



Universities UK
International

THE SCALE OF UK HIGHER EDUCATION TRANSNATIONAL EDUCATION 2018-19

**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 2018–19 more UK universities were delivering transnational education (TNE) than ever before, although the total number of students decreased for the second year in a row.

This fourth 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 2018–19 academic year, and a longitudinal overview of trends in TNE from 2014–15. This edition also includes analysis of diversification trends, provision by mission group or sector representative organisation and by nation in the UK. The analysis disaggregates the data to show where providers with large provision have an impact on the overall figures. In the regional sections, the three main providers of distance, flexible and blended TNE have been excluded from the analysis.

OVERVIEW

The UK's higher education TNE provision in 2018–19:

- **142** higher education providers reported students studying through TNE.
- **85.5%** of all UK higher education providers¹ delivered TNE degree programmes. **20** providers reported **75.5%** of UK TNE students.
- **666,815** students were studying on UK TNE programmes, which was **1.4** times the number of international students in the UK in the same year.
- UK TNE student numbers decreased by **26,875** students (**-3.9%**) from 2017–18.
- **52.1%** of students were registered at an overseas partner organisation, followed by collaborative provision (**24.7%**), distance, flexible and distributed learning (**18.1%**) and overseas campus (**4.3%**). Students studying through collaborative provision experienced the greatest proportional growth from 2017–18 (**10.9%**).
- **80.9%** were studying at undergraduate level. The number of students studying at postgraduate level increased by **7.4%** from 2014–15.

Three providers of distance, flexible and blended TNE² together make up **49.6%** of the total number of TNE students. Excluding these providers:

- **336,375** students were studying UK TNE programmes in 2018–19, an increase of **4,250 (1.3%)** over the previous year. Student numbers grew by **33,620 (11.1%)** from 2014–15.
- **75** providers (**54.0%**) reported more than 1,000 students in TNE, compared to **66 (50.3%)** in 2014–15. **48.5%** of students were studying through collaborative provision, followed by distance, flexible and distributed learning (**21.3%**), registered at an overseas partner organisation (**19.9%**) and at an overseas campus (**8.6%**).
- Students studying through collaborative provision experienced the greatest proportional growth from 2017–18 (**11.0%**).
- **65.5%** were studying at undergraduate level. The number of students studying at postgraduate level increased by **10.3%** from 2014–15.

¹ This figure is based on the 165 higher education institutions who reported to HESA in 2018–19, plus the University of Buckingham.

² Oxford Brookes University, University of London and the Open University.

INSIGHTS BY REGION

The UK's higher education TNE provision in 2018–19:

- UK TNE was reported in **226** countries and territories.
- Overall, Asia hosted **50.2%** of students, followed by Africa (**20.3%**), the European Union (**12.4%**), the Middle East (**9.2%**), North America (**4.2%**), non-EU Europe (**2.7%**), Australasia (**0.5%**) and South America (**0.5%**).
- When the three main providers of distance, flexible and blended TNE are excluded, the European Union was the region with the second largest number of students, **54,585** in total, an increase of **11.4%** between 2017–18 and 2018–19.
- In 2018–19 China was the country hosting the most TNE students (**78,175, 11.7%**), followed by Malaysia (**68,290, 10.3%**), Singapore (**41,540, 6.2%**), Pakistan (**35,845, 5.4%**) and Sri Lanka (**28,315, 4.3%**). Together, the top **FIVE** host territories accounted for **37.8%** of all students.
- Students registered with an overseas partner organisation are prevalent in Africa (**71.3%**) and Asia (**48.9%**), while distance, flexible and distributed learning is the main type of delivery in Australasia (**70.7%**), South America (**55.4%**) and North America (**55.7%**).
- Most students in overseas campuses are located in Asia (**65.9%**) and the Middle East (**27.0%**).

UK TNE was reported in

226

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China was the country hosting
the most TNE students

78,175

in 2018–19.

1. INTRODUCTION

In 2018–19, 142 UK higher education providers reported 666,815 students studying through transnational education (TNE) in 226 territories worldwide.

Overall, UK TNE student numbers decreased by 26,880 (-3.9%) in 2018–19. This report sheds light on the complex landscape that lies behind this overall figure. For example, the report shows that:

- More providers reported students than ever before.
- The gap between large and small TNE providers is closing.
- Student numbers are growing faster in Welsh and Scottish providers.
- The number of students studying through collaborative provision and at overseas campuses is gaining ground.
- The number of students in the European Union is increasing faster than in other regions.

This is the fourth in a series of reports produced by UUKi that analyse trends in UK TNE provision by provider, location, type and level using the latest data available. This series followed the initial report on *The scale and scope of UK higher education transnational education* produced by the then UK Higher Education International Unit and the British Council in 2016 to support UK universities' TNE activity.

UUKi's *The scale of UK higher education transnational education* report series provides a longitudinal analysis of trends in TNE provision based on the Aggregate Offshore Record (AOR). The AOR is the official Higher Education Statistics Agency (HESA) data collection for students studying wholly outside the UK while registered at UK higher education providers (HEPs) or registered on their programmes. It represents one of the world's most comprehensive datasets of students located in a country other than that where the awarding provider is located. The AOR has, however, a number of limitations. It does not offer information on student characteristics, student outcomes or course disciplines, and data is reported in five TNE categories or types that are subject to different interpretations.

A review to ensure the UK's TNE data is fit for purpose has been announced by HESA.³ This review is partly a 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'. The results of this review could provide richer data to analyse in future reports, especially if it undertakes a more systematic nomenclature and categorisation and adopts an individualised TNE student record.

The present report focuses on the AOR data covering students on TNE programmes between 2014–15 and 2018–19. It is divided into three sections. The first section analyses sector-wide figures and highlights diversification trends by student numbers, provider, mission group or sector representative organisation, type of provision, location of provider and level of study. The second section analyses regional and country student numbers by type of TNE and level of provision. Finally, the third section delves into UK TNE patterns across eight world regions.

Datasets are disaggregated into two main groups: '**All providers**' and '**Excluding the three main providers of distance, flexible and blended TNE**'. The latter category excludes Oxford Brookes University, the Open University and University of London students. These three providers make up 49.6% of student numbers 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. The TNE models of these three providers deserve closer attention and we have included a description of their approach in the report.

³ <https://www.hesa.ac.uk/innovation/records/reviews/aggregate-offshore-return-review>

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 or dual awards. In this report, we use the word ‘students’ to represent these UK HE TNE learners, unless otherwise stated.⁴

Data about TNE is collected annually by HESA via the 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’. The HESA Aggregate Offshore Record contains information regarding higher education institutions and the University of Buckingham and therefore this report uses the term ‘higher education providers’.⁵

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.

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 HESA 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 and distributed learning for 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

⁴ If a student is expected to spend less than eight consecutive course weeks in the UK during their entire programme they should be included on the Aggregate Offshore Record throughout. <https://www.hesa.ac.uk/collection/c09052/coverage>

⁵ See <https://www.hesa.ac.uk/support/definitions/offshore>

THE THREE LARGEST PROVIDERS OF DISTANCE, FLEXIBLE AND BLENDED TNE

OXFORD BROOKES UNIVERSITY

For two decades, the collaboration between Oxford Brookes Business School at Oxford Brookes University and the Association of Chartered Certified Accountants (ACCA) has enabled students to work towards the BSc (Hons) in Applied Accounting while studying for their professional ACCA examinations. The combination of the professional examinations and the Research and Analysis Project enables students to develop business skills and enhance their career prospects. All ACCA students are registered as Oxford Brookes University students; however, the number of students actually undertaking and achieving the award is significantly lower.

The BSc (Hons) in Applied Accounting is an accessible degree, designed to allow students from around the world to participate. To date, over 30,000 students from 133 countries have graduated from this programme and are now pursuing careers in a range of sectors, contributing to their local communities and economies. The programme has attracted students from Pakistan, Malaysia and Singapore, as well as the UK, and there is growing interest from institutions in India, Vietnam, Uzbekistan and the Philippines.

Students studying for their ACCA professional qualifications in a university setting access the Oxford Brookes programme directly through the global ACCA/Oxford Brookes collaboration, rather than through individual partner universities.

THE OPEN UNIVERSITY

Celebrating its 51st year of operation in 2020, the Open University carries its wealth of experience as one of the world's first successful distance teaching universities through to its transnational education provision. Through a validation model managed by Open University Validation Partnerships (OUVP) and also through content licensing partnerships, Open University provision reaches learners in 151 countries and territories around the world.

Established in 1992, OUVP now supports over 40 partner institutions in the UK and abroad who delivered 350 programmes in 2019–20. The University's group of partner institutions includes institutions across Europe, Asia and the Middle East. Once approved, institutions offer Open University validated awards, granted under the University's UK Royal Charter.

Through its content licensing model, the Open University works with 21 education institutions in 23 different countries worldwide, helping build capacity and capability leading to long-term sustainable growth. Through partnership with the Open University, institutions have access to world class teaching materials supported by Open University research, covering a wide range of subject areas at undergraduate and postgraduate levels.

UNIVERSITY OF LONDON

Since 1858, the University of London (UoL) has worked with partners around the world to widen access to higher education. Through its global connections, sustained innovation and TNE model there are now 50,000 students in 190 countries studying for a UoL degree. The federal nature of UoL means that students have the opportunity to pursue degrees where the curriculum and assessment is by world-leading institutions in their field such as UCL, LSE and SOAS. These institutions in turn can greatly extend their global reach and access through UoL's unique TNE footprint.

UoL works with over 100 Recognised Teaching Centres in 42 countries, appointed through a robust recognition process. These are independent institutions, many of them also universities, which offer face-to-face academic and pastoral support for UoL students. 80% of their undergraduates choose to study face-to-face in this way, most of them full-time.

UoL has played a pivotal role in building higher education capacity in developing countries since the early 20th century. In Africa and the Caribbean, UoL Colleges were set up that are now universities in their own right. The vast majority of UoL graduates remain in their local, national and regional contexts, contributing to the longer-term development of their respective societies at a senior level.

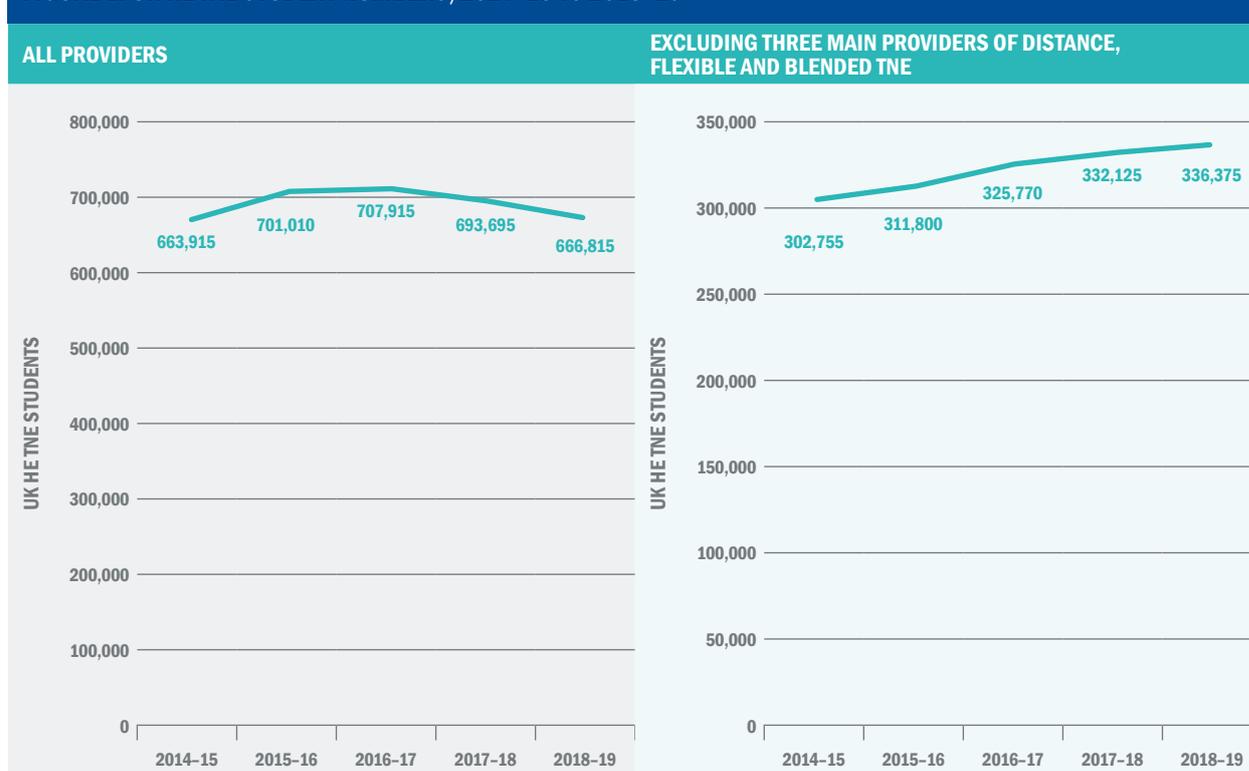
2. OVERVIEW

In 2018–19, 142 UK higher education providers reported that there were 666,815 students learning through transnational education (TNE) in 226 territories worldwide.

HESA AOR data shows a decrease of 26,880 students (-3.9%) compared to 2017–18. Approximately 50% of all students were enrolled in three main providers of distance, flexible and blended TNE. When these are excluded, records show an increase of 4,250 students (1.3%) year-on-year.

From 2017–18 to 2018–19, 79 providers reported increases in student numbers, 54 reported decreases and nine reported the same number of students. Five providers reported increases of more than 1,000 students while nine reported decreases of more than 1,000 students. The average rate of growth in providers that reported increases was 16.1%, while for providers who reported decreases, the average percentage change in student numbers was -9.7%.

FIGURE 1: UK HE TNE STUDENT NUMBERS, 2014–15 TO 2018–19



DIVERSIFICATION

Figure 2 shows that UK TNE is concentrated in a relatively limited number of providers. There are three providers with very large student numbers, followed by a ‘long tail’ of providers with smaller provision. However, while student numbers in providers reporting more than 10,000 students fell by 7.5% year-on-year, three new providers reported UK TNE students for the first time, and five others entered the group of those that report more than 1,000 students, with none falling off this group. This points to a widening of the ‘long tail’ and a progressively more even distribution of student numbers among providers.

- **75.5%** of all UK TNE provision was reported by the top 20 providers
- **125** providers accounted for less than **1%** of UK TNE provision each.
- **78** providers reported more than **1,000** TNE students in 2018–19 up from **73** in 2017–18
- The average number of students was **4,696** and the median was **1,220**.

FIGURE 2: (ALL PROVIDERS) UK HE TNE STUDENT NUMBERS, 2018–19 LOGARITHMIC SCALE

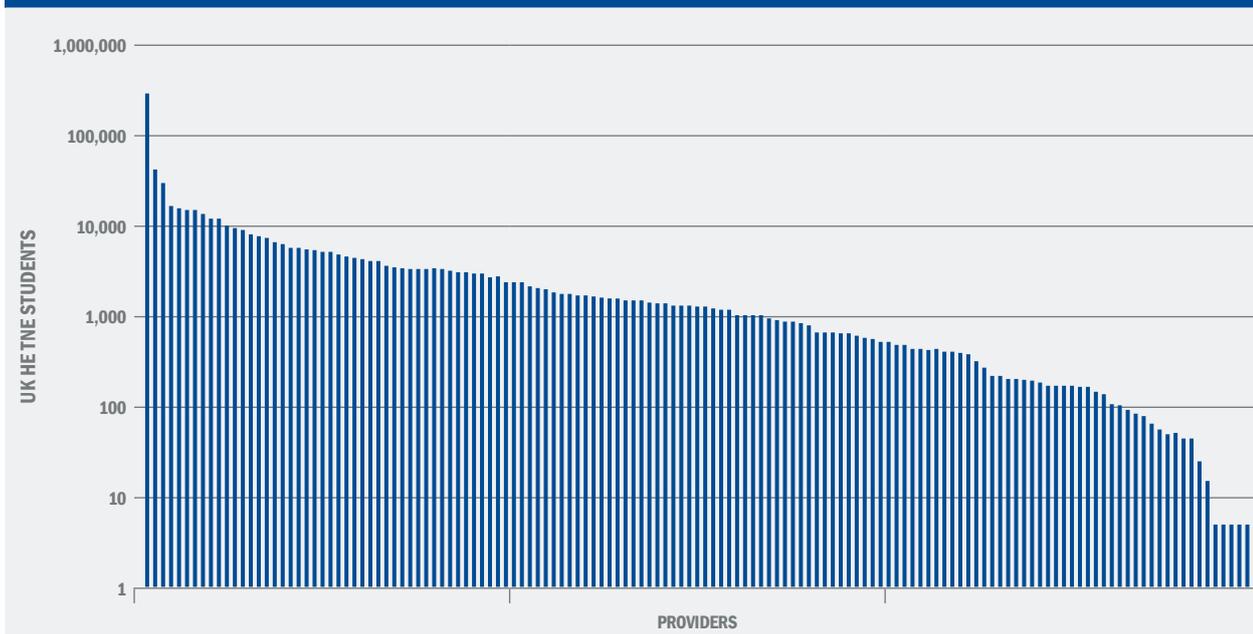
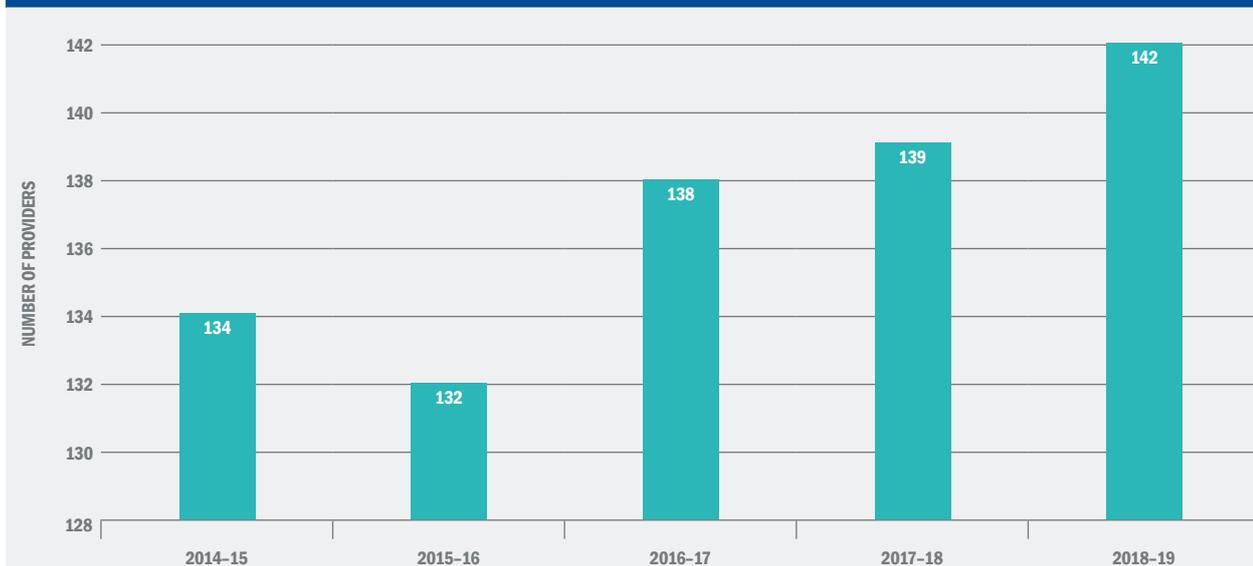


Figure 3 shows that the number of providers reporting UK TNE students rose by eight from 134 in 2014–15 to 142 in 2018–19. Between 2017–18 and 2018–19 three new providers reported students in UK TNE.

FIGURE 3: NUMBER OF PROVIDERS WITH UK HE TNE STUDENTS, 2014–15 TO 2018–19



TYPE OF PROVISION

In 2018–19, 52.1% of UK TNE students were studying while registered at an overseas partner organisation (down from 56.5% in 2017–18), with an additional 24.7% studying through collaborative provision (up from 21.4%), 18.1% through distance, flexible and distributed learning (up from 17.0%) and 4.3% at overseas campuses.

Excluding the three main providers of distance, flexible and blended TNE, most students were studying through collaborative provision (48.5%, up from 44.3% in 2017–18), registered at an overseas partner organisation (19.9%, down from 24.5%), through distance, flexible and distributed learning (21.3%, up from 20.7%) and at overseas campuses (8.6%, up from 8.5%).

- UK TNE students registered at overseas partner organisations make up a large but decreasing proportion of the total.
- Collaborative provision and distance, flexible and distributed learning are the fastest growing categories.
- Students registered at overseas campuses are a small but growing proportion of the total.

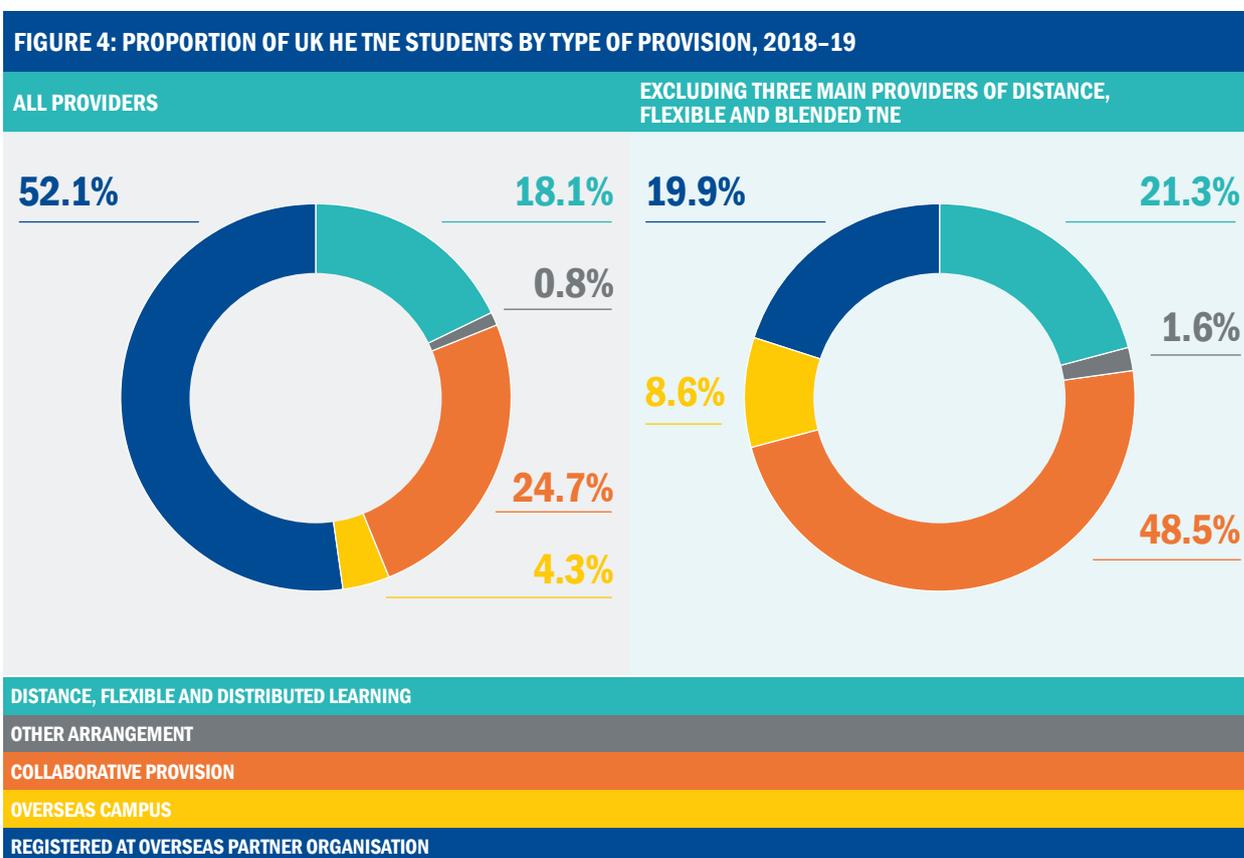
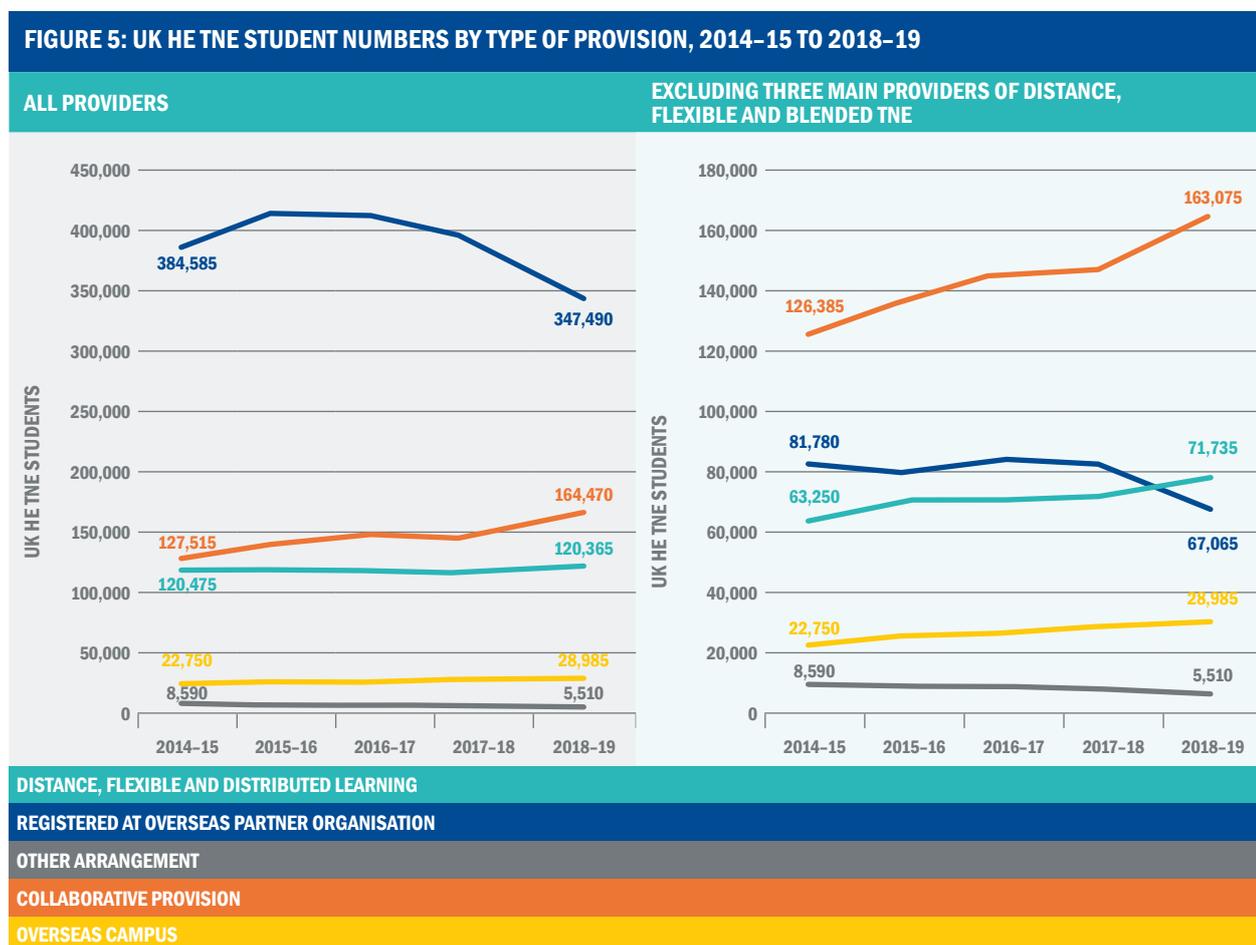


Figure 5 shows that between 2014-15 and 2018-19, the number of students registered at an overseas partner organisation decreased by 38,095 (-9.6%). This decrease has been steeper each year since numbers peaked in 2015-16. Students studying through collaborative provision grew by 36,955 (29.0%) and at overseas campuses by 6,235 (27.4%). The former category experienced the strongest growth in the last year (10.9%). Students in distance, flexible and distributed learning remained stable at around 120,000 (-0.1%) and students in other arrangements decreased by 3,080 (-35.9%) since 2014-15.

Most of the decrease in total student numbers between 2017-18 and 2018-19 was in students registered at an overseas partner organisation, which is the category in which two of the three main providers of distance, flexible and blended TNE report a large number of students. When the three main providers of distance, flexible and blended TNE are excluded, collaborative provision grew by 36,690 students (29.0%) between 2014-15 and 2018-19. The increase was of 16,100 students (11.0%) in the last year. Students studying through distance, flexible and distributed learning grew by 8,485 (13.4%) and at an overseas campus by 6,235 (27.4%). Students registered at an overseas partner organisation decreased by 14,715 (-18.0%), with a fall of 14,220 students (-17.5%) in the last year. Students in other arrangements decreased by 3,080 (-35.9%) since 2014-15.



LOCATION OF UK PROVIDER

Out of 166 providers eligible to be counted in the AOR, (165 institutions categorised by HESA as ‘Higher Education Institutions (HEIs)’ plus the University of Buckingham), 142 reported TNE students in 2018–19. **Table 2** shows that the majority of students (88.8%) were reported by providers located in England. This was followed by Scotland (6.4%), Wales (4.5%) and Northern Ireland (0.2%).

- **114 out of 135** providers in England reported TNE students. Provision fell by **12,855** students (**-2.1%**) between 2014–15 and 2018–19.
- **Two out of four** providers in Northern Ireland reported TNE students. Provision grew by **30** students (**2.2%**) between 2014–15 and 2018–19.
- **17 out of 18** providers in Scotland reported TNE students. Provision grew by **4,460** students (**11.7%**) between 2014–15 and 2018–19.
- **Nine out of nine** providers in Wales reported TNE students. Provision grew by **11,270** students (**59.3%**) between 2014–15 and 2018–19.

TABLE 2: UK HIGHER EDUCATION TNE STUDENTS BY COUNTRY OF PROVIDER, 2018–19

CATEGORY	ENGLAND	NORTHERN IRELAND	SCOTLAND	WALES
Number of providers reporting UK HE TNE students	114	2	17	9
Total number of TNE students	592,550	1,380	42,625	30,265
Proportion of TNE student numbers	88.9%	0.2%	6.4%	4.5%

MISSION GROUP OR SECTOR REPRESENTATIVE ORGANISATIONS

Table 3 shows that all universities affiliated to Million+ and the University Alliance reported UK TNE students. Most Russell Group universities reported TNE students (23 out of 24) while only some GuildHE members did (15 out of 28*). Student numbers were highest in Million+ providers, if we exclude Oxford Brookes University, but relative to membership the University Alliance had the most student per affiliated provider.

TABLE 3: MISSION GROUP OR SECTOR REPRESENTATIVE ORGANISATION OF UK PROVIDERS WITH UK HE TNE STUDENTS, 2017–18 TO 2018–19

MISSION GROUP OR SECTOR REPRESENTATIVE ORGANISATION	2017–18			2018–19			
	TOTAL MEMBERS	TOTAL DELIVERING TNE	PERCENTAGE OF MEMBERS	TOTAL MEMBERS	TOTAL DELIVERING TNE	PERCENTAGE OF MEMBERS	NUMBER OF TNE STUDENTS
GuildHE	26*	14	53.8%	28*	15	53.3%	4,380
Million+	22	22	100.0%	22	22	100.0%	90,080
Non-aligned	-	-	-	79	73	92.4%	188,350
Russell Group	24	23	95.8%	24	23	95.8%	60,985
University Alliance	12	12	100.0%	12	12	100.0%	a. 329,780 b. 69,625

a. including Oxford Brookes University b. excluding Oxford Brookes University

* Number of GuildHE Members who returned HESA data out of GuildHE’s 50 member institutions

Table 4 shows that universities affiliated to the University Alliance reported the largest number of students in 2018–19, followed by non-aligned providers, Million+, Russell Group and GuildHE. Student numbers were higher among non-aligned and Million+ providers if we exclude Oxford Brookes University. Between 2014–15 and 2018–19 student numbers increased in providers affiliated to Million+ (20.2%) and the Russell Group (18.7%) and decreased in non-aligned (-7.3%) and GuildHE member (-2.6%) institutions. When Oxford Brookes is excluded, students at University Alliance providers also increased (34.9%).

TABLE 4: MISSION GROUP OR SECTOR REPRESENTATIVE ORGANISATION OF UK PROVIDERS WITH UK HE TNE STUDENTS, 2014–15 TO 2018–19

MISSION GROUP OR SECTOR REPRESENTATIVE ORGANISATION	NUMBER OF TNE STUDENTS					PERCENTAGE CHANGE FROM 2017-18	PERCENTAGE CHANGE FROM 2014-15
	2014-15	2015-16	2016-17	2017-18	2018-19		
GuildHE	4,495	4,970	4,905	4,930	4,380	-11.2%	-2.6%
Million+	74,955	81,270	83,950	86,010	90,080	4.7%	20.2%
Non-aligned	203,285	196,885	206,100	196,245	188,350	-4.0%	-7.3%
Russell Group	51,390	52,470	53,625	58,395	60,985	4.4%	18.7%
University Alliance (a.)	335,000	371,160	365,650	354,490	329,780	-7.0%	-1.6%
University Alliance (b.)	51,620	55,450	60,525	64,575	69,625	7.8%	34.9%

a. including Oxford Brookes University b. excluding Oxford Brookes University

3. HOST COUNTRIES AND REGIONS

In 2018–19, UK TNE was delivered in 226 countries and territories around the world. 50.2% of all UK TNE students were studying in Asia, followed by Africa (20.3%), the EU (12.4%) and the Middle East (9.2%).

KEY POINTS:

- Asia hosted **334,410** students, an increase of **2,250** year-on-year.
- The European Union experienced the largest annual increase (**3,005**).
- Cyprus, China, Greece and Sri Lanka increased their student numbers.
- **16** of the top 20 countries saw decreases in student numbers.
- When the three largest providers of distance, flexible and blended TNE are excluded, there were increases in **11** of the top 20 countries, and Nepal and Spain entered the list of the top 20 countries with the largest provision.
- The type of provision is different by region: Asia, the EU, non-EU Europe and the Middle East have significant numbers of students studying through collaborative provision; studying with an overseas provider is predominant in Africa; and in Australasia, North America and South America distance, flexible and distributed learning is the prevalent mode of delivery.

REGIONAL OVERVIEW

Figure 6 shows that between 2014–15 and 2018–19 there were increases in student numbers in South America (20.4%), the EU (12.0%), Asia (4.9%) and the Middle East (0.9%) and decreases in North America (-13.1%), non-EU Europe (-12.3%), Africa (-10.3%) and Australasia (-5.8%). In the last year there were increases in South America (4.7%) and the EU (3.8%) while all other regions lost student numbers.

- Asia and the Middle East peaked in 2016–17 and have decreased since then (-9,475 and -6,645).
- Africa experienced the largest decrease since 2015–16 (-26,545).
- The EU has experienced growth since 2015–16 (9,170).

FIGURE 6: (ALL PROVIDERS) UK HE TNE STUDENT NUMBERS BY REGION OF PROVISION, 2014–15 TO 2018–19

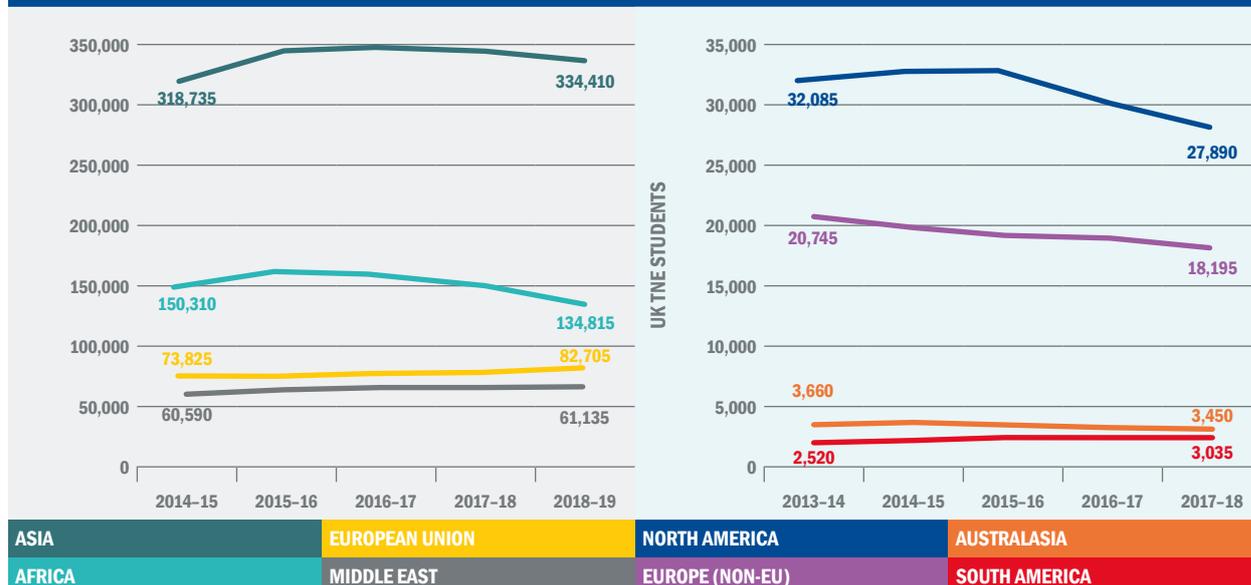


Figure 7 shows that when the three main providers of distance, flexible and blended TNE are excluded, between 2014–15 and 2018–19 there were increases in student numbers in the EU (42.0%), South America (27.7%), Asia (14.1%) and the Middle East (5.3%) and decreases in Australasia (-12.8%), Africa (-10.3%), North America (-9.1%) and non-EU Europe (-2.2%). In the last year there were increases in South America (12.2%) and EU (11.4%), and Asia (3.1%) while all other regions lost student numbers.

- Asia and the EU have increased continuously since 2014–15 (22,135 and 16,140).
- Africa experienced the largest decrease since 2014–15 (-4,615).
- The Middle East experienced comparably small variations in student numbers.

FIGURE 7: (EXCLUDING THREE MAIN PROVIDERS) UK HE TNE STUDENT NUMBERS BY REGION OF PROVISION, 2014–15 TO 2018–19

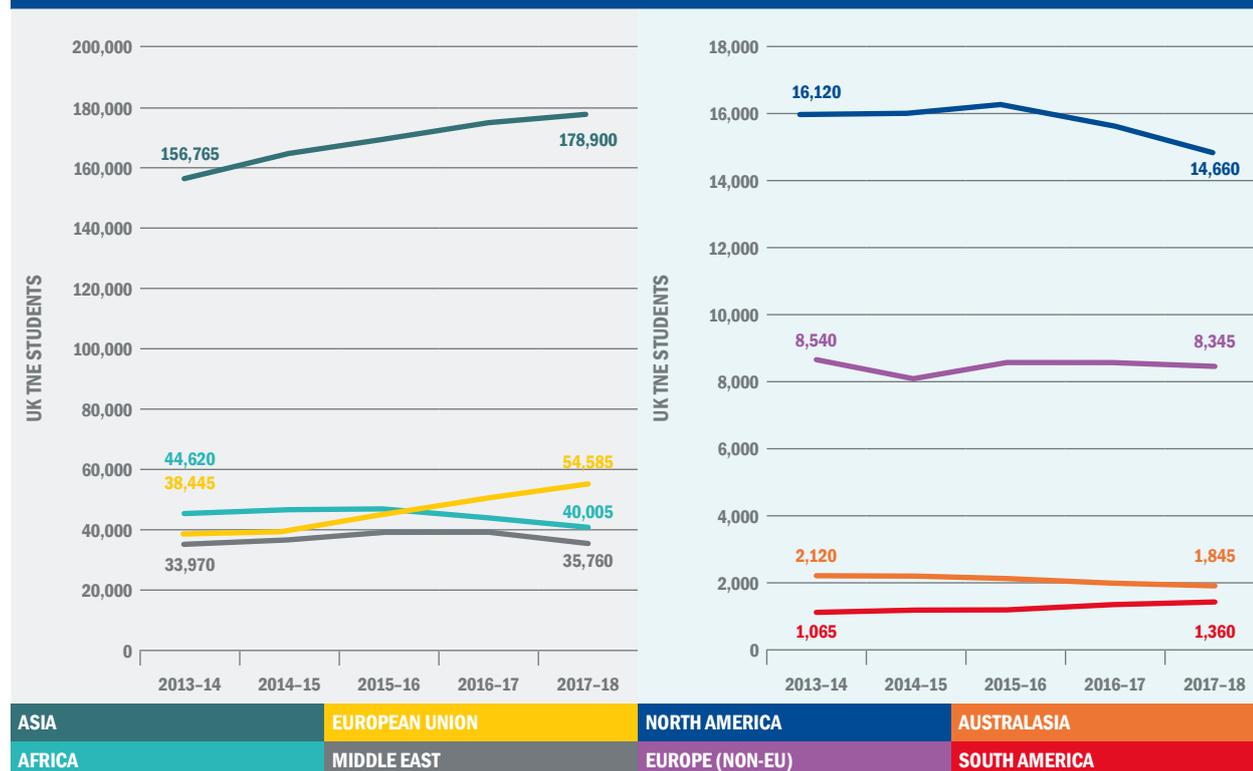


Table 5 shows that, when the three main providers of distance, flexible and blended TNE are excluded, Asia and the EU increased the proportion of students they host. This was mostly at the expense of Africa and, to a lesser degree, the Middle East. South America increased its proportion of total students compared to North America, Australasia and non-EU Europe.

TABLE 5: (EXCLUDING THREE MAIN PROVIDERS) PROPORTION OF UK HE TNE STUDENTS BY REGION OF PROVISION, 2017–18 TO 2018–19

REGION	2017–18		2018–19	
	STUDENT NUMBERS	PERCENTAGE TOTAL	STUDENT NUMBERS	PERCENTAGE TOTAL
Africa	43,365	13.1%	40,005	11.9%
Asia	173,580	52.4%	178,900	53.3%
Australasia	1,915	0.6%	1,845	0.6%
Middle East	37,875	11.4%	35,760	10.7%
North America	15,690	4.7%	14,660	4.4%
Europe (non-EU)	8,475	2.6%	8,345	2.5%
EU	49,010	14.8%	54,585	16.3%
South America	1,215	0.4%	1,360	0.4%

Note: Percentages exclude UK territories.

Table 6 shows that Cyprus (3,700), China (2,250), Greece (905) and Sri Lanka (865) experienced increases, while Nigeria (-4,445), Pakistan (-4,365), Malaysia (-4,190) and Singapore (-3,265) experienced the largest decreases in total student numbers. Percentage decreases were also significant in Trinidad and Tobago (-14.8%), Kenya (-13.4%) and Ghana (-10.0%).

TABLE 6: (ALL PROVIDERS) TOP 20 COUNTRIES AND TERRITORIES FOR UK TNE STUDENTS 2018–19			
COUNTRY	STUDENT NUMBERS	PERCENTAGE CHANGE FROM 2017–18	PERCENTAGE OF TOTAL
 China	78,175	↑ 3.0%	11.7%
 Malaysia	68,290	↓ 5.8%	10.3%
 Singapore	41,540	↓ 7.3%	6.2%
 Pakistan	35,845	↓ 10.9%	5.4%
 Sri Lanka	28,315	↑ 3.2%	4.3%
 Nigeria	25,420	↓ 14.9%	3.8%
 Hong Kong	24,680	↓ 3.9%	3.7%
 Egypt	20,280	↓ 1.0%	3.0%
 Oman	18,445	↓ 9.4%	2.8%
 Greece	18,315	↑ 5.2%	2.8%
 United Arab Emirates	16,720	↓ 4.5%	2.5%
 India	16,550	↓ 2.9%	2.5%
 Mauritius	14,285	↓ 6.3%	2.1%
 Ghana	13,785	↓ 10.0%	2.1%
 Cyprus (EU)	13,565	↑ 37.5%	2.0%
 Ireland	10,660	↓ 8.2%	1.6%
 Kenya	10,175	↓ 13.4%	1.5%
 Zimbabwe	8,980	↓ 5.3%	1.3%
 Saudi Arabia	8,430	↓ 10.9%	1.3%
 Trinidad and Tobago	8,045	↓ 14.8%	1.2%

Note: Percentages exclude UK territories.

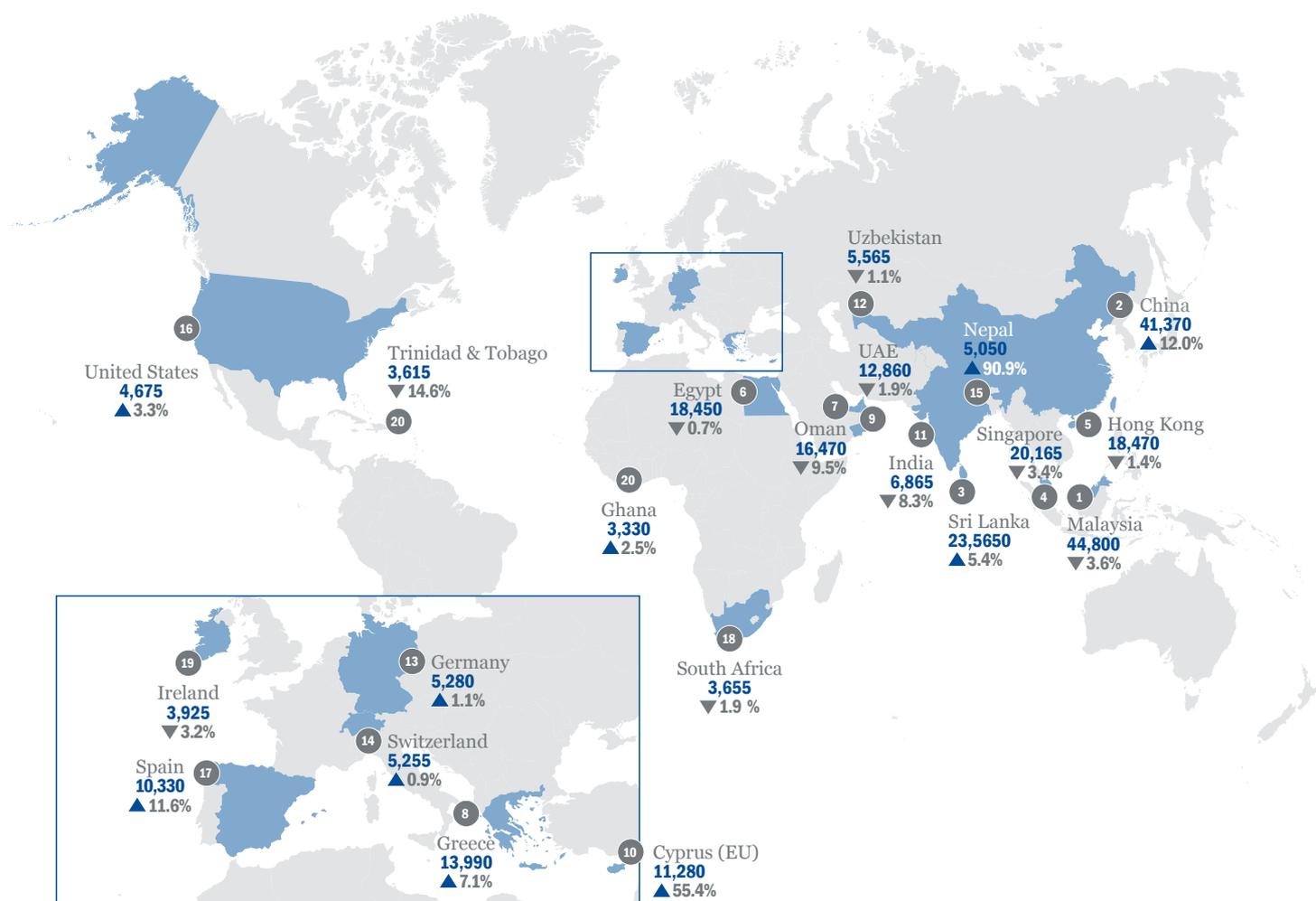
Table 7 shows that, when the three main providers of distance, flexible and blended TNE are excluded, China (4,430), Cyprus (EU) (4,020), Nepal (2,405) and Sri Lanka (1,215) experienced the largest increases while Oman (-1,725), Malaysia (-1,690) and Singapore (-710) experienced the largest decreases in total student numbers. Percentage increases were also significant in Spain (11.6%) and Greece (7.1%), while percentage decreases were significant in Trinidad and Tobago (-14.7%) and India (-8.3%).

TABLE 7: (EXCLUDING THREE MAIN PROVIDERS) TOP 20 COUNTRIES AND TERRITORIES FOR UK HE TNE STUDENTS 2018–19

COUNTRY	STUDENT NUMBERS	PERCENTAGE CHANGE FROM 2017–18	PERCENTAGE OF TOTAL
 Malaysia	44,800	↓ 3.6%	13.4%
 China	41,370	↑ 12.0%	12.3%
 Sri Lanka	23,565	↑ 5.4%	7.0%
 Singapore	20,165	↓ 3.4%	6.0%
 Hong Kong	18,470	↓ 1.4%	5.5%
 Egypt	18,450	↓ 0.7%	5.5%
 Oman	16,470	↓ 9.5%	4.9%
 Greece	13,990	↑ 7.1%	4.2%
 United Arab Emirates	12,860	↓ 1.9%	3.8%
 Cyprus (EU)	11,280	↑ 55.4%	3.4%
 India	6,865	↓ 8.3%	2.0%
 Uzbekistan	5,565	↓ 1.0%	1.7%
 Germany	5,280	↑ 1.1%	1.6%
 Switzerland	5,255	↑ 0.9%	1.6%
 Nepal	5,050	↑ 90.9%	1.5%
 United States	4,675	↑ 3.4%	1.4%
 Ireland	3,925	↓ 3.2%	1.2%
 South Africa	3,665	↓ 1.8%	1.1%
 Spain	3,665	↑ 11.6%	1.1%
 Trinidad and Tobago	3,615	↓ 14.7%	1.1%

Note: Percentages exclude UK territories.

MAP 1: TOP 20 UK HE TNE HOST COUNTRIES, 2018–19*



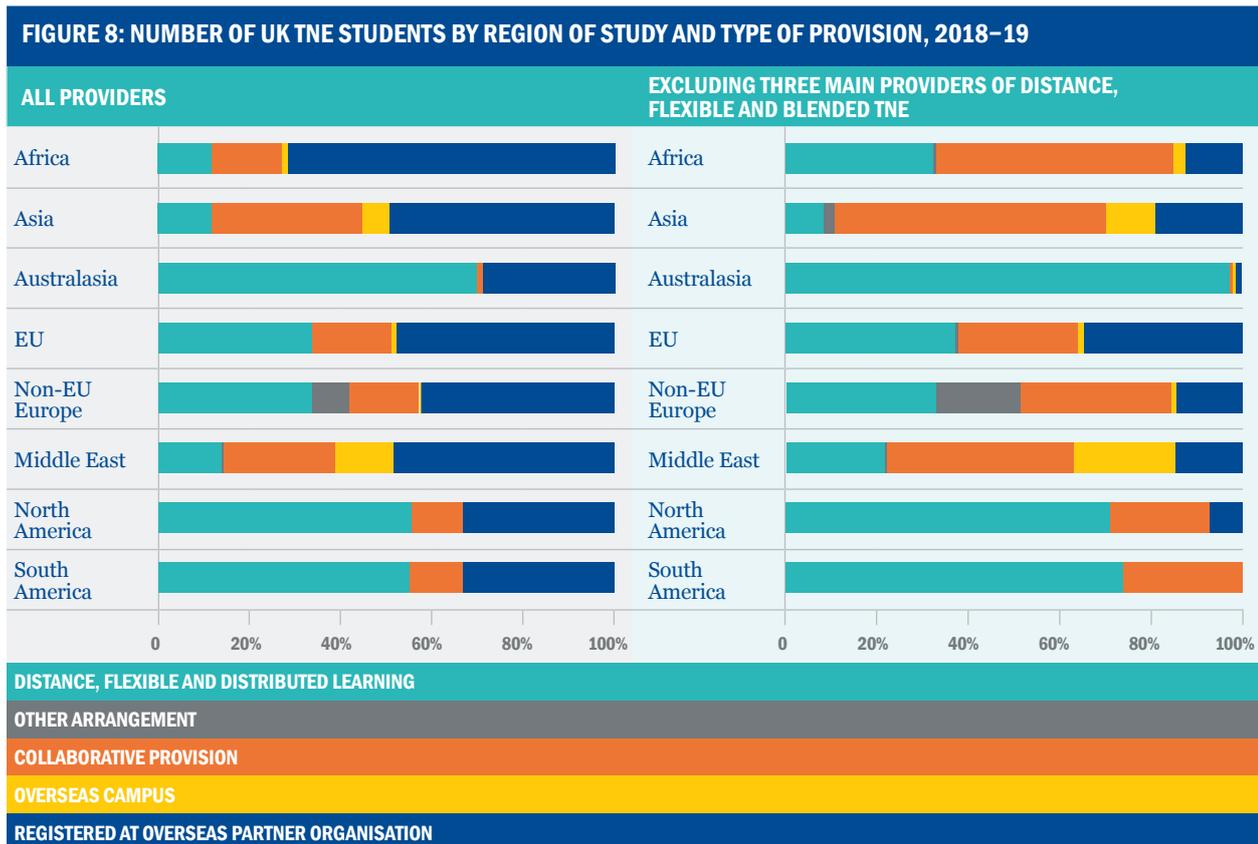
Data source: HESA aggregate offshore record (2018–19)
 *excluding the three main providers

The top five host countries for UK TNE are Malaysia, China, Sri Lanka, Singapore and Hong Kong. The numbers of TNE students in China and Sri Lanka have increased by 12.0% and 5.4% respectively since 2017–18, while there has been a small decrease in the other three countries. The top host country for TNE outside of Asia is Egypt, ranking sixth globally.

TYPE OF PROVISION BY REGION

Figure 8 disaggregates the type of TNE study by region of study in 2018–19. Students registered at an overseas partner organisation and through distance, flexible and distributed learning are the main types of TNE across all regions except Africa, Asia and the Middle East, where collaborative provision is more prevalent than distance learning.

Excluding the three main providers of distance, flexible and blended TNE, collaborative provision is prevalent in Asia, Africa and the Middle East; distance learning is dominant in Australasia, North and South America; and there is substantial overseas campus provision in the Middle East and Asia. Provision in the EU and non- EU Europe is diversified in three categories.



Tables 8 to 12 show the top host countries by type of provision in 2018–19, excluding the three main providers of distance, flexible and blended TNE. In three of the five types of provision, Asian territories represented half or more of the total. Provision in distance, flexible and distributed learning and other types of provision was more evenly spread. The concentration of students in fewer territories is more marked in overseas campuses and those registered at an overseas partner organisation.

TABLE 8: TOP 10 HOST COUNTRIES OF STUDENTS REGISTERED AT AN OVERSEAS PARTNER ORGANISATION, 2018–19

COUNTRY	NUMBER OF STUDENTS
 China	13,005
 Malaysia	9,860
 Greece	5,805
 Oman	3,565
 Sri Lanka	3,505
 Singapore	3,460
 Hong Kong	2,265
 Austria	2,255
 Germany	2,095
 Egypt	2,030

TABLE 9: TOP 10 HOST COUNTRIES OF STUDENTS STUDYING THROUGH DISTANCE, FLEXIBLE AND DISTRIBUTED LEARNING, 2018–19

COUNTRY	NUMBER OF STUDENTS
 Cyprus (EU)	9,205
 United States	3,995
 South Africa	3,560
 United Arab Emirates	3,090
 Nigeria	2,975
 Canada	2,675
 China	2,570
 Sri Lanka	2,260
 Hong Kong	2,120
 Ireland	2,120

TABLE 10: TOP 10 HOST COUNTRIES OF STUDENTS STUDYING AT AN OVERSEAS CAMPUS, 2018–19

COUNTRY	NUMBER OF STUDENTS
 Malaysia	9,110
 China	8,650
 United Arab Emirates	6,955
 Hong Kong	1,130
 Mauritius	990
 Qatar	555
 Belgium	280
 Malta	265
 Greece	180
 Singapore	180

TABLE 11: TOP 10 HOST COUNTRIES OF STUDENTS STUDYING THROUGH COLLABORATIVE PROVISION 2018–19

COUNTRY	NUMBER OF STUDENTS
 Malaysia	24,725
 Sri Lanka	17,805
 China	17,140
 Egypt	15,820
 Singapore	14,640
 Hong Kong	12,945
 Oman	12,370
 Greece	7,485
 Uzbekistan	4,335
 Nepal	3,950

TABLE 12: TOP 10 HOST COUNTRIES OF STUDENTS STUDYING THROUGH OTHER TYPES OF PROVISION, 2018–19

COUNTRY	NUMBER OF STUDENTS
 India	1,660
 Switzerland	1,515
 Uzbekistan	1,215
 Singapore	305
 Malaysia	275
 Bahrain	205
 Zimbabwe	140
 Ireland	60
 Japan	25
 United Arab Emirates	25

LEVEL OF STUDY ACROSS REGIONS

Table 13 shows the top host countries by level of provision in 2018–19, excluding the three main providers of distance, flexible and blended TNE. At undergraduate level the first four positions remained the same as the previous year but the largest increase in student numbers took place in China, while in Malaysia, Egypt and Singapore they either increased only slightly or decreased. Sri Lanka, Hong Kong, Uzbekistan, Nepal and Myanmar moved up the list. Mauritius entered the top 20 while Trinidad and Tobago fell off the list.

At postgraduate level, Cyprus became the country with the largest provision. The United Arab Emirates, Singapore, the United States, Hong Kong, Switzerland, India and Austria also moved up the list.

TABLE 13: (EXCLUDING THREE MAIN PROVIDERS) TOP 20 HOST COUNTRIES FOR UK HE TNE STUDENTS BY LEVEL OF STUDY, 2018-19

RANKING	UNDERGRADUATE		POSTGRADUATE	
	COUNTRY	NUMBER OF STUDENTS	COUNTRY	NUMBER OF STUDENTS
1	 Malaysia	39,000	 Cyprus (EU)	9,585
2	 China	36,100	 Sri Lanka	9,280
3	 Egypt	17,300	 United Arab Emirates	6,895
4	 Singapore	15,995	 Malaysia	5,805
5	 Hong Kong	14,520	 China	5,270
6	 Sri Lanka	14,285	 Singapore	4,170
7	 Oman	13,855	 United States	3,970
8	 Greece	10,080	 Hong Kong	3,955
9	 United Arab Emirates	5,965	 Greece	3,910
10	 Uzbekistan	5,350	 Switzerland	3,370
11	 Nepal	4,620	 Nigeria	2,950
12	 India	4,505	 Canada	2,755
13	 Germany	3,055	 South Africa	2,750
14	 Spain	2,920	 Oman	2,620
15	 Vietnam	2,250	 India	2,360
16	 Switzerland	1,885	 Ghana	2,355
17	 Myanmar	1,870	 Austria	2,280
18	 Ireland	1,765	 Germany	2,225
19	 Cyprus (EU)	1,695	 Ireland	2,160
20	 Mauritius	1,630	 Trinidad and Tobago	2,140

4. INSIGHTS BY REGION

AFRICA

Unless specified otherwise, this section excludes the three main programme providers of distance, flexible and blended TNE.

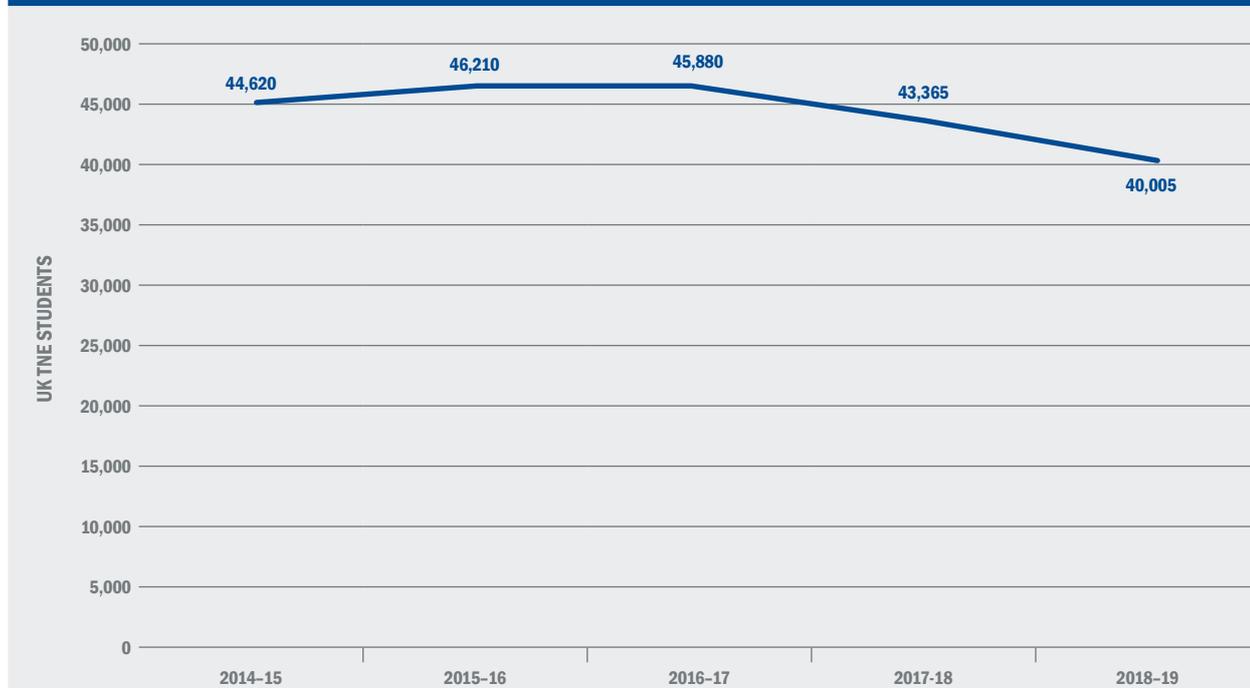
AT A GLANCE: UK HE TNE IN AFRICA IN 2018–19

- Africa hosted the third largest number of students by region (**40,005**), **11.9%** of the world's total.
- The number of students decreased by **7.8%** between 2017–18 and 2018–19.
- TNE was delivered in **55** African countries and territories.
- The countries with the most students were Egypt (**18,450**), South Africa (**3,655**) and Ghana (**3,305**).
- The most common forms of provision were collaborative provision (**51.6%**) and distance, flexible and distributed learning (**32.4%**).
- The majority of students were studying at undergraduate level (**57.9%**).
- Egypt was the country with the largest provision at undergraduate level (**17,300**) and Nigeria at postgraduate level (**2,950**).

TREND ANALYSIS

As shown in **Figure 9**, student numbers in Africa increased by 1,500 (3.4%) between 2014-15 and 2015-16 but decreased by 6,115 (-13.3%) between 2015-16 and 2018-19. The decrease from 2017-18 to 2018-19 was 3,360 (-7.8%).

FIGURE 9: NUMBER OF UK HE TNE STUDENTS IN AFRICA, 2014-15 TO 2018-19



UK HE TNE was delivered in

55

African countries and territories in 2018-19.

Africa hosted

11.9%

of UK TNE students in 2018-19.

HOST COUNTRIES

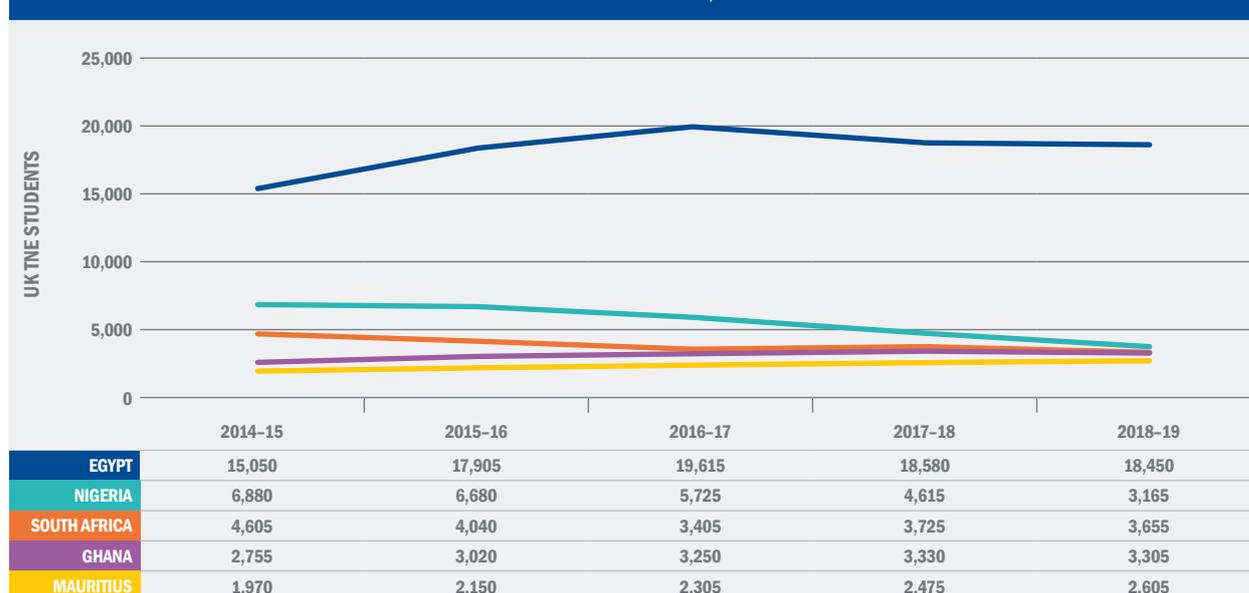
Table 14 shows the 10 African countries hosting the most students in 2018–19. Egypt was the country hosting the most students with 18,450 (46.1% of the total). The greatest proportional increase took place in Mauritius (5.4%) while the greatest proportional decrease took place in Nigeria (-31.4%).

TABLE 14: TOP 10 HOST COUNTRIES IN AFRICA FOR UK HE TNE STUDENTS, 2018–19 AND PERCENTAGE CHANGE FROM 2017–18

HOST COUNTRIES	NUMBER OF STUDENTS IN 2018–19	PERCENTAGE OF STUDENTS IN 2018–19	PERCENTAGE CHANGE FROM 2017–18
 Egypt	18,450	46.1%	-0.7%
 South Africa	3,655	9.1%	-1.8%
 Ghana	3,305	8.3%	-0.8%
 Nigeria	3,165	7.9%	-31.4%
 Mauritius	2,605	6.5%	5.4%
 Botswana	1,385	3.5%	-11.6%
 Kenya	1,235	3.1%	-17.4%
 Zambia	1,065	2.7%	-15.6%
 Uganda	875	2.2%	-1.5%
 Morocco	600	1.5%	-7.7%

Figure 10 shows the different progression of student numbers in the top five host countries, which together accounted for over 75% of all TNE students in Africa in 2018–19. Student numbers decreased by 1,165 (-5.9%) in Egypt between 2016–17 and 2018–19. In the last year there were also slight decreases of 70 in South Africa (-1.8%) and 25 in Ghana (-0.8%). In Nigeria student numbers decreased by 1,450 (-31.4%) in the last year, or by 3,715 (-54.0%) since 2014–15 while in Mauritius they increased by 130 (5.4%) in the last year or by 635 (32.3%) since 2014–15.

FIGURE 10: TOP 5 COUNTRIES FOR UK HE TNE STUDENTS IN AFRICA, 2018–19 AND CHANGES SINCE 2014–15



TYPE OF PROVISION

Table 15 shows how many students were studying through each type of TNE provision, how many countries in Africa hosted each type of provision, and what the top countries were for each type of provision. Collaborative provision is delivered in 33 of 55 countries where students are reported, with 76.6% of them located in Egypt. Distance, flexible and distributed learning is delivered in all 55 countries where TNE students are reported in Africa, with 27.5% studying in South Africa. Students registered at overseas partner organisations are reported in nine countries, with 39.0% located in Egypt. Students studying at an overseas campus are reported in four countries, with 92.6% of them studying in Mauritius. Other arrangements are reported in seven countries, with 94.6% of these students located in Zimbabwe.

TABLE 15: UK HE TNE STUDENTS IN AFRICA BY TYPE OF PROVISION, 2018–19			
TYPE OF PROVISION	NUMBER OF STUDENTS	NUMBER OF COUNTRIES REPRESENTED OUT OF 55 (%)	TOP COUNTRIES
Collaborative provision	20,635	33 (60.0%)	 Egypt (76.6%)  Botswana (5.6%)  Mauritius (4.1%)
Distance, flexible and distributed learning	12,955	55 (100.0%)	 South Africa (27.5%)  Nigeria (23.0%)  Kenya (7.5%)
Registered at overseas partner organisation	5,195	9 (16.4%)	 Egypt (39.0%)  Ghana (35.5%)  Uganda (9.2%)
Overseas campus	1,070	4 (7.3%)	 Mauritius (92.6%)  Tanzania (6.8%)  Uganda (..)
Other arrangement	150	7 (12.7%)	 Zimbabwe (94.6%)  South Africa (..)  Mauritius (..)

Collaborative provision is delivered in 33 of 55 countries where students are reported, with

76.7%

African countries and territories in 2018–19.

Students studying at an overseas campus are reported in four countries, with

92.6%

of them studying in Mauritius in 2018–19.

LEVEL OF STUDY

Table 16 shows the distribution between undergraduate and postgraduate TNE study across African countries:

- Egypt alone accounted for 74.7% of undergraduate students in Africa, although student numbers decreased slightly (-10).
- Undergraduate student numbers increased in Mauritius (+195) Ghana (+50), South Africa (+150) and Nigeria (+25) and fell in Botswana (-180), Zambia (-45), Morocco (-35), Kenya (-15) and Egypt (-10).
- At postgraduate level, Nigeria, South Africa and Ghana accounted for 47.8% of all students. All countries decreased their postgraduate student numbers except Botswana, which saw no change. The largest decrease in student numbers at postgraduate level took place in Nigeria (-1,475).

TABLE 16: TOP 10 HOST COUNTRIES IN AFRICA FOR UK HE TNE STUDENTS BY LEVEL OF STUDY, 2018–19

RANK	UNDERGRADUATES			POSTGRADUATE		
	COUNTRY	NUMBER OF STUDENTS	PERCENTAGE OF UG IN AFRICA	COUNTRY	NUMBER OF STUDENTS	PERCENTAGE OF PG IN AFRICA
1	 Egypt	17,300	74.7%	 Nigeria	2,950	17.5%
2	 Mauritius	1,630	7.0%	 South Africa	2,750	16.3%
3	 Ghana	950	4.1%	 Ghana	2,355	14.0%
4	 South Africa	905	3.9%	 Egypt	1,150	6.8%
5	 Botswana	730	3.2%	 Mauritius	975	5.8%
6	 Zambia	420	1.8%	 Kenya	945	5.6%
7	 Morocco	350	1.5%	 Uganda	855	5.1%
8	 Kenya	295	1.3%	 Botswana	655	3.9%
9	 Nigeria	215	0.9%	 Zambia	645	3.8%
10	 Malawi	160	0.7%	 Tanzania	550	3.3%

At postgraduate level, Nigeria, South Africa and Ghana accounted for

47.8%

of all students in 2018–19.

Egypt alone accounted for

74.7%

of undergraduate students in Africa in 2018–19.

Case study

GLASGOW CALEDONIAN UNIVERSITY – MAURITIUS

Glasgow Caledonian University (GCU) celebrates five years as the founding academic partner of the African Leadership College (ALC), Mauritius. Over this period 219 students from over 32 African countries have successfully completed GCU awarded undergraduate programmes in Business Management, Social Sciences, Computing or Electrical Power Systems Engineering.

All programmes are accelerated in their curriculum design and structure whereby students undertake academic modules in all three trimesters to allow a timeous entry to the employment market. The TNE programmes are delivered via a blended approach with ALC Associate Lecturers providing face to face teaching on campus. There is also a common year one, developed and delivered solely by ALC where global challenges, communication and entrepreneurial leadership are creatively explored. In addition, students have the advantage of the opportunity of 24 weeks of internship experience. The transferable skills students gain ensure they are well prepared for the transition to employment on successful completion of their programme. Each programme has been accredited by the Mauritian Higher Education Commission with another jointly developed and accredited programme, in Entrepreneurial Leadership, due to begin in January 2021.

The partnership has benefited from GCU staff teaching visits each trimester to support both students and ALC staff. These visits also provided the opportunity to monitor the student experience, share expertise and help to build capacity and capability in the workforce for future proofing the success of the college and supporting student achievement.

Case study

UNIVERSITY OF EAST LONDON – EGYPT

The University of East London's partnership with Ain Shams University, Egypt was born out of the British Council Newton Institutional Links project: 'Building Capacity for Sustainable Development of the Built Environment', which took place in December 2017. Together with a number of peer reviewed academic papers and an international conference, one of the key outputs of the projects was the validation of three dual award degree programmes between the University of East London and Ain Shams University in Building Engineering, Environmental Architecture and Urbanism; and Computer Engineering and Software Systems, which were launched in 2018/19 academic year.

The implementation and operation of these new courses was supported by extensive staff development activity, in which colleagues from Ain Shams University visited the University of East London to share ideas and best practice in relation to programme content and quality assurance. This then paved the way for the introduction of four new courses in 2019/20 in Engineering and Renewable Energy; Manufacturing Engineering; Mechatronics Engineering and Automation; and Communication Systems Engineering. Then in the summer of 2020, five further programmes were validated in Bioinformatics Technology, Software Engineering, Artificial Intelligence, Cyber Security and Digital Multimedia.

The establishment of deeper and broader ties between the University of East London and Ain Shams University has supported the engagement between faculty staff, who continue to explore new ways to grow this collaborative partnership on the basis that there is still potential to engage in further high impact research projects and to increase the range of programmes beyond Engineering and Computing.

ASIA

Unless specified otherwise, this section excludes the three main programme providers of distance, flexible and blended TNE.

AT A GLANCE: UK HE TNE IN ASIA IN 2018–19

- Asia hosted the largest number of students by region (**178,900**), **53.3%** of the world's total.
- The number of students increased by **3.1%** between 2017–18 and 2018–19.
- TNE was delivered in **32** Asian countries and territories.
- The countries with the most students were Malaysia (**44,800**), China (**41,370**) and Sri Lanka (**23,565**).
- The most common forms of provision were collaborative provision (**59.6%**) and registration at an overseas partner organisation (**19.5%**).
- The majority of students were studying at undergraduate level (**79.7%**).
- Malaysia was the country with the largest provision at undergraduate level (**38,995**) and Sri Lanka at postgraduate level (**9,280**).

TREND ANALYSIS

As shown in **Figure 11**, student numbers in Asia increased by 22,135 (14.1%) between 2014-15 and 2018-19 and by 5,320 (3.1%) between 2017-18 and 2018-19.

FIGURE 11: NUMBER OF UK HE TNE STUDENTS IN ASIA, 2014-15 TO 2018-19



UK TNE was delivered in

32

Asian countries and territories in 2018-19.

Asia hosted

53.3%

of UK TNE students in 2018-19.

HOST COUNTRIES

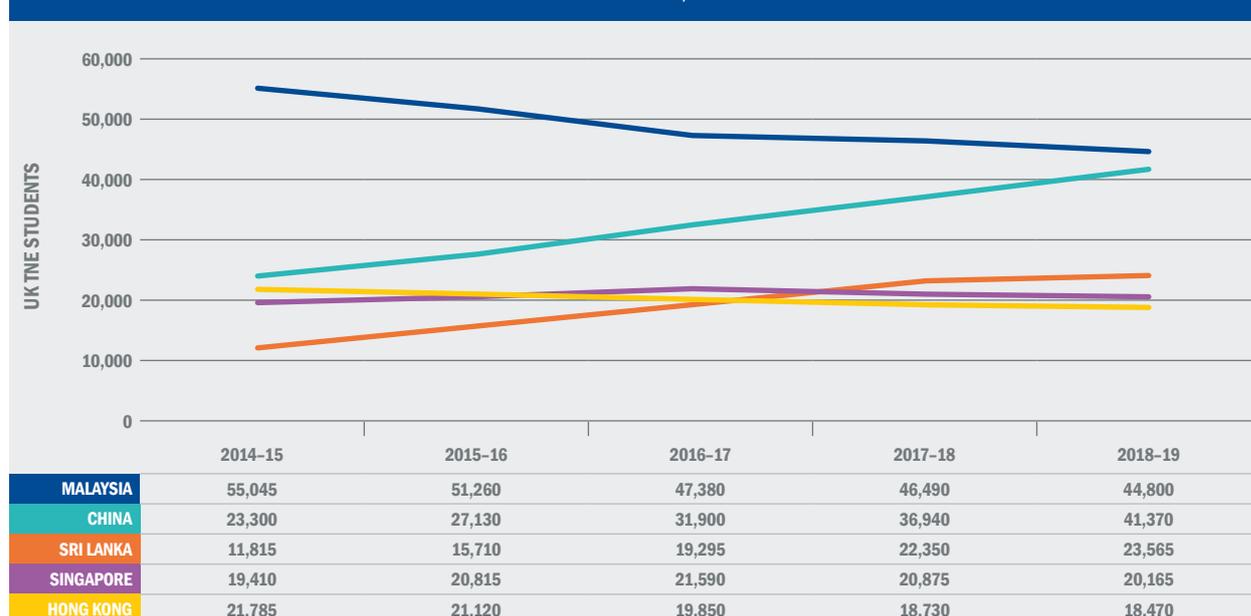
Table 17 shows the 10 Asian countries hosting the most students in 2018–19. Malaysia was the country hosting the most students, with 44,800 (25.0% of the total). The greatest proportional increase took place in Nepal (90.9%) while the greatest proportional decrease took place in India (-8.3%).

TABLE 17: TOP 10 HOST COUNTRIES IN ASIA FOR UK HE TNE STUDENTS, 2018–19 AND PERCENTAGE CHANGE FROM 2017–18

HOST COUNTRIES	NUMBER OF STUDENTS IN 2018–19	PERCENTAGE OF STUDENTS IN 2018–19	PERCENTAGE CHANGE FROM 2017–18
 Malaysia	44,800	25.0%	-3.6%
 China	41,370	23.1%	12.0%
 Sri Lanka	23,565	13.2%	5.4%
 Singapore	20,165	11.3%	-3.4%
 Hong Kong	18,470	10.3%	-1.4%
 India	6,865	3.8%	-8.3%
 Uzbekistan	5,565	3.1%	-1.0%
 Nepal	5,050	2.8%	90.9%
 Vietnam	2,830	1.6%	24.6%
 Myanmar	2,595	1.4%	29.3%

Figure 12 shows the different progression of student numbers in the top five host countries, which together accounted for over 83% of all TNE students in Asia in 2018–19. Between 2014–15 and 2018–19 student numbers increased by 18,070 (77.5%) in China and 11,750 (99.4%) in Sri Lanka, and decreased by 10,245 (-18.6%) in Malaysia and 3,315 in Hong Kong (-15.2%). In Singapore, numbers increased up to 2016–17 but decreased by 1,425 (-7.3%) in the last two years.

FIGURE 12: TOP 5 COUNTRIES FOR UK HE TNE STUDENTS IN ASIA, 2018–19 AND CHANGES SINCE 2014–15



TYPE OF PROVISION

Table 18 shows how many students were studying through each type of TNE provision, how many countries in Asia hosted each type of provision, and what the top countries were for each type of provision. Collaborative provision is delivered in 24 of 32 countries where students are reported, with 23.2% of them located in Malaysia. Distance, flexible and distributed learning is delivered in all 32 countries where TNE students are reported in Asia, with 17.3% studying in China. Students registered at overseas partner organisations are reported in 16 countries, with 37.4% located in China. Students studying at an overseas campus are reported in six countries, with 47.7% of them studying in Malaysia. Other arrangements are reported in 13 countries, with 47.3% studying in India.

TYPE OF PROVISION	NUMBER OF STUDENTS	NUMBER OF COUNTRIES REPRESENTED OUT OF 32 (%)	TOP COUNTRIES
Collaborative provision	106,605	24 (75.0%)	 Malaysia (23.2%)  Sri Lanka (16.7%)  China (16.1%)
Distance, flexible and distributed learning	14,885	32 (100.0%)	 China (17.3%)  Sri Lanka (15.2%)  Hong Kong (14.2%)
Registered at overseas partner organisation	34,805	16 (50.0%)	 China (37.4%)  Malaysia (28.3%)  Sri Lanka (10.1%)
Overseas campus	19,095	6 (18.8%)	 Malaysia (47.7%)  China (45.3%)  Hong Kong (5.9%)
Other arrangement	3,510	13 (40.6%)	 India (47.3%)  Uzbekistan (34.6%)  Singapore (8.7%)

Students registered at overseas partner organisations are reported in 16 countries, with

37.4%

located in China in 2018–19.

Students studying at an overseas campus are reported in six countries, with

47.7%

of them studying in Malaysia in 2018–19.

LEVEL OF STUDY

Table 19 shows the distribution between undergraduate and postgraduate TNE study across Asian countries:

- Malaysia and China accounted for 52.6% of undergraduate students in Asia, although student numbers decreased in Malaysia (-515) and increased in China (+3,920).
- Undergraduate student numbers increased in Nepal (+2,320), Sri Lanka (+1,315), Vietnam (+455) and Myanmar (+370), and fell in India (-1,090), Singapore (-180), Hong Kong (-435) and Uzbekistan (-30).
- At postgraduate level, Sri Lanka accounted for 25.6% of all students although numbers had decreased since 2017–18 (-100).
- Postgraduate student numbers increased in China (+510), India (+465), Myanmar (+220), Japan (+110), Vietnam (+100) and Thailand (+100), and fell in Malaysia (-1,175) and Singapore (-5).

TABLE 19: TOP 10 HOST COUNTRIES IN ASIA FOR UK HE TNE STUDENTS BY LEVEL OF STUDY, 2018–19

RANK	UNDERGRADUATES			POSTGRADUATE		
	COUNTRY	NUMBER OF STUDENTS	PERCENTAGE OF UG IN ASIA	COUNTRY	NUMBER OF STUDENTS	PERCENTAGE OF PG IN ASIA
1	 Malaysia	39,000	27.3%	 Sri Lanka	9,280	25.6%
2	 China	36,100	25.3%	 Malaysia	5,805	16.0%
3	 Singapore	15,995	11.2%	 China	5,270	14.5%
4	 Hong Kong	14,520	10.2%	 Singapore	4,170	11.5%
5	 Sri Lanka	14,285	10.0%	 Hong Kong	3,955	10.9%
6	 Uzbekistan	5,350	3.8%	 India	2,360	6.5%
7	 Nepal	4,620	3.2%	 Myanmar	725	2.0%
8	 India	4,505	3.2%	 Japan	600	1.6%
9	 Vietnam	2,250	1.6%	 Thailand	585	1.6%
10	 Myanmar	1,870	1.3%	 Vietnam	580	1.6%

At postgraduate level,
Sri Lanka accounted for

25.6%

of all students in 2018–19.

Malaysia and China
accounted for

52.6%

of undergraduate students
in Asia in 2018–19.

Case study

LIVERPOOL JOHN MOORES UNIVERSITY – INDIA

Liverpool John Moores University entered a collaborative partnership with Indian online provider upGrad in early 2019. Initial discussions began in mid-2018, with the first postgraduate programmes (MSc Machine Learning and AI and MSc Data Science) starting in April 2019. To date, over 1,000 students have started on the programmes, and more than 200 have graduated, providing for a completion rate in excess of 95%. A further two programmes, MSc Computer Science and MSc Big Data, commenced in September 2020 and two management programmes are due to come on stream in early 2021.

upGrad was founded in 2015, with the primary goal of upskilling professionals by leveraging technology to transform how they are taught in the digital age. upGrad works with premier industry and HE partners and has quickly become India's largest online education provider. Key to the inception of the partnership was the alignment of both institutions' core principles of providing high quality, industry-focused programmes which address the needs of local, national, and international employers. upGrad also offers an impressive array of student support mechanisms; boot camps, careers fairs, hackathons, industry mentorship, and a dedicated job portal, accessed by recruiters from some of the largest, global, blue-chip companies. This defined upGrad as a solid, forward-thinking and student-centred organisation.

The initial programmes targeted the growing IT and Data Science Sector within India. The impact of the partnership speaks for itself, with recent graduates enjoying excellent academic success, significant career progression opportunities and an average 52% salary increase.

Case study

LONDON METROPOLITAN UNIVERSITY – NEPAL

In 2021 London Metropolitan University will be celebrating 10 years of their educational partnership with Nepal. The partnership with Islington College Kathmandu (ICK) started with a range of undergraduate Computing and Technology degrees, and in 2014 was expanded with the addition of an MSc in Information Technology, and undergraduate and MBA Business programmes.

In 2015 Nepal was hit by a devastating earthquake and many international universities ceased operating. ICK were fortunate to survive the earthquake with little damage and few injuries among staff and students, and became a centre for relief efforts taking much needed medical supplies, food and water to those in and around Kathmandu. Through the existing links of the partnership, London Metropolitan University was able to offer support and raise funds for earthquake victims.

Today the partnership has nearly 5000 students and is made up of three separate colleges across Nepal which form part of the ING Group. The university now also offer a full scholarship awarded each year to study a Master's at London Met to the top student at one of the ING colleges. The partnership has created a pipeline of skilled professionals for Nepal's economy, evidenced by ING's recently launched commercial venture in Kathmandu staffed by graduates of ICK specialising in: Animation; Video Production; Computer Games; Cybersecurity; and programming interactive monitoring and support for online learning.

What started as a conversation about how to offer UK education to Nepalese students has now developed into a valuable and transformative partnership for both the UK and Nepal and has had a significant economic impact within the local communities in which it is based.

Case study

UNIVERSITY OF BEDFORDSHIRE – SRI LANKA

The British School of Commerce, Colombo, Oxford College of Business and SLIIT Academy, are leading private education institutions based in Sri Lanka, and are three of the longstanding collaborative academic partners of the University of Bedfordshire. Partnerships in Sri Lanka were first established in 2014 and have been operating for six years, supporting the development of the education sector. They provide students with a range of well recognised undergraduate top-up degree programmes in Sri Lanka which have produced more than 277 graduates to date, with a current total TNE student population of over 2,000 across the country.

All the collaborative academic partners' programmes comply with UK academic quality standards. University of Bedfordshire staff regularly visit to monitor the work, and to enhance and support the staff and students. The university's decision to establish these three partnerships was based on common values and the commitment towards providing the best possible approach to professional higher education in, and for, the local context. All institutions have engaged proactively to secure the ongoing development and success of the partnerships and the programmes now attract over 1,300 enrolments per year with above average achievement and success figures.

The University of Bedfordshire currently offers BSc (Hons) Computer Science & Software Engineering, BSc (Hons) Computer Networking, BA (Hons) Business Administration & BSc (Hons) Human Resources Management top-up degree programmes as well as MBAs and MScs in Project Management and Sustainable Management, enabling more students to access a high-quality, recognised degree, fulfilling the ultimate desire to meet the needs of the next younger generation of graduates of Sri Lanka.

AUSTRALASIA

Unless specified otherwise, this section excludes the three main programme providers of distance, flexible and blended TNE.

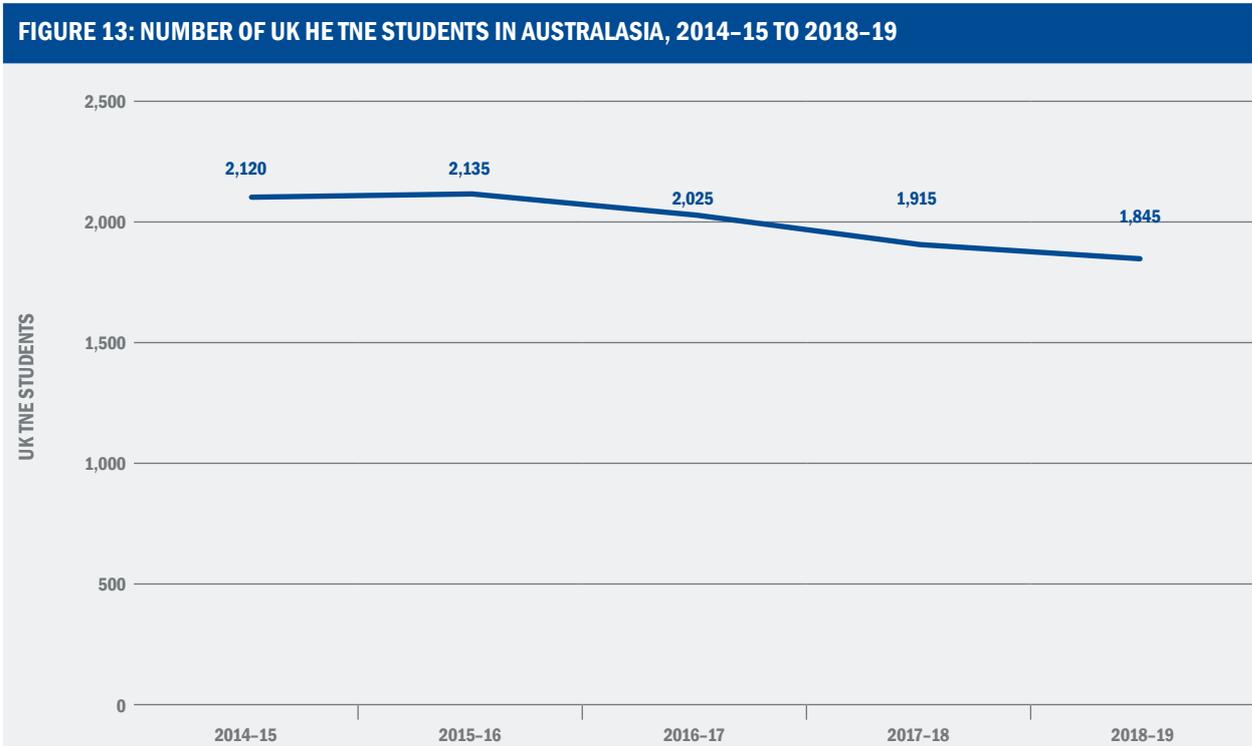


AT A GLANCE: UK HE TNE IN AUSTRALASIA IN 2018–19

- Australasia hosted the second lowest number of students by region (**1,845**), **0.6%** of the world's total.
- The number of students decreased by **-3.7%** between 2017–18 and 2018–19.
- TNE was delivered in **16** Australasian countries and territories.
- The countries with the most students were Australia (**1,465**), New Zealand (**300**) and Fiji (**25**).
- The most common forms of provision were distance, flexible and distributed learning (**97.0%**) and registration at an overseas partner organisation (**2.3%**).
- The majority of students were studying at postgraduate level (**81.4%**).
- Australia was the country with the largest provision at both undergraduate (**255**) and postgraduate level (**1,215**).

TREND ANALYSIS

As shown in **Figure 13**, student numbers in Australasia decreased by 290 (-13.5%) between 2015-16 and 2018-19.



UK TNE was delivered in

16

Australasian countries and territories in 2018-19.

Australasia hosted

0.6%

of UK TNE students in 2018-19.

HOST COUNTRIES

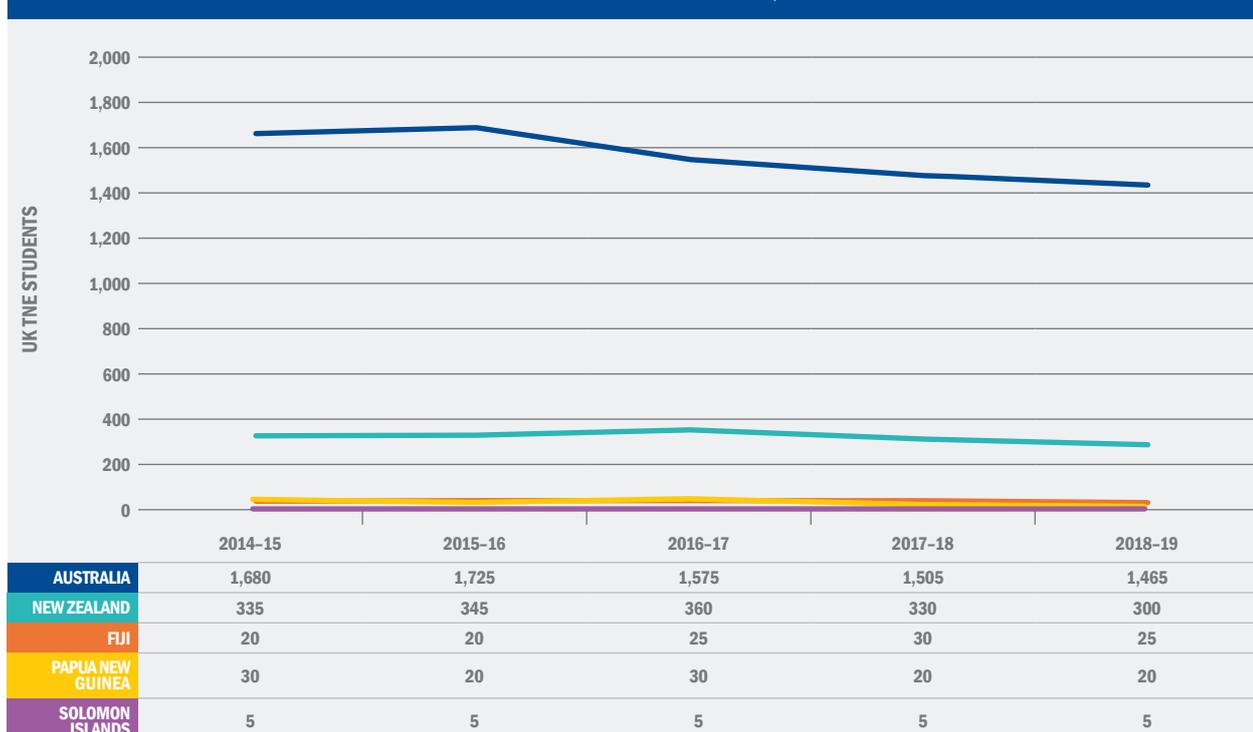
Table 20 shows the 10 Australasian countries hosting the most students in 2018–19. Australia was the country hosting the most students with 1,465 (79.4% of the total). The greatest proportional decrease took place in New Zealand (-9.6%).

TABLE 20: TOP 10 HOST COUNTRIES IN AUSTRALASIA FOR UK HE TNE STUDENTS, 2018–19 AND PERCENTAGE CHANGE FROM 2017–18

HOST COUNTRIES	NUMBER OF STUDENTS IN 2018–19	PERCENTAGE OF STUDENTS IN 2018–19	PERCENTAGE CHANGE FROM 2017–18
 Australia	1,465	79.4%	-2.6%
 New Zealand	300	16.2%	-9.6%
 Fiji	25	1.5%	-3.6%
 Papua New Guinea	20	..%	..%
 Samoa	5	..%	..%
 Solomon Islands	5	..%	..%
 Tonga	5	..%	..%
 Vanuatu	5	..%	..%
 New Caledonia	5	..%	..%
 Guam	5	..%	..%

Figure 14 shows the different progression of student numbers in the top five host countries, which together accounted for 98.4% of all TNE students in Australasia in 2018–19. Between 2014–15 and 2018–19 student numbers increased by five in Fiji and decreased by 215 (-12.8%) in Australia, and 35 (-10.4%) in New Zealand.

FIGURE 14: TOP 5 COUNTRIES FOR UK HE TNE STUDENTS IN AUSTRALASIA, 2018–19 AND CHANGES SINCE 2014–15



TYPE OF PROVISION

Table 21 shows how many students were studying through each type of TNE provision, how many countries in Australasia hosted each type of provision, and what the top countries were for each type of provision. Collaborative provision is reported in two of 16 countries, with students mainly located in Australia. Distance, flexible and distributed learning is delivered in all 16 countries where TNE students are reported in Australasia, with 81.2% studying in Australia. Students registered at overseas partner organisations are reported only in New Zealand.

TABLE 21: UK HE TNE STUDENTS IN AUSTRALASIA BY TYPE OF PROVISION, 2018–19

TYPE OF PROVISION	NUMBER OF STUDENTS	NUMBER OF COUNTRIES REPRESENTED OUT OF 16 (%)	TOP COUNTRIES
Collaborative provision	10	2 (12.5%)	 Australia (..) %  New Zealand (..) %
Distance, flexible and distributed learning	1,790	16 (100.0%)	 Australia (81.2%)  New Zealand (14.3%)  Fiji (1.5%)
Registered at overseas partner organisation	40	1 (6.3%)	 New Zealand (100.0%)
Other arrangement	5	1 (6.3%)	 Australia (100.0%)

Distance, flexible and distributed learning is delivered in all 16 countries where TNE students are reported in Australasia, with

81.2%

studying in Australia in 2018–19.

LEVEL OF STUDY

Table 22 shows the distribution between undergraduate and postgraduate TNE study across Australasian countries:

- Australia and New Zealand accounted for 97.0% of undergraduate students and 95.4% of postgraduate students in Australasia.
- Undergraduate student numbers increased in Australia (+45) and New Caledonia (+5) and decreased in New Zealand (-35).
- Postgraduate student numbers increased in New Zealand (+5) and decreased in Australia (-80) and Fiji (-5).
- Papua New Guinea, Samoa, Solomon Islands and Vanuatu reported students at postgraduate level.

TABLE 22: TOP 10 HOST COUNTRIES IN AUSTRALASIA FOR UK HE TNE STUDENTS BY LEVEL OF STUDY, 2018–19

RANK	UNDERGRADUATES			POSTGRADUATE		
	COUNTRY	NUMBER OF STUDENTS	PERCENTAGE OF UG IN AUSTRALASIA	COUNTRY	NUMBER OF STUDENTS	PERCENTAGE OF PG IN AUSTRALASIA
1	 Australia	255	73.5%	 Australia	1,215	80.8%
2	 New Zealand	80	23.5%	 New Zealand	220	14.6%
3	 New Caledonia	5	..%	 Fiji	25	1.7%
4	 Tonga	5	..%	 Papua New Guinea	20	..%
5				 Samoa	5	..%
6				 Solomon Islands	5	..%
7				 Vanuatu	5	..%

Australia and New Zealand accounted for

97.0%

of undergraduate students in Australasia in 2018–19.

Australia and New Zealand accounted for

95.4%

of postgraduate students in Australasia in 2018–19.

EUROPEAN UNION

Unless specified otherwise, this section excludes the three main programme providers of distance, flexible and blended TNE.

AT A GLANCE: UK HE TNE IN THE EUROPEAN UNION IN 2018–19

- The EU hosted the second largest number of students by region (**54,585**), **16.3%** of the world's total.
- The number of students increased by **11.4%** between 2017–18 and 2018–19.
- TNE was delivered in **33** EU countries and territories.
- The countries with the most students were Greece (**13,990**), Cyprus (EU) (**11,280**) and Germany (**5,280**).
- The most common forms of provision were distance, flexible and distributed learning (**37.2%**) and registered at an overseas partner organisation (**34.9%**).
- The majority of students were studying at postgraduate level (**52.9%**).
- Greece was the country with the largest provision at undergraduate level (**10,080**) and Cyprus (EU) at postgraduate level (**9,585**).

TREND ANALYSIS

As shown in **Figure 15**, student numbers in the EU increased by 16,140 (42.0%) between 2014-15 and 2018-19. The average annual increase between 2015-16 and 2018-19 was 12.1%.

FIGURE 15: NUMBER OF UK HE TNE STUDENTS IN EUROPEAN UNION, 2014-15 TO 2018-19



UK TNE was delivered in

33

EU countries and territories in 2018-19.

The EU hosted

16.3%

of UK TNE students in 2018-19.

HOST COUNTRIES

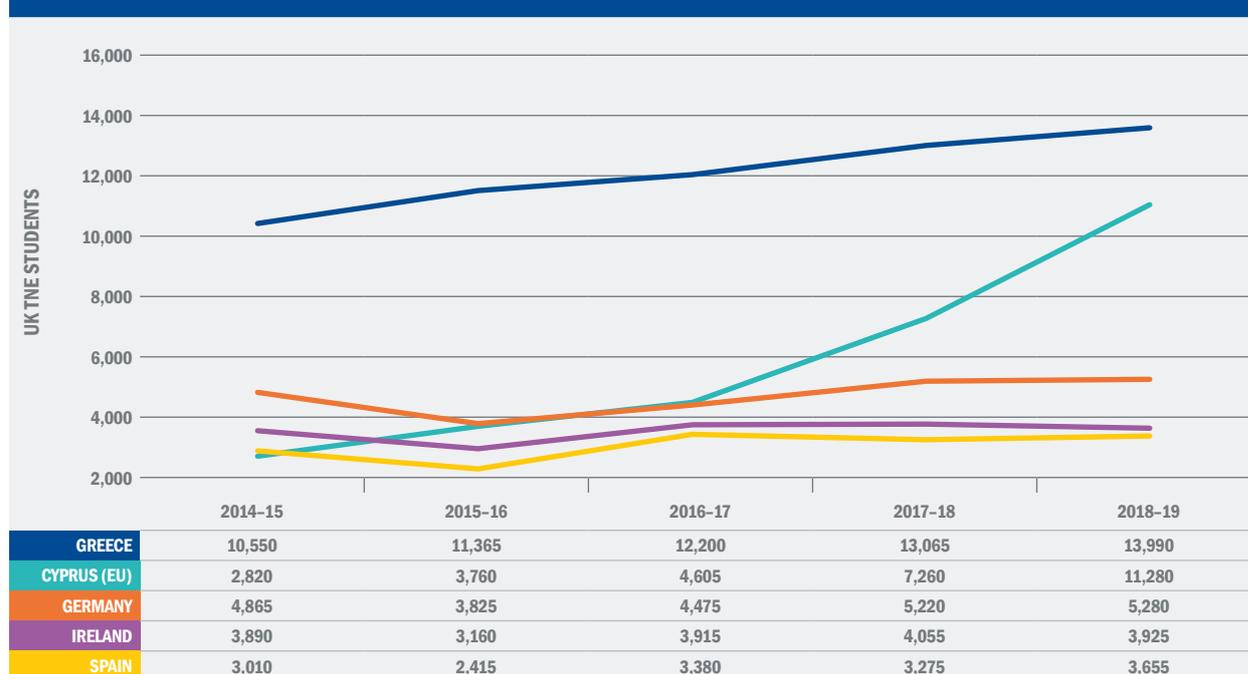
Table 23 shows the 10 EU countries hosting the most students in 2018–19. Greece was the country hosting the most students with 13,990 (25.6% of the total) followed by Cyprus (EU) with 11,280 (20.7% of the total). The greatest proportional increase took place in Cyprus (EU) (55.4%) while the greatest proportional decrease took place in Ireland (-3.2%).

TABLE 23: TOP 10 HOST COUNTRIES IN THE EU FOR UK HE TNE STUDENTS, 2018–19 AND PERCENTAGE CHANGE FROM 2017–18

HOST COUNTRIES	NUMBER OF STUDENTS IN 2018–19	PERCENTAGE OF STUDENTS IN 2018–19	PERCENTAGE CHANGE FROM 2017–18
 Greece	13,990	25.6%	7.1%
 Cyprus (EU)	11,280	20.7%	55.4%
 Germany	5,280	9.7%	1.1%
 Ireland	3,925	7.2%	-3.2%
 Spain	3,655	6.7%	11.6%
 Austria	2,610	4.8%	11.1%
 France	2,070	3.8%	7.8%
 Italy	1,770	3.2%	0.1%
 Malta	1,545	2.8%	8.1%
 Netherlands	1,435	2.6%	3.3%

Figure 16 shows the different progression of student numbers in the top five host countries, which together accounted for 69.9% of all TNE students in the EU in 2018–19. Between 2014–15 and 2018–19 student numbers increased by 8,460 (300.3%) in Cyprus (EU), by 3,440 (32.6%) in Greece and by 415 (8.5%) in Germany. In Ireland and Spain student numbers increased or decreased in alternate years, with an increase of 380 (11.6%) in Spain and a decrease of 130 (-3.2%) in Ireland between 2017–18 and 2018–19.

FIGURE 16: TOP FIVE COUNTRIES FOR TNE STUDENTS IN THE EU, 2018–19 AND CHANGES SINCE 2014–15



TYPE OF PROVISION

Table 24 shows how many students were studying through each type of TNE provision, how many countries in the EU hosted each type of provision, and what the top countries were for each type of provision. Collaborative provision is delivered in 27 of 33 countries where students are reported, with 52.7% located in Greece. Distance, flexible and distributed learning is delivered in all 33 countries where TNE students are reported in the EU, with 45.4% studying in Cyprus (EU). Students registered at overseas partner organisations are reported in 25 countries, with 30.4% located in Greece. Students studying at an overseas campus are reported in 12 of the 33 countries, with 29.8% studying in Belgium. Other arrangements are reported in 12 countries, with 69.7% reported in Ireland.

TABLE 24: UK HE TNE STUDENTS IN THE EUROPEAN UNION BY TYPE OF PROVISION, 2018–19

TYPE OF PROVISION	NUMBER OF STUDENTS	NUMBER OF COUNTRIES REPRESENTED OUT OF 33 (%)	TOP COUNTRIES
Collaborative provision	14,200	27 (81.8%)	 Greece (52.7%)  Germany (9.6%)  Spain (8.8%)
Distance, flexible and distributed learning	20,285	33 (100.0%)	 Cyprus (EU) (45.4%)  Ireland (10.5%)  Germany (8.9%)
Registered at overseas partner organisation	19,070	25 (75.8%)	 Greece (30.4%)  Austria (11.8%)  Germany (11.0%)
Overseas campus	935	6 (18.2%)	 Belgium (29.8%)  Malta (28.3%)  Greece (19.4%)
Other arrangement	90	12 (36.4%)	 Ireland (69.7%)  France (..) (%)  Spain (..) (%)

Collaborative provision is delivered in 27 of 33 countries where students are reported, with

52.7%

located in Greece in 2018–19.

Students studying at an overseas campus are reported in 12 of the 33 countries, with

29.8%

studying in Belgium in 2018–19.

LEVEL OF STUDY

Table 25 shows the distribution between undergraduate and postgraduate TNE study across EU countries:

- Greece accounted for 39.2% of undergraduate students in the EU, with an increase of 905 students.
- Undergraduate student numbers increased in Hungary (+205), France (+165), Spain (+140), Germany (+135), Ireland (+115), Bulgaria (+50), Belgium (+40), and Cyprus (EU) (+35), and fell in Denmark (-150), and Italy (-25).
- At postgraduate level, Cyprus (EU) accounted for 33.2% of all students, with an increase of 3,980 students.
- Postgraduate student numbers increased in Spain (+240), Austria (+240), Malta (+95), the Netherlands (+45), Greece (+20) and Italy (+30), and fell in Ireland (-245), Hungary (-75), Germany (-75) and France (-15).

TABLE 25: TOP 10 HOST COUNTRIES IN EUROPEAN UNION FOR UK HE TNE STUDENTS BY LEVEL OF STUDY, 2018–19

RANK	UNDERGRADUATES			POSTGRADUATE		
	COUNTRY	NUMBER OF STUDENTS	PERCENTAGE OF UG IN THE EU	COUNTRY	NUMBER OF STUDENTS	PERCENTAGE OF PG IN THE EU
1	 Greece	10,080	39.2%	 Cyprus (EU)	9,585	33.2%
2	 Germany	3,055	11.9%	 Greece	3,915	13.5%
3	 Spain	2,920	11.4%	 Austria	2,280	7.9%
4	 Ireland	1,765	6.9%	 Germany	2,225	7.7%
5	 Cyprus (EU)	1,695	6.6%	 Ireland	2,160	7.5%
6	 France	1,145	4.5%	 Malta	1,065	3.7%
7	 Italy	1,040	4.0%	 Netherlands	955	3.3%
8	 Hungary	975	3.8%	 France	925	3.2%
9	 Netherlands	485	1.9%	 Denmark	885	3.1%
10	 Malta	475	1.9%	 Belgium	790	2.7%

Undergraduate student numbers increased by

205

in Hungary in 2018–19.

At postgraduate level, Cyprus (EU) accounted for

33.2%

of all students in 2018–19.

Case study

UNIVERSITY COLLEGE LONDON – FRANCE

As it approaches its tenth year, the BA (Hons) European Social and Political Studies dual degree, run in conjunction with Sciences Po (Paris), has become an integral part of UCL's European engagement. It is a flagship example of UCL's mission to prepare their students for global lives and global careers.

The programme consists of a two-year period at one of Sciences Po's five campuses (Poitiers, Menton, Nancy, Dijon, and Paris) before students come to London for the final two years of study. Throughout the programme, students gain fluency in one of four European languages and, upon arrival at UCL, choose a disciplinary specialism in either Economics, History, International Relations, Law, Philosophy, or Politics.

A defining feature of the partnership is the interdisciplinarity fostered by study at two very different types of institutions: the specialised social sciences focus of Sciences Po allied to the more comprehensive nature of UCL. Students graduate with a truly international outlook, informed by two contrasting academic traditions at two world leading institutions.

UCL is 'London's Global University' working with partners to achieve fair solutions to global challenges. The university's long and fruitful collaboration with Sciences Po owes to the recognition that no one institution, no matter how prestigious, can solve these problems alone.

EUROPE (NON-EU)

Unless specified otherwise, this section excludes the three main programme providers of distance, flexible and blended TNE.



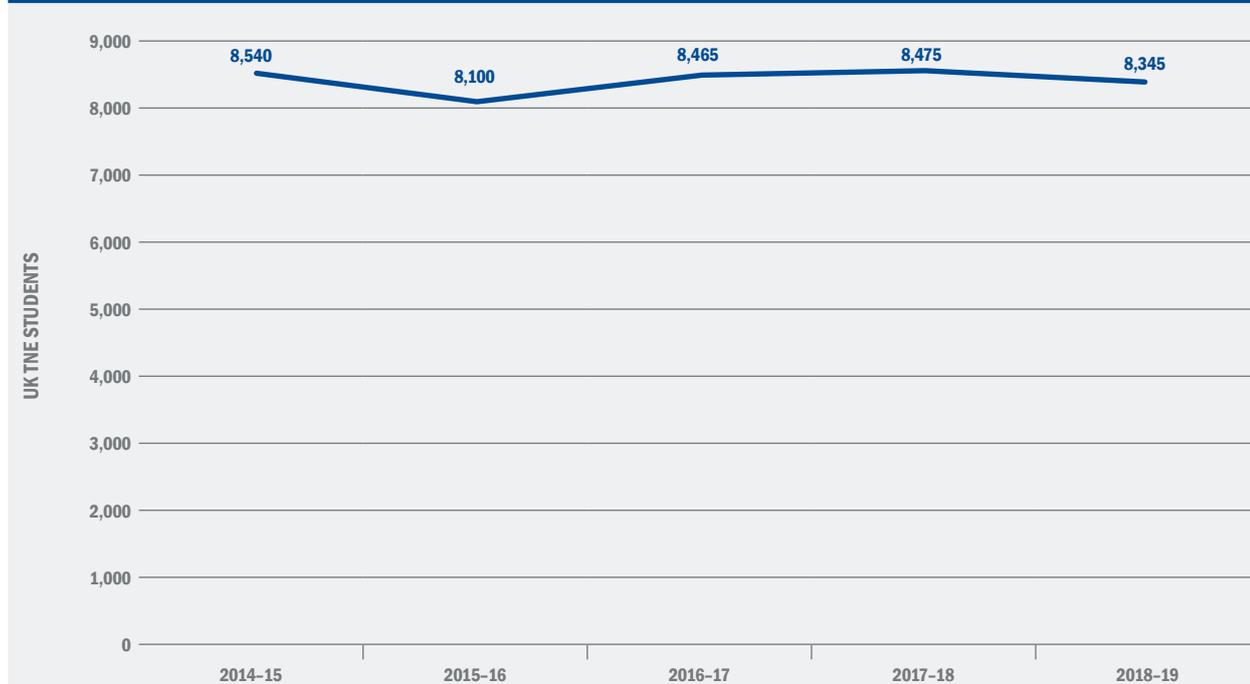
AT A GLANCE: UK HE TNE IN EUROPE (NON-EU) IN 2018–19

- Non-EU Europe hosted the third lowest number of students by region (**8,345**), **2.5%** of the world's total.
- The number of students decreased by **-1.5%** between 2017–18 and 2018–19.
- TNE was delivered in **22** non-EU European countries and territories.
- The countries with the most students were Switzerland (**5,255**), Russia (**1,090**) and Norway (**500**).
- The most common forms of provision were distance, flexible and distributed learning (**32.5%**) and collaborative provision (**33.3%**).
- The majority of students were studying at postgraduate level (**65.1%**).

TREND ANALYSIS

As shown in **Figure 17**, student numbers in non-EU Europe increased by 375 (4.6%) between 2015-16 and 2017-18 but decreased by 130 (-1.5%) in 2018-19.

FIGURE 17: NUMBER OF UK HE TNE STUDENTS IN EUROPE (NON-EU), 2014-15 TO 2018-19



UK TNE was delivered in

22

Non-EU European countries and territories in 2018-19.

Non-EU European countries hosted

2.5%

of UK TNE students in 2018-19.

HOST COUNTRIES

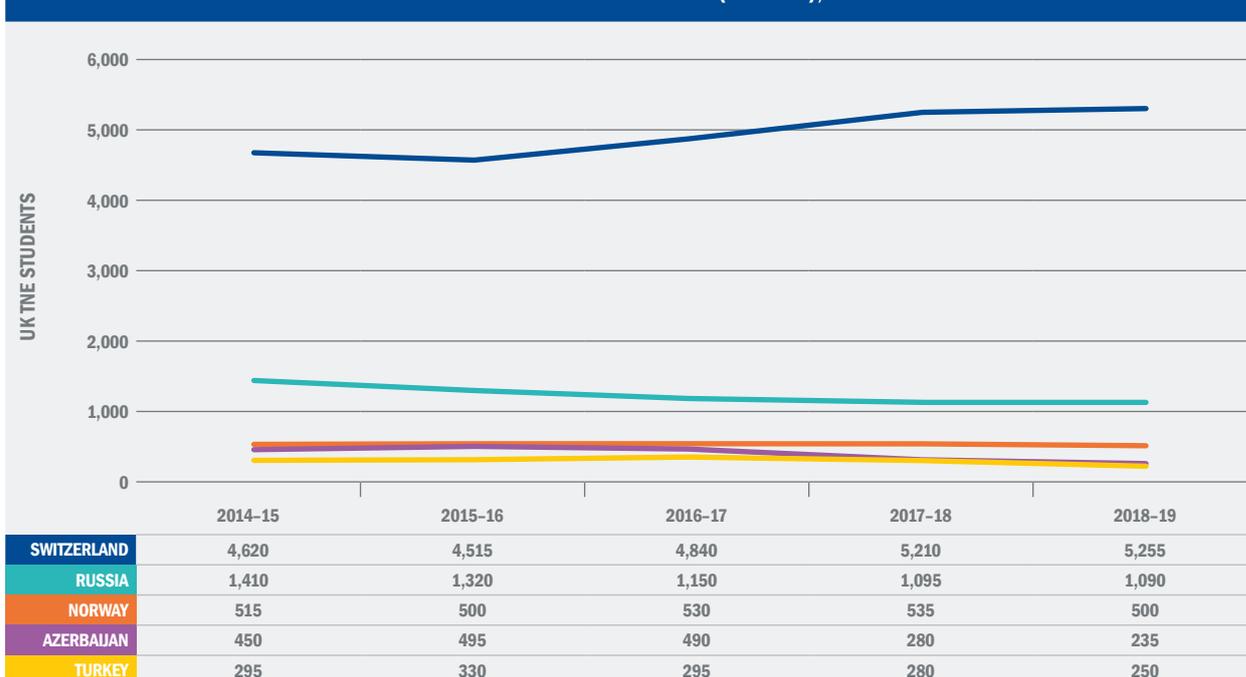
Table 26 shows the 10 non-EU European countries hosting the most students in 2018–19. Switzerland was the country hosting the most students with 5,255 (63.0% of the total), followed by Russia with 1,090 (13.1% of the total). The greatest proportional increase took place in Serbia (88.9%) while the greatest proportional decrease took place in Kosovo (-32.3%).

TABLE 26: TOP 10 HOST COUNTRIES IN EUROPE (NON-EU) FOR UK HE TNE STUDENTS, 2018–19 AND PERCENTAGE CHANGE FROM 2017–18

HOST COUNTRIES	NUMBER OF STUDENTS IN 2018–19	PERCENTAGE OF STUDENTS IN 2018–19	PERCENTAGE CHANGE FROM 2017–18
 Switzerland	5,255	63.0%	0.9%
 Russia	1,090	13.1%	-0.5%
 Norway	500	6.0%	-6.4%
 Turkey	250	3.0%	-10.7%
 Azerbaijan	235	2.8%	-16.7%
 Bosnia and Herzegovina	220	2.6%	-20.7%
 Ukraine	215	2.6%	-4.1%
 Serbia	170	2.0%	88.9%
 Kosovo	105	1.2%	-32.5%
 Cyprus (non-EU)	60	0.7%	-13.2%

Figure 18 shows the different progression of student numbers in the top five host countries, which together accounted for 87.9% of all TNE students in non-EU Europe in 2018–19. Between 2014–15 and 2018–19 student numbers increased by 635 (13.7%) in Switzerland, and decreased by 320 (-22.7%) in Russia, 215 (-47.7%) in Azerbaijan, 45 (-15.2%) in Turkey and 15 (-2.9%) in Norway.

FIGURE 18: TOP 5 COUNTRIES FOR UK HE TNE STUDENTS IN EUROPE (NON-EU), 2018–19 AND CHANGES SINCE 2014–15



TYPE OF PROVISION

Table 27 shows how many students were studying through each type of TNE provision, how many countries in non-EU Europe hosted each type of provision, and what the top countries were for each type of provision. Collaborative provision is delivered in 15 of 22 countries where students are reported, with 63.4% located in Switzerland. Distance, flexible and distributed learning is delivered in all 22 countries where TNE students are reported in non-EU Europe, with 53.2% studying in Switzerland. Students registered at overseas partner organisations are reported in nine countries, with 36.9% located in Switzerland. Students studying at an overseas campus are reported only in Switzerland. Other arrangements are reported in two countries, Switzerland and Russia.

TABLE 27: UK HE TNE STUDENTS IN EUROPE (NON-EU) BY TYPE OF PROVISION, 2018–19

TYPE OF PROVISION	NUMBER OF STUDENTS	NUMBER OF COUNTRIES REPRESENTED OUT OF 22 (%)	TOP COUNTRIES
Collaborative provision	2,780	15 (68.2%)	 Switzerland (63.4%)  Russia (26.0%)  Kosovo (2.6%)
Distance, flexible and distributed learning	2,715	22 (100.0%)	 Switzerland (53.2%)  Norway (12.8%)  Russia (9.5%)
Registered at overseas partner organisation	1,270	9 (40.9%)	 Switzerland (36.9%)  Norway (11.9%)  Bosnia and Herzegovina (11.8%)
Overseas campus	65	1 (4.5%)	 Switzerland (100.0%)
Other arrangement	1,520	2 (9.1%)	 Switzerland (99.9%)  Russia (..)

Collaborative provision is delivered in 15 of 22 countries where students are reported, with

63.4%

located in Switzerland in 2018–19.

LEVEL OF STUDY

Table 28 shows the distribution between undergraduate and postgraduate TNE study across non-EU European countries:

- Switzerland accounted for 64.7% of undergraduate students in non-EU Europe, although student numbers decreased by 60.
- Undergraduate student numbers increased in Serbia (+50), Ukraine (+10) and Norway (+5), and fell in Azerbaijan (-85), Kosovo (-25), Bosnia and Herzegovina (-20), Russia (-5) and Turkey (-5). Numbers remained the same in Iceland.
- At postgraduate level, Switzerland accounted for 62.1% of all students, with an increase of 100 students.
- Postgraduate student numbers increased in Azerbaijan (+35) and Serbia (+30) and fell in Norway (-40), Bosnia and Herzegovina (-40), Turkey (-25), Kosovo (-25), Ukraine (-15) and Russia (-5). Numbers remained the same in Iceland.

TABLE 28: TOP 10 HOST COUNTRIES IN EUROPE (NON-EU) FOR UK HE TNE STUDENTS BY LEVEL OF STUDY, 2018–19

RANK	UNDERGRADUATES			POSTGRADUATE		
	COUNTRY	NUMBER OF STUDENTS	PERCENTAGE OF UG IN NON EU EUROPE	COUNTRY	NUMBER OF STUDENTS	PERCENTAGE OF PG IN NON EU EUROPE
1	 Switzerland	1,885	64.7%	 Switzerland	3,370	62.1%
2	 Russia	575	19.8%	 Russia	515	9.5%
3	 Bosnia and Herzegovina	145	4.9%	 Norway	425	7.8%
4	 Norway	75	2.6%	 Turkey	220	4.0%
5	 Azerbaijan	55	2.0%	 Azerbaijan	175	3.3%
6	 Serbia	55	2.0%	 Ukraine	175	3.3%
7	 Turkey	35	1.2%	 Serbia	115	2.1%
8	 Ukraine	35	1.2%	 Kosovo	85	1.5%
9	 Kosovo	20	..%	 Bosnia and Herzegovina	75	1.4%
10	 Iceland	15	..%	 Cyprus (non-EU)	55	1.1%

Undergraduate student numbers in 2018–19 increased by:

50

in Serbia

10

in Ukraine

5

in Norway

Postgraduate student numbers in 2018–19 increased by:

35

in Azerbaijan

30

in Serbia

Case study

ROBERT GORDON UNIVERSITY – SWITZERLAND

The School of Creative and Cultural Business at the Robert Gordon University (RGU) in Scotland and Benedict Education Group in Switzerland commenced discussions on a validated partnership in 2007, launching their first provision, Bachelor of Arts in Hotel and Hospitality Management in 2008. The relationship has blossomed into a major TNE partnership with two sites in Lucerne and Zurich, catering for 500 students per academic year with a variety of both undergraduate and postgraduate programmes developed with a focus on the business of hospitality in Lucerne and business disciplines in Zurich.

Key to the success of the relationship has been the partners' commitment to quality assurance and open communication. A unique feature is the development of a mix of programmes taught in both English and the local language, thus capitalising on RGU German-speaking faculty and the appointment of German speaking external examiners. Students are integrated into both institutions through the use of online learning platforms, support services, special events and RGU guest lectures.

The 12-year partnership has gone from strength to strength. With consistently strong demand for an RGU degree studied at a Benedict School, there may be some silver linings to the current challenging times with both institutions ready to further evolve the partnership programmes in response to changing industry and student needs.

THE MIDDLE EAST

Unless specified otherwise, this section excludes the three main programme providers of distance, flexible and blended TNE.

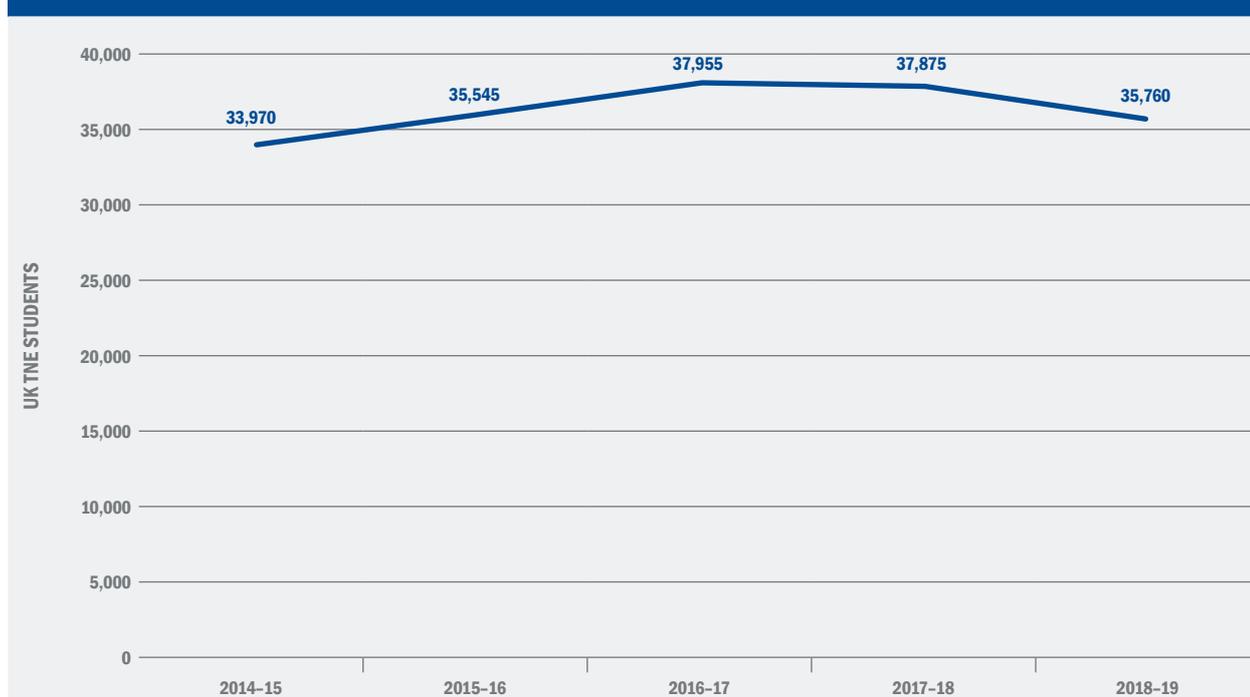
AT A GLANCE: UK HE TNE IN THE MIDDLE EAST IN 2018–19

- The Middle East hosted the fourth largest number of students by region (**35,760**), **10.7%** of the world's total.
- The number of students decreased by **-5.6%** between 2017–18 and 2018–19.
- TNE was delivered in **14** Middle Eastern countries and territories.
- The countries with the most students were Oman (**16,470**), the United Arab Emirates (**12,860**) and Qatar (**1,825**).
- The most common forms of provision were collaborative provision (**41.1%**), overseas campuses (**21.9%**) and distance, flexible and distributed learning (**21.2%**).
- The majority of students were studying at undergraduate level (**60.3%**).
- Oman was the country with the largest provision at undergraduate level (**13,855**) and the United Arab Emirates at postgraduate level (**6,895**).

TREND ANALYSIS

As shown in **Figure 19**, student numbers in the Middle East increased by 3,985 (11.7%) between 2014-15 and 2016-17, and decreased by 2,195 (-5.8%) between 2016-17 and 2018-19.

FIGURE 19: NUMBER OF UK HE TNE STUDENTS IN THE MIDDLE EAST, 2014-15 TO 2018-19



UK TNE was delivered in

14

Middle Eastern countries and territories in 2018-19.

The Middle East hosted

10.7%

of UK TNE students in 2018-19.

HOST COUNTRIES

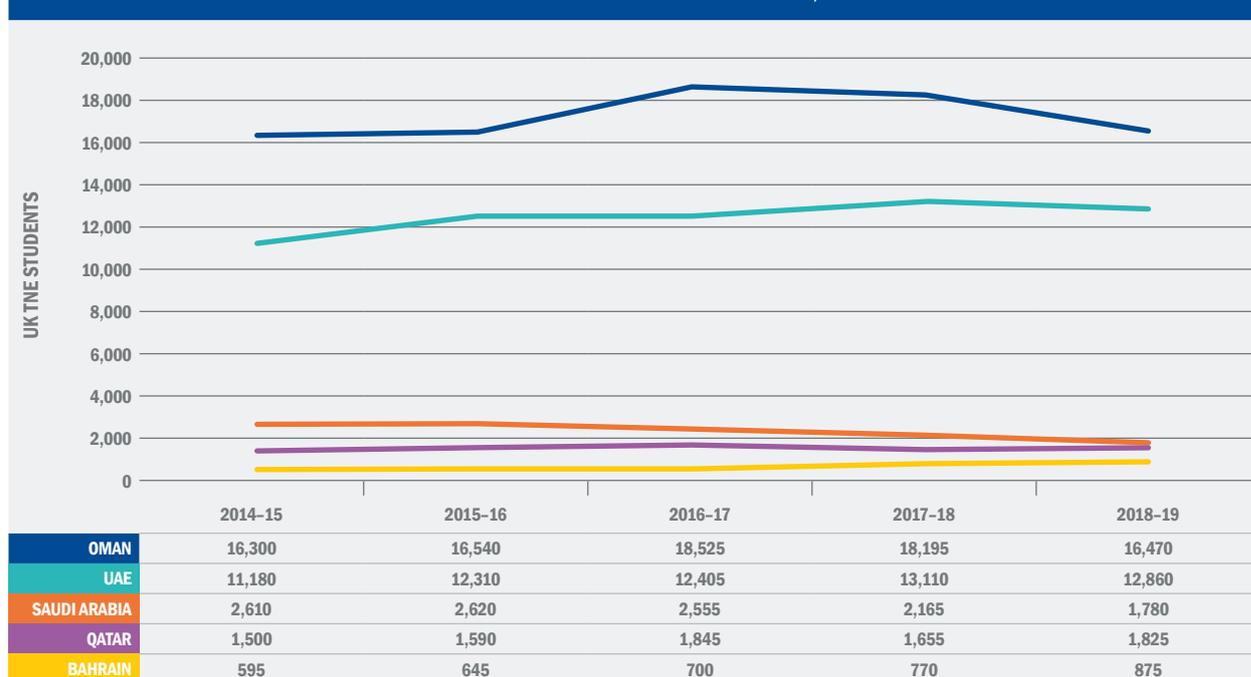
Table 29 shows the 10 Middle Eastern countries hosting the most students in 2018–19. Oman was the country hosting the most students with 16,470 (46.1% of the total) followed by the United Arab Emirates with 12,860 (36.0% of the total). The greatest proportional increase took place in Jordan (26.3%) while the greatest proportional decrease took place in Saudi Arabia (-18.0%).

TABLE 29: TOP 10 HOST COUNTRIES IN THE MIDDLE EAST FOR UK HE TNE STUDENTS, 2018–19 AND PERCENTAGE CHANGE FROM 2017–18

HOST COUNTRIES	NUMBER OF STUDENTS IN 2018–19	PERCENTAGE OF STUDENTS IN 2018–19	PERCENTAGE CHANGE FROM 2017–18
 Oman	16,470	46.1%	-9.5%
 United Arab Emirates	12,860	36.0%	-1.9%
 Qatar	1,825	5.1%	10.5%
 Saudi Arabia	1,780	5.0%	-18.0%
 Bahrain	875	2.4%	13.2%
 Jordan	705	2.0%	26.3%
 Kuwait	420	1.2%	-13.9%
 Lebanon	390	1.1%	-11.6%
 Iraq	130	0.4%	8.3%
 Israel	105	0.3%	-2.8%

Figure 20 shows the different progression of student numbers in the top five host countries, which together accounted for 94.6% of all TNE students in the Middle East in 2018–19. Between 2014–15 and 2016–17 student numbers increased by 2,225 (13.6%) in Oman, but they decreased by 2,055 (-11.1%) between 2016–17 and 2018–19. Between 2014–15 and 2018–19 student numbers increased by 1,680 (15.0%) in the United Arab Emirates, 325 (21.6%) in Qatar and 280 (47.1%) in Bahrain, and decreased by 830 (-31.8%) in Saudi Arabia.

FIGURE 20: TOP 5 COUNTRIES FOR UK HE TNE STUDENTS IN THE MIDDLE EAST, 2018–19 AND CHANGES SINCE 2014–15



TYPE OF PROVISION

Table 30 shows how many students were studying through each type of TNE provision, how many countries in the Middle East hosted each type of provision, and what the top countries were for each type of provision. Collaborative provision is delivered in 13 of 14 countries where students are reported, with 84.3% located in Oman. Distance, flexible and distributed learning is delivered in all 14 countries where TNE students are reported in the Middle East, with 40.8% studying in the United Arab Emirates. Students registered at overseas partner organisations are reported in six countries, with 65.4% located in Oman. Students studying at an overseas campus are reported in five countries, with 89.0% located in the United Arab Emirates. Other arrangements are reported in seven countries, with 86.2% located in Bahrain.

TYPE OF PROVISION	NUMBER OF STUDENTS	NUMBER OF COUNTRIES REPRESENTED OUT OF 14 (%)	TOP COUNTRIES
Collaborative provision	14,680	13 (92.9%)	 Oman (84.3%)  United Arab Emirates (9.1%)  Bahrain (2.1%)
Distance, flexible and distributed learning	7,575	14 (100.0%)	 United Arab Emirates (40.8%)  Saudi Arabia (20.2%)  Qatar (12.9%)
Registered at overseas partner organisation	5,445	6 (42.9%)	 Oman (65.4%)  United Arab Emirates (26.7%)  Saudi Arabia (3.6%)
Overseas campus	7,820	5 (35.7%)	 United Arab Emirates (89.0%)  Qatar (7.1%)  Bahrain (2.2%)
Other arrangement	240	7 (50.0%)	 Bahrain (86.2%)  United Arab Emirates (10.5%)  Lebanon (..)

Students studying at an overseas campus are reported in five countries, with

89.0%

located in the United Arab Emirates in 2018–19.

LEVEL OF STUDY

Table 31 shows the distribution between undergraduate and postgraduate TNE study across Middle Eastern countries:

- Oman accounted for 64.3% of undergraduate students in the Middle East, although student numbers decreased by 1,740.
- Undergraduate student numbers increased in Qatar (+250), Bahrain (+110), Jordan (+15), Iraq (+5), Israel (+5) and Yemen (+5), and fell in Saudi Arabia (-60), Lebanon (-25), Iran (-10), United Arab Emirates (-10) and Kuwait (-5).
- At postgraduate level, the United Arab Emirates accounted for 48.5% of all students, although numbers decreased by 245.
- Postgraduate student numbers increased in Jordan (+130), Oman (+20) and Iraq (+5), and fell in Saudi Arabia (-325), the United Arab Emirates (-245), Qatar (-75), Kuwait (-60), Lebanon (-30), Iran (-15), the Occupied Palestinian Territories (-15), Syria (-15), Yemen (-10) and Bahrain (-5). Student numbers remained the same in Israel.

TABLE 31: TOP 10 HOST COUNTRIES IN THE MIDDLE EAST FOR UK HE TNE STUDENTS BY LEVEL OF STUDY, 2018–19

RANK	UNDERGRADUATES			POSTGRADUATE		
	COUNTRY	NUMBER OF STUDENTS	PERCENTAGE OF UG IN THE MIDDLE EAST	COUNTRY	NUMBER OF STUDENTS	PERCENTAGE OF PG IN THE MIDDLE EAST
1	 Oman	13,855	64.3%	 United Arab Emirates	6,895	48.5%
2	 United Arab Emirates	5,965	27.7%	 Oman	2,620	18.4%
3	 Qatar	705	3.3%	 Saudi Arabia	1,445	10.2%
4	 Bahrain	385	1.8%	 Qatar	1,120	7.9%
5	 Saudi Arabia	335	1.5%	 Jordan	515	3.6%
6	 Jordan	190	0.9%	 Bahrain	490	3.4%
7	 Lebanon	50	0.2%	 Kuwait	380	2.7%
8	 Kuwait	40	0.2%	 Lebanon	335	2.4%
9	 Israel	20	..%	 Iraq	125	0.9%
10	 Iraq	5	..%	 Israel	90	0.6%

Oman accounted for

64.3%

of undergraduate students in the Middle East in 2018–19.

Postgraduate student numbers increased in 2018–19 by:

130 in Jordan	20 in Oman	5 in Iraq
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Case study

HERIOT-WATT UNIVERSITY – UNITED ARAB EMIRATES

Established in 2005, Heriot-Watt University Dubai was the first campus of an overseas university to open in Dubai International Academic City. From an initial cohort of 120 students, provision has grown to over 3,400 students pursuing foundation through to doctoral degrees within a vibrant research community.

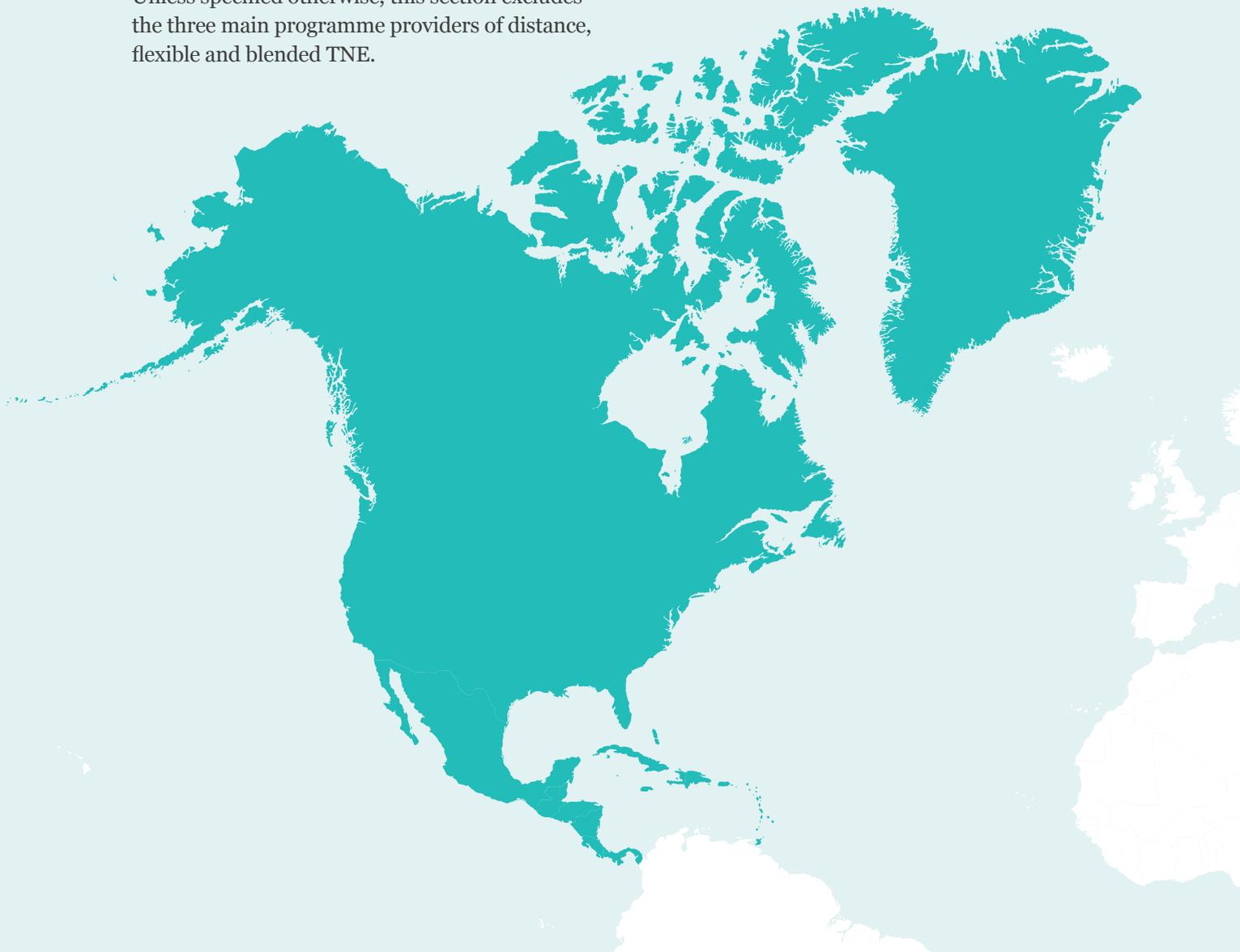
There is only one Heriot-Watt degree no matter where or how students study. Students on a specific programme all receive the same degree under the same unitary quality framework with the same graduate attributes and to the same learning outcomes. External and professional accreditation holds across campuses and this globally and professionally orientated approach is recognised by employers and regulators. This unique 'One Heriot-Watt' model allows for seamless intercampus transfer possibilities for students and is key to institutional success.

2019 saw the establishment of the University's Centre of Excellence in Smart Construction (CESC) in Dubai, the first such centre outside of Edinburgh. The Centre has key research areas in sustainability, robotics and construction management and is engaging with industrial partners to overcome some of the global challenges related to the construction sector. CESC will promote greater research engagement between multidisciplinary research teams across Heriot-Watt Global Research Institutes, and those in industry and the United Arab Emirates government.

Heriot-Watt Dubai delivers benefits worth £94 million a year to the local economy and this success is set to grow with the opening of the new state-of-the-art Heriot-Watt Dubai campus in Knowledge Park in January 2021 – the same year Heriot-Watt celebrates its founding bicentenary.

NORTH AMERICA

Unless specified otherwise, this section excludes the three main programme providers of distance, flexible and blended TNE.



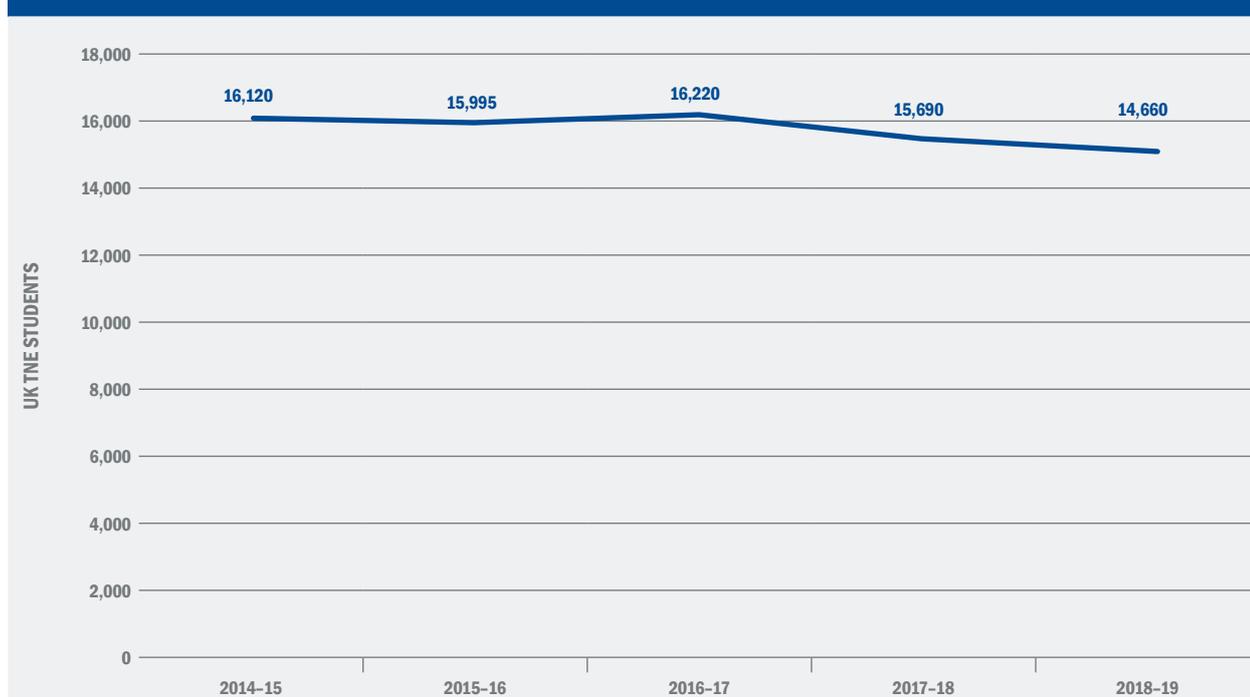
AT A GLANCE: UK HE TNE IN NORTH AMERICA IN 2018–19

- North America hosted the fourth largest number of students by region (**14,660**), **4.4%** of the world's total.
- The number of students decreased by **-6.6%** between 2017–18 and 2018–19.
- TNE was delivered in **37** North American countries and territories.
- The countries with the most students were United States (**4,675**), Trinidad and Tobago (**3,615**) and Canada (**2,970**).
- The most common forms of provision were distance, flexible and distributed learning (**71.1%**) and collaborative provision (**21.2%**).
- The majority of students were studying at postgraduate level (**78.2%**).
- Trinidad and Tobago had the largest provision at undergraduate level (**1,475**) and the United States at postgraduate level (**3,965**).

TREND ANALYSIS

As shown in **Figure 21**, student numbers in North America decreased by 1,460 (-9.1%) between 2014-15 and 2018-19.

FIGURE 21: NUMBER OF UK HE TNE STUDENTS IN NORTH AMERICA, 2014-15 TO 2018-19



UK TNE was delivered in

37

North American countries and territories in 2018-19.

North America hosted

4.4%

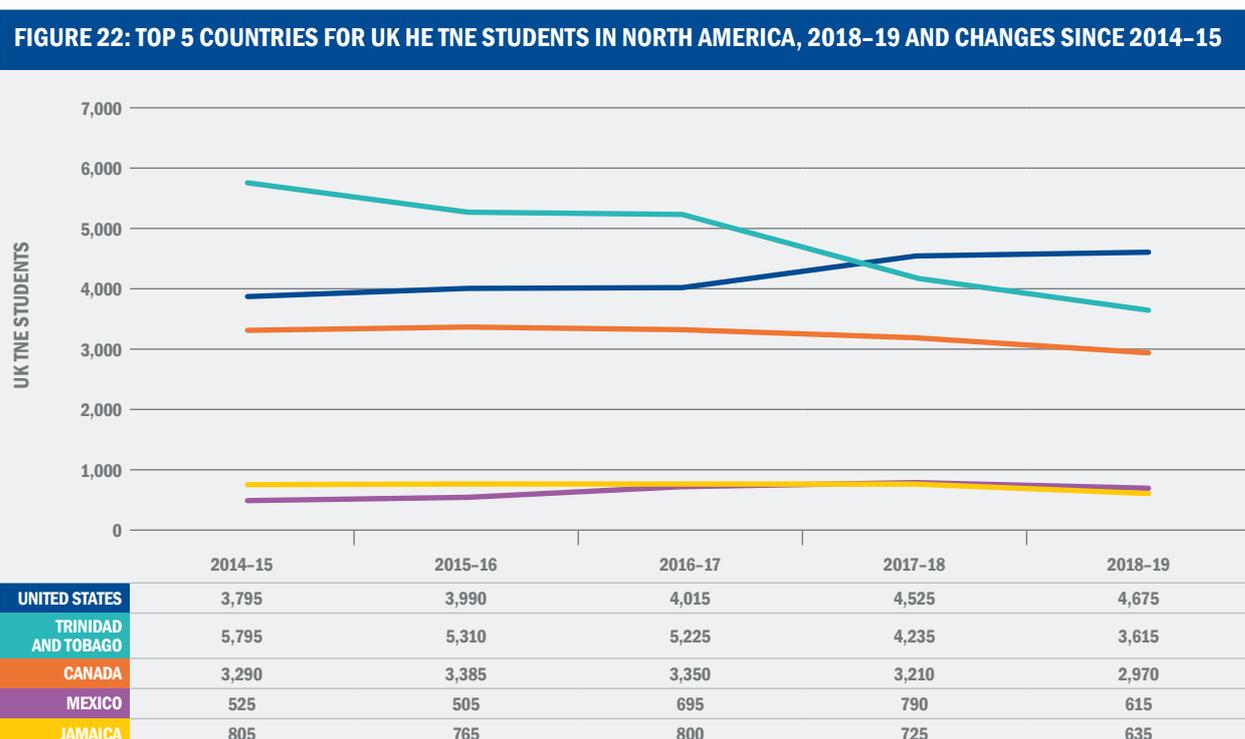
of UK TNE students in 2018-19.

HOST COUNTRIES

Table 32 shows the 10 North American countries hosting the most students in 2018–19. The United States was the country hosting the most students with 4,675 (31.9% of the total), followed by Trinidad and Tobago with 3,615 (24.7% of the total). The greatest proportional increase took place in the Bahamas (32.0%) while the greatest proportional decrease took place in Mexico (-22.1%).

HOST COUNTRIES	NUMBER OF STUDENTS IN 2018–19	PERCENTAGE OF STUDENTS IN 2018–19	PERCENTAGE CHANGE FROM 2017–18
 United States	4,675	31.9%	3.4%
 Trinidad and Tobago	3,615	24.7%	-14.7%
 Canada	2,970	20.3%	-7.5%
 Jamaica	635	4.3%	-12.5%
 Mexico	615	4.2%	-22.1%
 Barbados	445	3.0%	-12.1%
 The Bahamas	355	2.4%	32.0%
 St Lucia	230	1.6%	-2.6%
 Cayman Islands	220	1.5%	-16.6%
 Antigua and Barbuda	150	1.0%	10.4%

Figure 22 shows the different progression of student numbers in the top five host countries, which cumulatively together accounted for 85.3% of all TNE students in North America in 2018–19. Between 2014–15 and 2018–19 student numbers increased by 880 (23.1%) in the United States and by 90 (17.1%) in Mexico. They decreased by 2,180 (-37.6%) in Trinidad and Tobago, 320 (-9.7%) in Canada and 170 (-21.1%) in Jamaica.



TYPE OF PROVISION

Table 33 shows how many students were studying through each type of TNE provision, how many countries in North America hosted each type of provision, and what the top countries were for each type of provision. Collaborative provision is delivered in 15 of 37 countries where students are reported, with 65.9% located in Trinidad and Tobago. Distance, flexible and distributed learning is delivered in all 37 countries where TNE students are reported in North America, with 38.4% studying in the United States. Students registered at overseas partner organisations are reported in five countries, with 53.7% located in Trinidad and Tobago. Students studying at an overseas campus are reported only in Jamaica. Other arrangements are reported in four countries.

TYPE OF PROVISION	NUMBER OF STUDENTS	NUMBER OF COUNTRIES REPRESENTED OUT OF 37 (%)	TOP COUNTRIES
Collaborative provision	3,110	15 (40.5%)	 Trinidad and Tobago (65.9%)  United States (21.7%)  Canada (9.4%)
Distance, flexible and distributed learning	10,420	37 (100.0%)	 United States (38.4%)  Canada (25.7%)  Trinidad and Tobago (9.2%)
Registered at overseas partner organisation	1,125	5 (13.5%)	 Trinidad and Tobago (53.7%)  Mexico (32.1%)  Jamaica (14.0%)
Overseas campus	>5	1 (2.7%)	 Jamaica (100.0%)
Other arrangement	5	4 (10.8%)	 Trinidad and Tobago (..)  Mexico (..)  Jamaica (..)

Distance, flexible and distributed learning is delivered in all 37 countries where TNE students are reported in North America, with

38.4%

studying in the United States in 2018–19.

Students registered at overseas partner organisations are reported in five countries, with

53.7%

located in Trinidad and Tobago in 2018–19.

LEVEL OF STUDY

Table 34 shows the distribution between undergraduate and postgraduate TNE study across North American countries:

- Trinidad and Tobago accounted for 46.2% of undergraduate students in North America, although student numbers decreased by 230.
- Undergraduate student numbers increased in the Bahamas (+30), St Lucia (+15), Canada (+15), Antigua and Barbuda (+5), and the United States (+5), and fell in Trinidad and Tobago (-390), Mexico (-200), Jamaica (-20) and the Cayman Islands (-10).
- At postgraduate level, the United States accounted for 34.6% of all students, and numbers increased by 145.
- Postgraduate student numbers increased in the Bahamas (+60), Mexico (+25) and Antigua and Barbuda (+10), and fell in Trinidad and Tobago (-390), Canada (-255), Jamaica (-70), Barbados (-60), the Cayman Islands (-35) and St Lucia (-20).

TABLE 34: TOP 10 HOST COUNTRIES IN NORTH AMERICA FOR UK HE TNE STUDENTS BY LEVEL OF STUDY, 2018–19

RANK	UNDERGRADUATES			POSTGRADUATE		
	COUNTRY	NUMBER OF STUDENTS	PERCENTAGE OF UG IN NORTH AMERICA	COUNTRY	NUMBER OF STUDENTS	PERCENTAGE OF PG IN NORTH AMERICA
1	 Trinidad and Tobago	1,475	46.2%	 United States	3,970	34.6%
2	 United States	710	22.2%	 Canada	2,755	24.0%
3	 Mexico	295	9.2%	 Trinidad and Tobago	2,140	18.7%
4	 Canada	215	6.8%	 Jamaica	590	5.2%
5	 The Bahamas	90	2.8%	 Barbados	385	3.4%
6	 Cayman Islands	80	2.5%	 Mexico	320	2.8%
7	 St Lucia	65	2.1%	 The Bahamas	265	2.3%
8	 Barbados	60	1.8%	 St Lucia	160	1.4%
9	 Jamaica	45	1.4%	 Cayman Islands	140	1.2%
10	 Antigua and Barbuda	25	0.8%	 Antigua and Barbuda	125	1.1%

At postgraduate level, the United States accounted for

34.6%

of all students, and numbers increased by 145 in 2018–19.

Trinidad and Tobago accounted for

42.6%

of undergraduate students in North America in 2018–19.

Case study

UNIVERSITY OF BEDFORDSHIRE – CARIBBEAN

The University of Bedfordshire has over 1,000 students registered with its collaborative academic partnerships in the Caribbean in Trinidad and Tobago and Guyana. These students, across CTS College, SITAL College and SHEL in Trinidad and Tobago and Nations in Guyana study franchised undergraduate and postgraduate business-related programmes. These partner institutions follow the University of Bedfordshire's quality and standards. A university Account Manager and course Link Coordinator are assigned to and visit each partner regularly (subject to Covid-19 restrictions) and a senior member of the university executive attends local graduation ceremonies. The partner colleges and students benefit from the accessibility of the university's staff and learning materials and the widely recognised qualifications.

Both Trinidad and Tobago and Guyana have high standards in primary and secondary education and access to public universities is highly competitive. The University of Bedfordshire contributes towards the private higher education offer and widens access to students who are unable to either access the public higher education provision or travel overseas to study. Programmes are tailored to contribute to socio-economic development in the region, with an offer that includes undergraduate business administration courses as well as postgraduate MBA courses with regional specialties including: Oil and Gas Management and Logistics, Business Supply Management, Education Leadership, and International Oil and Gas Law.

The collaborative academic partnerships provide reciprocal widening participation and capacity building, promoting equality and diversity through teaching and learning, while also contributing to Bedfordshire's innovative curriculum development.

SOUTH AMERICA

Unless specified otherwise, this section excludes the three main programme providers of distance, flexible and blended TNE.



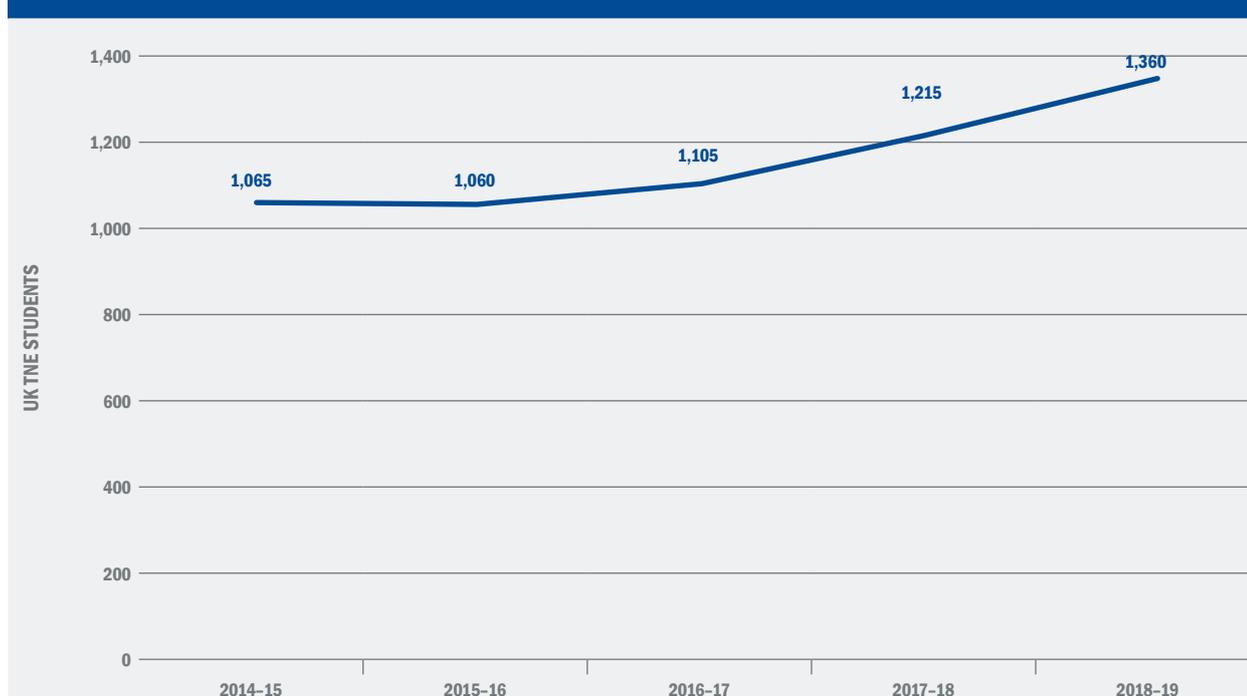
AT A GLANCE: UK HE TNE IN SOUTH AMERICA IN 2018–19

- South America hosted the lowest number of students by region (**1,360**), **0.4%** of the world's total.
- The number of students increased by **12.2%** between 2017–18 and 2018–19.
- TNE was delivered in **13** South American countries and territories.
- The countries with the most students were Guyana (**435**), Brazil (**405**) and Colombia (**160**).
- The most common forms of provision were distance, flexible and distributed learning (**73.4%**) and collaborative provision (**26.6%**).
- The majority of students were studying at postgraduate level (**83.2%**).
- Brazil was the country with the largest provision at undergraduate level (**110**) and Guyana at postgraduate level (**375**).

TREND ANALYSIS

As shown in **Figure 23**, student numbers in South America increased by 295 (27.7%) between 2014–15 and 2018–19.

FIGURE 23: NUMBER OF UK HE TNE STUDENTS IN SOUTH AMERICA, 2014–15 TO 2018–19



UK TNE was delivered in

13

South American countries and territories in 2018–19.

South America hosted

0.4%

of UK TNE students in 2018–19.

HOST COUNTRIES

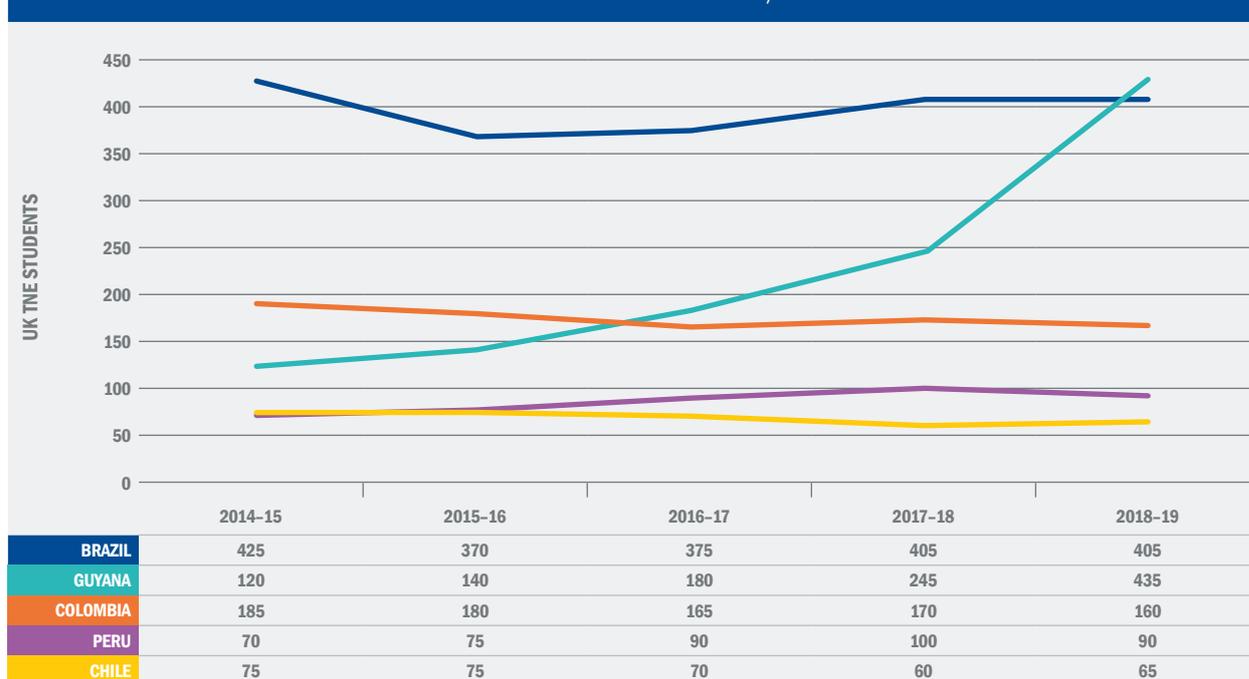
Table 35 shows the 10 South American countries hosting the most students in 2018–19. Guyana was the country hosting the most students with 435 (32.0% of the total), followed by Brazil with 405 (29.8% of the total). The greatest proportional increase took place in Guyana (77.2%) while the greatest proportional decrease took place in Peru (-13.7%).

TABLE 35: TOP 10 HOST COUNTRIES IN SOUTH AMERICA FOR UK HE TNE STUDENTS, 2018–19 AND PERCENTAGE CHANGE FROM 2017–18

HOST COUNTRIES	NUMBER OF STUDENTS IN 2018–19	PERCENTAGE OF STUDENTS IN 2018–19	PERCENTAGE CHANGE FROM 2017–18
 Guyana	435	32.0%	77.2%
 Brazil	405	29.8%	-0.2%
 Colombia	160	11.9%	-4.1%
 Peru	90	6.5%	-13.7%
 Argentina	65	4.9%	-8.2%
 Chile	65	4.8%	4.8%
 Ecuador	50	3.8%	-10.3%
 Uruguay	40	3.1%	-2.3%
 Bolivia	15	..%	..%
 Venezuela	10	..%	..%

Figure 24 shows the different progression of student numbers in the top five host countries, which together accounted for 85.2% of all TNE students in South America in 2018–19. Between 2014–15 and 2018–19 student numbers increased by 315 (262.5%) in Guyana and by 20 (25.5%) in Peru, and decreased by 25 (-13.5%) in Colombia and by 10 (-13.3%) in Chile. Student numbers increased by 35 (9.4%) in Brazil between 2015–16 and 2018–19.

FIGURE 27: TOP FIVE COUNTRIES FOR TNE STUDENTS IN SOUTH AMERICA, 2018–19 AND CHANGES SINCE 2014–15



TYPE OF PROVISION

Table 36 shows how many students were studying through each type of TNE provision, how many countries in South America hosted each type of provision, and what the top countries were for each type of provision. Collaborative provision was delivered in 8 of 13 countries where students are reported, with 57.5% located in Guyana. Distance, flexible and distributed learning was delivered in all 13 countries where TNE students were reported in South America, with 31.6% studying in Brazil.

TYPE OF PROVISION	NUMBER OF STUDENTS	NUMBER OF COUNTRIES REPRESENTED OUT OF 13 (%)	TOP COUNTRIES
Collaborative provision	360	8 (61.5%)	 Guyana (57.5%)  Brazil (24.9%)  Peru (10.8%)
Distance, flexible and distributed learning	1,000	13 (100.0%)	 Brazil (31.6%)  Guyana (22.8%)  Colombia (14.2%)

Distance, flexible and distributed learning was delivered in all 13 countries where TNE students were reported in South America, with

31.6%

studying in Brazil in 2018–19.

Collaborative provision was delivered in 8 of 13 countries where students are reported, with

57.5%

located in Guyana in 2018–19.

LEVEL OF STUDY

Table 37 shows the distribution between undergraduate and postgraduate TNE study across South American countries:

- Brazil accounted for 48.5% of undergraduate students in South America, student numbers increased by 15.
- Undergraduate student numbers increased in Guyana (+55), Argentina (+5), Colombia (+5) and Peru (+5), and remained the same in Chile and Ecuador.
- At postgraduate level, Guyana accounted for 33.0% of all students, and numbers increased by 135.
- Postgraduate student numbers increased in Bolivia (+5), and fell in Brazil (-20), Peru (-20), Colombia (-10), Argentina (-5) and Ecuador (-5) and remained the same in Chile.

TABLE 37: TOP 10 HOST COUNTRIES IN SOUTH AMERICA FOR UK HE TNE STUDENTS BY LEVEL OF STUDY, 2018–19

RANK	UNDERGRADUATES			POSTGRADUATE		
	COUNTRY	NUMBER OF STUDENTS	PERCENTAGE OF UG IN SOUTH AMERICA	COUNTRY	NUMBER OF STUDENTS	PERCENTAGE OF PG IN SOUTH AMERICA
1	 Brazil	110	48.5%	 Guyana	375	33.0%
2	 Guyana	60	27.3%	 Brazil	295	26.1%
3	 Colombia	15	..%	 Colombia	150	13.2%
4	 Argentina	15	..%	 Peru	80	7.1%
5	 Peru	10	..%	 Argentina	55	4.8%
6	 Chile	10	..%	 Chile	55	4.8%
7	 Ecuador	5	..%	 Ecuador	45	4.1%
8	 Uruguay	< 5	..%	 Uruguay	40	3.5%
9	 Bolivia	< 5	..%	 Bolivia	15	..%
10	 Suriname	< 5	..%	 Suriname	10	..%

Brazil accounted for

48.5%

of undergraduate students in South America in 2018–19.

At postgraduate level, Guyana accounted for

33.0%

of all students, and numbers increased by 135 in 2018–19.

5. CONCLUSION

Transnational education (TNE) is a key component of UK universities' internationalisation strategies, but we need to make progress in our understanding of this form of international activity.

In 2018–19, more universities than ever before reported students in TNE programmes, and the number of territories where those students are located continued to grow. When the three top providers with specialist forms of distance, flexible and blended TNE are excluded from the analysis, student numbers increased slightly, and the number of providers reporting more than 1,000 students grew by almost 7% year on year.

Nevertheless, it seems clear that, as numbers plateau, the unprecedented growth in student numbers of the past decade seems to be behind us. Further analysis is necessary to fully understand if this is a systemic issue or a transitory phase towards consolidation in existing markets and expansion in new territories. HESA's review of the AOR and richer data will also help us get a more complete picture of how TNE is evolving.

Complex global and domestic factors act to shape a TNE landscape with different characteristics by region, country, type of TNE and provider. In analysing the data, we found growth in overseas campus and collaborative provision, expansion at postgraduate level, strong numbers in China and the EU, decreases in Africa and rapid growth in emerging markets coupled with stagnation in traditional ones.

This year we also presented analysis of TNE data by UK nation and by mission group or sector representative organisation. This led to some interesting findings, such as growth in Northern Ireland, Scotland and Wales and among Million+ and Russell Group providers. Future work will help us disaggregate further the different aspects of TNE to support policymakers and university strategists in their decision-making processes.

From the data, we can infer the important role that TNE continues to play in UK universities' internationalisation strategies, but data alone cannot capture the complex interrelation of domestic and global political, economic, social and technological factors that shape TNE policy and practice. Holistic approaches to analysing TNE trends can help us get a more complete picture of how it operates. Some of the vectors that may change the way we understand TNE in years to come include:

- i) The UK's new independent trade policy:** the end of the transition period for leaving the EU and the UK's new positioning as an independent trading nation will impact the way UK universities organise their TNE strategies in the EU and beyond. The loss of access to the EU's single market needs to be offset by an ambitious strategy to increase education exports. The UK Government (and the devolved administrations) will need to provide targeted resources to support new TNE partnerships in emerging territories.
- ii) The UK's new immigration system:** the student visa routes, the new graduate immigration route and the Global Talent scheme will have implications for TNE. UUKi and the British Council are conducting research to explore the correlation between TNE and onshore recruitment. TNE pathways could be leveraged by university leaders to provide options to students in a post-Covid-19 environment of delayed mobility.

- iii) A new system to enhance the quality of TNE:** the international reputation for quality of UK universities underpins their position as partner of choice globally. Following a joint consultation, the QAA has been commissioned by UUK and GuildHE to develop a new model for the enhancement of transnational education that retains a UK-wide approach. The sector will have an opportunity to provide views on how this system can support their TNE efforts.
- iv) The technological leap in higher education:** the Covid-19 pandemic has accelerated trends that were already visible in TNE. Online learning, remote proctoring, virtual and augmented reality or gamification are making strides in the TNE space, but challenges such as digital access, recognition of online learning and cybersecurity place new and difficult choices on TNE strategists. A better understanding of the opportunities and risks brought about by the distance learning leap should be sought.
- v) The demographic shift in Asia and Africa:** with population growth stagnating in some Asian countries and skyrocketing in African ones, the role of TNE in helping bridge the gap between supply and demand for higher education will have to be reviewed. International development aid policies and openness to foreign investment in education should be shaped by an evidenced-based approach to the role of TNE in helping meet the United Nations Sustainable Development Goals (SDGs).
- vi) Recognition of TNE qualifications:** the adoption of UNESCO’s Global Convention on the Recognition of Qualifications in 2019 could open the door to enhanced inter-regional academic mobility based on universal principles for improving recognition practices. The UK sector, supported by government and bodies such as UK NARIC, should explore how recognition of TNE qualifications can be addressed in bilateral and multilateral dialogue.
- vii) The changing geopolitical landscape:** TNE operates under multiple regulatory frameworks that are affected by national foreign strategic policy. Increasing tensions between China and the West, but also regionally localised shifts in the balance of powers will surely affect the way TNE develops in the future. Dialogue about how preventative and precautionary measures can mitigate risks related to rapid and slow onset change should be undertaken.

This report should be read jointly with other resources such as the British Council’s *‘The Shape of Global Higher Education’*⁷ series of reports and the Department for Education’s *‘UK revenue from education related exports and transnational education activity’*.⁸ Sector bodies such as the Quality Assurance Agency for Higher Education and Jisc also have useful resources that supplement the findings of this report.

As the UK embarks on uncharted waters in a post-Covid-19 world, the reputation for quality of UK universities, and also their internationalism, scientific excellence, openness to innovation, and emphasis on employability, critical thinking and life-long learning are likely to position them as partners of choice globally.

Behind the numbers in this report lie unparalleled expertise developed through years of carefully crafted internationalisation by university leaders, academics and practitioners in the UK and beyond. Renewed commitment to the principles of internationalism will ensure that UK TNE continues to transform the lives of students globally.

⁷ <https://www.britishcouncil.org/education/ihe/knowledge-centre/global-landscape/report-shape-global-higher-education>

⁸ https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/850263/SFR_Education_Exports_2017_FINAL.pdf



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