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SCALE OF UK HIGHER EDUCATION TRANSNATIONAL EDUCATION 2018–19: 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 examines where students studied, at what level, and through what kind of provision during the 2018–19 academic year. It also puts some of the figures into context, by providing a longitudinal overview of trends in TNE.

Audience:

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

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DECEMBER 2020

EXECUTIVE SUMMARY

In 2018–19, Scottish universities were delivering transnational education (TNE) to more students than ever before and in more countries and territories than ever before.

This second edition of *The Scale of UK Higher Education Transnational Education: Scottish Providers* provides a snapshot analysis of where, at what level and through what type of provision Scottish TNE students studied during the 2018–19 academic year, and a longitudinal overview of trends in TNE from 2014–15.

OVERVIEW

Scotland's higher education (HE) TNE provision in 2018–19:

- **17** higher education providers reported students studying through TNE.
- **76.5%** of Scottish providers reported more than 1,000 TNE students each.
- Scottish providers reported **42,625** students in TNE, which is **12.7%** of the total reported by UK providers.
- Scottish TNE student numbers increased by **1,235** students (**3.0%**) from 2017–18.
- Scottish TNE was reported in **183** countries and territories, more than ever before.
- Asia continued to host the largest proportion of Scottish providers' TNE students (**38.5%**) in 2018–19, followed by the Middle East (**22.4%**), the European Union (**12.1%**), Africa (**11.8%**), North America (**9.3%**), non-EU Europe (**4.2%**), Australasia (**1.5%**) and South America (**0.7%**).
- Scottish providers reported that **55.3%** of TNE students were studying at undergraduate level and **44.7%** at postgraduate level.
- **37.8%** of TNE students at Scottish providers were studying through collaborative provision, followed by **34.5%** studying through distance, flexible and distributed learning, **17.1%** registered at an overseas campus and **10.6%** registered at an overseas partner organisation.

INTRODUCTION

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 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 or dual awards. In this report, we use the word ‘students’ to represent these UK 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 (HEPs) 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 HEP award at overseas campus of reporting provider.	Overseas campus.	Overseas standalone or joint campus.
	Distance, flexible and distributed learning for a UK HEP award where the location of the student is known to be overseas.	Distance, flexible and 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 2018–19, these three providers made up 49.6% 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 among UK universities.

As shown in **FIGURE 1**, in 2018–19 Scottish providers reported 42,625 students in TNE, which is 12.7% of the total reported by UK providers. By way of comparison, Scottish providers hosted 12.0% of the international (non-UK) students in the UK in 2018–19.

FIGURE 1: PROPORTION OF UK HE TNE STUDENTS BY COUNTRY OF PROVIDER, 2018–19

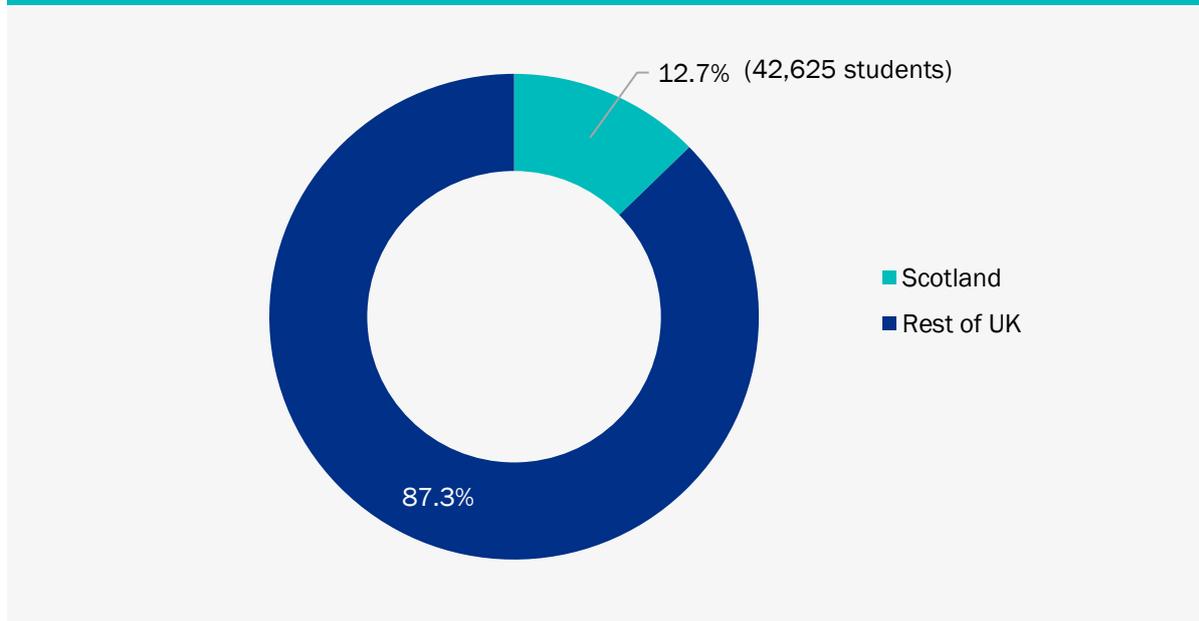
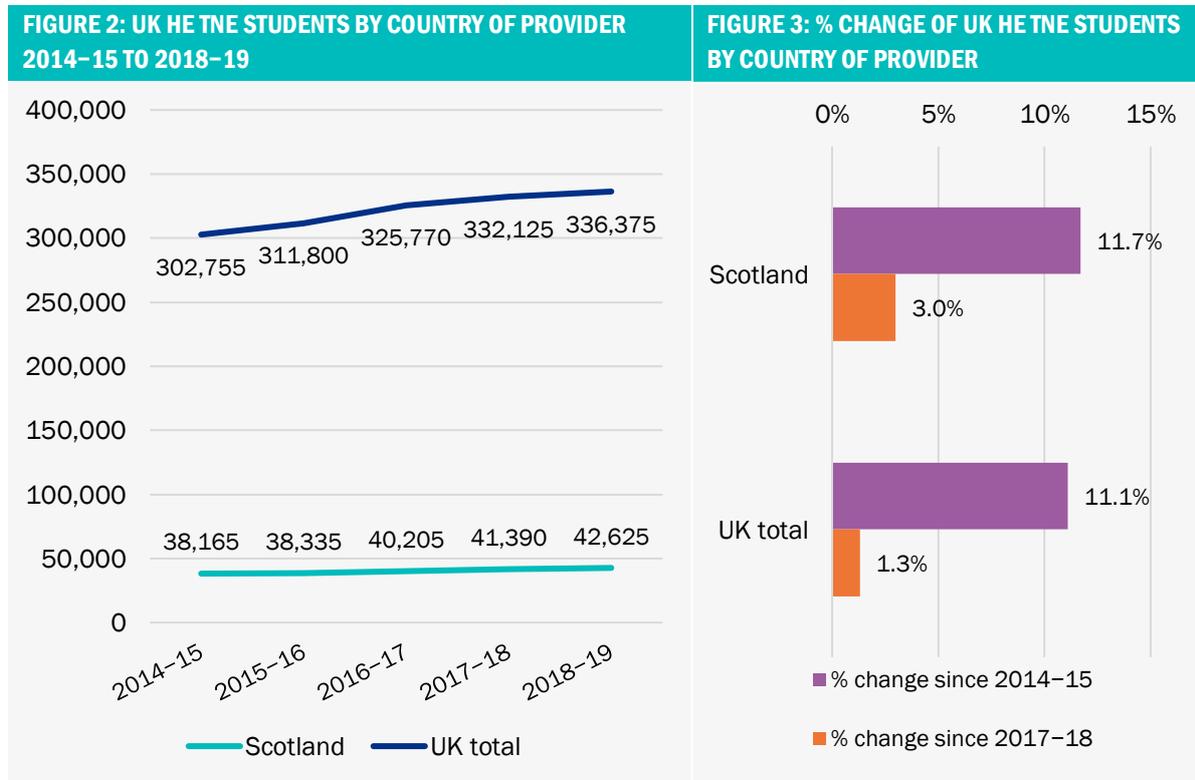
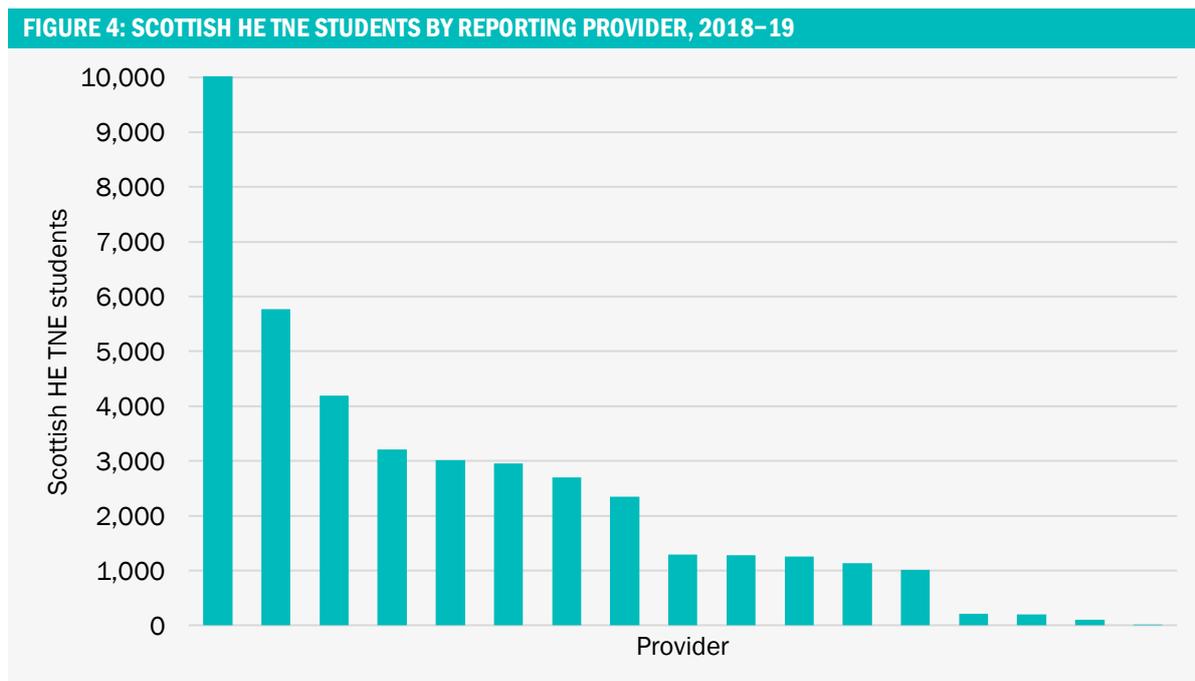


FIGURE 2 and **FIGURE 3** show that between 2014–15 and 2018–19, TNE student numbers grew by 11.7% in Scotland, compared to 11.1% in the UK as a whole (excluding the three main providers of distance, flexible and blended TNE). From 2017–18 to 2018–19, growth was 3.0% in Scotland compared to 1.3% in the UK as a whole.



In 2018–19, 13 out of 17 providers in Scotland reported more than 1,000 students in TNE, as shown in **FIGURE 4**. This represents 76.5% of providers, compared with 54.0% in the UK as a whole. 14 providers reported fewer than 4,000 students, which is 82.4%, compared with 78.9% in the UK as a whole.



TYPE OF PROVISION

FIGURE 5 shows that in 2018–19, 37.8% of TNE students at Scottish providers were studying through collaborative provision, compared with 48.5% overall in the UK; 34.5% were studying through distance, flexible and distributed learning, compared with 21.3% overall in the UK; 17.1% were registered at an overseas campus, compared with 8.6% overall in the UK and 10.6% were registered at an overseas partner organisation, compared with 19.9% overall in the UK.

FIGURE 5: SCOTTISH HE TNE STUDENTS BY TYPE OF PROVISION, 2018–19

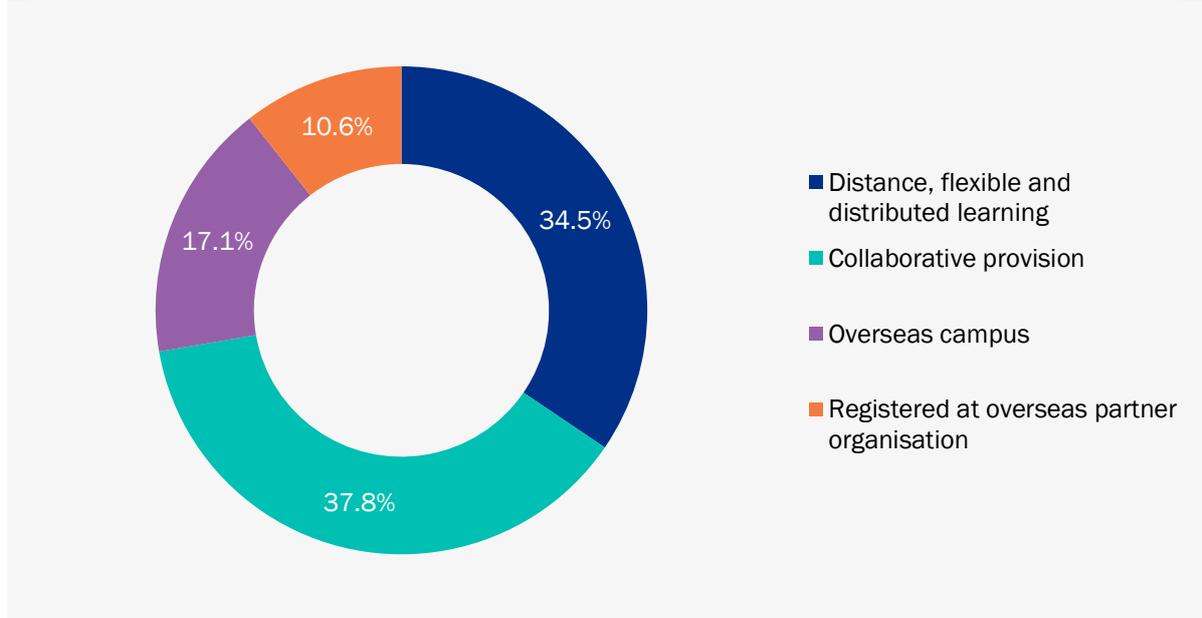


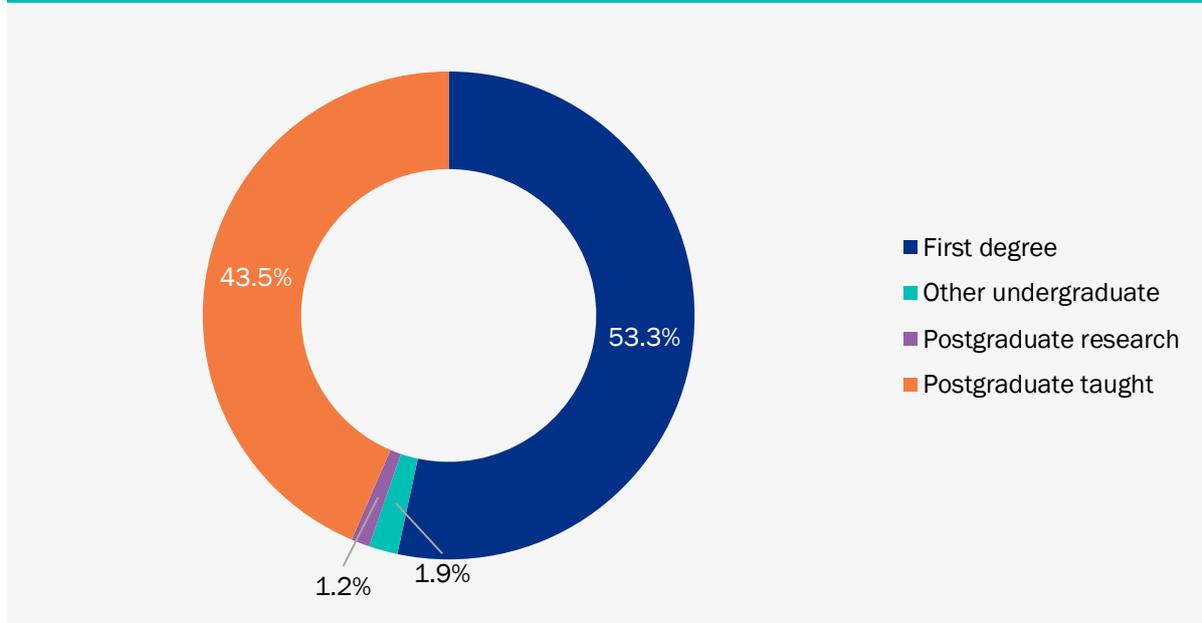
TABLE 2 shows that the fastest growing type of TNE provision in Scotland between 2014–15 and 2018–19 was distance, flexible and distributed learning with a 34.6% increase. This method of provision saw a slower increase for UK providers overall, with a 13.4% increase in the same time period. Between 2017–18 and 2018–19, the fastest growing category in Scotland was collaborative provision, which increased by 8.8%, compared to 11.0% in the UK as a whole. There has been a marked decline in Scotland in TNE students registered at an overseas partner organisation (-48.2%) compared with a smaller decrease (-18.0%) in the UK as a whole from 2014–15 to 2018–19.

TABLE 2: SCOTTISH HE TNE STUDENTS BY TYPE OF PROVISION, 2014–15 TO 2018–19							
Type of provision	Academic year					Change since 2014–15	Change since 2017–18
	2014–15	2015–16	2016–17	2017–18	2018–19		
Distance, flexible and distributed learning	10,935	11,725	12,630	13,790	14,710	34.6%	6.7%
Collaborative provision	12,395	12,925	14,285	14,815	16,125	30.1%	8.8%
Overseas campus	6,120	6,330	6,420	6,895	7,275	18.9%	5.5%
Registered at overseas partner organisation	8,715	7,355	6,865	5,885	4,515	-48.2%	-23.3%
Total	38,165	38,335	40,205	41,390	42,625	11.7%	3.0%

LEVEL OF PROVISION

FIGURE 6 shows that in 2018–19, Scottish providers reported that 55.3% of TNE students were studying at undergraduate level and 44.7% at postgraduate level. The proportion for the UK as a whole was 65.5% undergraduate and 34.5% postgraduate.

FIGURE 6: SCOTTISH HE TNE STUDENTS BY LEVEL OF STUDY, 2018–19



As shown in **TABLE 3**, in 2018–19, Scottish providers reported 23,555 TNE students at undergraduate level, an increase of 18.3% since 2014–15, and 19,070 TNE students at postgraduate level, an increase of 4.4% since 2014–15. In the UK as a whole the increases were 11.5% and 10.3% respectively.

TABLE 3: SCOTTISH HE TNE STUDENTS BY LEVEL OF STUDY, 2014–15 TO 2018–19								
Level of study		Academic Year					Change since 2014-15	Change since 2017-18
		2014–15	2015–16	2016–17	2017–18	2018–19		
UG	First degree	19,410	19,190	20,290	21,360	22,730	17.1%	6.4%
	Other UG	500	450	735	745	825	65.3%	10.3%
	Total	19905	19,640	21,025	22,110	23,555	18.3%	6.5%
PG	PG research	445	550	585	700	510	15.3%	-27.0%
	PG taught	17,815	18,150	18,590	18,580	18,560	4.2%	-0.1%
	Total	18,260	18,700	19,175	19,280	19,070	4.4%	-1.1%
Total		38,165	38,335	40,205	41,390	42,625	11.7%	3.0%

HOST REGIONS

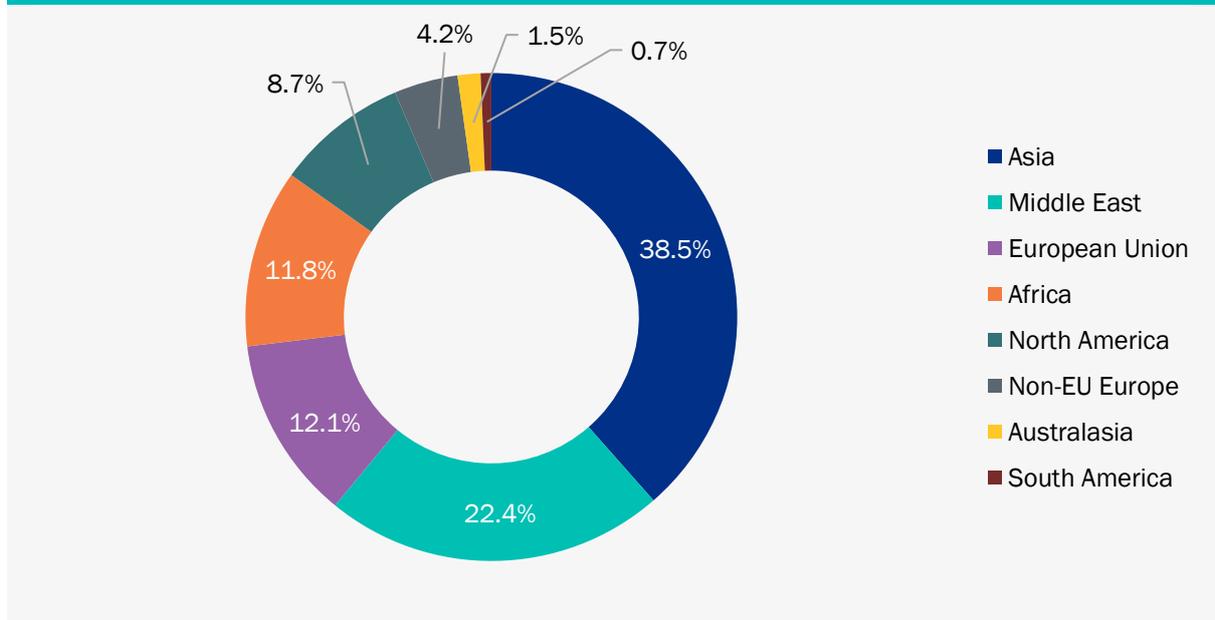
TABLE 4 shows that Asia hosted the largest contingent of TNE students reported by Scottish providers in 2018–19, followed by the Middle East, the European Union, Africa, North America, non-EU Europe, Australasia and South America.

TABLE 4: SCOTTISH HE TNE STUDENTS BY HOST REGION, 2018–19

Region	%	Students
Asia	38.5%	16,410
Middle East	22.4%	9,565
European Union	12.1%	5,170
Africa	11.8%	5,030
North America	8.7%	3,710
Europe (non-EU)	4.2%	1,810
Australasia	1.5%	650
South America	0.7%	280

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 (22.4% in Scotland vs 10.7% in the UK), North America (8.7% in Scotland vs 4.4% in the UK), non-EU Europe (4.2% in Scotland vs 2.5% in the UK), Australasia (1.5% in Scotland vs 0.6% in the UK) and South America (0.7% in Scotland vs 0.4% in the UK) and a lower proportion in Asia (38.5% in Scotland vs 53.3% in the UK), Africa (11.8% in Scotland vs 11.9% in the UK) and the European Union (12.1% in Scotland vs 16.3% in the UK).

FIGURE 7: SCOTTISH HE TNE STUDENTS BY HOST REGION, 2018–19



Africa

FIGURE 8 shows that a majority of TNE students reported by Scottish providers in Africa were studying through distance, flexible and distributed learning (63.8%), followed by those registered at overseas partner organisation (19.0%), collaborative provision (15.8%) and at an overseas campus (1.5%).

FIGURE 8: SCOTTISH HE TNE STUDENTS IN AFRICA BY TYPE OF PROVISION, 2018–19

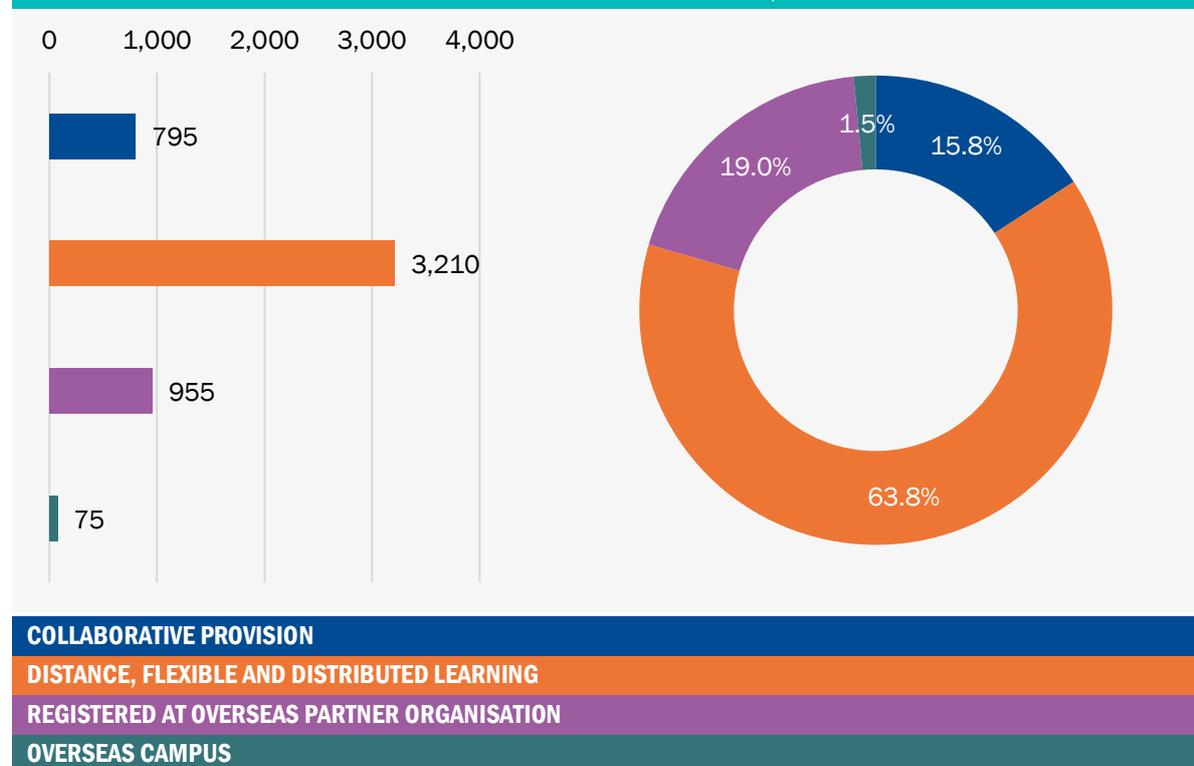
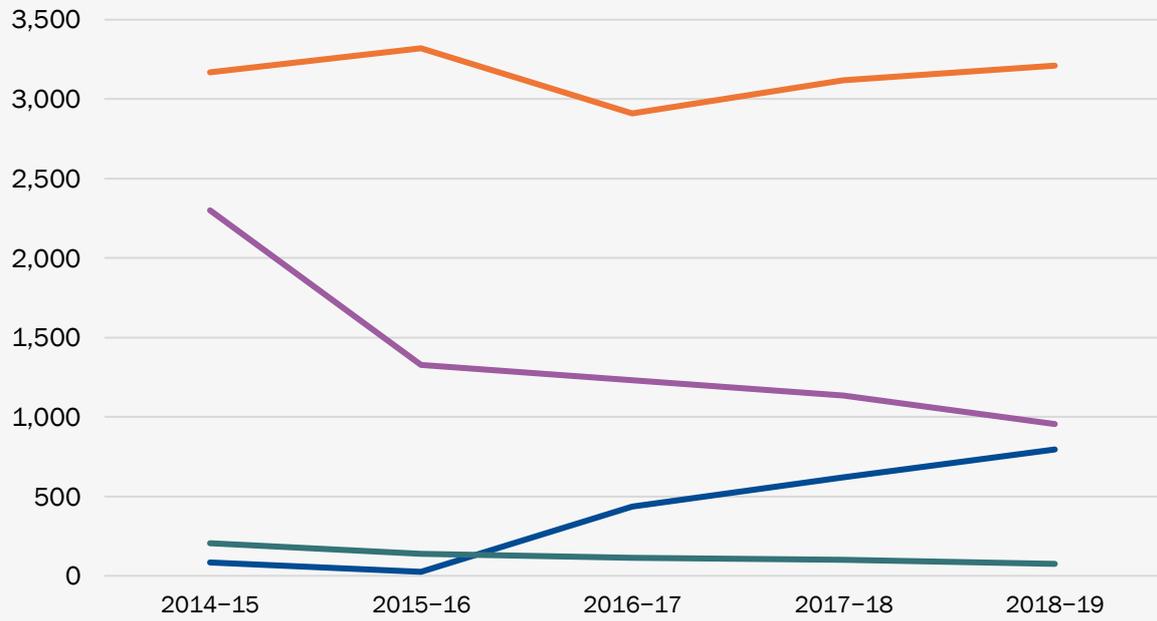


FIGURE 9 shows that between 2014–15 and 2018–19, there was a decrease in all types of TNE provision reported by Scottish providers in Africa except a small increase in distance, flexible and distributed learning and a large increase in collaborative provision.

FIGURE 9: SCOTTISH HE TNE STUDENTS IN AFRICA BY TYPE OF PROVISION, 2014–15 TO 2018–19



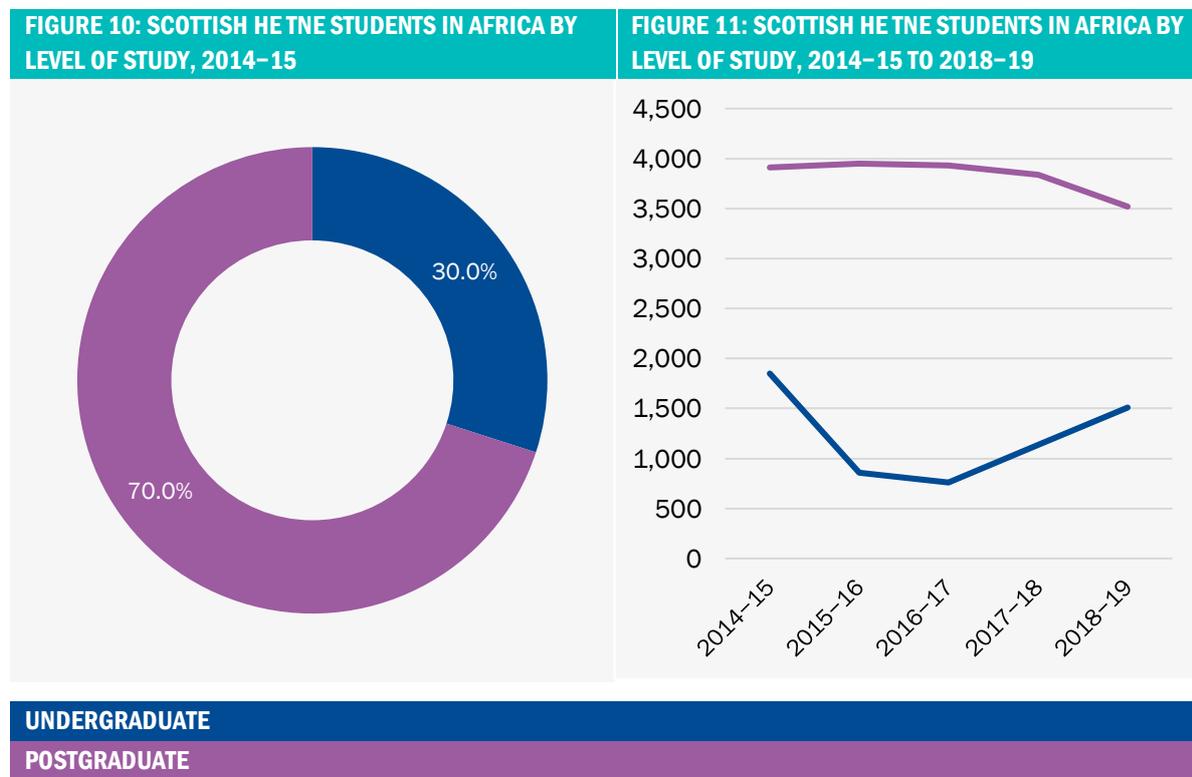
COLLABORATIVE PROVISION

DISTANCE, FLEXIBLE AND DISTRIBUTED LEARNING

REGISTERED AT OVERSEAS PARTNER ORGANISATION

OVERSEAS CAMPUS

FIGURE 10 shows that 70.0% of TNE students reported by Scottish providers in 2018–19 in Africa were studying at postgraduate level, against 30.0% at undergraduate level. **FIGURE 11** shows that between 2014–15 and 2018–19, there was a decrease at both levels of study, although there was an increase at undergraduate level between 2016–17 and 2018–19.



Asia

FIGURE 12 shows that a majority of TNE students reported by Scottish providers in Asia were studying through collaborative provision (51.5%), followed by distance, flexible and distributed learning (20.9%), registered at an overseas campus (16.2%) and at overseas partner organisation (11.5%).

FIGURE 12: SCOTTISH HE TNE STUDENTS IN ASIA BY TYPE OF PROVISION, 2018–19

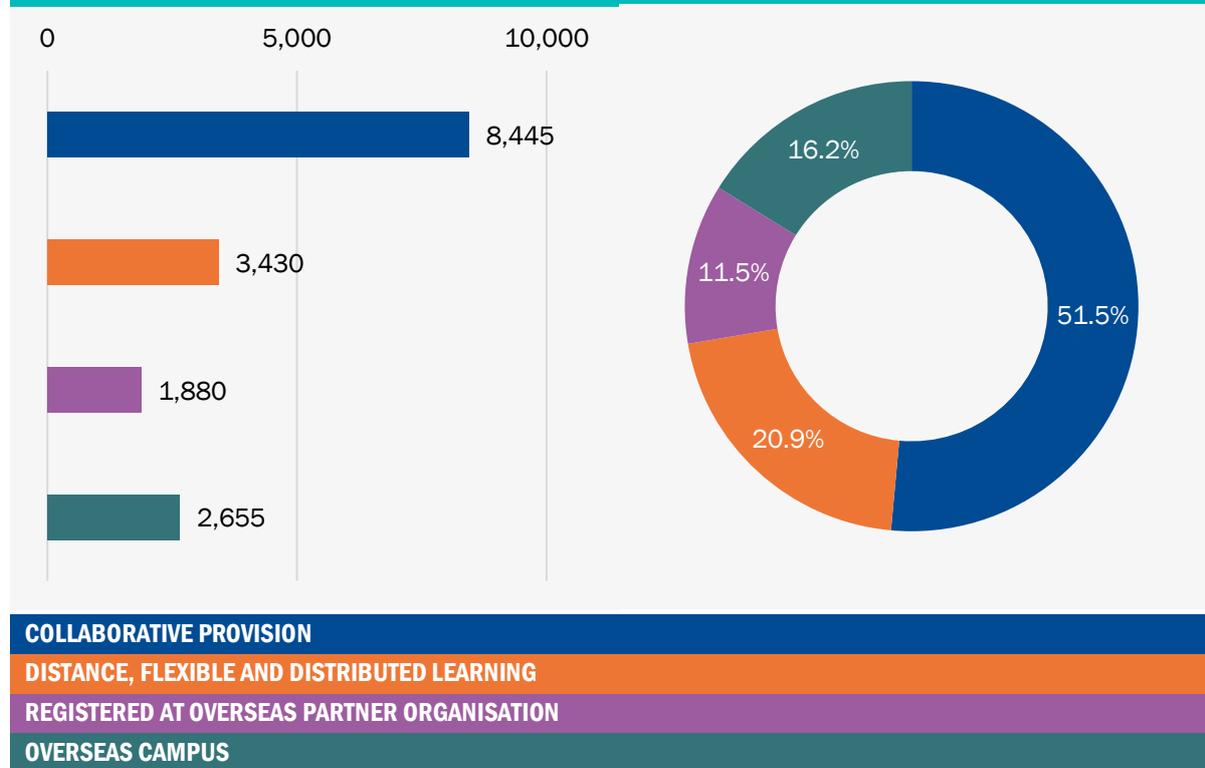


FIGURE 13 shows that between 2014–15 and 2018–19, there was an increase in all TNE modes of study reported by Scottish providers in Asia except in those registered at an overseas partner organisation.

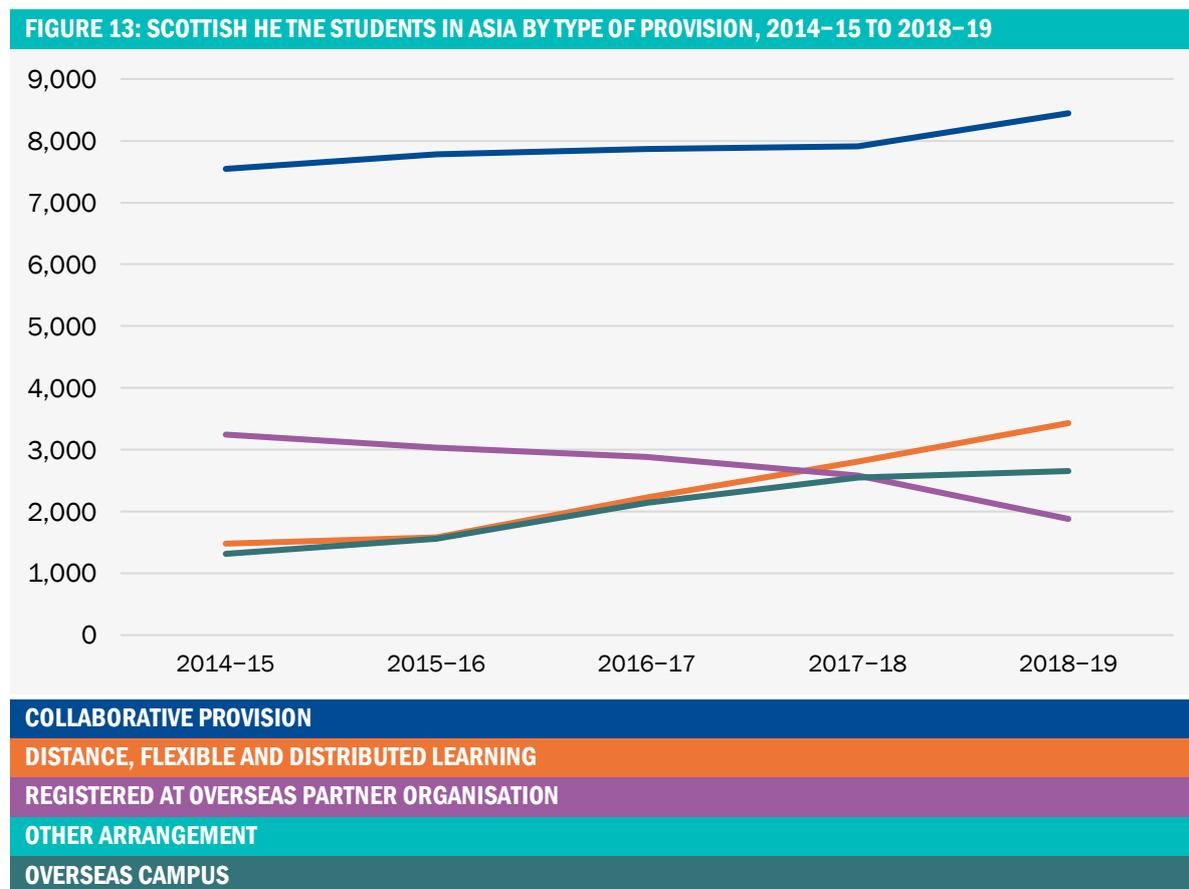
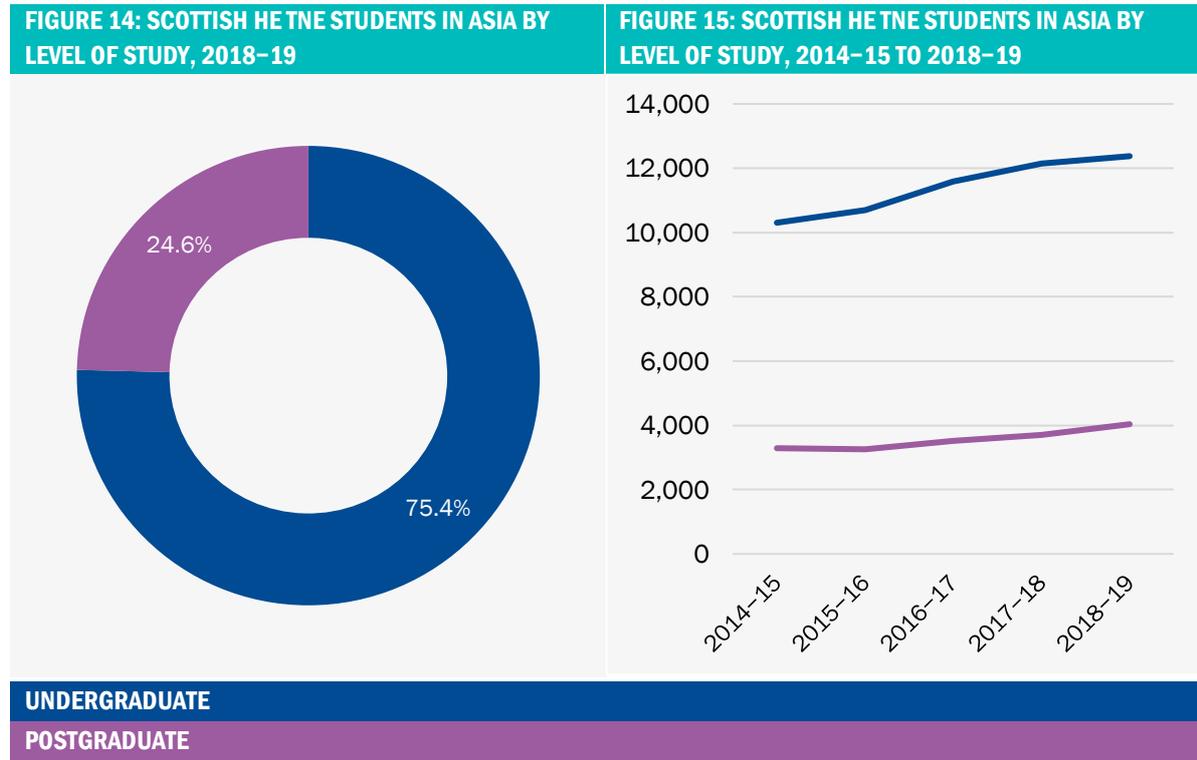


FIGURE 14 shows that 75.4% of TNE students reported by Scottish providers in 2018–19 in Asia were studying at undergraduate level, against 24.6% at postgraduate level. **FIGURE 15** shows that between 2014–15 and 2018–19, there was an increase at both levels of study.



Australasia

FIGURE 16 shows that all TNE students reported by Scottish providers in Australasia were studying through distance, flexible and distributed learning.

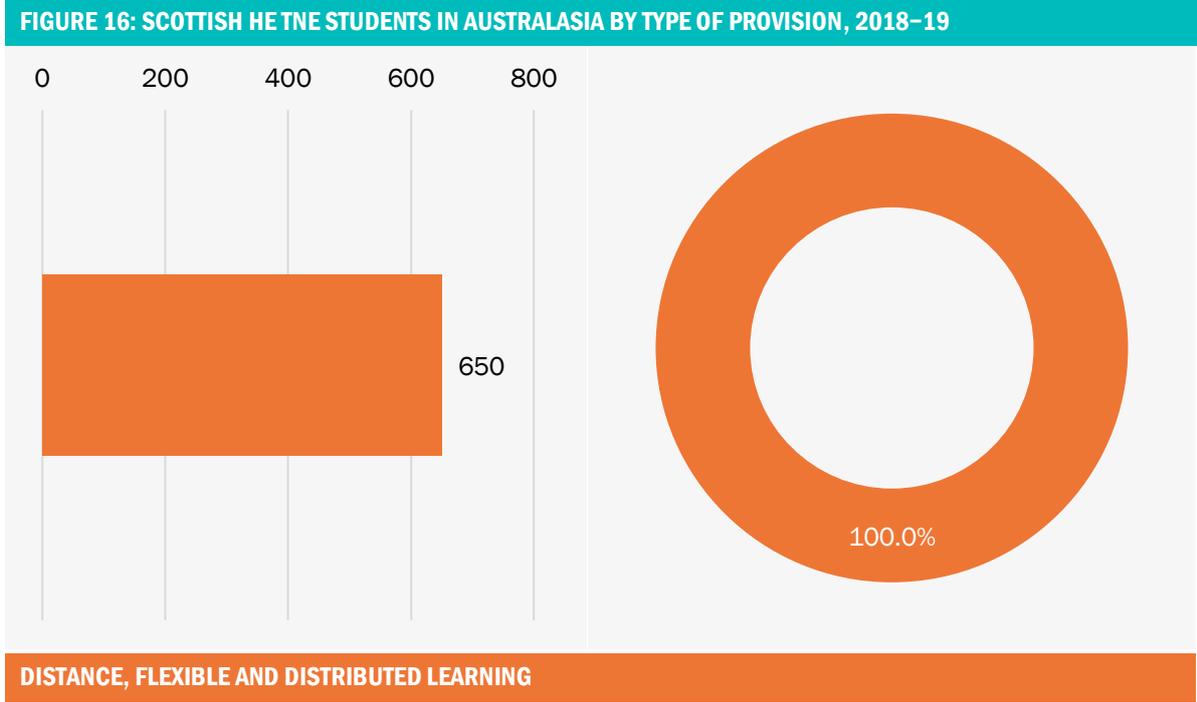
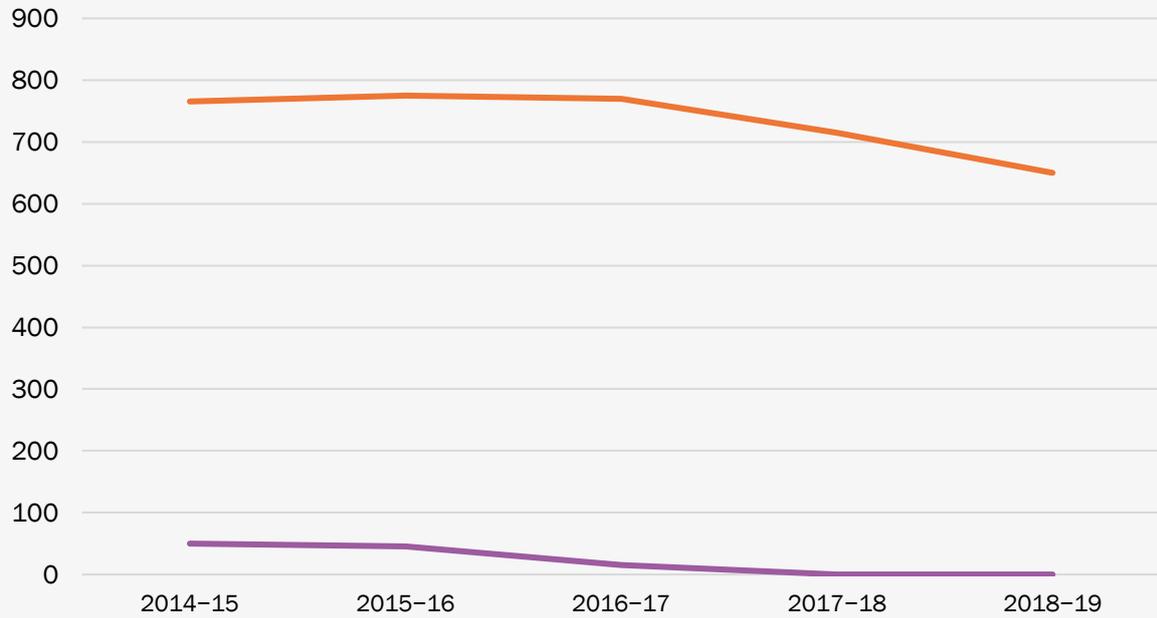


FIGURE 17 shows that the number of students studying through distance, flexible and distributed learning in Australasia increased between 2014–15 and 2015–16 and decreased between 2015–16 and 2018–19. The number of students registered at an overseas partner organisation was zero in 2018–19; the last year any students were recorded as studying this way was in 2016–17.

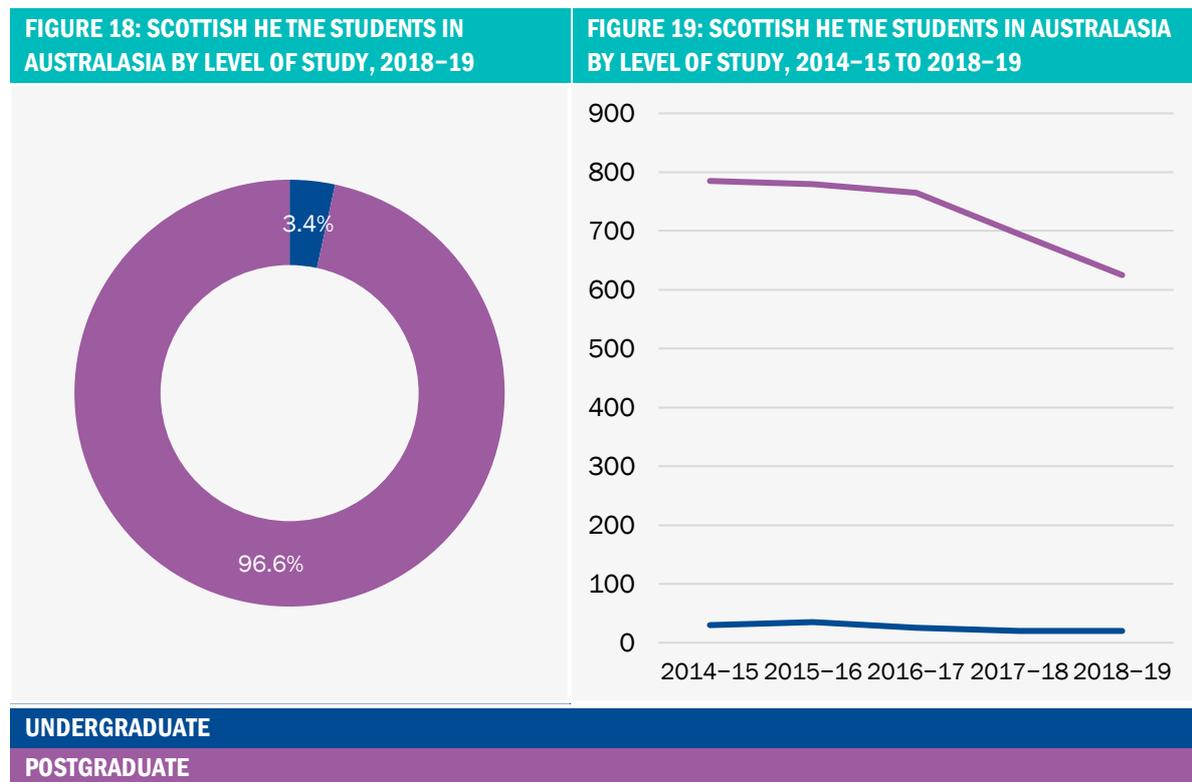
FIGURE 17: SCOTTISH HE TNE STUDENTS IN AUSTRALASIA BY TYPE OF PROVISION, 2014–15 TO 2018–19



DISTANCE, FLEXIBLE AND DISTRIBUTED LEARNING

REGISTERED AT OVERSEAS PARTNER ORGANISATION

FIGURE 18 shows that 96.6% of TNE students reported by Scottish providers in 2018–19 in Australasia were studying at postgraduate level, against 3.4% at undergraduate level. **FIGURE 19** shows that there was a decrease in student numbers at both levels between 2014–15 and 2018–19.



European Union

FIGURE 20 shows that a majority of TNE students reported by Scottish providers in the European Union were studying through collaborative provision (45.1%), followed by distance, flexible and distributed learning (41.8%), registered at overseas partner organisation (9.6%) and at an overseas campus (3.5%).

FIGURE 20: SCOTTISH HE TNE STUDENTS IN THE EU BY TYPE OF PROVISION, 2018–19

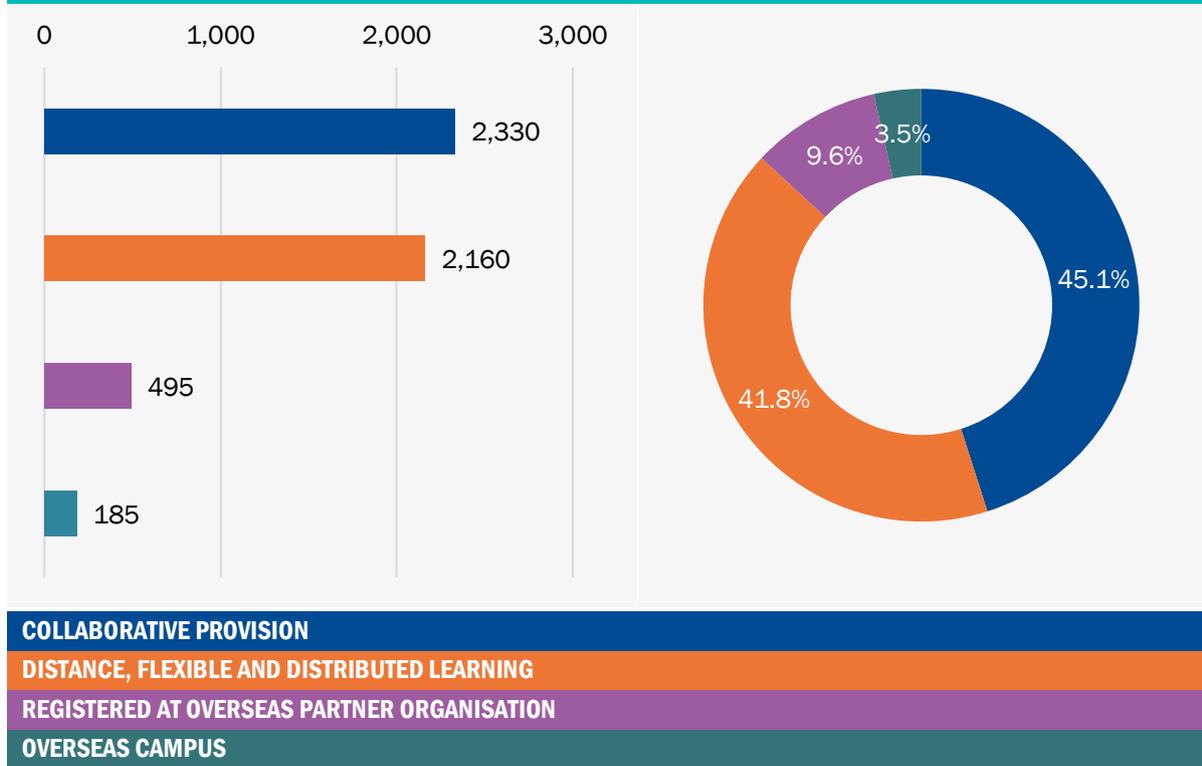
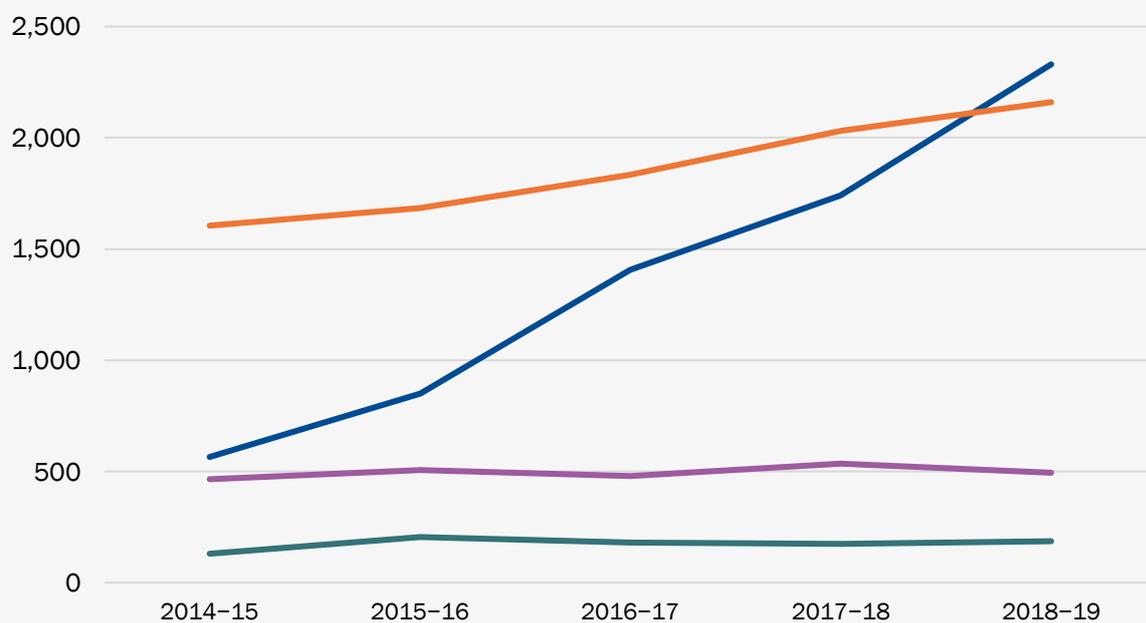


FIGURE 21 shows that between 2014–15 and 2018–19, there was an increase in all TNE modes of study reported by Scottish providers in the European Union, particularly marked in collaborative provision.

FIGURE 21: SCOTTISH HE TNE STUDENTS IN THE EU BY TYPE OF PROVISION, 2014–15 TO 2018–19



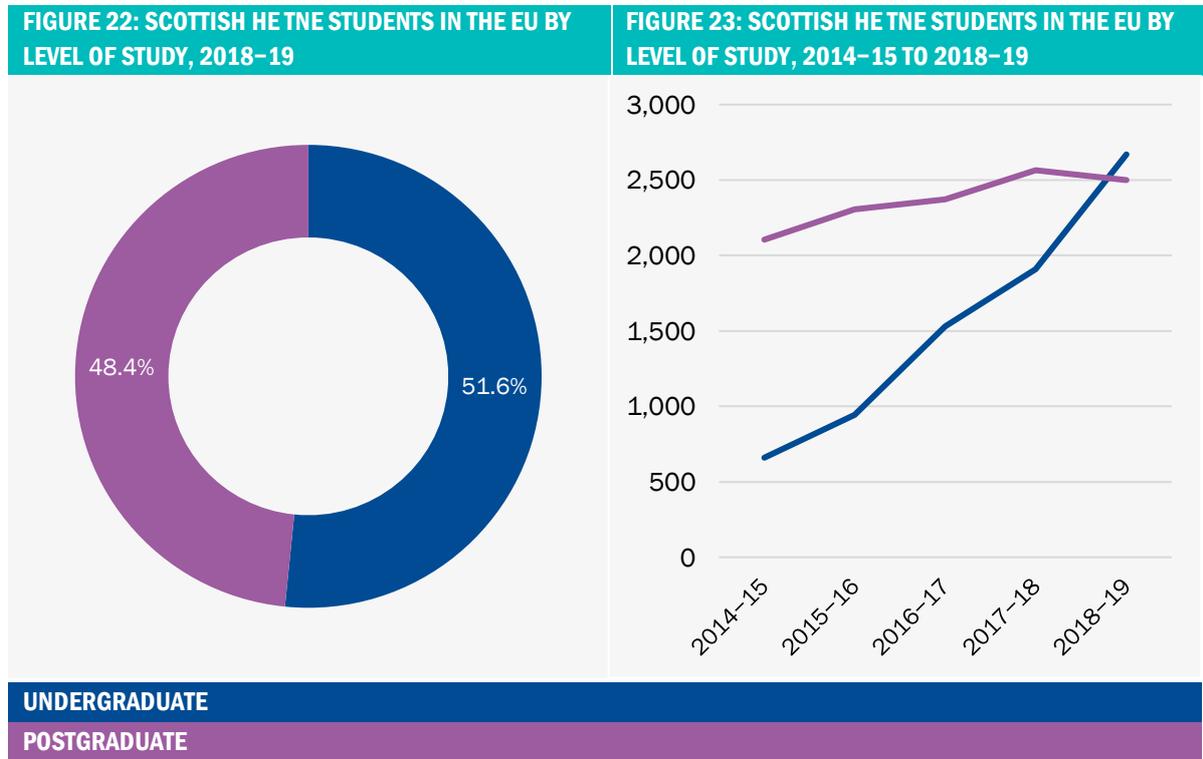
COLLABORATIVE PROVISION

DISTANCE, FLEXIBLE AND DISTRIBUTED LEARNING

REGISTERED AT OVERSEAS PARTNER ORGANISATION

OVERSEAS CAMPUS

FIGURE 22 shows that 51.6% of TNE students reported by Scottish providers in 2018–19 in the European Union were studying at undergraduate level, against 48.4% at postgraduate level. **FIGURE 23** shows that between 2014–15 and 2018–19, there was an increase at both levels of study, but the increase was substantially more marked at undergraduate level.



Non-EU Europe

FIGURE 25 shows that in 2018–19, a majority of TNE students reported by Scottish providers in non-EU Europe were studying through collaborative provision (52.1%), followed by distance, flexible and distributed learning (23.4%), registered at overseas partner organisation (20.9%) and at an overseas campus (3.5%).

FIGURE 24: SCOTTISH HE TNE STUDENTS IN NON-EU EUROPE BY TYPE OF PROVISION, 2018–19

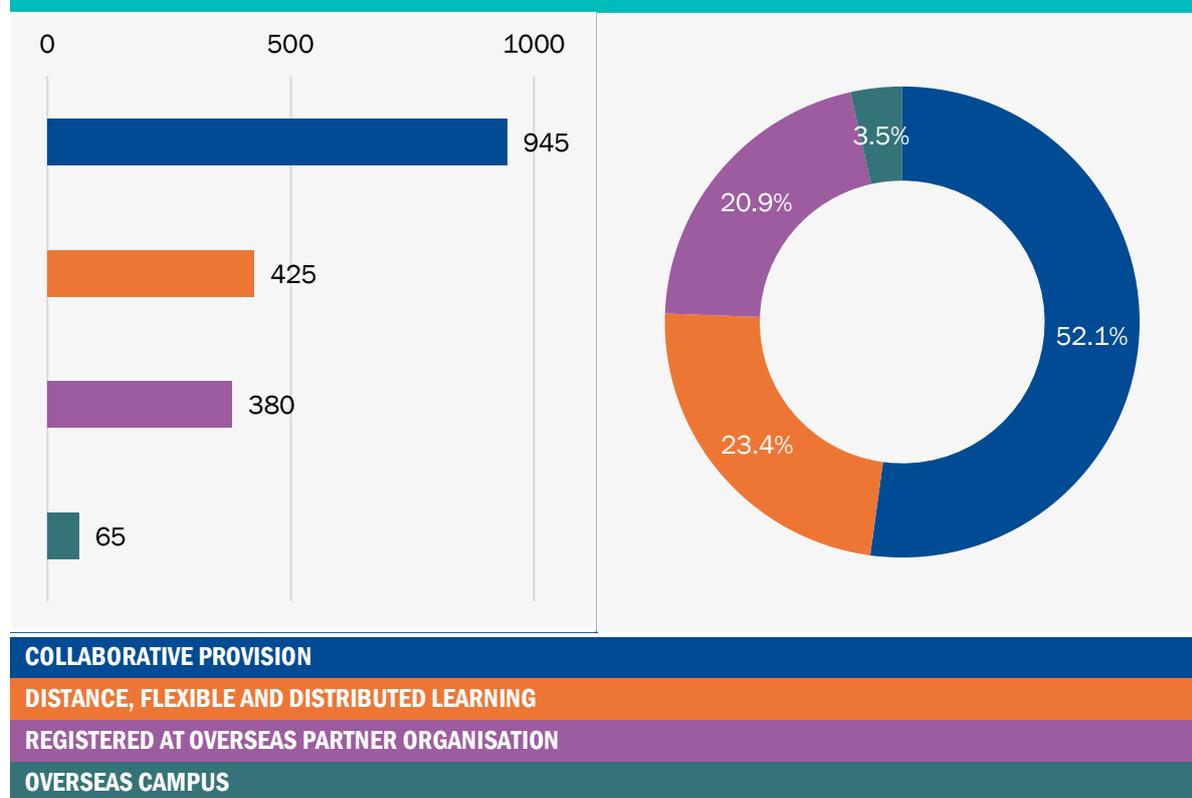
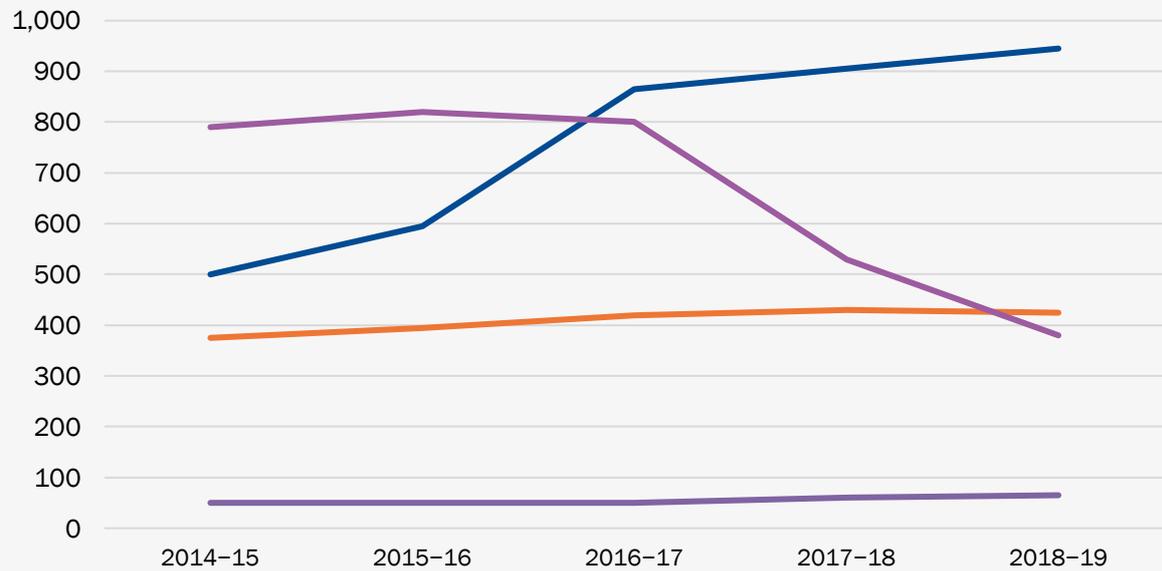


FIGURE 25 shows that between 2014–15 and 2018–19, there was an increase in almost all TNE modes of study reported by Scottish providers in non-EU Europe. The exception to this was in the ‘registered at overseas partner’ category, which experienced a large decrease after 2016–17.

FIGURE 25: SCOTTISH HE TNE STUDENTS IN NON-EU EUROPE BY TYPE OF PROVISION, 2014–15 TO 2018–19



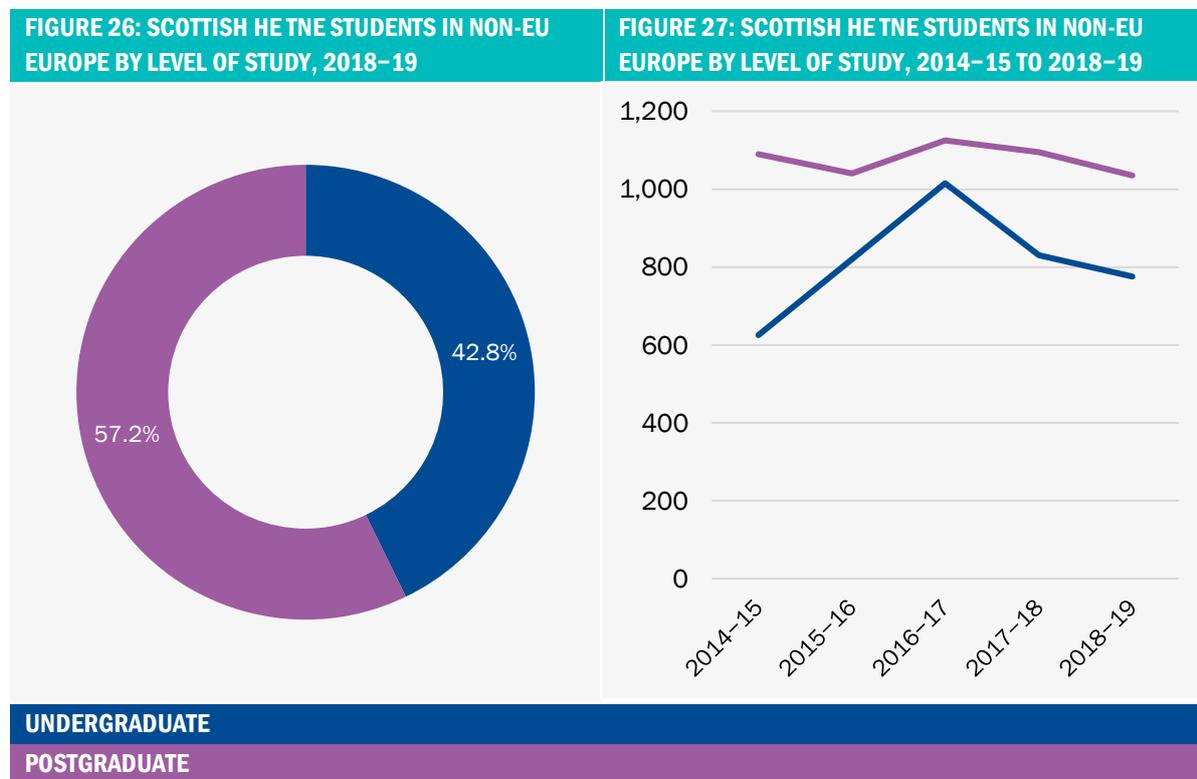
COLLABORATIVE PROVISION

DISTANCE, FLEXIBLE AND DISTRIBUTED LEARNING

REGISTERED AT OVERSEAS PARTNER ORGANISATION

OVERSEAS CAMPUS

FIGURE 26 shows that 57.2% of TNE students reported by Scottish providers in 2018–19 in non-EU Europe were studying at postgraduate level, against 42.8% at undergraduate level. **FIGURE 27** shows that between 2014–15 and 2018–19, there was a decrease at postgraduate level and an increase at undergraduate level, although numbers decreased at both levels between 2017–18 and 2018–19.



Middle East

FIGURE 28 shows that the largest proportion of TNE students reported by Scottish providers in the Middle East were studying at an overseas campus (45.0%), followed by collaborative provision (37.7%), distance, flexible and distributed learning (17.2%) and those registered at overseas partner organisations (0.2%).

FIGURE 28: SCOTTISH HE TNE STUDENTS IN THE MIDDLE EAST BY TYPE OF PROVISION, 2018–19

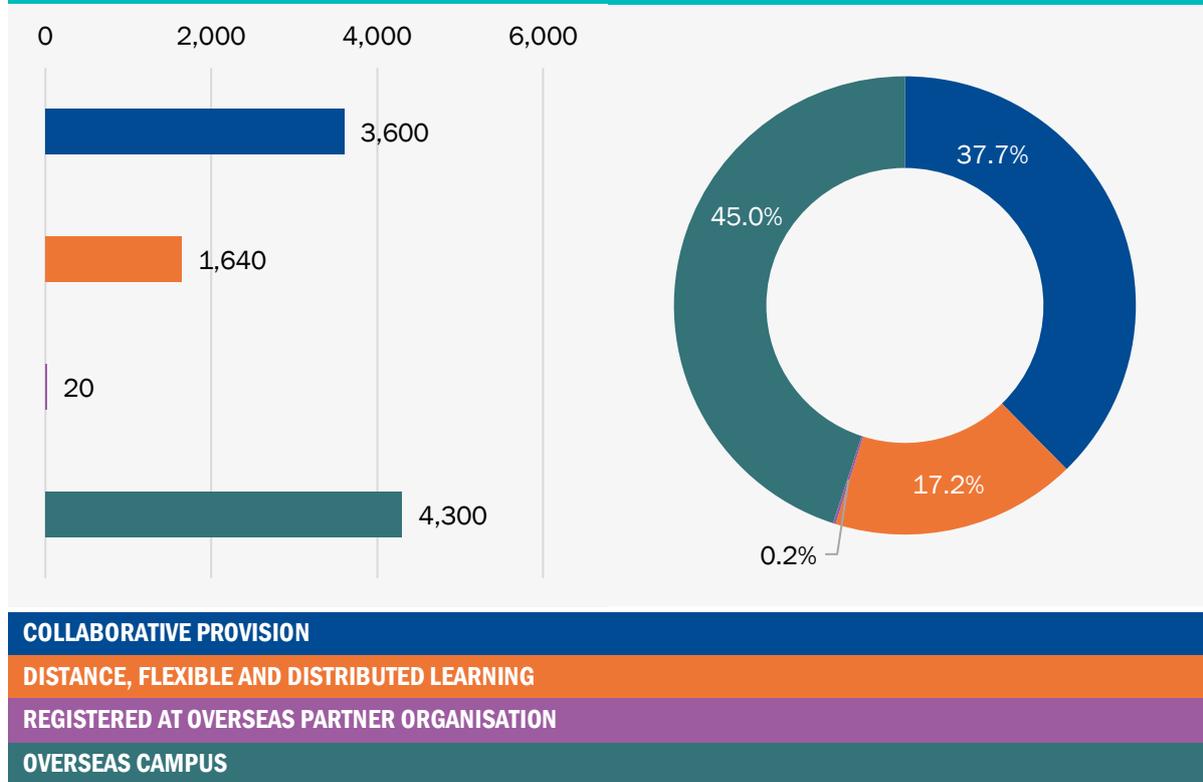
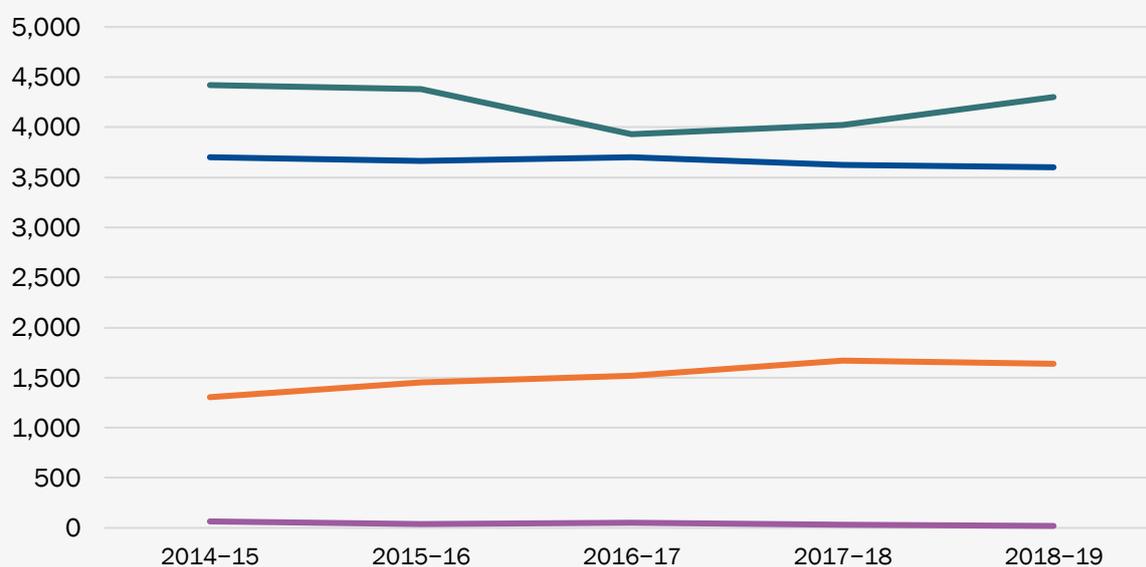


FIGURE 29 shows that between 2014–15 and 2018–19, there was a decrease in all TNE modes of study reported by Scottish providers in the Middle East except in distance, flexible and distributed learning. However, the number of students at an overseas campus increased slightly after reaching a low in 2016–17.

FIGURE 29: SCOTTISH HE TNE STUDENTS IN THE MIDDLE EAST BY TYPE OF PROVISION, 2014–15 TO 2018–19



COLLABORATIVE PROVISION

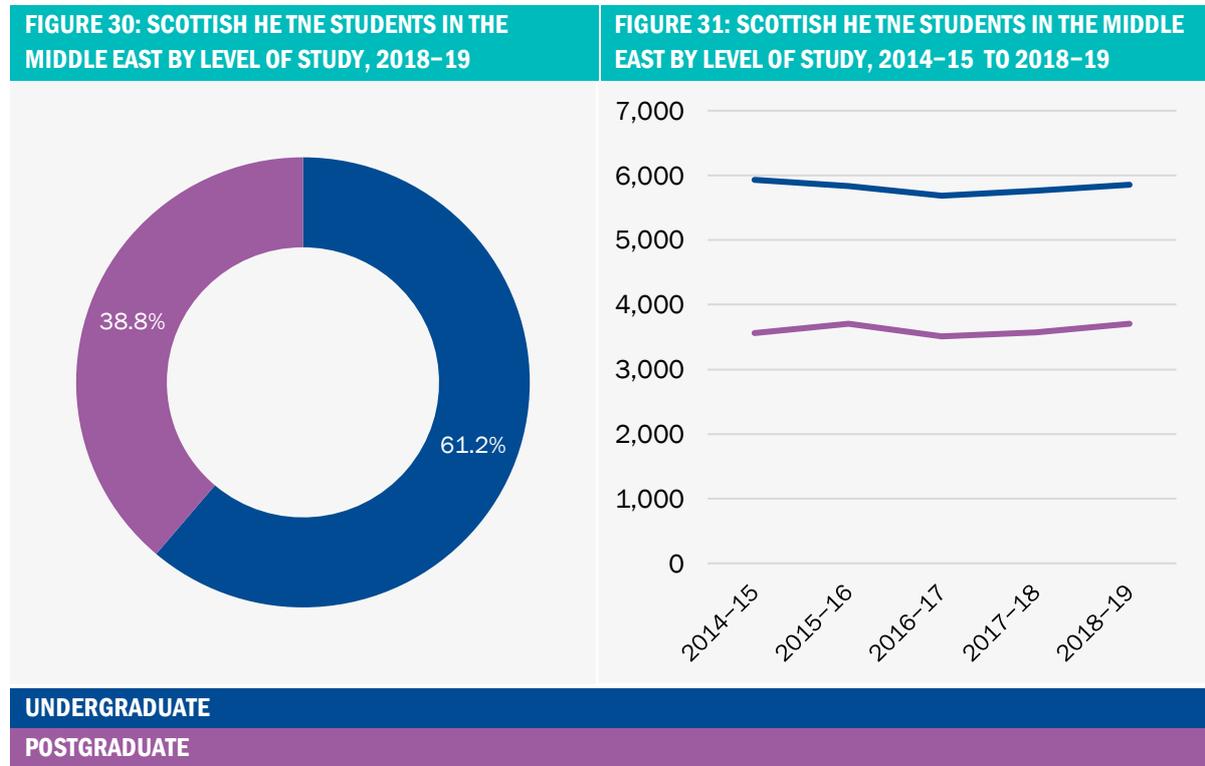
DISTANCE, FLEXIBLE AND DISTRIBUTED LEARNING

REGISTERED AT OVERSEAS PARTNER ORGANISATION

OTHER ARRANGEMENT

OVERSEAS CAMPUS

FIGURE 30 shows that 61.2% of TNE students reported by Scottish providers in 2018–19 in the Middle East were studying at undergraduate level, against 38.8% at postgraduate level. **FIGURE 31** shows that between 2014–15 and 2018–19, there was an increase at postgraduate level, with a slight decrease at undergraduate level.



North America

FIGURE 32 shows that a majority of TNE students reported by Scottish providers in North America were studying through distance, flexible and distributed learning (78.7%), followed by registered at an overseas partner organisation (21.1%) and collaborative provision (0.2%).

FIGURE 32: SCOTTISH HE TNE STUDENTS IN NORTH AMERICA BY TYPE OF PROVISION, 2018–19

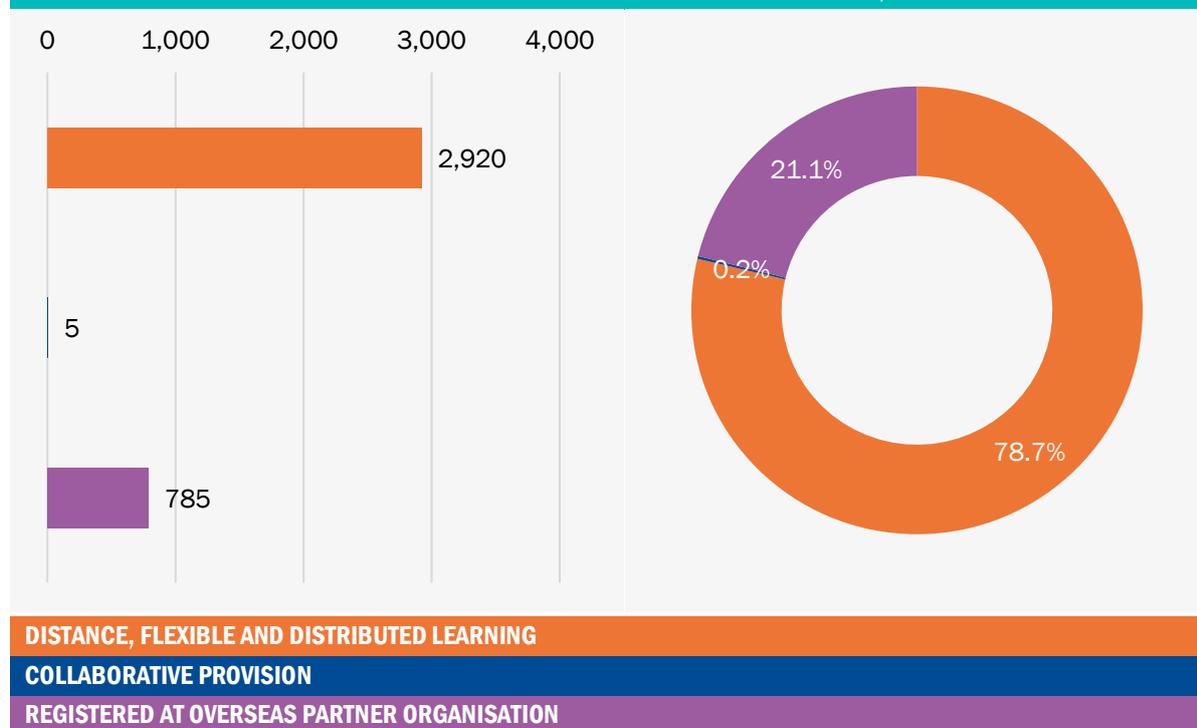
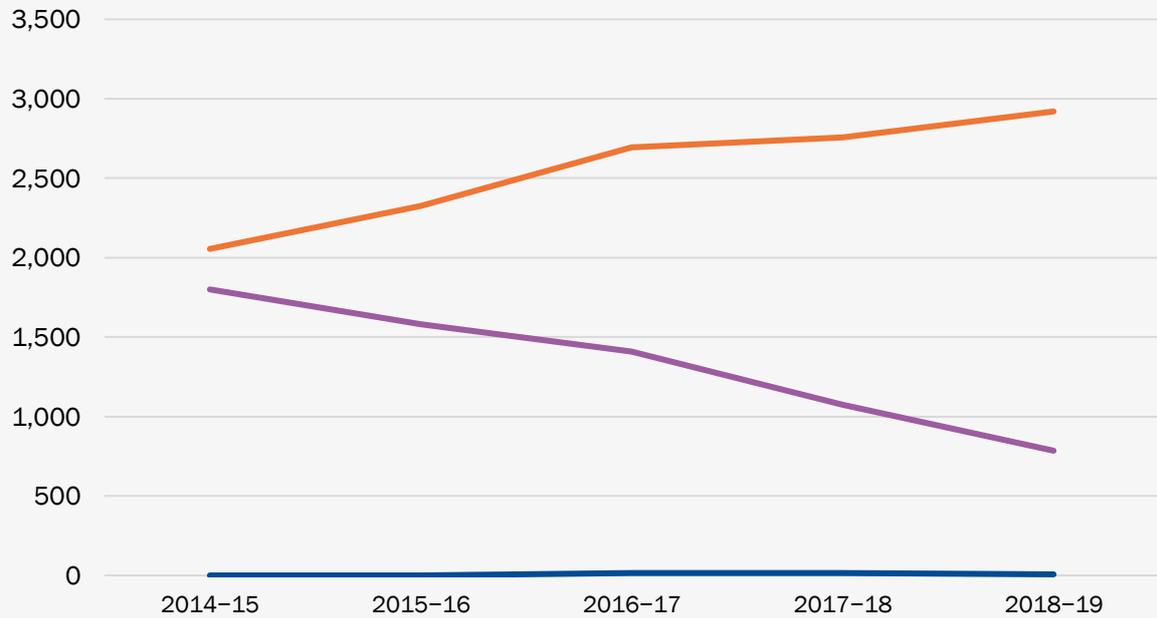


FIGURE 33 shows that between 2014–15 and 2018–19, there was an increase in students studying through distance, flexible and distributed learning and a decrease in students registered at an overseas partner organisation reported by Scottish providers in North America.

FIGURE 33: SCOTTISH HE TNE STUDENTS IN NORTH AMERICA BY TYPE OF PROVISION, 2014–15 TO 2018–19



DISTANCE, FLEXIBLE AND DISTRIBUTED LEARNING

REGISTERED AT OVERSEAS PARTNER ORGANISATION

COLLABORATIVE PROVISION

FIGURE 34 shows that 91.1% of TNE students reported by Scottish providers in 2018–19 in North America were studying at postgraduate level, against 8.9% at undergraduate level. **FIGURE 35** shows that between 2014–15 and 2018–19, there was a negligibly small increase at postgraduate level, with numbers increasing to a peak in 2016–17 and then declining again. There was a decrease overall at undergraduate level, although undergraduate numbers increased slightly between 2017–18 and 2018–19.

FIGURE 34: SCOTTISH HE TNE STUDENTS IN NORTH AMERICA BY LEVEL OF STUDY, 2018–19

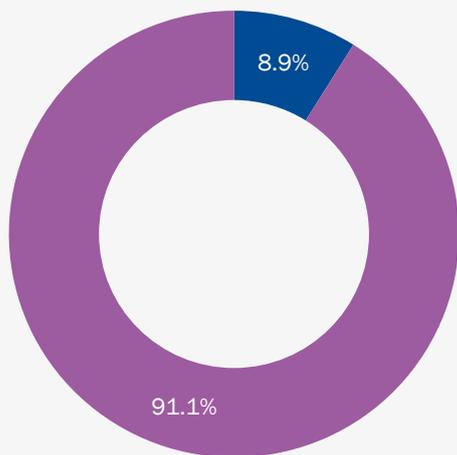
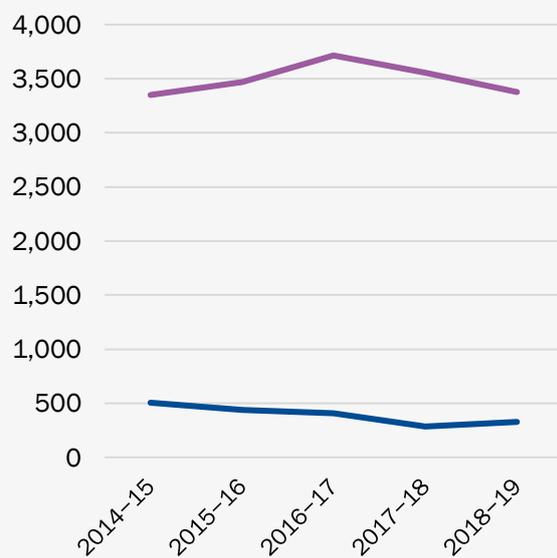


FIGURE 35: SCOTTISH HE TNE STUDENTS IN NORTH AMERICA BY LEVEL OF STUDY, 2014–15 TO 2018–19



UNDERGRADUATE

POSTGRADUATE

South America

FIGURE 36 shows that a majority of TNE students reported by Scottish providers in South America were studying through distance, flexible and distributed learning (99.6%), followed by collaborative provision (0.4%).

FIGURE 36: SCOTTISH HE TNE STUDENTS IN SOUTH AMERICA BY TYPE OF PROVISION, 2018–19

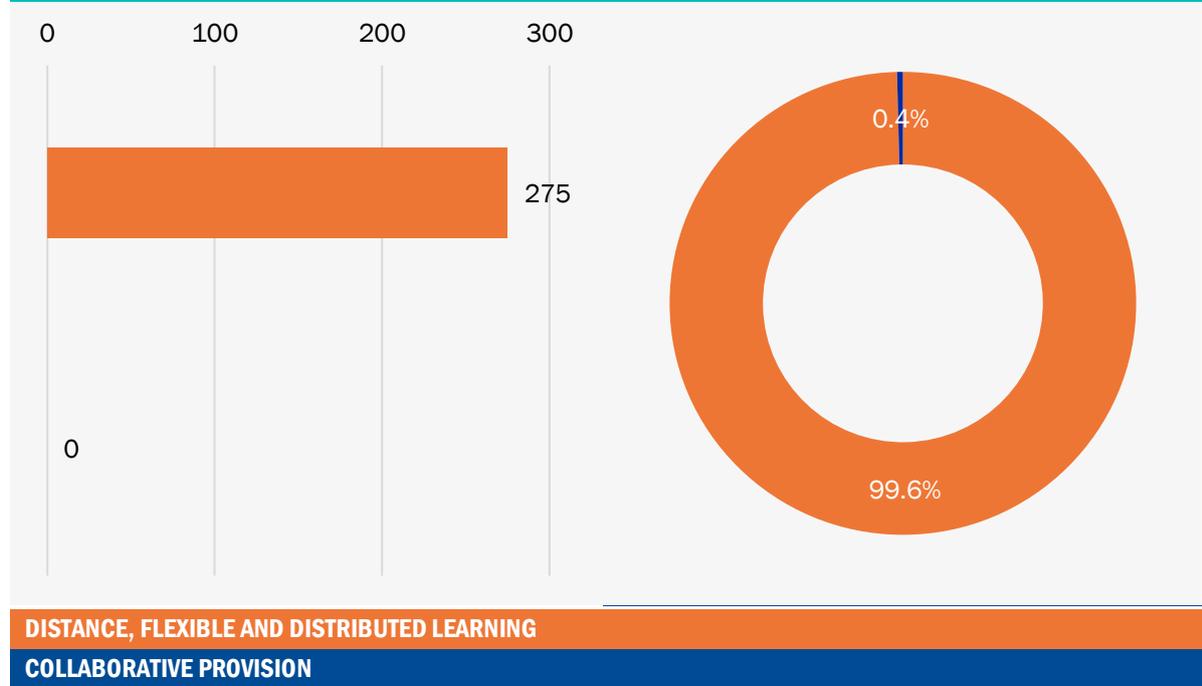
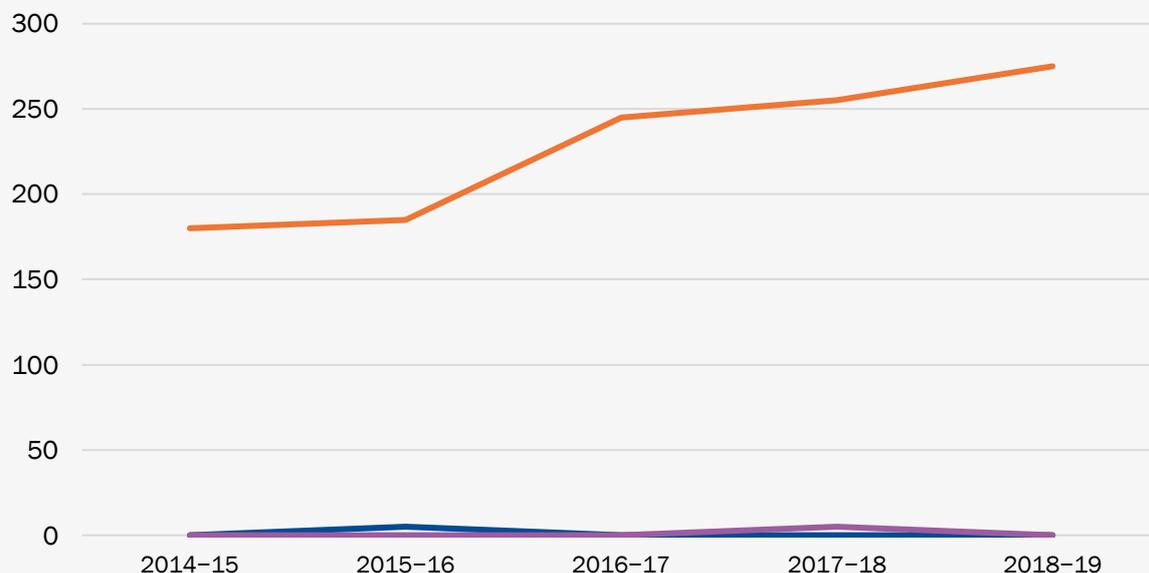


FIGURE 37 shows that between 2014–15 and 2018–19, there was an increase in those studying through distance, flexible and distributed learning. Numbers of students registered with an overseas partner organisation or studying through collaborative provision have remained at very low or zero levels.

FIGURE 37: SCOTTISH HE TNE STUDENTS IN SOUTH AMERICA BY TYPE OF PROVISION, 2014–15 TO 2018–19

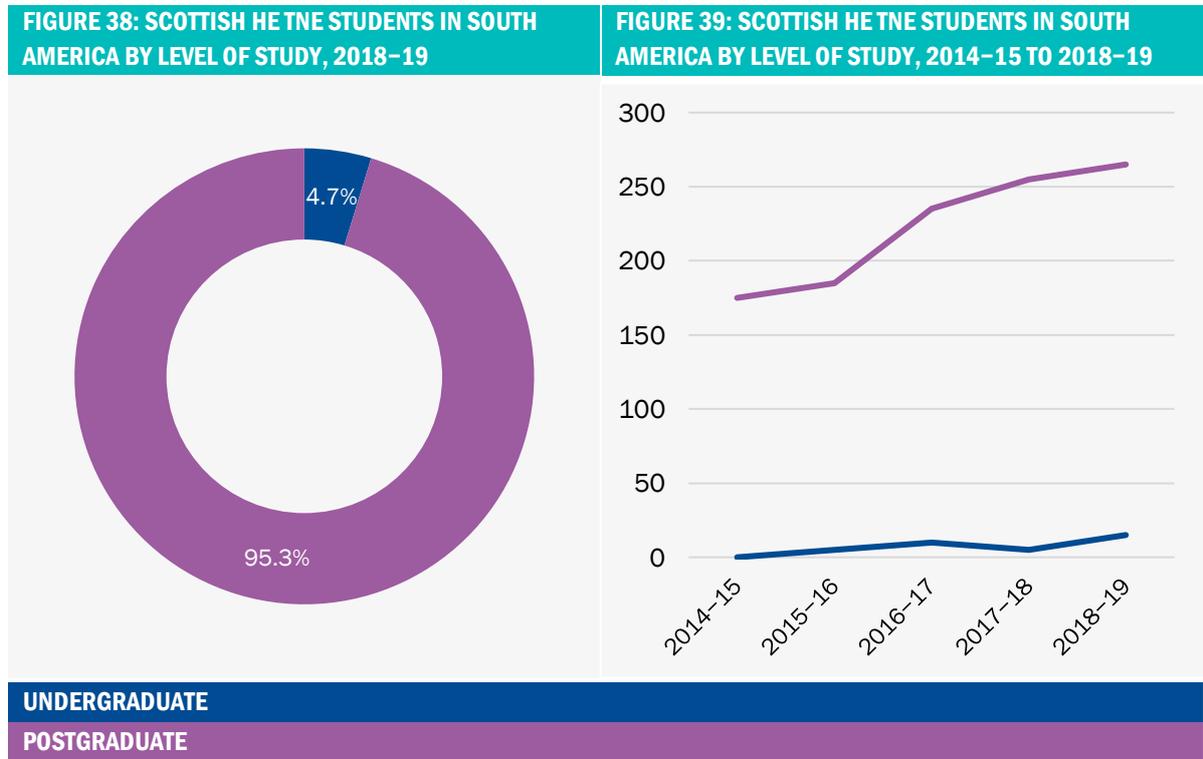


DISTANCE, FLEXIBLE AND DISTRIBUTED LEARNING

COLLABORATIVE PROVISION

REGISTERED AT OVERSEAS PARTNER ORGANISATION

FIGURE 38 shows that 95.3% of TNE students reported by Scottish providers in 2018–19 in South America were studying at postgraduate level, against 4.7% at undergraduate level. **FIGURE 39** shows that between 2014–15 and 2018–19, there was a steep increase at postgraduate level and a slight increase at undergraduate level.



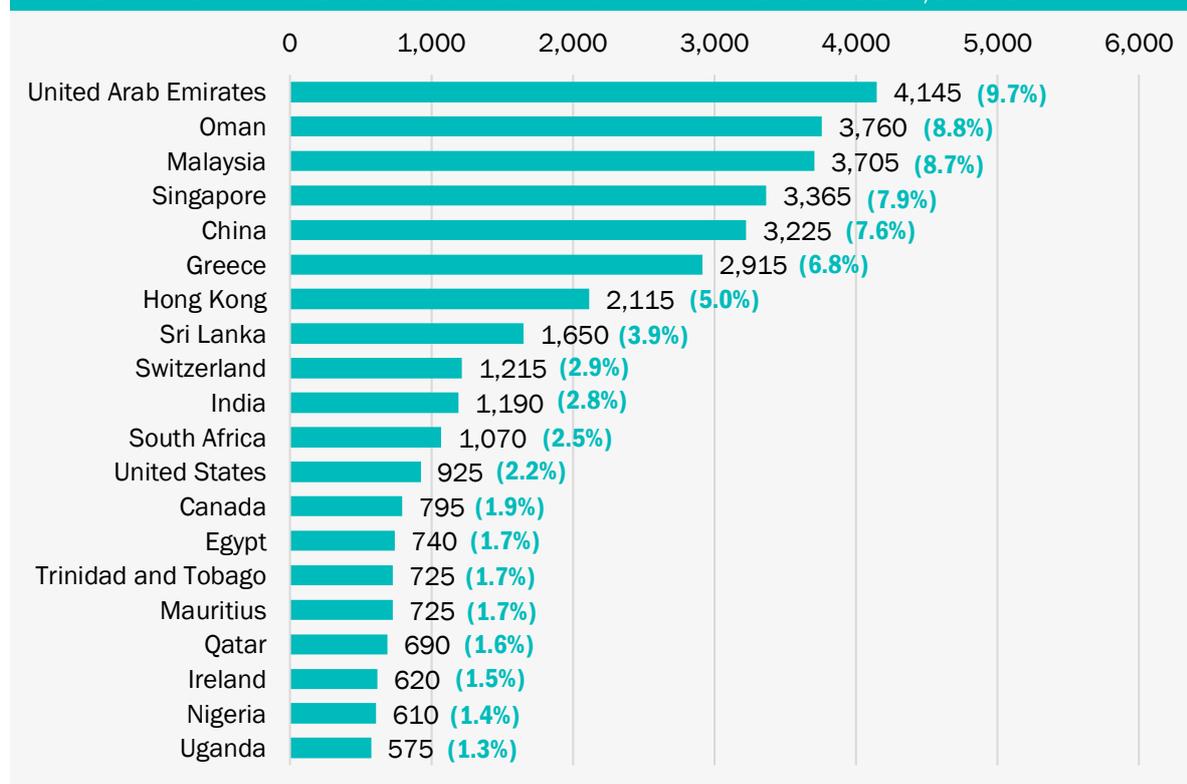
HOST COUNTRIES AND TERRITORIES

Notes

- UK total excludes three main reporting providers of distance, flexible and blended TNE.
- This section excludes UK territories (Channel Islands and the Isle of Man).

Scottish providers delivered TNE in a total of 183 countries and territories in 2018–19. **FIGURE 40** shows a breakdown of TNE students reported by Scottish providers by country in 2018–19. The top seven countries and territories host nearly 55% of all students. United Arab Emirates (UAE), Oman, Greece, Switzerland, India, South Africa, United States, Canada, Trinidad and Tobago, Mauritius, Qatar, Nigeria and Uganda have a higher relative position in Scotland than in the UK overall, while Malaysia, China, Hong Kong, Sri Lanka, Egypt and Ireland have a lower relative position.

FIGURE 40: TOP 20 COUNTRIES AND TERRITORIES HOSTING SCOTTISH HE TNE STUDENTS, 2018–19



Scottish providers reported TNE students in 46 countries and territories in Africa in 2018–19. **TABLE 5** shows the five **African** countries and territories hosting the most TNE students from Scottish providers in 2018–19. South Africa, Mauritius and Uganda have a higher relative position than for the rest of the UK, while Nigeria has the same position and Egypt has a lower relative position.

TABLE 5: TOP FIVE HOST COUNTRIES AND TERRITORIES OF SCOTTISH HE TNE STUDENTS IN AFRICA, 2018–19

Host country	Students	%
South Africa	1,070	21.2%
Egypt	740	14.7%
Mauritius	725	14.4%
Nigeria	610	12.2%
Uganda	575	11.4%

Scottish providers reported TNE students in 29 countries and territories in Asia in 2018–19. **TABLE 6** shows the five **Asian** countries and territories hosting the most TNE students from Scottish providers in 2018–19. Singapore and Hong Kong have a higher relative position than for the rest of the UK, while China and Sri Lanka have lower relative positions. Malaysia has the same leading position.

TABLE 6: TOP FIVE HOST COUNTRIES AND TERRITORIES OF SCOTTISH HE TNE STUDENTS IN ASIA, 2018–19

Host country	Students	%
Malaysia	3,705	22.6%
Singapore	3,365	20.5%
China	3,225	19.6%
Hong Kong	2,115	12.9%
Sri Lanka	1,650	10.0%

Scottish providers reported TNE students in six countries and territories in Australasia in 2018–19. **TABLE 7** shows the five **Australasian** countries and territories hosting the most TNE students from Scottish providers in 2018–19. Tonga has a higher relative position than for the rest of the UK, while Papua New Guinea has a lower relative position. The same leading positions are held by Australia, New Zealand and Fiji.

TABLE 7: TOP FIVE HOST COUNTRIES AND TERRITORIES OF SCOTTISH HE TNE STUDENTS IN AUSTRALASIA, 2018–19

Host country	Students	%
Australia	550	84.6%
New Zealand	85	12.8%
Fiji	10	..%
Tonga	5	..%
Papua New Guinea	5	..%

Scottish providers reported TNE students in 28 countries and territories in the European Union in 2018–19. **TABLE 8** shows the five **European Union** countries and territories hosting the most TNE students from Scottish providers in 2018–19. Ireland, Malta and the Netherlands 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 AND TERRITORIES OF SCOTTISH HE TNE STUDENTS IN THE EU, 2018–19		
Host country	Students	%
Greece	2,915	56.4%
Ireland	620	12.0%
Germany	320	6.2%
Malta	185	3.6%
Netherlands	140	2.7%

Scottish providers reported TNE students in 16 countries and territories in non-EU Europe in 2018–19. **TABLE 9** shows the five **non-EU European** countries and territories hosting the most TNE students from Scottish providers in 2018–19. 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 AND TERRITORIES OF SCOTTISH HE TNE STUDENTS IN NON-EU EUROPE, 2018–19		
Host country	Students	%
Switzerland	1,215	67.2%
Norway	220	12.1%
Azerbaijan	105	5.9%
Russia	100	5.6%
Ukraine	90	5.0%

Scottish providers reported TNE students in 14 countries and territories in the Middle East in 2018–19. **TABLE 10** shows the five **Middle Eastern** countries and territories hosting the most TNE students from Scottish providers in 2018–19. UAE and Oman swap positions relative to the rest of the UK, while the same positions are held by Qatar, Saudi Arabia and Bahrain.

TABLE 10: TOP FIVE HOST COUNTRIES AND TERRITORIES OF SCOTTISH HE TNE STUDENTS IN THE MIDDLE EAST, 2018–19		
Host country	Students	%
United Arab Emirates	4,145	43.3%
Oman	3,760	39.3%
Qatar	690	7.2%
Saudi Arabia	390	4.1%
Bahrain	210	2.2%

Scottish providers reported TNE students in 32 countries and territories in North America in 2018–19. **TABLE 11** shows the five **North American** countries and territories hosting the most TNE students from Scottish providers in 2018–19. Canada and Barbados have a higher relative position than for the rest of the UK, while Trinidad and Tobago has a lower relative position. The United States and Jamaica have the same positions.

TABLE 11: TOP FIVE HOST COUNTRIES AND TERRITORIES OF SCOTTISH HE TNE STUDENTS IN NORTH AMERICA, 2018–19

Host country	Students	%
United States	925	25.0%
Canada	795	21.4%
Trinidad and Tobago	725	19.6%
Jamaica	315	8.5%
Barbados	255	6.9%

Scottish providers reported TNE students in 12 countries and territories in South America in 2018–19. **TABLE 12** shows the five **South American** countries and territories hosting the most TNE students from Scottish providers in 2018–19. Ecuador and Venezuela have a higher relative position than for the rest of the UK. Guyana, Brazil and Colombia have the same positions.

TABLE 12: TOP TWO HOST COUNTRIES AND TERRITORIES OF SCOTTISH HE TNE STUDENTS IN SOUTH AMERICA, 2018–19

Host country	Students	%
Guyana	130	47.1%
Brazil	45	16.5%
Colombia	40	13.7%
Ecuador	15	..%
Venezuela	10	..%

CONCLUSIONS

Scottish providers punch above their weight when it comes to transnational education provision, accounting for 12.7% of the UK's total TNE student population. By comparison, Scottish providers account for 12.0% of international students studying in the UK. Between 2014–15 and 2018–19, TNE student numbers grew by a slightly larger amount at Scottish providers (11.7%) than in the UK as a whole (11.1%). Scottish providers are more likely to be engaged in large scale TNE, with a higher proportion of Scottish providers reporting more than 1,000 students in TNE in 2018–19 (76.5%) compared to the UK as a whole (54.0%).

Different types of provision are more favoured by Scottish providers than their other UK counterparts. In 2018–19, Scottish providers reported almost double the proportion (17.1%) of students on branch campuses compared to the proportion reported by all UK providers (8.6%), and this mode of provision continues to grow for Scottish providers, with an increase of 5.5% from 2017–18 to 2018–19. Distance, flexible and distributed learning also made up a greater proportion of the Scottish TNE student population in 2018–19 than for the UK as a whole: 34.5% were studying through this mode from Scottish providers, compared to 21.3% overall in the UK.

Undergraduate provision is less prevalent among Scottish providers compared to the UK, but undergraduate provision is growing at a faster rate for Scottish providers. Between 2014–15 and 2018–19, undergraduate TNE provision grew at a faster rate in Scotland (18.3% growth) than in the UK as a whole (11.5%), while postgraduate provision grew at a slower rate (4.4% compared to 10.3%).

Scottish TNE provision can be found in most corners of the globe. Asia continued to host the largest proportion of Scottish providers' TNE students (38.5%) in 2018–19, although this was smaller than the proportion for the UK as a whole (53.3%). On the other hand, the percentage of TNE students in the Middle East (22.4%), North America (9.3%), non-EU Europe (4.2%), Australasia (1.5%) and South America (0.7%) was larger among Scottish providers than in the UK as a whole. Globally, 17 Scottish providers together reported TNE students in a total of 183 countries and territories, with especially large student populations in the United Arab Emirates, Oman, Malaysia, Singapore, China and Greece.

It should be noted that the data analysed in this report predates the impact of the Covid-19 pandemic, and its impact on TNE student numbers remains to be seen. The effects of the pandemic are likely to be varied. Disruption to international travel may potentially lead to growing interest among UK providers in TNE as a key pillar of internationalisation strategies, and the widespread shift to online learning may lead to wider regulatory recognition and increased uptake of this mode of delivery among students.