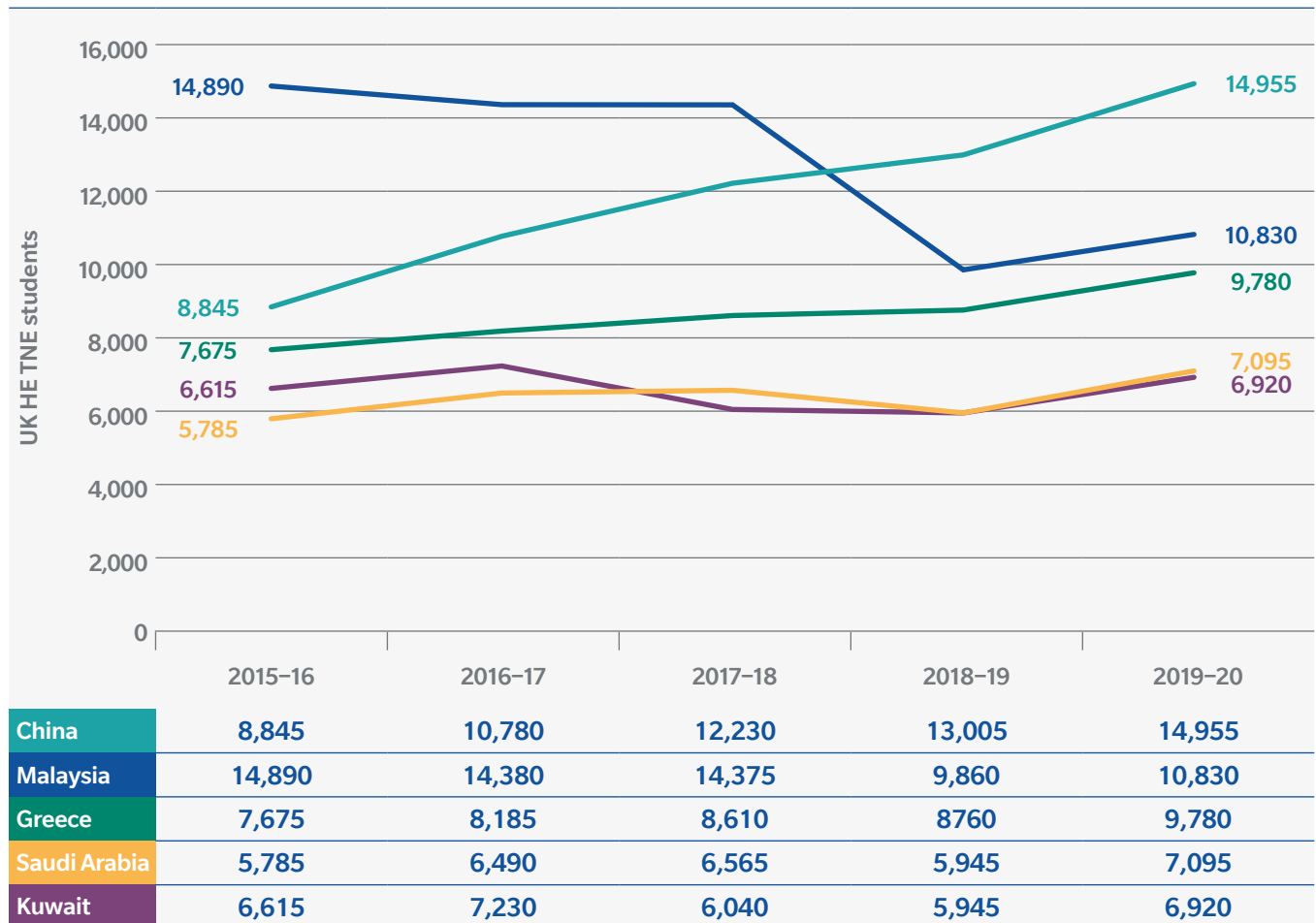


Figure 30 shows the change in student numbers between 2015–16 and 2019–20 in the top five host countries and territories where providers reported students registered at a partner organisation. Student numbers increased in China (69.0%), Greece (27.5%) and Saudi Arabia (22.7%); in Kuwait, there was an overall increase (4.6%), though numbers fluctuated over the period. Student numbers decreased quite sharply in Malaysia (-27.3%) over this period, despite an increase of 9.8% between 2018–19 and 2019–20.

Figure 30: Top five countries and territories for UK HE TNE students through overseas partner organisation, 2015–16 to 2019–20 (Excluding Oxford Brookes University)



Number of providers

Table 19 shows the number of providers reporting students studying in TNE through on-site categories of provision between 2015–16 and 2019–20. The number of providers reporting students in collaborative provision increased by 15 (18.5%) and in overseas campuses by 6 (31.6%). There was no change in the number of providers who reported students registered at an overseas partner organisation, while two fewer providers reported students in other arrangements (-25.0%).

Table 19: Number of UK providers delivering TNE through on site types of provision, 2015–16 to 2019–20

Category	2015–16	2016–17	2017–18	2018–19	2019–20
Other arrangement	8	7	5	6	6
Collaborative provision	81	85	90	93	96
Overseas campus	19	19	20	23	25
Overseas partner organisation	38	40	36	37	38

Tables 20 to 23 show the number of providers reporting students studying in TNE in the various categories of on-site provision in 2019–20, the change from 2018–19 and the total number of students in each country or territory. The largest increases in providers reporting students in collaborative provision (**Table 21**) took place in Greece and the UAE. The largest increase in providers reporting students at overseas campuses (**Table 22**) took place in Germany. The largest increase in providers reporting students registered at an overseas partner organisation (**Table 23**) took place in China.

Table 20: Top 10 host countries and territories by number of UK providers delivering TNE via other arrangement, 2019–20











Rank	Country or territory	Number of UK providers	Change from 2018–19	Student numbers 2019–20
1	 Malaysia	3	-1 ↓	275
2	 Ireland	2	0	280
3	 Singapore	2	0	160
4	 Switzerland	1	-1 ↓	2,350
5	 India	1	-1 ↓	705
6	 Zimbabwe	1	0	105
7	 Pakistan	1	-1 ↓	0
8	 Oman	1	0	0
9	 Kuwait	1	0	0
10	 Mauritius	1	0	0

Table 21: Top 10 host countries and territories by number of UK providers delivering TNE via collaborative provision, 2019–20











Rank	Country or territory	Number of UK providers	Change from 2018–19	Student numbers 2019–20
1	 Singapore	43	-1 ↓	13,755
2	 China	39	1 ↑	22,525
3	 Hong Kong	35	-1 ↓	12,670
4	 Malaysia	31	2 ↑	23,380
5	 Sri Lanka	31	2 ↑	22,045
6	 Greece	25	3 ↑	8,835
7	 Germany	23	1 ↑	1,900
8	 UAE	20	3 ↑	1,635
9	 India	18	-2 ↓	2,970
10	 Oman	15	2 ↑	11,915

Table 22: Top 10 host countries and territories by number of UK providers delivering TNE via overseas campus, 2019–20





















Rank	Country or territory	Number of UK providers	Change from 2018–19	Student numbers 2019–20
1	 UAE	7	0	7,040
2	 Malaysia	5	0	9,805
3	 Hong Kong	4	1 ↑	1,100
4	 China	3	-1 ↓	8,720
5	 Germany	3	3	840
6	 Oman	2	0	100
7	 France	2	0	160
8	 Malta	2	-1 ↓	210
9	 Qatar	2	0	875
10	 Uganda	2	1 ↑	10

Table 23: Top 10 host countries and territories by number of UK providers delivering TNE via overseas partner organisation, 2019–20

Rank	Country or territory	Number of UK providers	Change from 2018–19	Student numbers 2019–20
1	 China	15	6 ↑	14,955
2	 Malaysia	13	-4 ↓	10,830
3	 Singapore	12	-1 ↓	3,655
4	 Hong Kong	11	0	2,330
5	 Sri Lanka	10	-2 ↓	4,970
6	 Greece	9	0	9,780
7	 India	8	2 ↑	1,145
8	 Egypt	8	1 ↑	3,405
9	 Ireland	7	-1 ↓	785
10	 Spain	7	0	1,435

Level of study

Figure 31 compares level of study among those learning via on-site provision with the figures for the overall TNE population, showing that first degrees are a much more important part of the on-site learning landscape. In 2019–20, 76.6% of students in on-site provision were studying first degrees, against 64.9% overall, and 2.5% were studying other undergraduate degrees against 3.4% overall. Postgraduate study was less significant in this cohort, with 20.1% studying postgraduate taught degrees, against 30.3% overall, and 0.8% studying postgraduate research degrees against 1.4% overall.

Figure 31: Proportion of UK TNE students by level of study, 2019–20

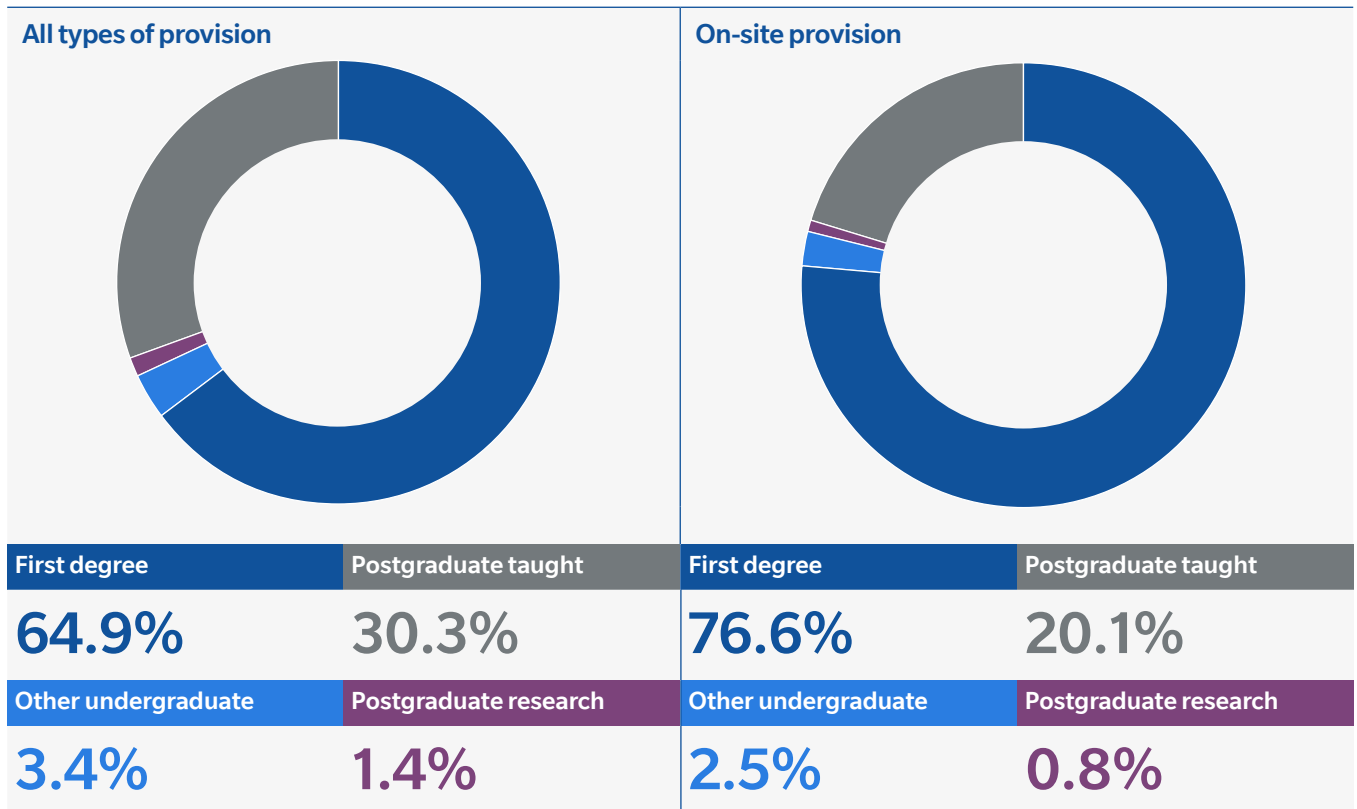


Figure 32 shows how level of study patterns differ among the various categories of on-site provision. In 2019–20, 79.2% of students registered at an overseas partner organisation were studying first degrees – similar to the figure for collaborative provision (78.3%), but notably more than for overseas campuses (65.1%) and, especially, other arrangements (39.8%). The other arrangement type of provision is notable in that the majority (55.0%) of this cohort were studying for postgraduate degrees; in all other categories, postgraduates (taught + research) were a minority, representing 27.9% of those at overseas campuses, 19.7% of those registered with overseas partner organisations and 19.2% studying via collaborative provision.

Figure 32: Proportion of UK TNE students by level of study by type of provision, 2019–20

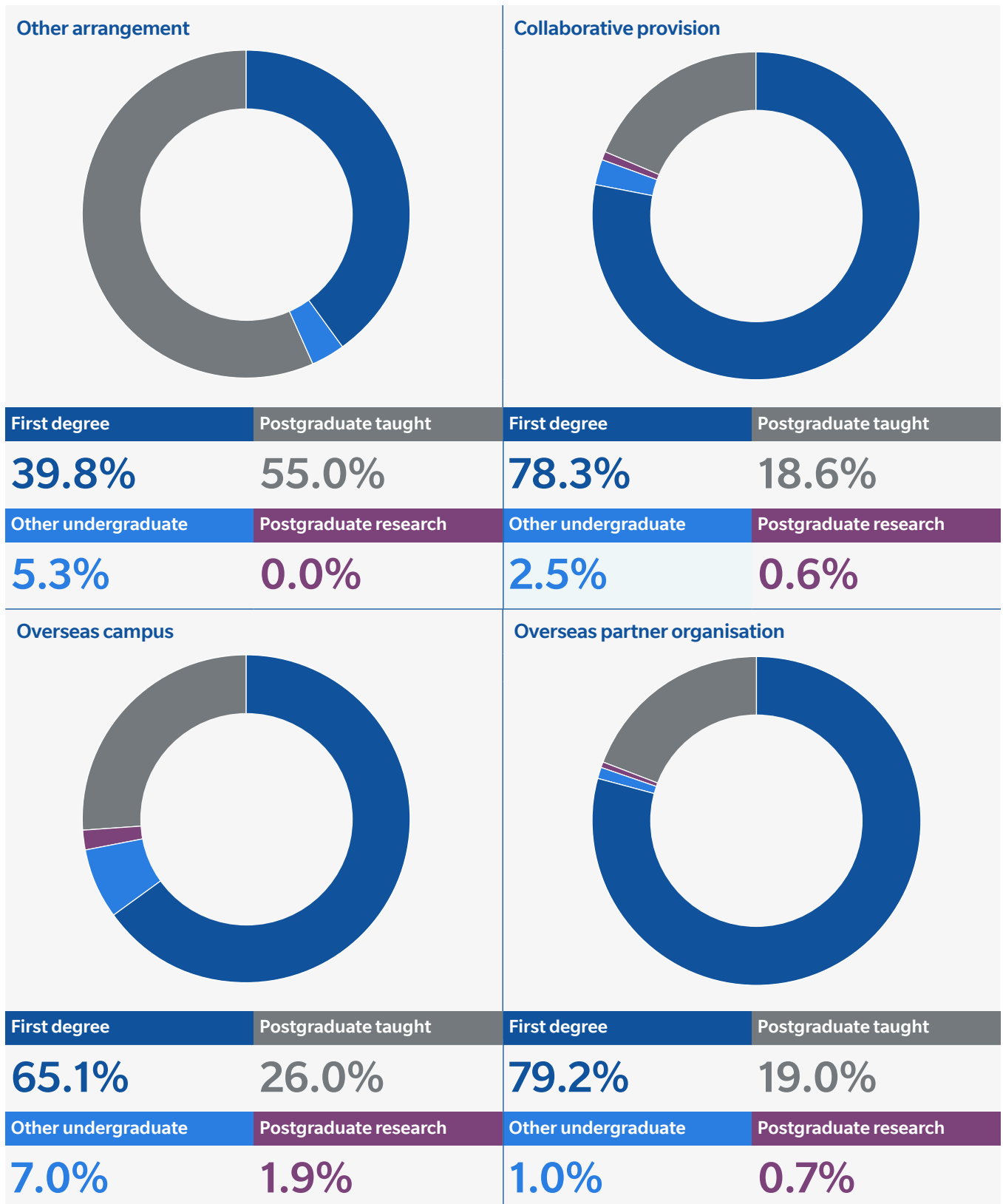


Table 24 shows the top 20 countries and territories hosting students across all categories of on-site provision by level of study in 2019–20. At undergraduate level, the top five countries and territories accounted for 53.3% of all students studying on-site, while at postgraduate level, the top seven countries and territories accounted for 52.0%. Most countries and territories were among the top 20 at both levels. The exceptions were Bahrain, Kuwait, Nepal, Saudi Arabia, Spain, Uzbekistan and Vietnam, which were among the top 20 at undergraduate but not at postgraduate level, and Belgium, Ghana, Hungary, Mauritius, Nigeria and Trinidad and Tobago, which were among the top 20 at postgraduate but not at undergraduate level.

Table 24: Top 20 host countries and territories for on-site UK TNE students by level of study, 2019–20

Rank	Undergraduate		Postgraduate	
	Country or territory	Number of students	Country or territory	Number of students
1	 China	42,585	 Sri Lanka	9,820
2	 Malaysia	38,435	 Malaysia	5,855
3	 Egypt	17,985	 United Arab Emirates	4,305
4	 Sri Lanka	17,195	 Greece	4,230
5	 Oman	15,015	 China	3,620
6	 Singapore	14,850	 Switzerland	3,070
7	 Greece	14,540	 Singapore	2,835
8	 Hong Kong	13,640	 Hong Kong	2,460
9	 Saudi Arabia	7,090	 Austria	2,165
10	 Kuwait	6,915	 Oman	2,085
11	 Nepal	6,625	 Trinidad and Tobago	1,975
12	 Uzbekistan	5,875	 Ghana	1,655
13	 United Arab Emirates	5,835	 Germany	1,435
14	 India	3,520	 India	1,295
15	 Germany	3,455	 Mauritius	790
16	 Vietnam	2,925	 Hungary	745
17	 Spain	2,790	 Belgium	730
18	 Bahrain	2,270	 Nigeria	700
19	 Myanmar (Burma)	2,220	 Egypt	655
20	 Switzerland	1,865	 Myanmar (Burma)	615

Lancaster University Ghana

Established in 2013, Lancaster University Ghana (LUG) is a branch campus of Lancaster University in partnership with Transnational Academic Group (TAG), a private education provider.

The campus, with a staff strength of approximately 50, currently delivers eight undergraduate and postgraduate programmes in business, social sciences and computing to over 400 students from across Africa and beyond. There are plans to grow the campus to approximately 2,500 students over the next 10 years with an associated growth in programme diversity, particularly in STEM disciplines in line with Ghana's national skills development strategy.

Aligned to Lancaster University's strategy to increase its global presence, this TNE project was developed to allow students across Africa to access Lancaster's academic excellence in teaching, research and engagement on the African continent. From a research perspective, the Ghana TNE project has led to collaborative research projects where Lancaster academics have worked with partner staff, including The RECIRCULATE Project using eco innovation for capacity building in the circular water economy in Africa <http://www.recirculate.global/> – a project that was co-designed to develop co-created solutions to the problems associated with Africa's water economy.

The campus has been instrumental in developing Lancaster's reputation for international teaching which has seen over 500 students undertake a Lancaster degree and graduate in Ghana. Two-way study abroad, exchange programmes and integrated curricula enhance the learning experience for students. PG programmes have enabled a number of additional engagement and research take place with alumni and current students through Guest Lecture sessions and Masterclasses; the hosting of consultancy projects and provision of internship opportunities to existing UG students by alumni and local organisations. In addition, international modules afford the chance for students from different Lancaster TNE projects in different countries to study and learn together through live projects and joint assessments.

Local academic staff are registered on Lancaster programmes and its PG Cert in Academic Practice – over 20 local partner staff have achieved PG Certs in this regard and some LUG staff have completed the Lancaster MBA programme as a personal development opportunity. Further, graduates from Lancaster PG and doctoral programmes are employed by LUG. Staff exchanges (up to one month) have ensured that the project has led to the capacity building of partner and Lancaster staff who support the programmes.

The campus currently delivers eight undergraduate and postgraduate programmes to over **400** students from across Africa and beyond

7. Conclusion

UK transnational education is growing and diversifying, and richer datasets are beginning to allow for more sophisticated analysis of existing trends to support the UK higher education sector in developing sustainable, scalable TNE in the future.

This edition of *The scale of UK higher education transnational education* introduces a new structure with novel analysis that responds to new categories in HESA's data collection, providers newly registered with the Office for Students reporting data to HESA, and changes in reporting practice by one large TNE provider. A limited review of the AOR has allowed us to analyse student numbers in four new headcount categories for providers based in England and Wales: continuing students, dormant students, students who have successfully completed and those who have withdrawn. The change in reporting practice by Oxford Brookes University has provided more accurate estimates of student numbers in 2019–20, but also produced sharp changes in the longitudinal analysis at the sector level that do not truly reflect sector trends. In response to this we opted to exclude its student numbers in the analysis of trends over time.

Finally, we have introduced a number of innovations in this year's report structure with the intention of exploring new ways of providing useful insights for TNE leaders and policymakers:

1

The report provides analysis of the number of providers reporting students by UK nation, by mission group, by location and by type of provision.

We hope this will help shed light on the behaviour of providers while moderating distortions where small numbers of providers report significant student numbers in certain categories, and that it will open new ways of looking at data that we intend to further explore in the future.

2

The report includes two separate sections on 'distance, flexible or distributed learning' and 'on-site' forms of provision.

We hope that this analysis will provide insight into trends in both types of provision, but especially for online distance learning – a type of provision that could see a significant expansion post-pandemic.

The main findings of the report are:

- Available data underestimates the scale of TNE. The growth in providers reporting TNE in 2019–20 is due to the Office for Students' finalising the registration process in England and has helped shed light on a number of alternative providers with significant student numbers, including in online provision. In the future it'll be important to work with HESA and regulators and authorities in the UK nations to progressively measure more accurately the scale of UK TNE.
- Almost one in three students study through distance learning, which was also the fastest growing and most common form of TNE, and prevalent at postgraduate level. The data in this report pre-dates the Covid pandemic but the growth trend was already well established. The transformations that have taken place since provide the sector with an opportunity to harness the potential that this type of TNE has to widen access to quality education globally as a preferred mode of delivery for certain demographic groups.

- Diversification of numbers to a more extensive number of countries will be crucial. While numbers in China or Sri Lanka increased at double digit rates, there were few new territories in the ‘top 20’ host destinations. The International Education Strategy identifies priority countries such as India, Indonesia, Saudi Arabia, Vietnam and Nigeria, where student numbers are still relatively low. Regulatory reform in those markets coupled with UK government support should help ensure a more diversified picture emerges.
- Europe will continue to play a key role. Despite the UK leaving the EU (or partly because of it) the EU is still a crucial region both in terms of student numbers and the diversity of providers and types of provision. Given cultural and geographical proximity, and the protracted effects of Brexit in student recruitment, ensuring a regulatory environment as frictionless as possible framed in the UK-EU trade and cooperation agreement will be key to maintaining growth.
- Measuring TNE student outcomes and student experience will be increasingly important. This report provides a first look into the continuation and completion rates in TNE (for English and Welsh providers), which are generally encouraging, but more must be done to improve our understanding of the local impact of TNE. Notwithstanding this, given the complexity of TNE and the diversity of jurisdictions where it is delivered, any inferences from the data must be drawn with caution.
- The impact of geopolitical and regulatory drivers should not be underestimated. By their very nature, TNE collaborations are very sensitive to changes in policy and regulation. The review of regulatory conditions of registration in England, changes in immigration policy, the review of post-16 education funding, environmental sustainability concerns, and wider geopolitical developments may all impact on the future development of TNE - and will need to be monitored closely.

The AOR is the world’s most comprehensive dataset of students studying outside the territory where the awarding provider is located, but it does not allow us to analyse data on students’ characteristics, experiences or outcomes. HESA’s AOR review, which was partly in response to a regulatory mandate in England to ‘regulate such overseas activity on the basis that the obligations of the registered provider extend to students for whom it is the awarding body wherever and however they study’, was paused in early 2020 due to the global pandemic. It is uncertain when the review will fully resume, but whatever the outcome, there is a need to act with caution given the complexity of gathering and interpreting data from such a wide variety of provision models and in territories with widely different cultural expectations and legal requirements.

“The AOR is the world’s most comprehensive dataset of students studying outside the territory where the awarding provider is located.”

This report provides analysis of the number of providers, location of provision, type and level of TNE and some limited benchmarking tools that are, we hope, a useful contribution to policy and practice. It should be used in conjunction with UUKi’s Scale of TNE website,¹⁰ which enables users to conduct their own analysis, and with other reports, such as the British Council’s *Shape of Global Higher Education*¹¹ series or their early 2021 report on the *Local impact of transnational education*¹².

Beyond the numbers in this report lies a wide diversity of collaborations and partnerships that support an increasing number of students to achieve their goals and contribute to the development of the communities where they live and work. UK transnational education can play a crucial role in a post-Brexit, post-Covid-19 world, helping tackle global challenges such as poverty, global warming, geopolitical tensions, gender equality or access to healthcare and education. We hope this report will support higher education leaders and policy-makers in their efforts to develop sustainable, scalable TNE.

10. <https://www.universitiesuk.ac.uk/universities-uk-international/insights-and-publications/uuki-insights/scale-uk-transnational-education>

11. <https://www.britishcouncil.org/education/he-science/knowledge-centre/global-landscape>

12. https://www.britishcouncil.org/sites/default/files/bc_tne_report_final_120421.pdf



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