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# SCALE OF UK HIGHER EDUCATION TRANSNATIONAL EDUCATION 2017–18: SCOTTISH PROVIDERS TREND ANALYSIS OF HESA DATA

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## Executive summary:

This report provides trend analysis of UK transnational education (TNE) in relation to Scottish providers. It provides an analysis of where students studied, at what level, and through what kind of provision during the 2017–18 academic year. It also puts some of the figures into context, by providing a longitudinal overview of trends in TNE.

## Audience:

Pro-Vice-Chancellors, Directors International  
and International Office staff  
with responsibility for TNE in Scotland.

# INTRODUCTION

Higher education transnational 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, Scottish TNE students are learners enrolled in a higher education degree programme which leads to a Scottish provider qualification but is based in a country outside the UK. In this report, we use the word ‘students’ to represent these Scottish TNE learners, unless otherwise stated.

Data about TNE is collected annually by the Higher Education Statistics Agency (HESA) via the Aggregate Offshore Record (AOR). AOR 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”.

HESA collects data which relates to five categories or types of TNE provision and universities are responsible for returning data against these. The categories are broad, and universities may not always define their programmes by the same definitions used by HESA. **TABLE 1** shows these categories, how they are referred to in this briefing, 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.

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.

All data relates to Scottish providers that returned data to HESA.

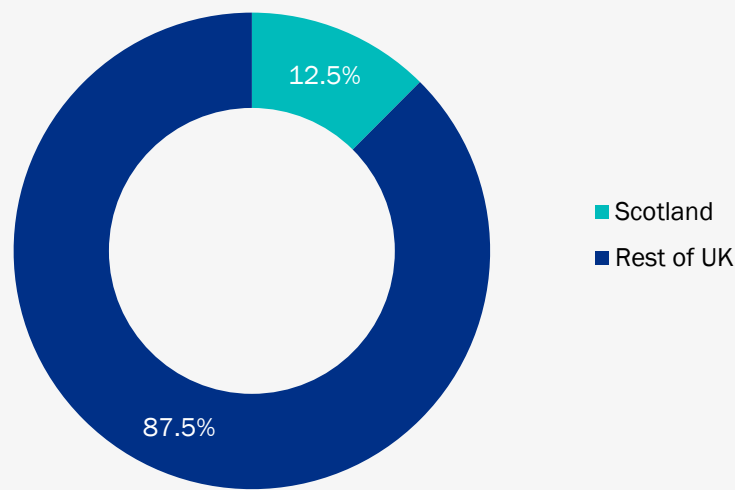
Type of provision		Report terminology	Example of provision
Students registered at the reporting provider.	Studying overseas for UK Higher education Provider (HEP) award at overseas campus of reporting provider.	Overseas campus.	Overseas standalone or joint campus.
	Distance, flexible and distributed 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.

# REPORTING PROVIDERS

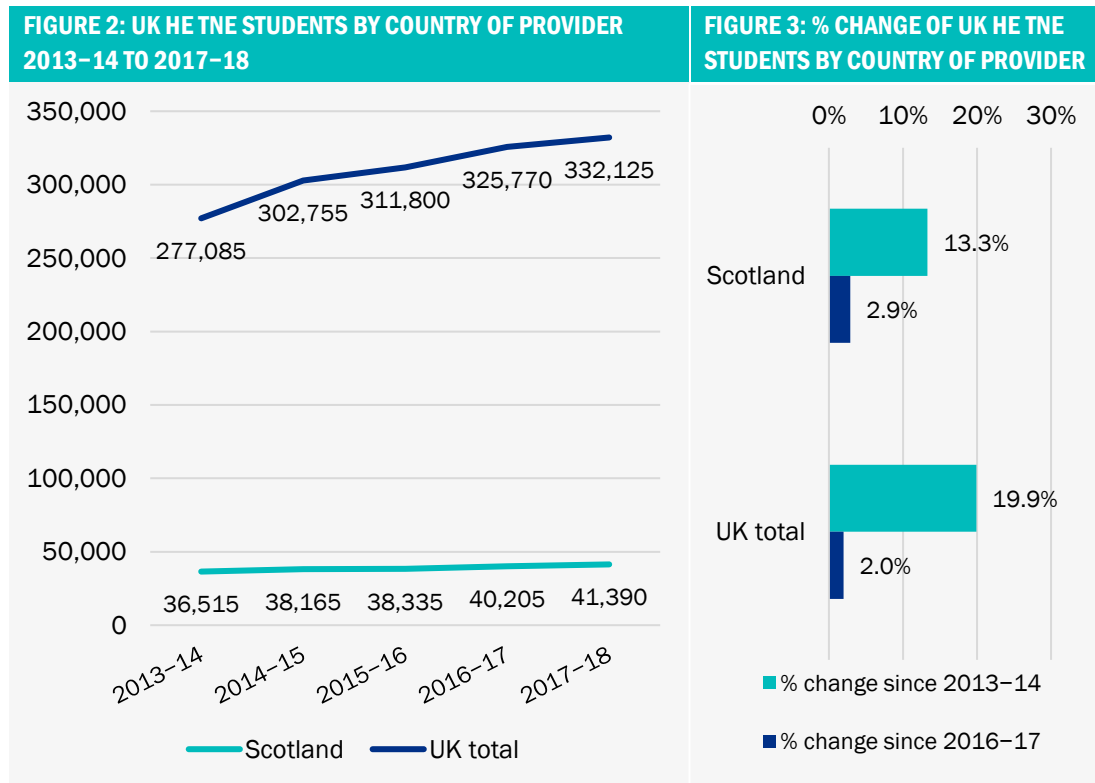
**Note:** UK total excludes three main reporting providers of distance, flexible and blended TNE (Oxford Brookes University, the Open University and the University of London). In 2017–18, these three providers made up 51.2% of the AOR and relatively small variations in one of them can have an impact on our understanding of the performance and spread of TNE more generally amongst UK universities.

As shown in **FIGURE 1**, in 2017–18 Scottish providers reported 41,390 students in TNE, which is 12.5% of the total reported by UK providers. As a way of comparison, Scottish providers hosted 11.8% of the international (non-UK) students in the UK in 2017–18.

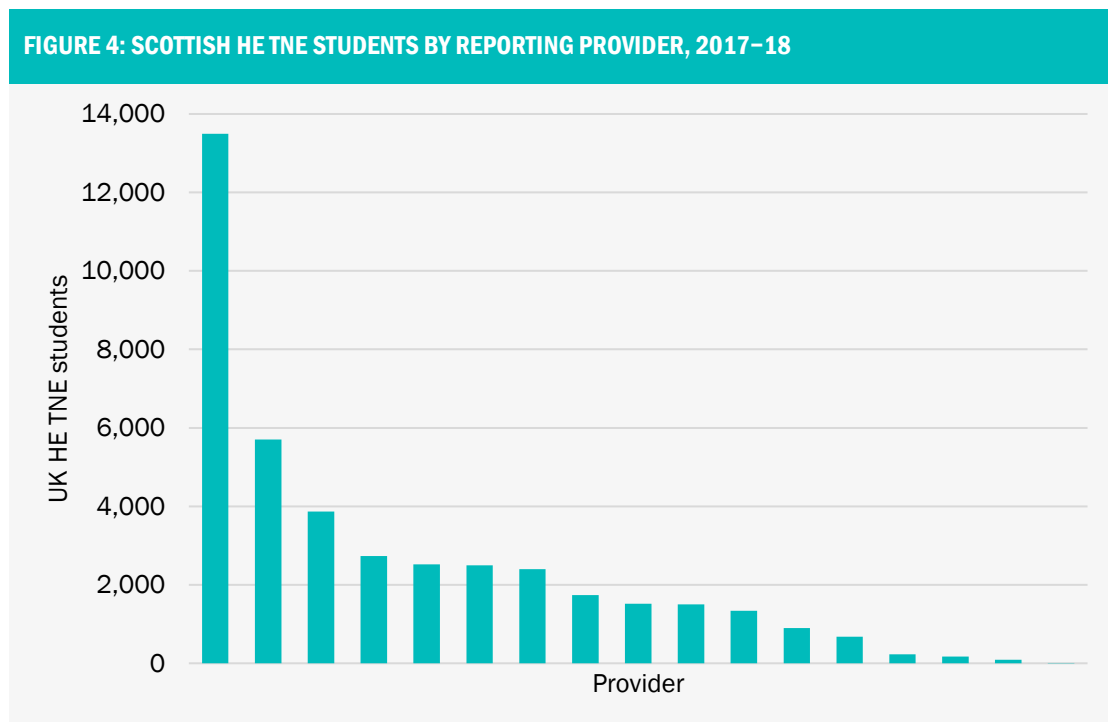
**FIGURE 1: PROPORTION OF UK HE TNE STUDENTS BY COUNTRY OF PROVIDER, 2017–18**



**FIGURE 2** and **FIGURE 3** show that between 2013–14 and 2017–18, TNE student numbers grew by 13.3% in Scotland, compared to 19.9% in the UK (excluding the three main providers of distance, flexible and blended TNE). From 2016–17 to 2017–18 growth was 2.9% in Scotland against 2.0% in the UK.



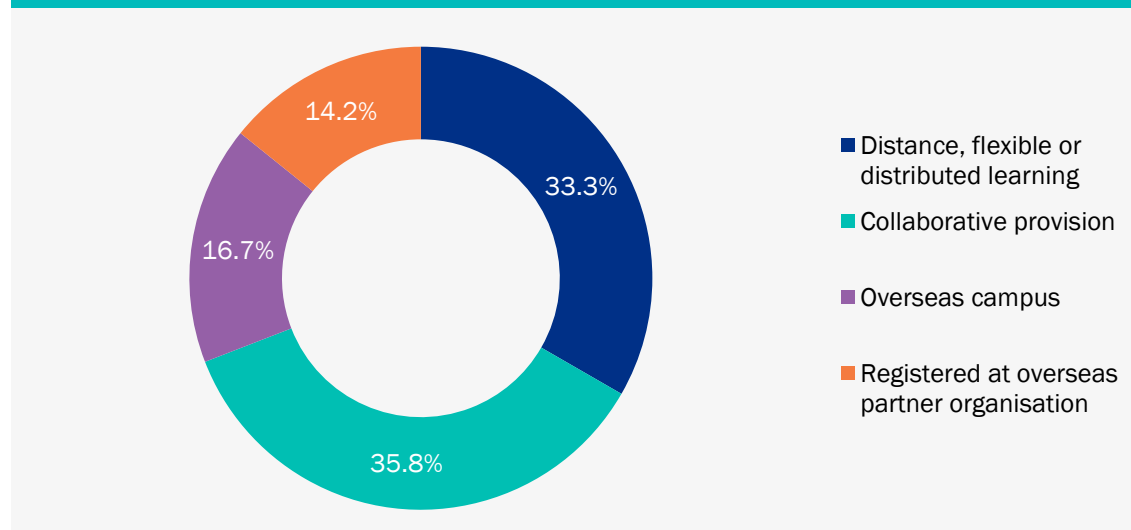
In 2017–18, 11 out of 17 providers in Scotland reported more than 1,000 students in TNE, as shown in **FIGURE 4**. This represents 64.7% of providers, compared with 51.4% in the UK as a whole. 14 providers reported fewer than 4,000 students, which is 82%, compared with 80% in the UK as a whole.



# TYPE OF PROVISION

**FIGURE 5** shows that in 2017–18, 35.8% of TNE students at Scottish providers were studying through collaborative provision, compared with 44.3% overall in the UK; 33.3% were studying through distance, flexible or distributed learning compared with 20.7% overall in the UK; 16.7% were registered at an overseas campus compared with 8.5% overall in the UK and 14.2% were registered at an overseas partner organisation compared with 24.5% overall in the UK.

**FIGURE 5: SCOTTISH HE TNE STUDENTS BY TYPE OF PROVISION, 2017–18**



**TABLE 2** shows that the fastest growing TNE type of provision in Scotland between 2013–14 and 2017–18 was overseas campus with an 84.3% increase, which was also the fastest growing type of provision for UK providers overall with a 47.5% increase. Between 2016–17 and 2017–18 the fastest growing category in Scotland was distance, flexible or distributed learning increasing by 9.2%, compared to 7.3% in the UK as a whole. There has been a marked decline in Scotland in the registered at overseas partner organisation category (-42.4%) compared with 4.5% growth in the UK as a whole from 2013–14 to 2017–18.

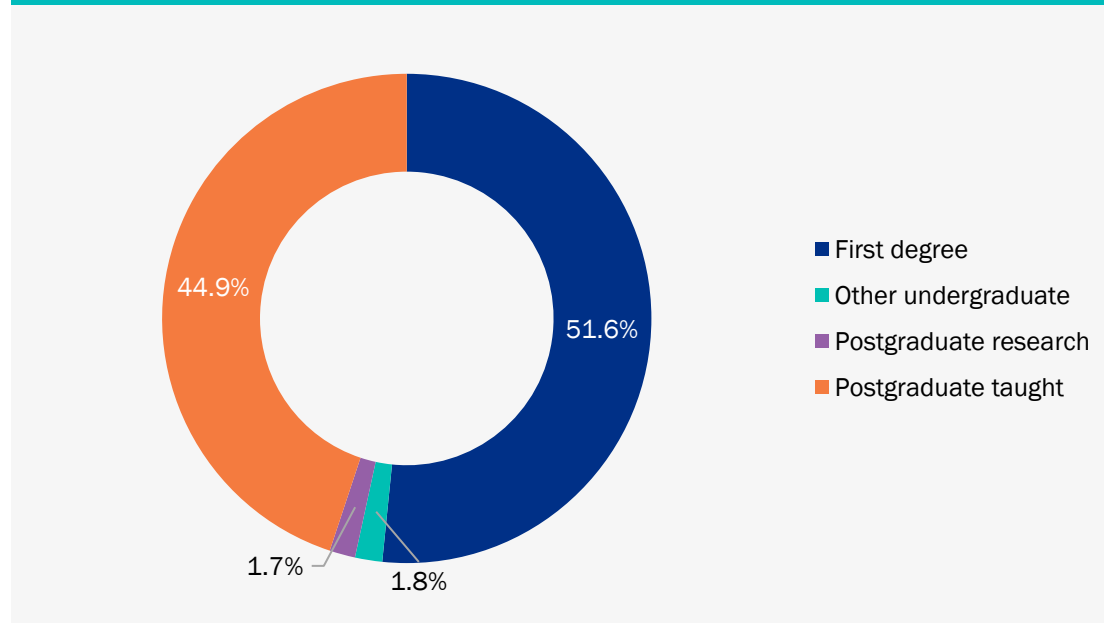
**TABLE 2: SCOTTISH HE TNE STUDENTS BY TYPE OF PROVISION, 2013–14 TO 2017–18**

Type of provision	Academic year					Change since 2013–14	Change since 2016–17
	2013–14	2014–15	2015–16	2016–17	2017–18		
Distance, flexible or distributed learning	12,130	10,935	11,725	12,630	13,790	13.7%	9.2%
Collaborative provision	10,420	12,395	12,925	14,285	14,815	42.2%	3.7%
Overseas campus	3,745	6,120	6,330	6,420	6,895	84.3%	7.4%
Registered at overseas partner organisation	10,220	8,715	7,355	6,865	5,885	-42.4%	-14.2%
Total	36,515	38,165	38,335	40,205	41,390	13.3%	2.9%

# LEVEL OF PROVISION

**FIGURE 6** shows that in 2017–18 Scottish providers reported that 53.4% of TNE students were studying at the undergraduate level and 46.6% at the postgraduate level. The proportion for the UK as a whole was 64.9% undergraduate and 35.1% postgraduate.

**FIGURE 6: SCOTTISH HE TNE STUDENTS BY LEVEL OF STUDY, 2017–18**



As shown in **TABLE 3**, in 2017–18 Scottish providers reported 22,110 TNE students at undergraduate level, an increase of 22.3% over 2013–14, and 19,280 TNE students at postgraduate level, an increase of 4.5% over 2013–14. In the UK as a whole the increases were 17.1% and 25.4% respectively.

**TABLE 3: SCOTTISH HE TNE STUDENT BY LEVEL OF STUDY, 2013–14 TO 2017–18**

Level of study		Academic Year					Change since 2013–14	Change since 2016–17
		2013–14	2014–15	2015–16	2016–17	2017–18		
UG	First degree	17,860	19,410	19,190	20,290	21,360	19.6%	5.3%
	Other UG	215	500	450	735	745	247.0%	1.2%
	Total	18,075	19,905	19,640	21,025	22,110	22.3%	5.1%
PG	PG research	380	445	550	585	700	84.2%	19.3%
	PG taught	18,060	17,815	18,150	18,590	18,580	2.9%	0.0%
	Total	18,440	18,260	18,700	19,175	19,280	4.5%	0.5%
Total		36,515	38,165	38,335	40,205	41,390	13.3%	2.9%

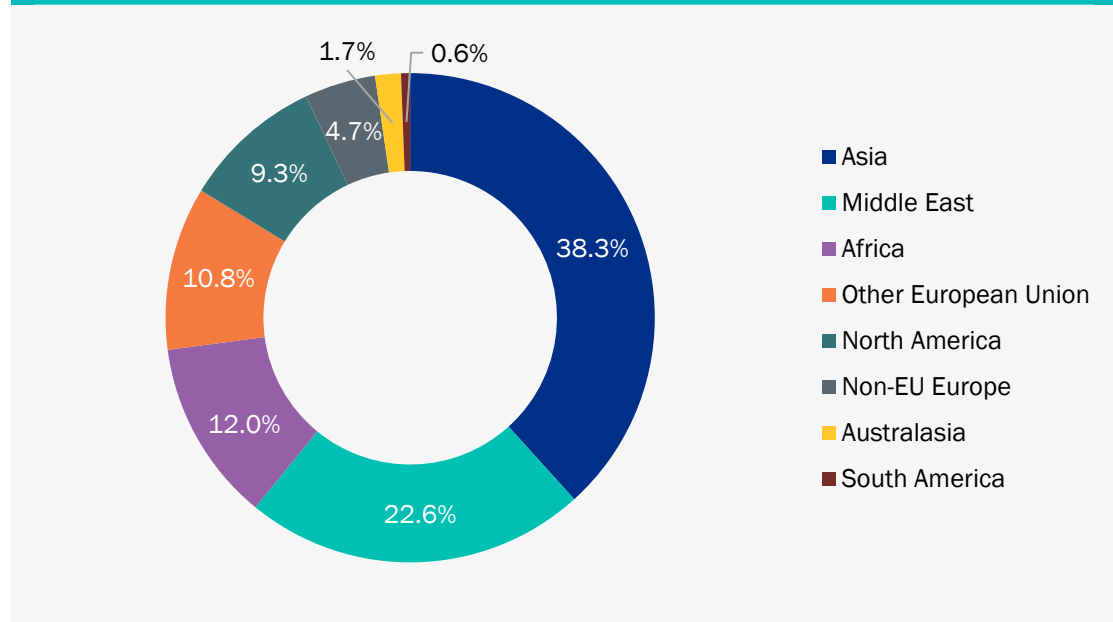
# HOST REGIONS & HOST COUNTRIES

**TABLE 4** shows that Asia hosted the largest contingent of TNE students reported by Scottish providers in 2017–18, followed by the Middle East, Africa, Other European Union, North America, non-EU Europe, Australasia and South America.

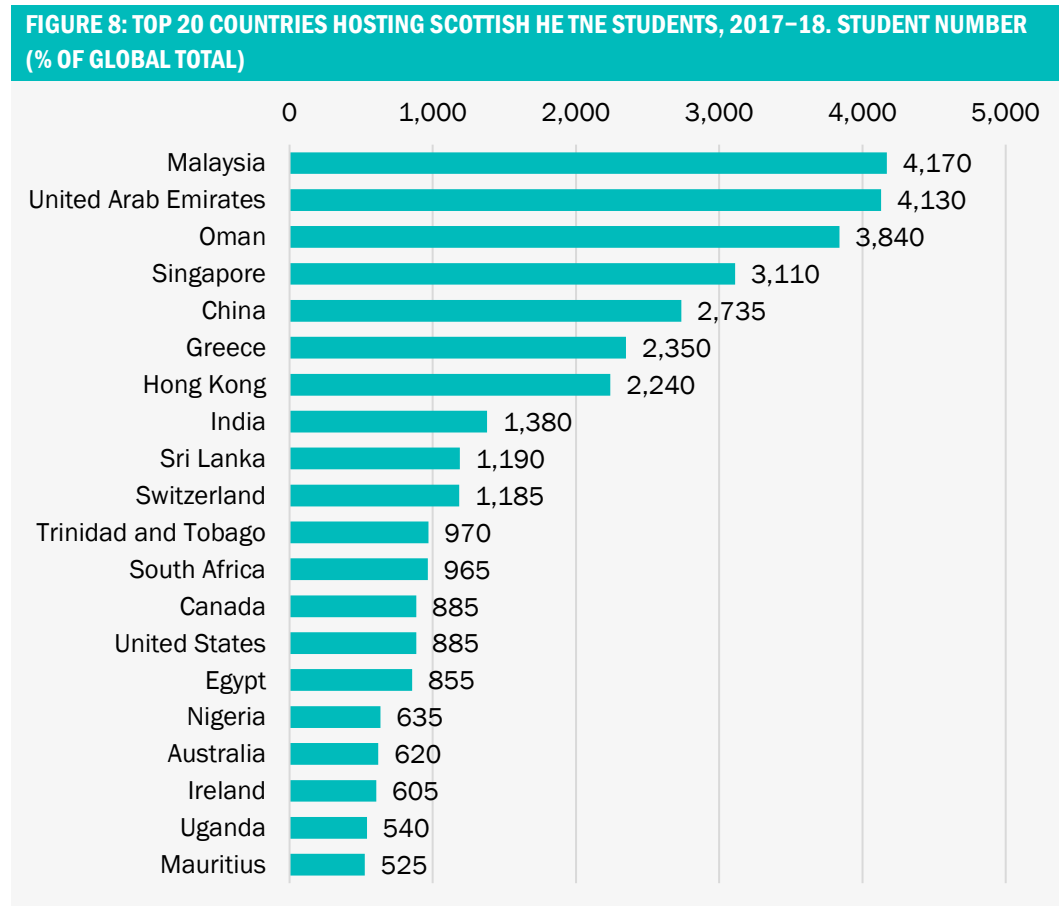
TABLE 4: SCOTTISH HE TNE STUDENTS BY HOST REGION, 2017–18		
Region	Students	%
Asia	15,850	38.3%
Middle East	9,340	22.6%
Africa	4,975	12.0%
Other European Union	4,480	10.8%
North America	3,845	9.3%
Non-EU Europe	1,925	4.7%
Australasia	715	1.7%
South America	260	0.6%

**FIGURE 7** shows a breakdown of TNE students reported by Scottish providers by region in 2017–18. Compared with the UK as a whole, in Scotland there was a higher proportion of students in the Middle East (22.6% in Scotland vs 11.4% in the UK), North America (9.3% in Scotland vs 4.7% in the UK), non-EU Europe (4.7% in Scotland vs 2.6% in the UK), Australasia (1.7% in Scotland vs 0.6% in the UK) and South America (0.6% in Scotland vs 0.4% in the UK) and a lower proportion in Asia (38.3% in Scotland vs 52.4% in the UK), Africa (12% in Scotland vs 13.1% in the UK) and Other European Union (10.8% in Scotland vs 14.8% in the UK).

**FIGURE 7: HE TNE STUDENTS BY HOST REGION, 2017–18**



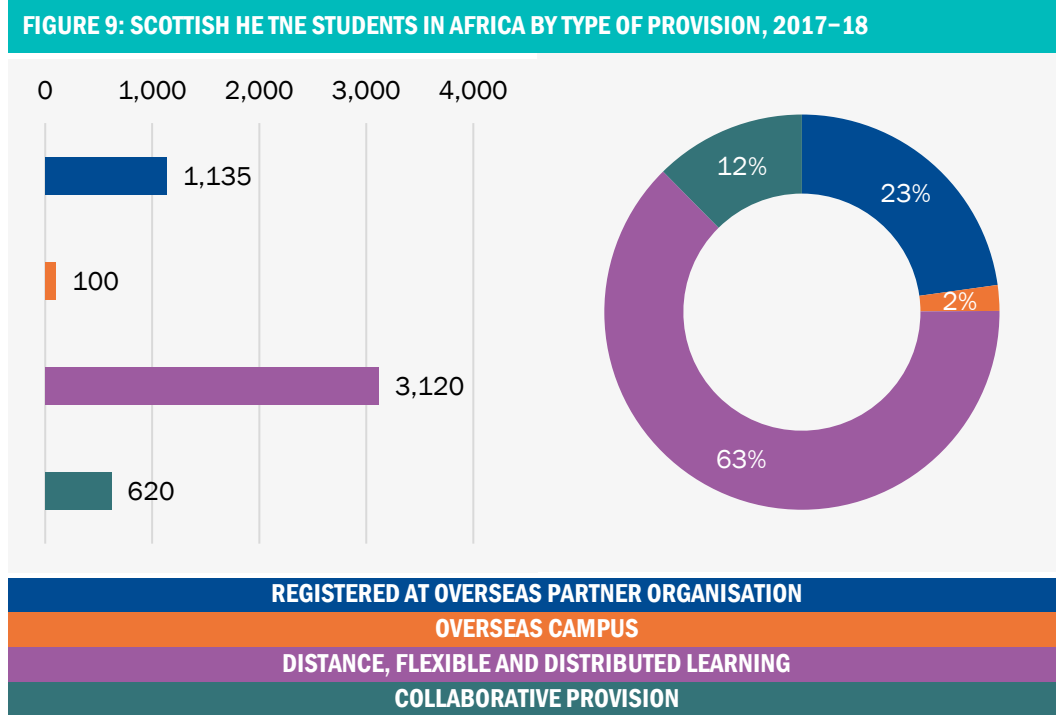
**FIGURE 8** shows a breakdown of TNE students reported by Scottish providers by country in 2017–18. The top seven countries host nearly 55% of all students. United Arab Emirates (UAE), Oman, Greece, India, Switzerland, Trinidad and Tobago, South Africa, Canada, United States, Australia, Uganda and Mauritius have a higher relative position in Scotland than in the UK overall, while China, Hong Kong, Sri Lanka, Egypt and Nigeria have a lower relative position. Malaysia, Singapore and Ireland have the same position in Scotland and the UK overall.



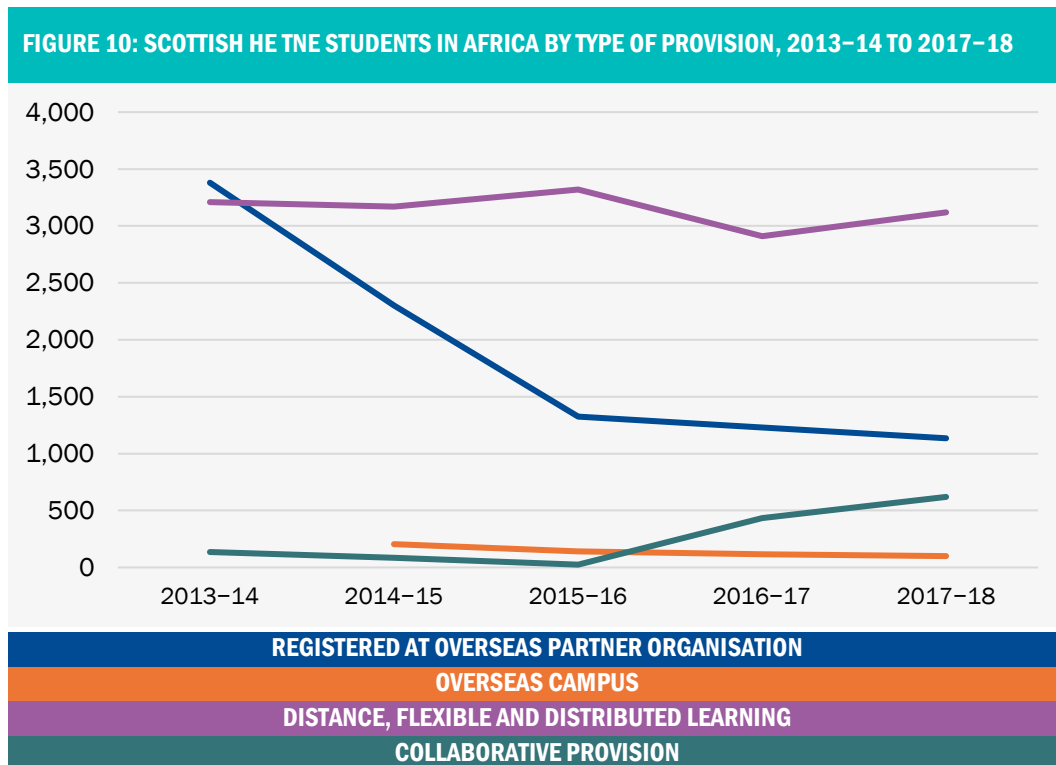


## Africa

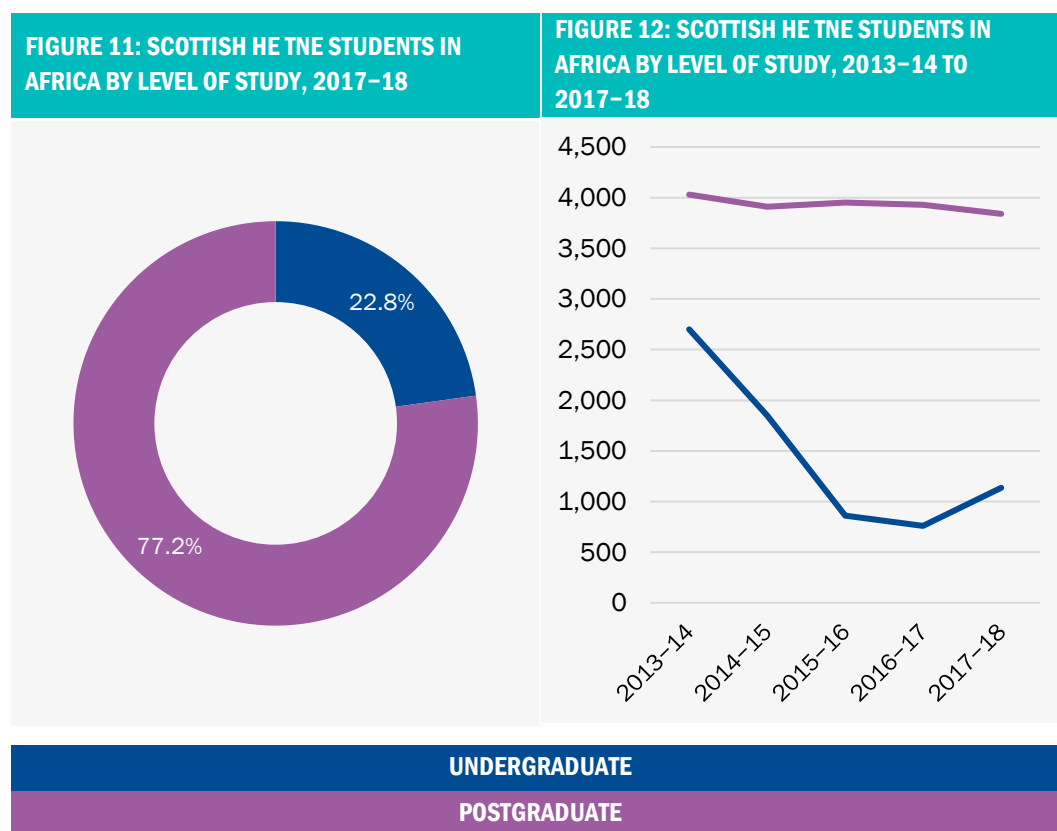
**FIGURE 9** shows that a majority of TNE students reported by Scottish providers in Africa were studying through distance, flexible and distributed learning (63%), followed by registered at overseas partner organisation (23%), collaborative provision (12%) and at an overseas campus (2%).



**FIGURE 10** shows that between 2013–14 and 2017–18 there was a decrease in all TNE modes of study reported by Scottish providers in Africa except in collaborative provision.



**FIGURE 11** shows that 77.2% of TNE students reported by Scottish institutions in 2017–18 in Africa were studying at postgraduate level, against 22.8% at undergraduate level. **FIGURE 12** shows that between 2013–14 and 2017–18 there was a decrease at both levels of study although there was an increase at undergraduate level between 2016–17 and 2017–18.

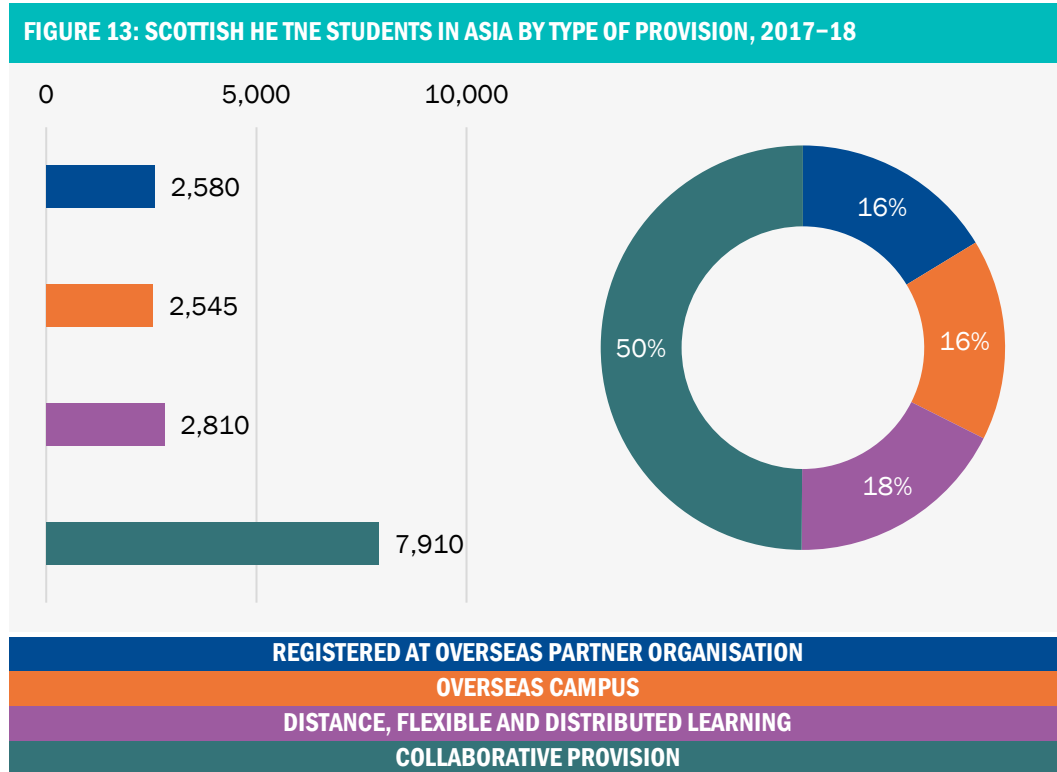


**TABLE 5** shows the five African countries hosting the most TNE students from Scottish providers in 2017–18. South Africa, Uganda and Mauritius have a higher relative position than for the rest of the UK, while Egypt and Nigeria have a lower relative position.

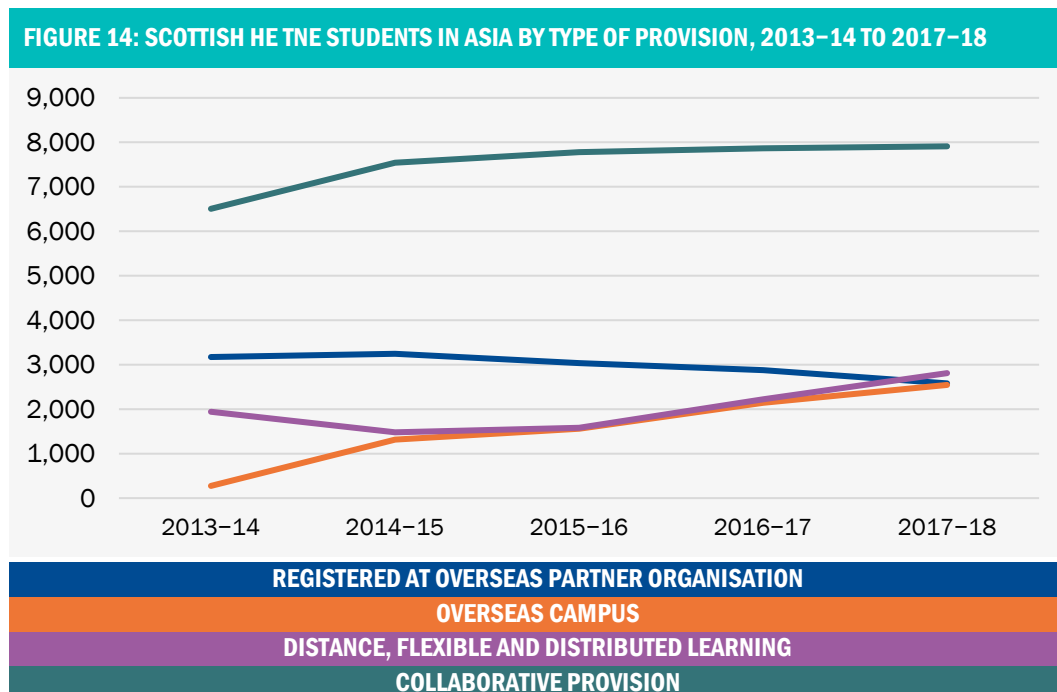
TABLE 5: TOP FIVE HOST COUNTRIES OF SCOTTISH HE TNE STUDENTS IN AFRICA, 2017–18		
Host country	Students	%
South Africa	965	19.4%
Egypt	855	17.2%
Nigeria	635	12.8%
Uganda	540	10.8%
Mauritius	525	10.6%

## Asia

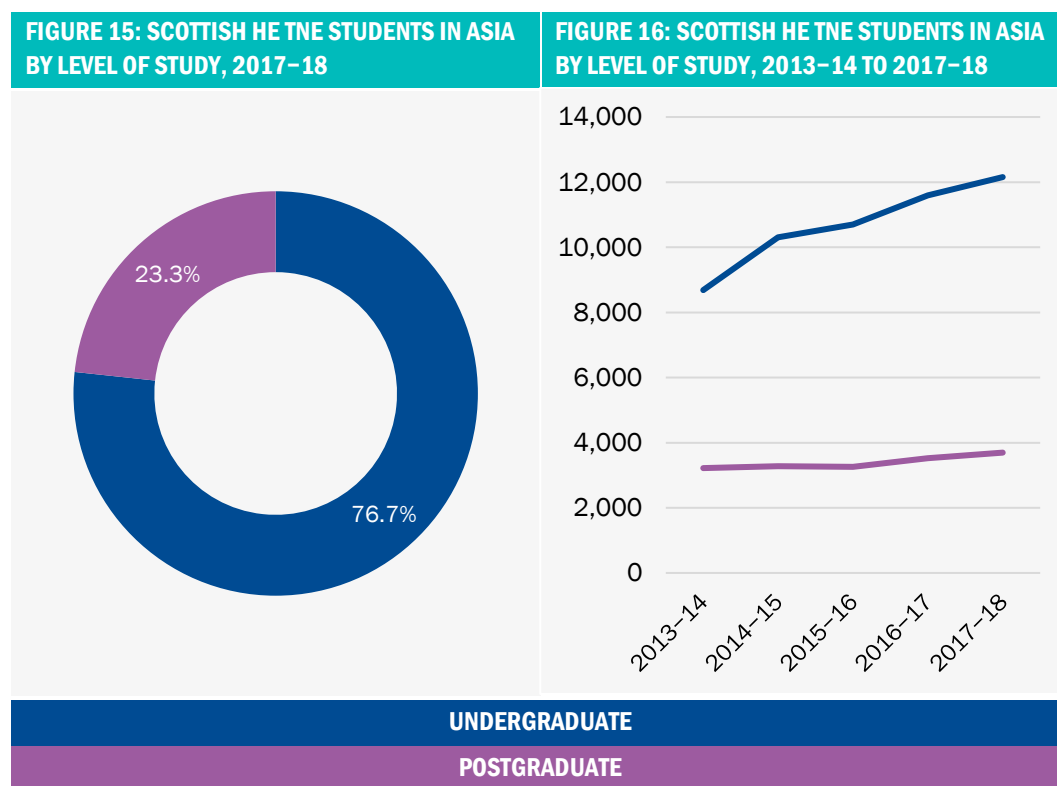
**FIGURE 13** shows that a majority of TNE students reported by Scottish providers in Asia were studying through collaborative provision (50%) followed by distance, flexible and distributed learning (17%), registered at overseas partner organisation (16%), and at an overseas campus (16%).



**FIGURE 14** shows that between 2013–14 and 2017–18 there was an increase in all TNE modes of study reported by Scottish providers in Asia except in registered at an overseas partner organisation.



**FIGURE 15** shows that 76.7% of TNE students reported by Scottish institutions in 2017–18 in Asia were studying at undergraduate level, against 23.3% at postgraduate level. **FIGURE 16** shows that between 2013–14 and 2017–18 there was an increase at both levels of study, more marked at undergraduate level.



**TABLE 6** shows the five Asian countries hosting the most TNE students from Scottish providers in 2017–18. Singapore, Hong Kong and India have a higher relative position than for the rest of the UK, while China has a lower relative position. Malaysia has the same leading position.

**TABLE 6: TOP FIVE HOST COUNTRIES OF SCOTTISH HE TNE STUDENTS IN ASIA, 2017–18**

Host country	Students	%
Malaysia	4,170	26.3%
Singapore	3,110	19.6%
China	2,735	17.3%
Hong Kong	2,240	14.1%
India	1,380	8.7%

## Australasia

FIGURE 17 shows that all TNE students reported by Scottish providers in Australasia were studying through distance, flexible and distributed learning.

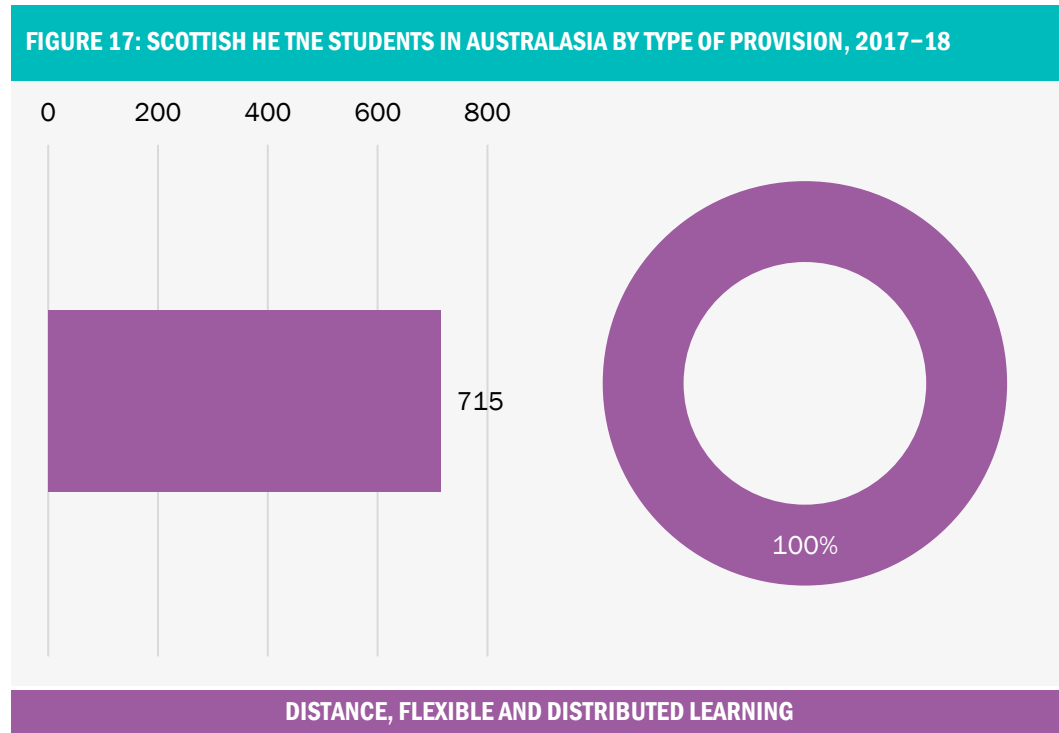
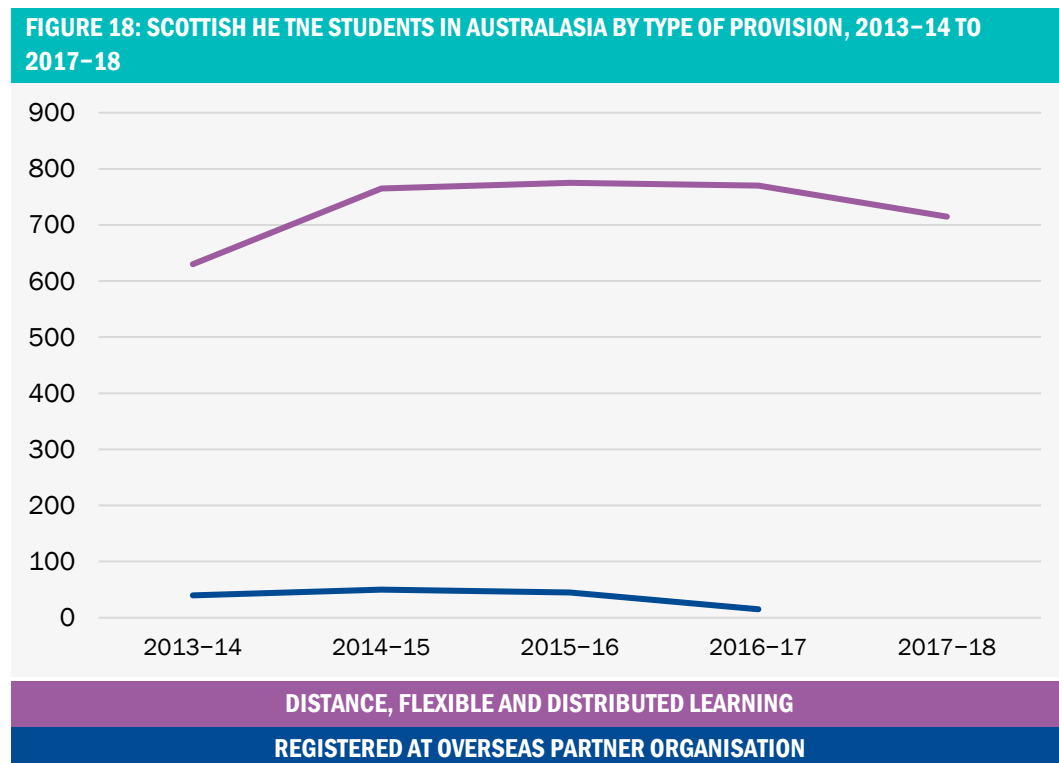
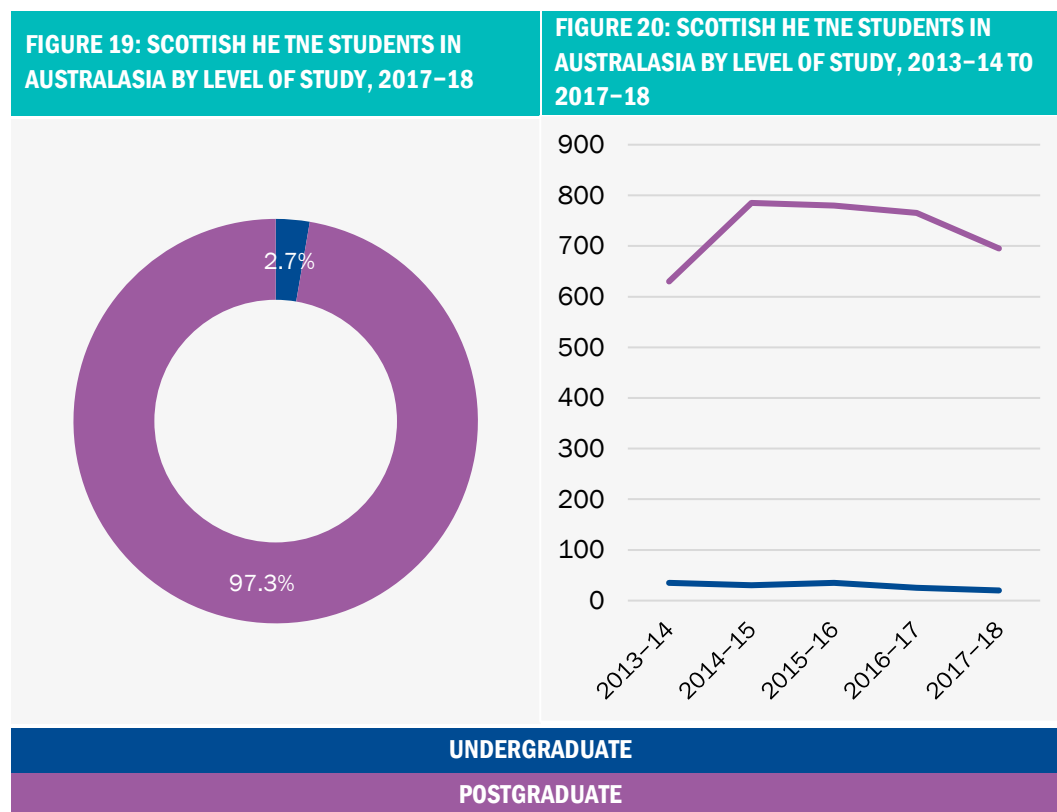


FIGURE 18 shows that the number of students studying through distance, flexible and distributed learning in Australasia increased between 2013–14 and 2015–16 and decreased between 2015–16 and 2017–18. The number of students registered at an overseas partner organisation was zero in 2017–18.



**FIGURE 19** shows that 97.3% of TNE students reported by Scottish institutions in 2017–18 in Australasia were studying at postgraduate level, against 2.7% at undergraduate level. **FIGURE 20** shows that following an increase in 2014–15, there was a decrease in student numbers between 2014–15 and 2017–18.



**TABLE 7** shows the five Australasian countries hosting the most TNE students from Scottish providers in 2017–18. Tonga and Samoa have a higher relative position than for the rest of the UK, while the same positions are held by Australia, New Zealand and Fiji.

TABLE 7: TOP FIVE HOST COUNTRIES OF SCOTTISH HE TNE STUDENTS IN AUSTRALASIA, 2017–18		
Host country	Students	%
Australia	620	86.6%
New Zealand	80	11.2%
Fiji	5	0.8%
Tonga	5	0.4%
Samoa	5	0.1%

## Other European Union

FIGURE 21 shows that a majority of TNE students reported by Scottish providers in Other European Union were studying through distance, flexible and distributed learning (45%), followed by collaborative provision (39%), registered at overseas partner organisation (12%), and at an overseas campus (4%).

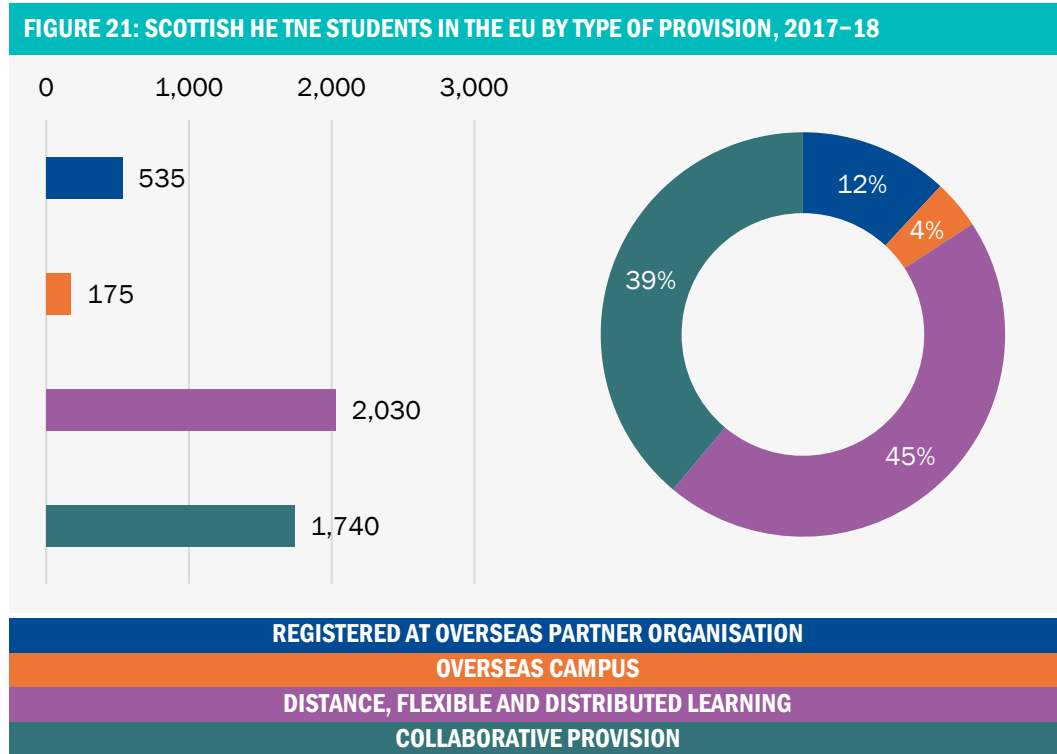
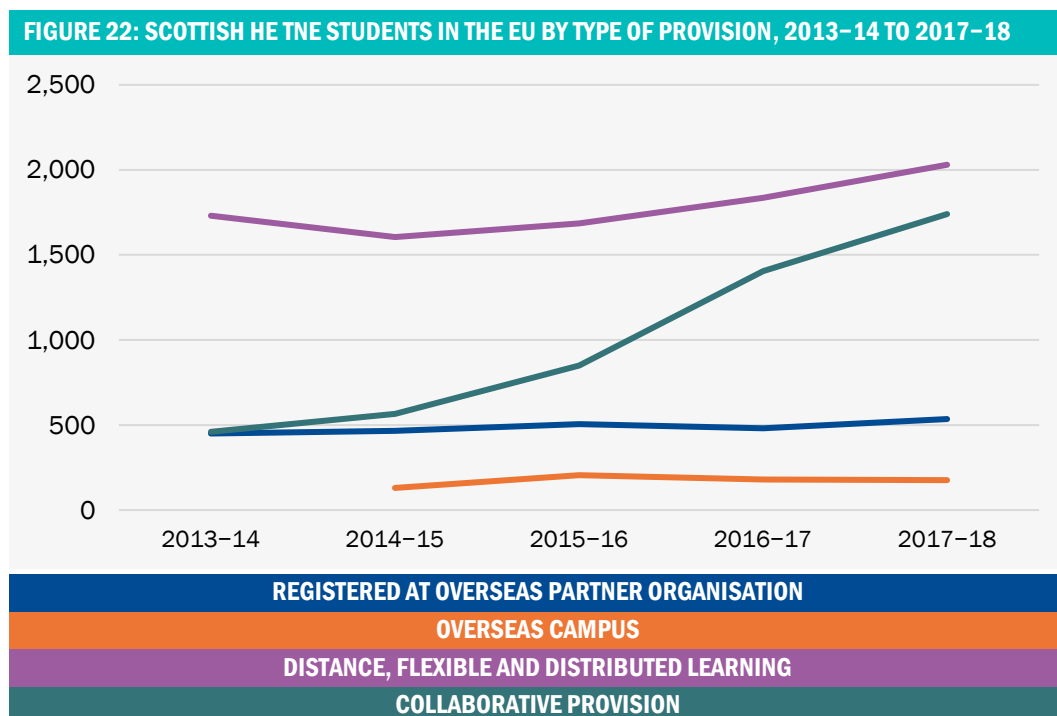
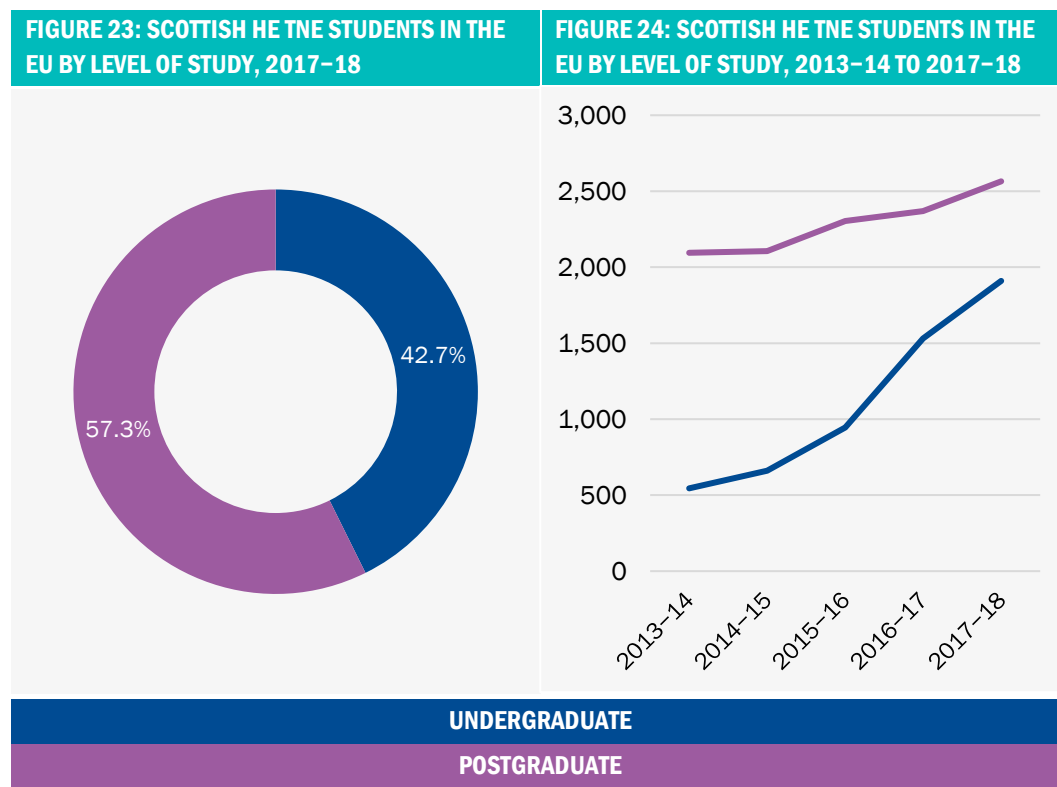


FIGURE 22 shows that between 2013–14 and 2017–18 there was an increase in all TNE modes of study reported by Scottish providers in Other European Union, particularly marked in collaborative provision.



**FIGURE 23** shows that 57.3% of TNE students reported by Scottish institutions in 2017–18 in Other European Union were studying at postgraduate level, against 42.7% at undergraduate level. **FIGURE 24** shows that between 2013–14 and 2017–18 there was an increase at both levels of study, more marked at the undergraduate level.



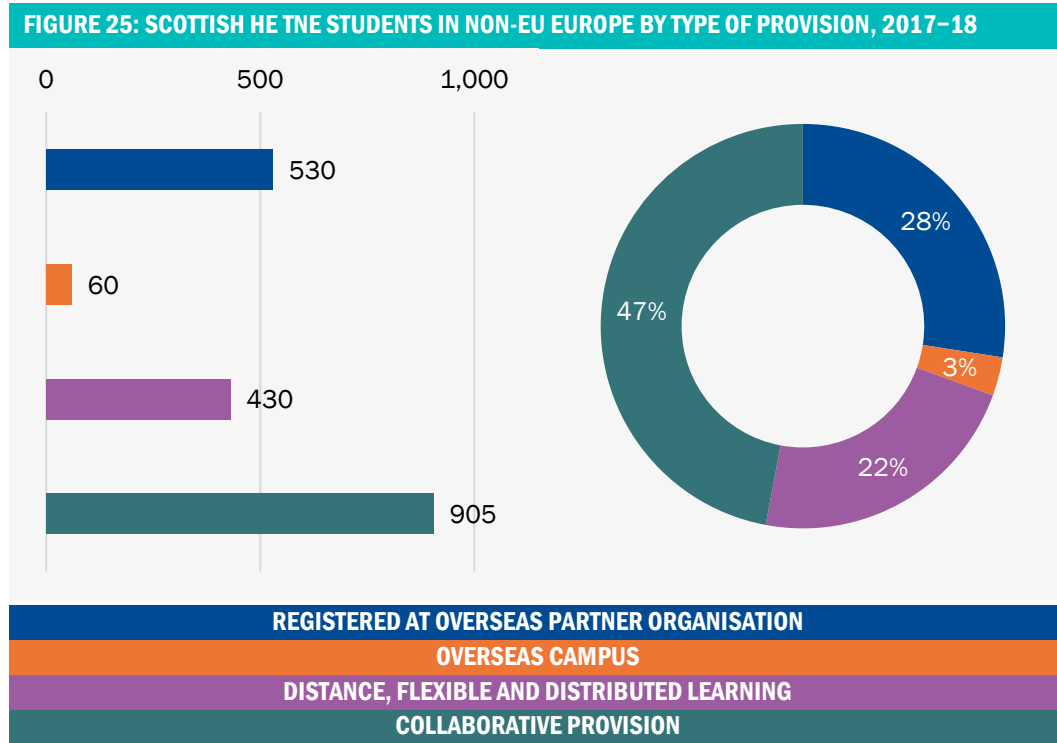
**TABLE 8** shows the five Other European Union countries hosting the most TNE students from Scottish providers in 2017–18. Ireland, Malta and Italy have a higher relative position than for the rest of the UK, while the same positions are held by Greece and Germany.

TABLE 8: TOP FIVE HOST COUNTRIES OF SCOTTISH HE TNE STUDENTS IN THE EU, 2017–18		
Host country	Students	%
Greece	2,350	52.5%
Ireland	605	13.5%
Germany	285	6.4%
Malta	185	4.1%
Italy	135	3.0%

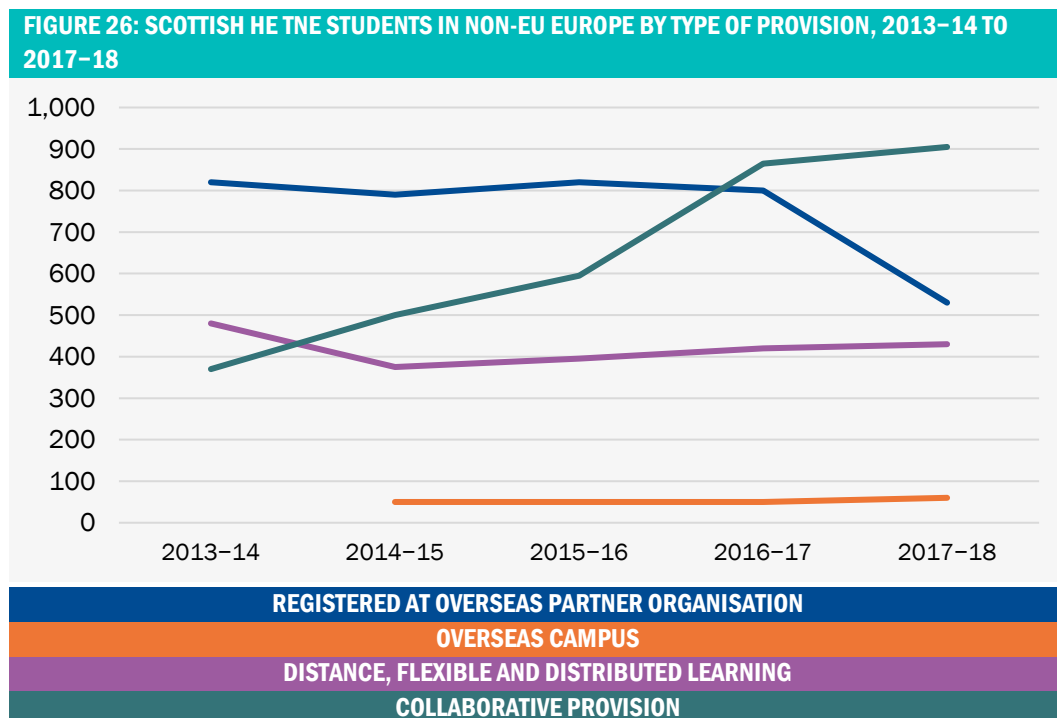


## Non-EU Europe

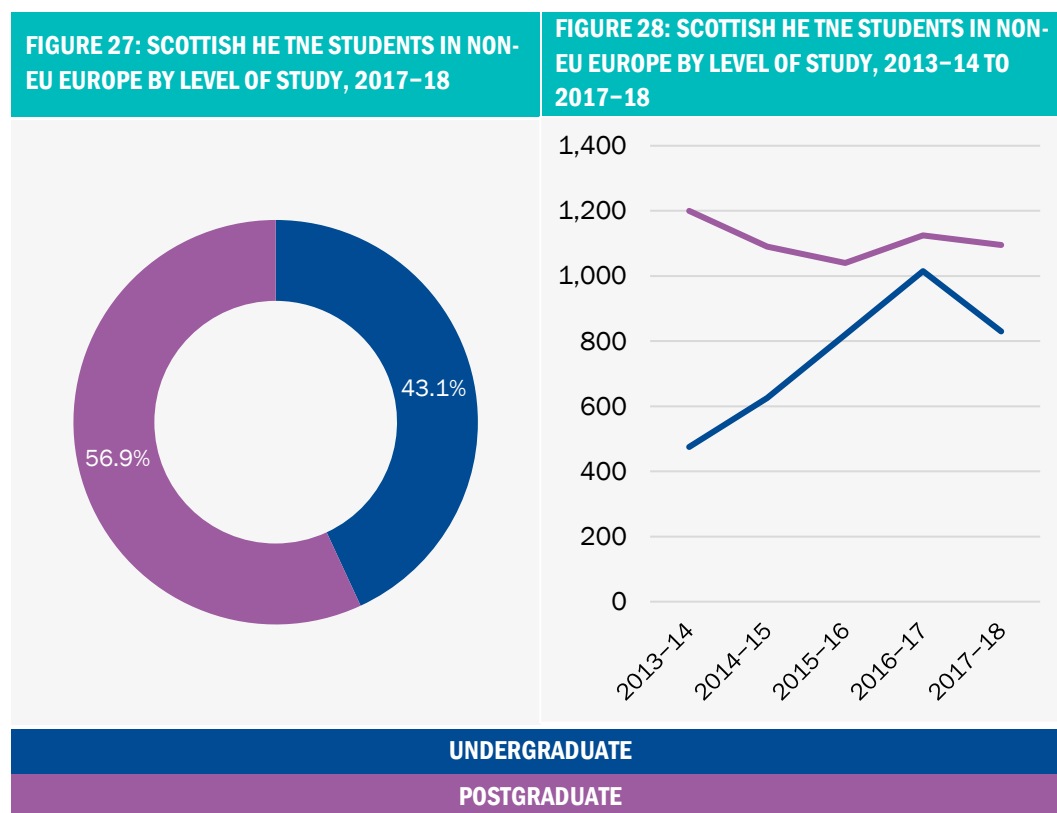
**FIGURE 25** shows that a majority of TNE students reported by Scottish providers in non-EU Europe were studying through collaborative provision (47%), followed by registered at overseas partner organisation (28%), distance, flexible and distributed learning (22%) and at an overseas campus (3%).



**FIGURE 26** shows that between 2013–14 and 2017–18 there was an increase in all TNE modes of study reported by Scottish providers in non-EU Europe except in registered at an overseas partner organisation.



**FIGURE 27** shows that 56.9% of TNE students reported by Scottish institutions in 2017–18 in non-EU Europe were studying at postgraduate level, against 43.1% at undergraduate level. **FIGURE 28** shows that between 2013–14 and 2017–18 there was a decrease at postgraduate level and an increase at undergraduate level, although numbers decreased at both levels between 2016–17 and 2017–18.



**TABLE 9** shows the five non-EU European countries hosting the most TNE students from Scottish providers in 2017–18. Norway, Azerbaijan and Ukraine have a higher relative position than for the rest of the UK, while Russia has a lower relative position. Switzerland has the same leading position.

TABLE 9: TOP FIVE HOST COUNTRIES OF SCOTTISH HE TNE STUDENTS IN NON-EU EUROPE, 2017–18		
Host country	Students	%
Switzerland	1,185	61.6%
Norway	255	13.3%
Azerbaijan	175	9.1%
Russia	115	6.0%
Ukraine	90	4.7%

## Middle East

FIGURE 29 shows that a majority of TNE students reported by Scottish providers in the Middle East were studying at an overseas campus (43%), followed by collaborative provision (39%) and distance, flexible and distributed learning (18%).

FIGURE 29: SCOTTISH HE TNE STUDENTS IN THE MIDDLE EAST BY TYPE OF PROVISION, 2017–18

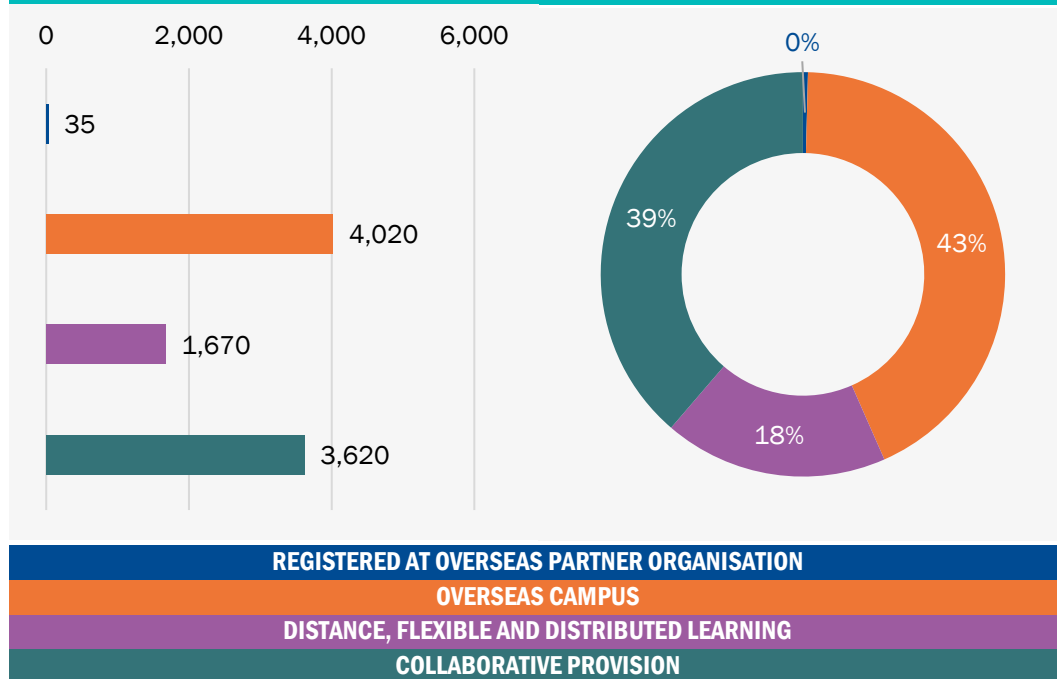
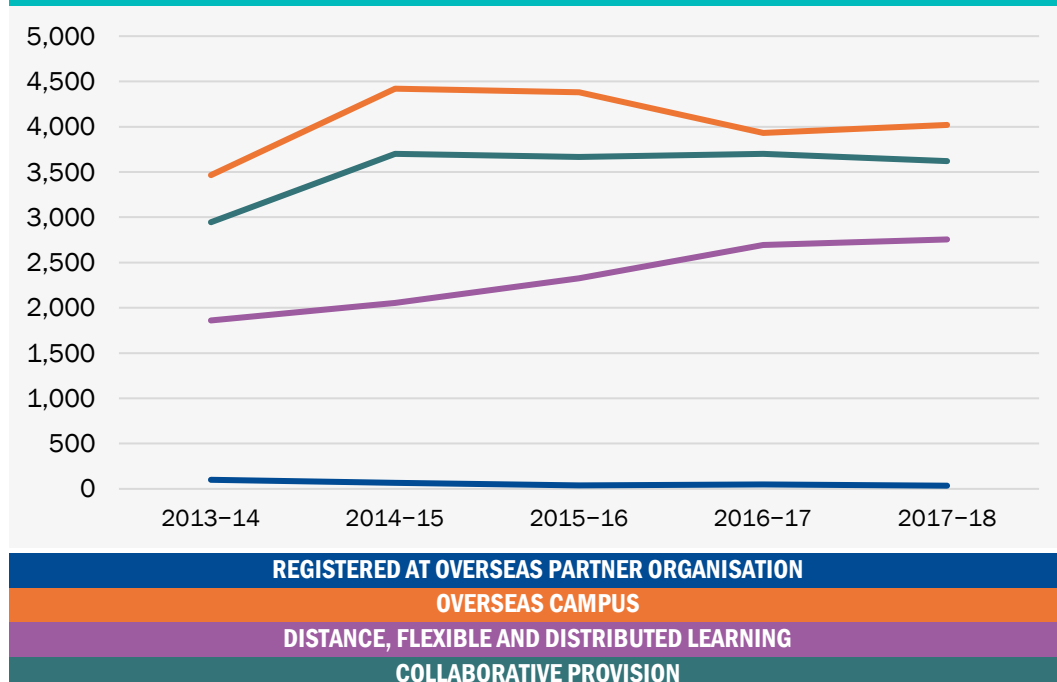
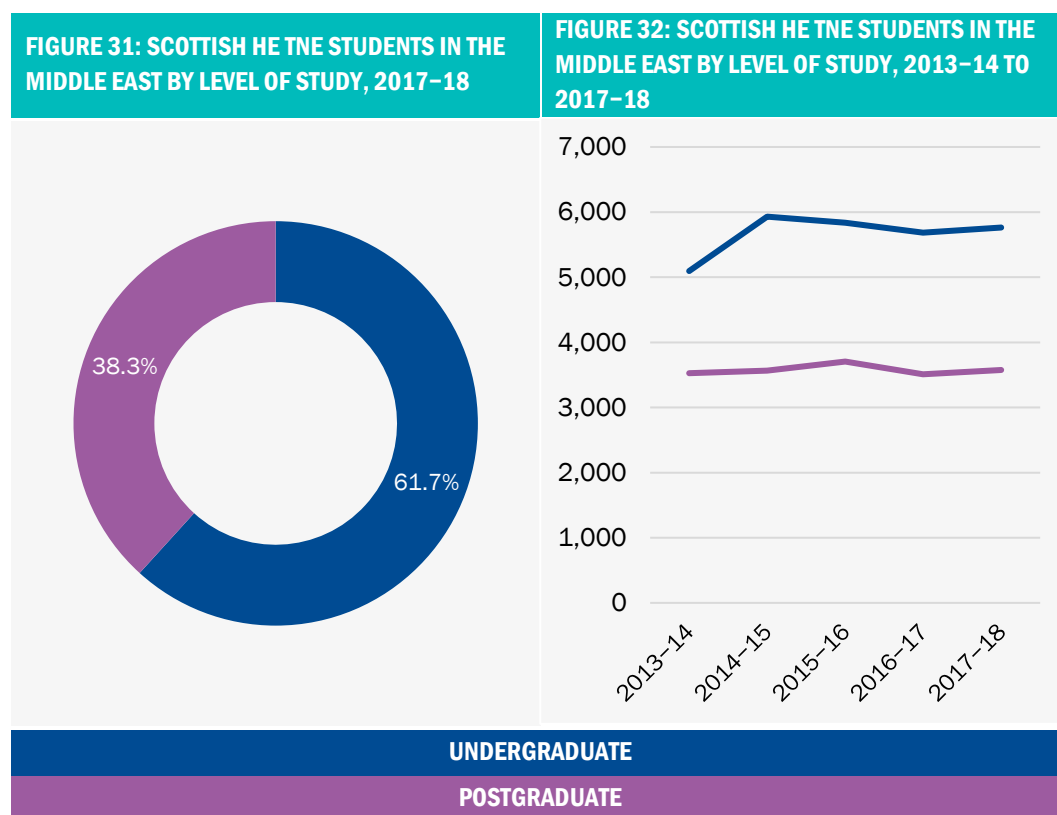


FIGURE 30 shows that between 2013–14 and 2017–18 there was an increase in all TNE modes of study reported by Scottish providers in the Middle East except in registered at an overseas partner organisation. The number of students at an overseas campus and studying through collaborative provision decreased since reaching a peak in 2014–15.

FIGURE 30: SCOTTISH HE TNE STUDENTS IN THE MIDDLE EAST BY TYPE OF PROVISION, 2016–17 TO 2017–18



**FIGURE 31** shows that 61.7% of TNE students reported by Scottish institutions in 2017–18 in the Middle East were studying at undergraduate level, against 38.3% at postgraduate level. **FIGURE 32** shows that between 2013–14 and 2017–18 there was an increase at undergraduate level, with numbers mostly flat at postgraduate level.

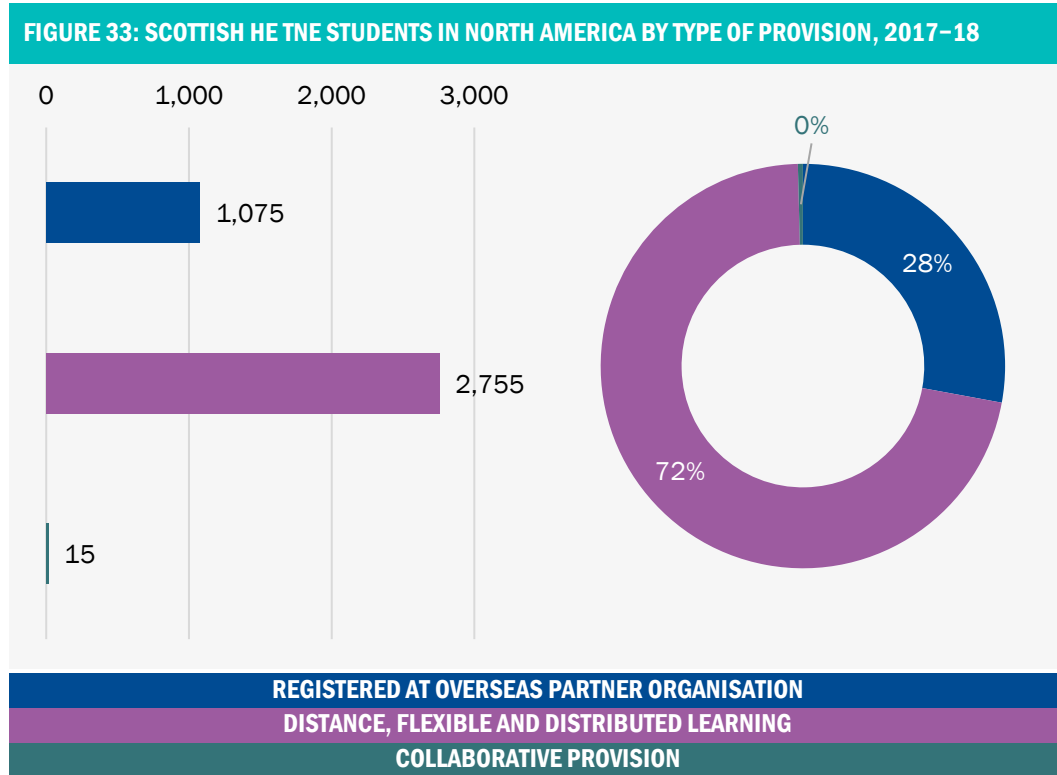


**TABLE 10** shows the five Middle Eastern countries hosting the most TNE students from Scottish providers in 2017–18. UAE and Oman swap positions relative to the rest of the UK, while the same positions are held by Saudi Arabia, Qatar and Bahrain.

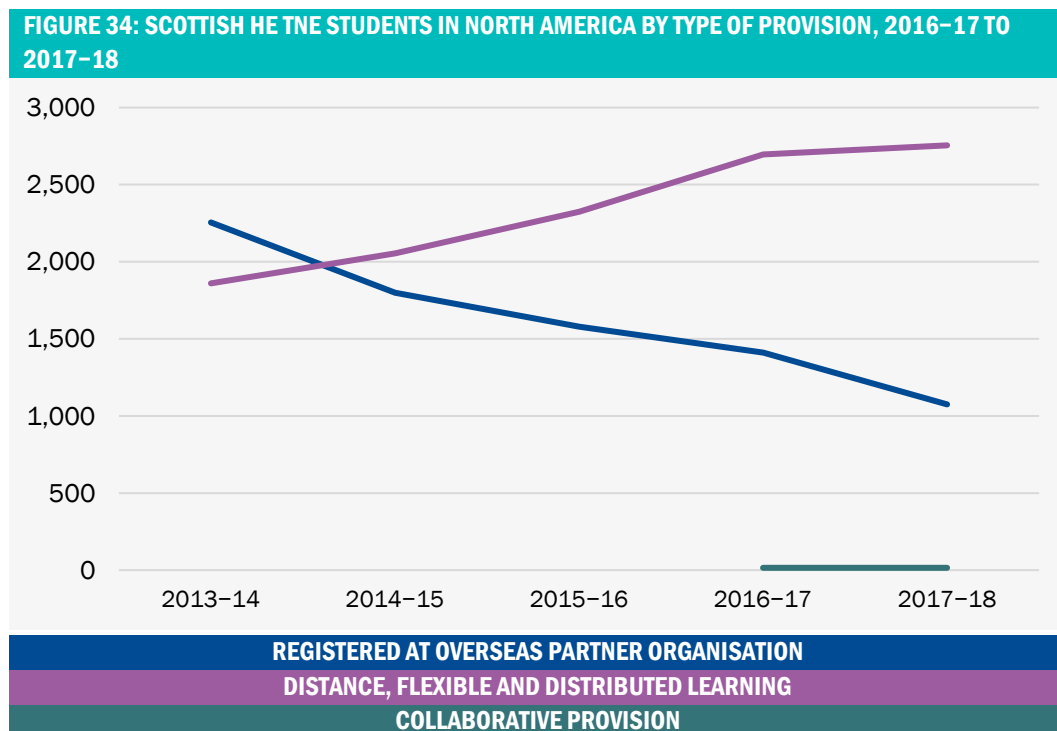
Host country	Students	%
United Arab Emirates	4,130	44.2%
Oman	3,840	41.1%
Saudi Arabia	390	4.2%
Qatar	360	3.8%
Bahrain	210	2.3%

## North America

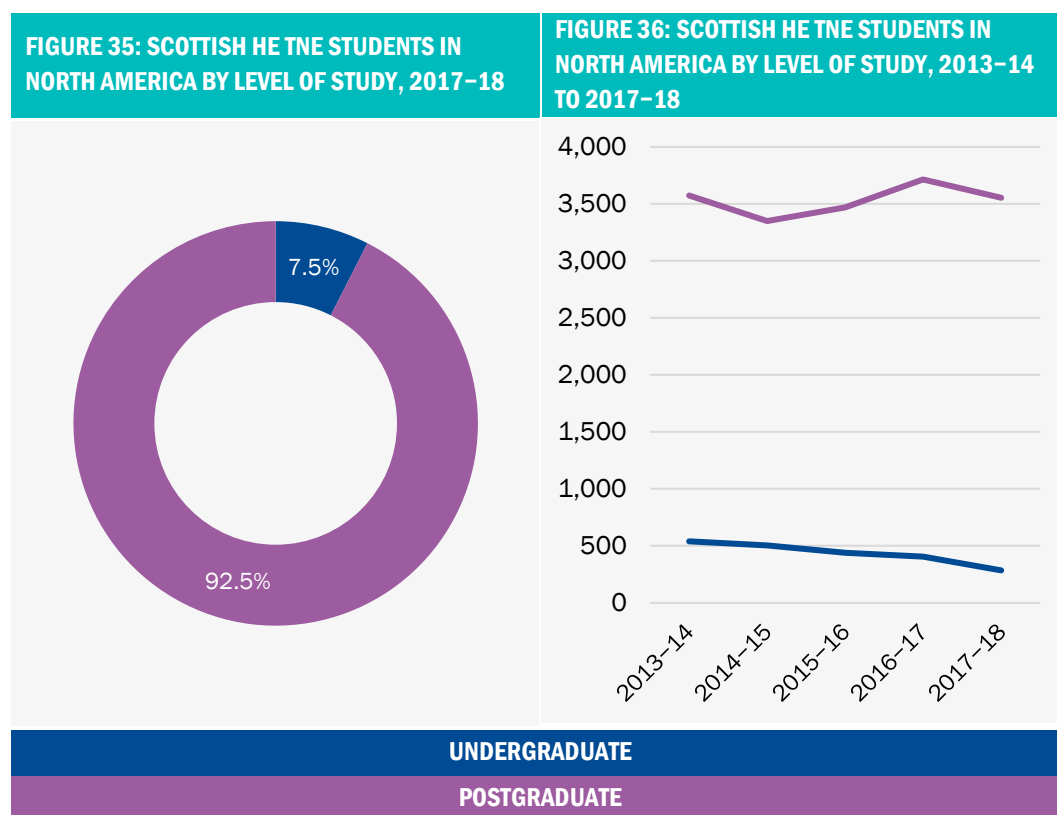
**FIGURE 33** shows that a majority of TNE students reported by Scottish providers in North America were studying through distance, flexible and distributed learning (72%), followed by registered at an overseas partner organisation (28%) and collaborative provision (less than 1%).



**FIGURE 34** shows that between 2013–14 and 2017–18 there was an increase in students studying through distance, flexible and distributed learning and a decrease in students registered at an overseas partner organisation reported by Scottish providers in North America.



**FIGURE 35** shows that 92.5% of TNE students reported by Scottish institutions in 2017–18 in North America were studying at postgraduate level, against 7.5% at undergraduate level. **FIGURE 36** shows that between 2013–14 and 2017–18 there was a decrease at both levels of study, more marked between 2016–17 and 2017–18.

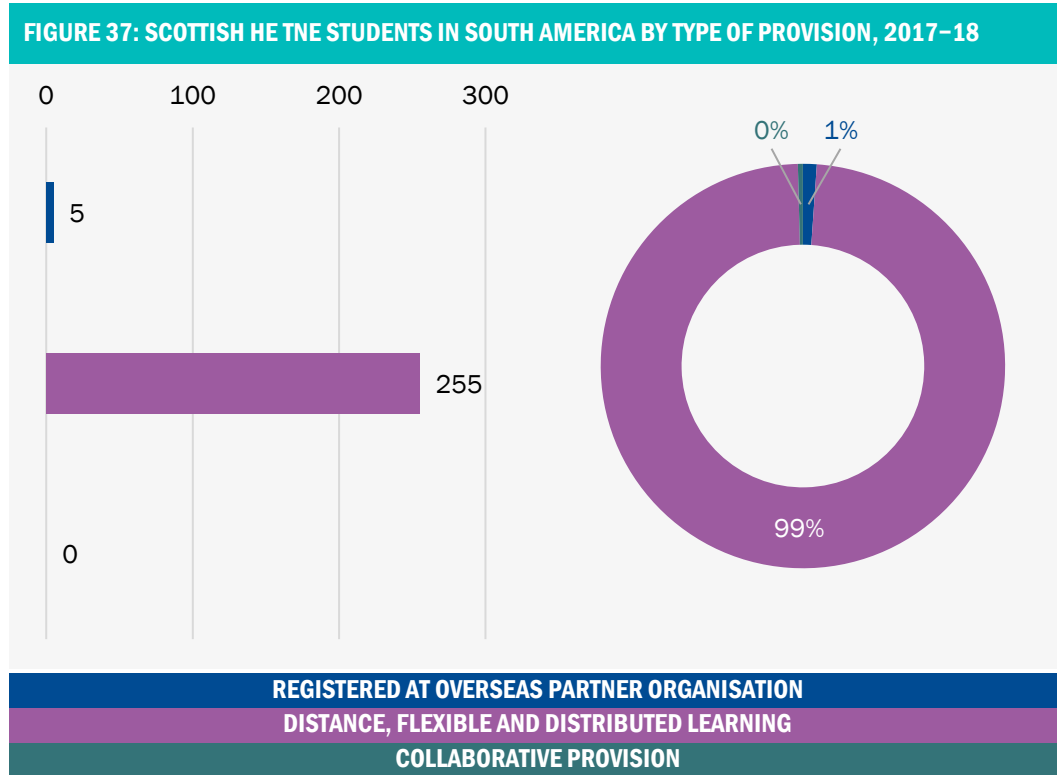


**TABLE 11** shows the five North American countries hosting the most TNE students from Scottish providers in 2017–18. Trinidad and Tobago, Canada, Jamaica and Barbados have a higher relative position than for the rest of the UK, while the United States has a lower relative position.

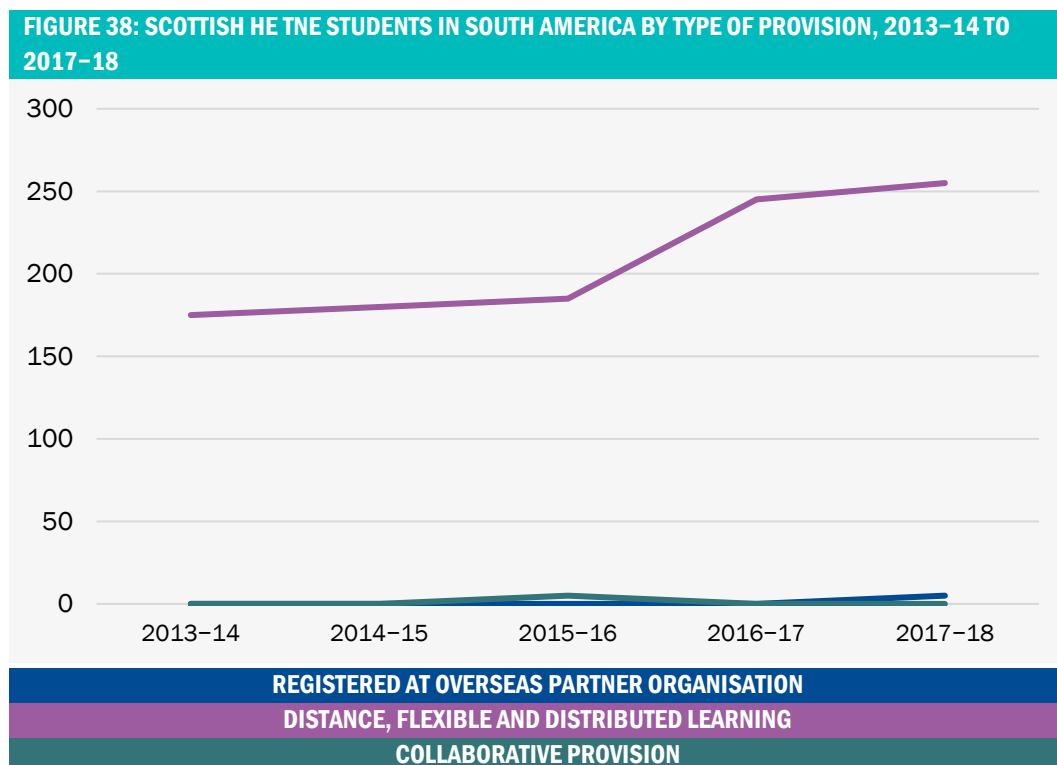
<b>TABLE 11: TOP FIVE HOST COUNTRIES OF SCOTTISH HE TNE STUDENTS IN NORTH AMERICA, 2017–18</b>		
Host country	Students	%
Trinidad and Tobago	970	25.3%
Canada	885	23.0%
United States	885	23.0%
Jamaica	350	9.1%
Barbados	220	5.7%

## South America

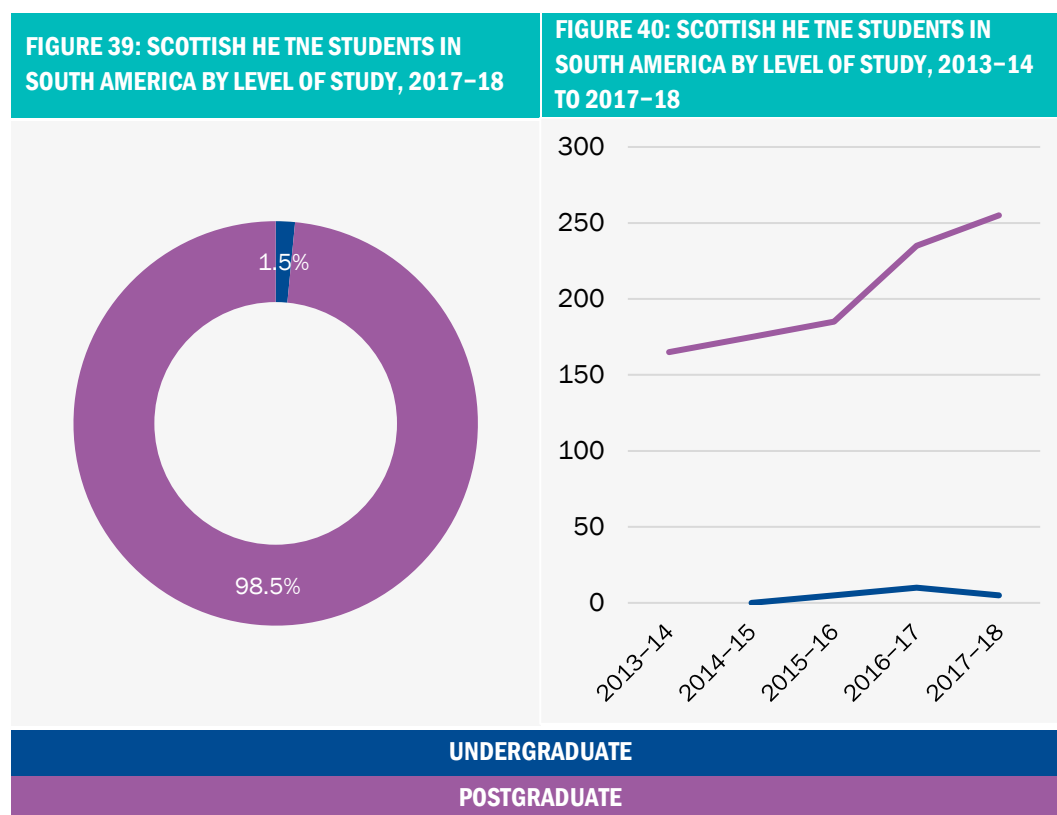
**FIGURE 37** shows that a majority of TNE students reported by Scottish providers in South America were studying through distance, flexible and distributed learning (99%), followed by registered at an overseas partner organisation (1%).



**FIGURE 38** shows that between 2013–14 and 2017–18 there was an increase in all TNE modes of study reported by Scottish providers in South America.



**FIGURE 39** shows that 98.5% of TNE students reported by Scottish institutions in 2017–18 in South America were studying at postgraduate level, against 1.5% at undergraduate level. **FIGURE 40** shows that between 2013–14 and 2017–18 there was a steep increase at postgraduate level.



**TABLE 12** shows the five South American countries hosting the most TNE students from Scottish providers in 2017–18. Guyana, Argentina and Ecuador have a higher relative position than for the rest of the UK, while Brazil has a lower relative position. Colombia has the same position.

<b>TABLE 12: TOP FIVE HOST COUNTRIES OF SCOTTISH HE TNE STUDENTS IN SOUTH AMERICA, 2017–18</b>		
Host country	Students	%
Guyana	100	37.9%
Brazil	50	18.8%
Colombia	40	15.7%
Argentina	20	7.3%
Ecuador	15	5.7%



# Conclusions

Scottish providers are responsible for nearly the same proportion of the UK's total TNE student population (12.5%) as they are for the proportion of international students studying in the UK (11.8%).

Between 2013–14 and 2017–18 TNE student numbers grew at a slower rate at Scottish institutions (13.3%) than in the UK as a whole (19.9%).

A larger proportion of Scottish providers reported more than 1,000 students in TNE in 2017–18 (64.7%) than in the UK (51.4%).

In 2017–18, Scottish providers reported almost double the proportion (16.7%) of students on branch campuses compared to the proportion reported by all UK providers (8.5%).

Distance, flexible or distributed learning made up a greater proportion of the Scottish TNE student population in 2017–18 than for the UK as a whole: 33.3% were studying through this mode from Scottish providers, compared to 20.7% overall in the UK.

Between 2013–14 and 2017–18 postgraduate TNE provision grew at a slower rate in Scotland (4.5% growth) than in the UK as a whole (25.4%).

Asia hosted the largest proportion of Scottish providers' TNE students (38.3%) in 2017–18, although this was smaller than the proportion for the UK as a whole (52.3%).

The percentage of TNE students in the Middle East (22.6%) and North America (9.3%) was larger among Scottish providers than in the UK as a whole in 2017–18 (11.4% and 4.7% respectively).