

Scale of UK higher education transnational education 2019-20: Welsh providers

Trend analysis of HESA data

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Executive summary

This third edition of *The Scale of UK Higher Education Transnational Education: Welsh Providers* provides a snapshot analysis of where, at what level and through what type of provision Welsh TNE students studied during the 2019–20 academic year, and a longitudinal overview of trends in TNE from 2015–16.

Overview

Wales' higher education (HE) TNE provision in 2019–20:

- Nine higher education providers reported students studying through TNE.
- 66.7% of Welsh providers reported more than 1,000 TNE students each, up from 55.5% the previous year.
- Welsh providers reported 28,795 students in TNE, which is 6.4% of the total reported by UK providers¹.
- Welsh TNE student numbers decreased by 1,470 students (-4.8%) from 2018–19.
- Welsh TNE was reported in 136 countries and territories.
- Welsh providers reported that 42.4% of TNE students were studying at undergraduate level and 57.6% at postgraduate level.
- 44.9% of TNE students at Welsh providers were studying through collaborative provision, followed by 37.8% studying through distance, flexible and distributed learning, 9.8% registered at an overseas partner organisation, and 2.3% registered at an overseas campus.
- The European Union hosted the largest population of TNE students reported by Welsh providers in 2019–20 (41.0%), followed by Asia (37.1%), the Middle East (11.5%), Africa (8.2%), North America (1.6%), Australasia (0.2%), non-EU Europe (0.2%), and South America (0.1%).

¹ UK total excludes Oxford Brookes University. For more information on why, please see our latest UK-wide [Scale of TNE report](#).

Introduction

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

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

Data about TNE is collected annually by the Higher Education Statistics Agency (HESA) via the Aggregate Offshore Record (AOR). AOR data has been collected since 2007–08 from UK higher education providers (HEPs) who subscribe to HESA. Universities provide data in their AOR return about "students that are studying wholly outside the UK who are either registered with the reporting provider or who are studying for an award of the reporting provider".

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

In accordance with HESA's Standard Rounding Methodology:

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

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

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

Table 1: Types of provision

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

Reporting providers

Note: UK totals and percentage changes excludes Oxford Brookes University.

As shown in **FIGURE 1**, In 2019–20 Welsh providers reported 28,795 students in TNE, which is 6.4% of the total reported by UK providers. By way of comparison, Welsh providers hosted 3.8% of the full-time international (non-UK) students in the UK in 2019–20.

Figure 1: Proportion of UK HE TNE students by country of provider, 2019-20

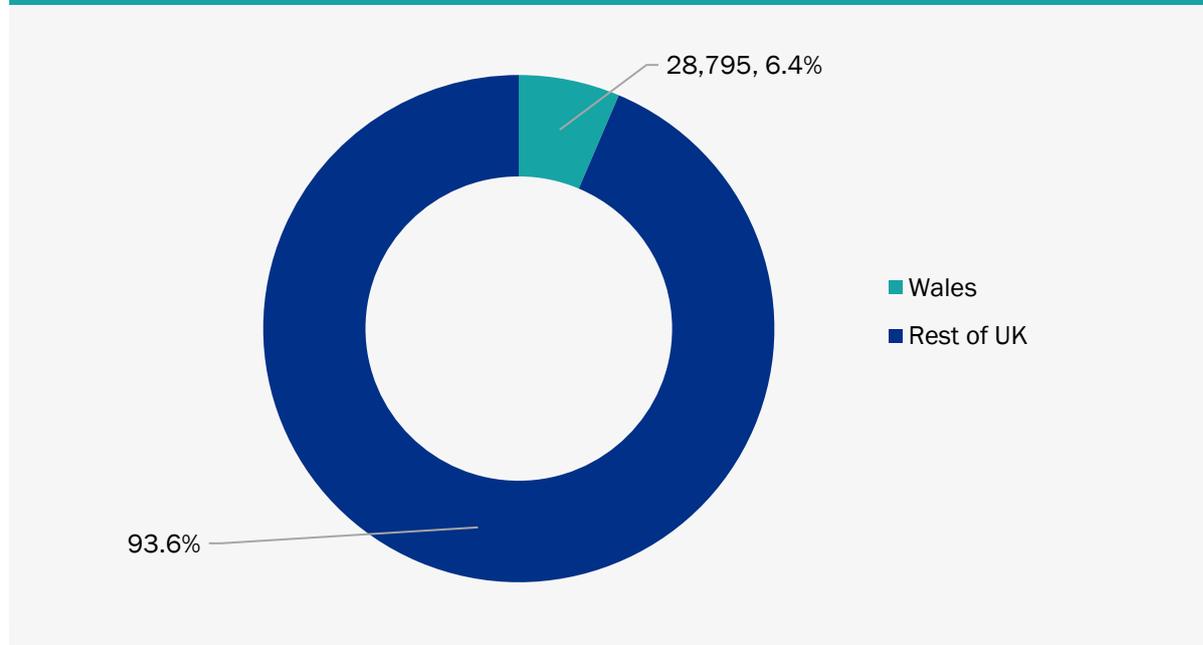


FIGURE 2 and FIGURE 3 show that between 2015–16 and 2019–20, TNE student numbers grew by 40.9% in Wales, compared to 16.7% in the UK. From 2018–19 to 2019–20, student numbers decreased by 4.8% in Wales, in comparison to 10.6% growth across the UK. This is partly due to the addition of 14 new providers in England to the Aggregate Offshore Record in 2019–20.

Figure 2: UK HE TNE students by country of provider 2015–16 to 2019–20

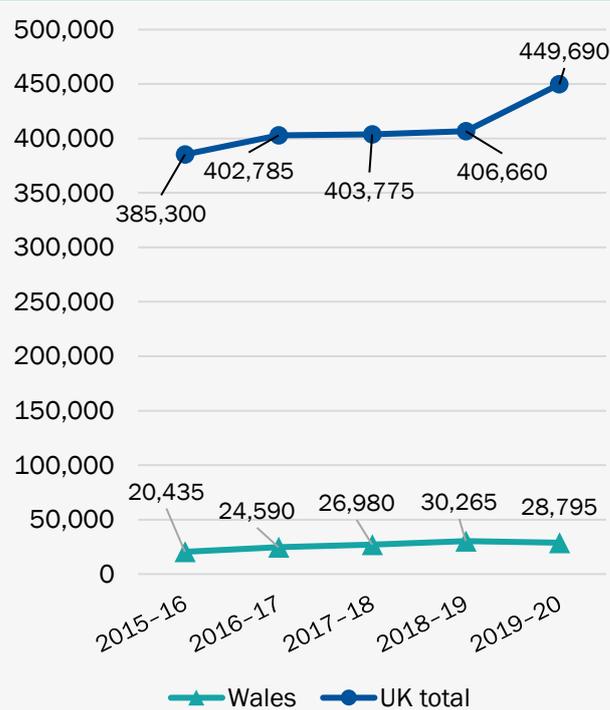
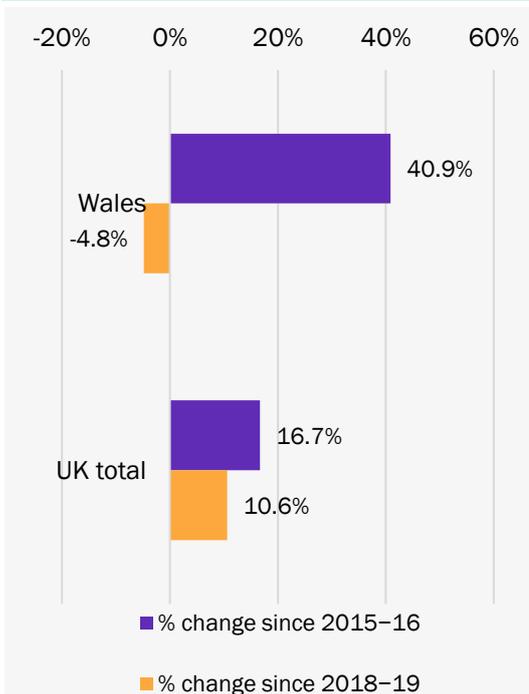
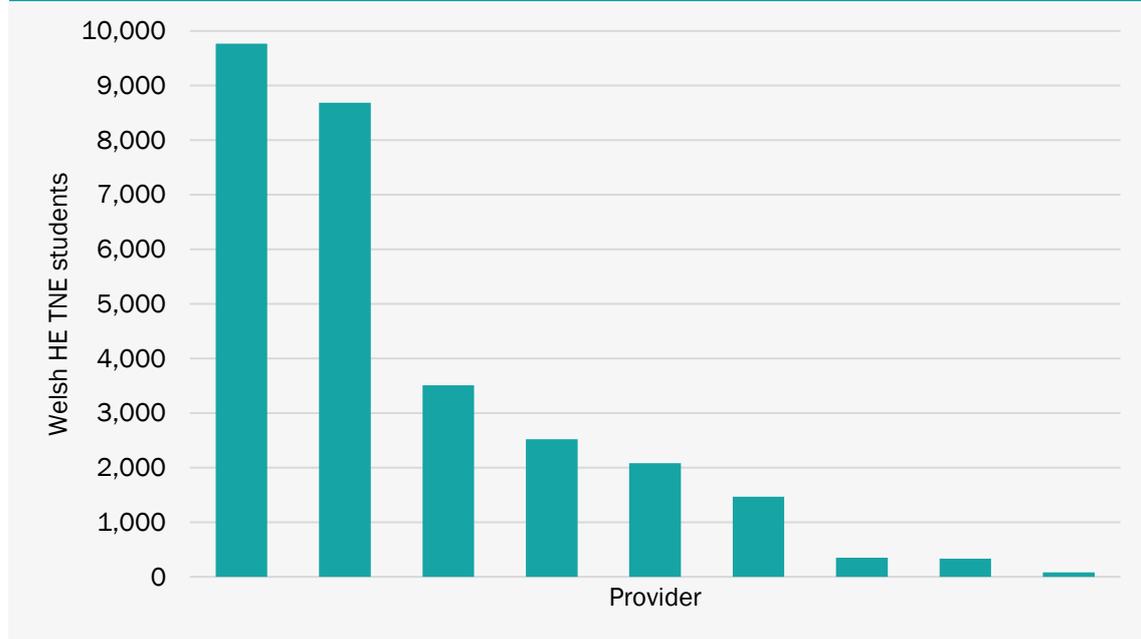


Figure 3: % change of UK HE TNE students by country of provider



In 2019–20, six out of nine providers in Wales reported more than 1,000 students in TNE, as shown in [FIGURE 4](#). This represents 55.5% of providers with TNE students, compared with 54.0% in the UK as a whole. Seven providers in Wales reported fewer than 4,000 students, which is 77.8% of providers with TNE students, compared with 78.9% in the UK as a whole. The median number of TNE students reported by Welsh institutions in 2019-20 was 2,080.

Figure 4: Welsh HE TNE students by reporting provider, 2019-20



Type of provision

FIGURE 5 shows that in 2019–20, 44.9% of TNE students at Welsh providers were studying through collaborative provision, compared with 39.1% overall in the UK; 37.8% were studying through distance, flexible and distributed learning, compared with 29.0% overall in the UK; 2.3% were registered at an overseas campus, compared with 7.0% overall in the UK and 9.8% were registered at an overseas partner organisation, compared with 21.8% overall in the UK.

Figure 5: Welsh HE TNE students by type of provision, 2019–20

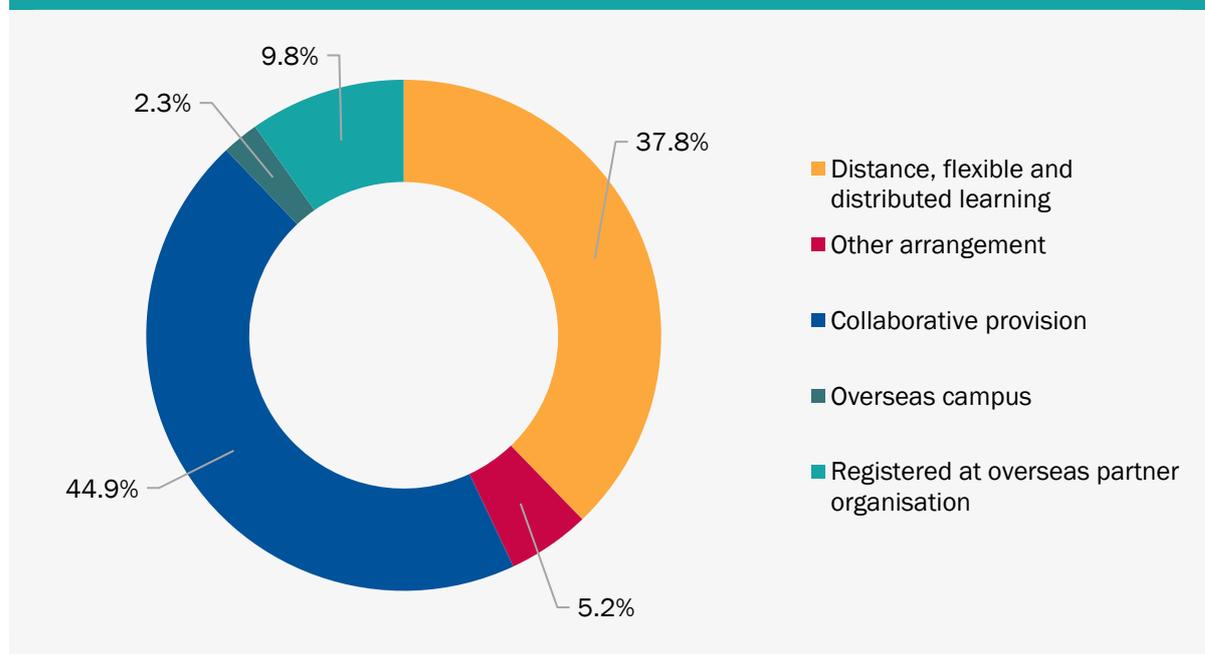


TABLE 2 shows that the fastest growing TNE type of provision in Wales between 2015–16 and 2019–20 was distance, flexible and distributed learning with a 481.3% increase. This method of provision saw a much slower increase for UK providers overall, with a 22.4% change in the same time period. Several Welsh providers have seen increases in their distance, flexible and distributed learning student numbers. However, this notably significant increase can largely be attributed to two providers.

Between 2018–19 and 2019–20, the fastest growing category in Wales was collaborative provision, which increased by 4.7%, compared to 7.6% in the UK as a whole. There has been a long-term decline in Wales in TNE students registered at an overseas partner organisation (–62.8%) compared with a smaller decrease in the UK as a whole (–3.2%) from 2015–16 to 2019–20.

Table 2: Welsh HE TNE students by type of provision, 2015–16 to 2019–20

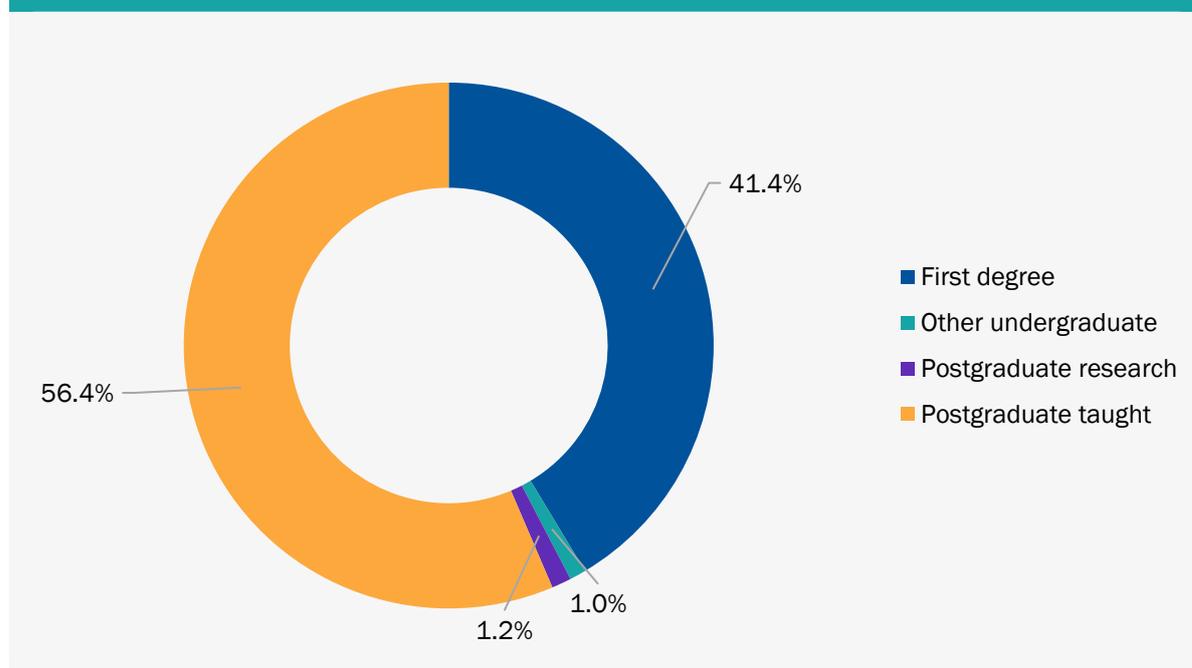
Type of provision	Academic year					Change since 2015–16	Change since 2018–19
	2015–16	2016–17	2017–18	2018–19	2019–20		
Distance, flexible and distributed learning	1,870	3,085	6,230	11,670	10,870	481.3%	–6.8%
Other arrangement	1,425	1,590	1,700	1,715	1,500	5.3%	–12.5%
Collaborative provision	9,035	11,780	12,730	12,345	12,930	43.1%	4.7%
Overseas campus	505	630	685	670	665	32.6%	–0.4%
Registered at overseas partner organisation	7,605	7,505	5,635	3,865	2,830	–62.8%	–26.8%
Total	20,435	24,590	26,980	30,265	28,795	40.9%	–4.8%

Level of provision

Note: UK totals excludes three main reporting providers of distance, flexible and blended TNE.

FIGURE 6 shows that in 2019–20, Welsh providers reported that 42.4% of TNE students were studying at undergraduate level and 57.6% at postgraduate level. The proportion for the UK as a whole was 68.1% undergraduate and 31.9% postgraduate.

Figure 6: Welsh HE TNE students by level of study, 2019–20



As shown in [TABLE 3](#), in 2019–20, Welsh providers reported 12,215 TNE students at undergraduate level, an increase of 2.3% since 2015–16; and 16,580 TNE students at postgraduate level, an increase of 95.0% since 2015–16. In the UK as a whole, the increases were 14.4% and 22.0% respectively.

TABLE 3: Welsh HE TNE students by level of study, 2015–16 to 2019–20

Level of study		Academic year					Change since 2015–16	Change since 2018–19
		2015–16	2016–17	2017–18	2018–19	2019–20		
UG	First degree	11,760	14,755	13,880	12,805	11,930	1.5%	-6.8%
	Other UG	175	190	235	230	285	61.9%	24.5%
	Total	11,935	14,945	14,115	13,035	12,215	2.3%	-6.3%
PG	PG research	80	160	285	320	345	325.9%	8.5%
	PG taught	8,420	9,490	12,575	16,910	16,235	92.8%	-4.0%
	Total	8,500	9,650	12,865	17,230	16,580	95.0%	-3.7%
Total		20,435	24,590	26,980	30,265	28,795	40.9%	-4.8%

Host regions

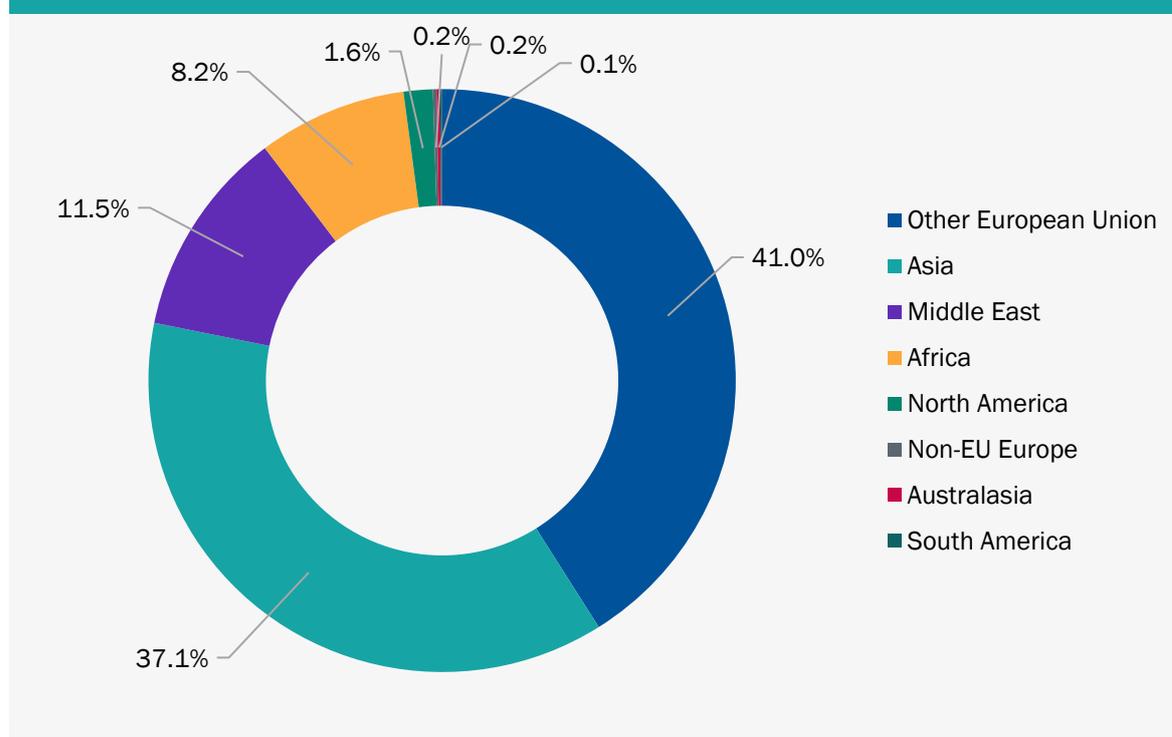
TABLE 4 shows that the European Union continued to host the largest contingent of TNE students reported by Welsh providers in 2019–20, followed by Asia, the Middle East, Africa, North America, non-EU Europe, Australasia and South America.

Table 4: Welsh HE TNE students by host region, 2019–20

Region	%	Students
European Union	41.0%	11,810
Asia	37.1%	10,695
Middle East	11.5%	3,295
Africa	8.2%	2,360
North America	1.6%	475
Non-EU Europe	0.2%	60
Australasia	0.2%	50
South America	0.1%	40

FIGURE 7 shows a breakdown of TNE students reported by Welsh providers by region in 2019–20. Compared with the UK as a whole, Wales offered provision to a higher proportion of students in only the European Union (41.0% in Wales vs 16.6% in the UK), and to a lower proportion in the Middle East (11.5% in Wales vs 13.1% in the UK), Asia (37.1% in Wales vs 50.2% in the UK), Africa (8.2% in Wales vs 10.7% in the UK), North America (1.6% in Wales vs 5.1% in the UK), non-EU Europe (0.2% in Wales vs 3.2% in the UK), Australasia (0.2% in Wales vs 0.6% in the UK) and South America (0.1% in Wales vs 0.6% in the UK).

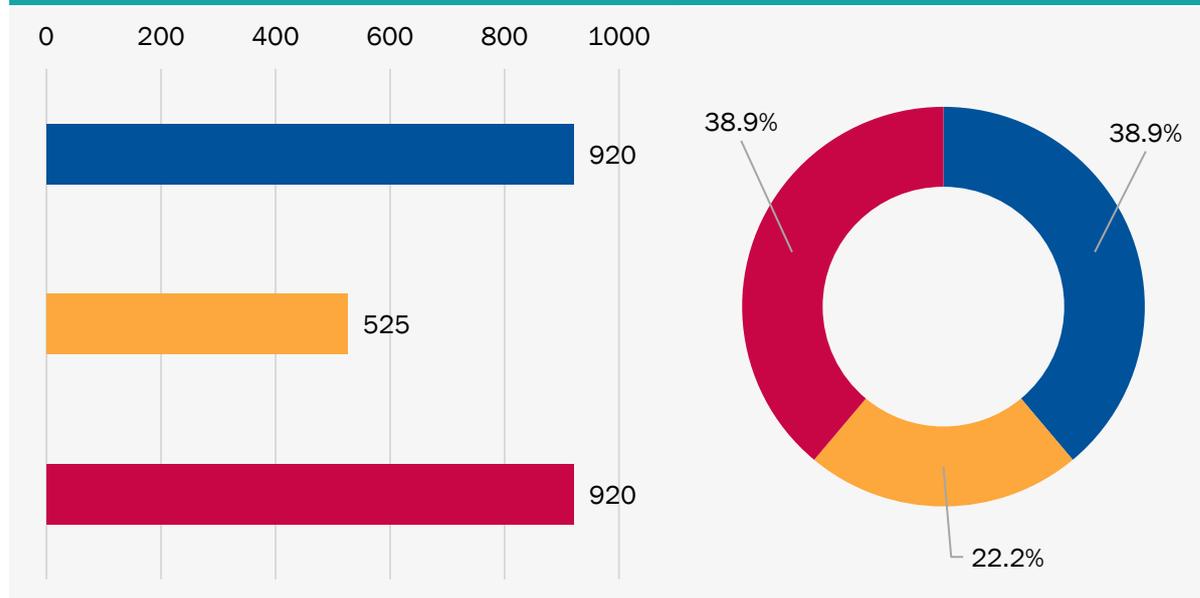
Figure 7: Welsh HE TNE students by host region, 2019–20



Africa

FIGURE 8 shows that in 2019–20, the largest proportion of TNE students reported by Welsh providers in Africa was equally shared by registered at an overseas partner organisation (38.9%), and by collaborative provision (38.9%). The remaining 22.2% of students were studying via distance, flexible and distributed learning.

Figure 8: Welsh HE TNE students in Africa by type of provision, 2019–20



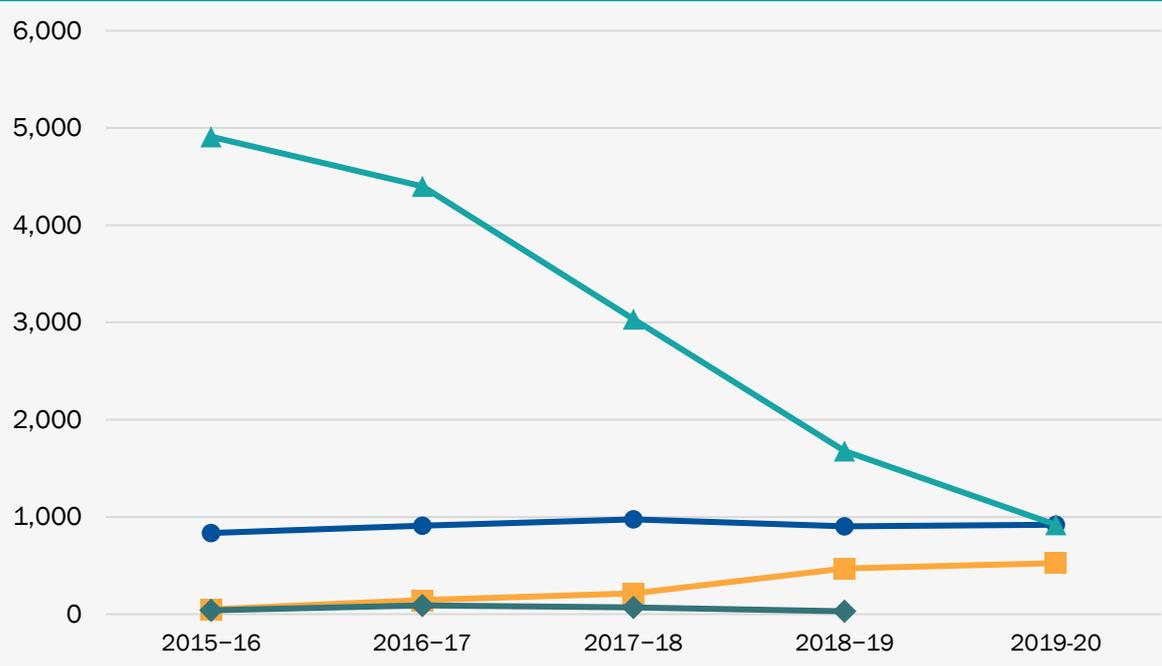
Collaborative provision (920, 38.9%)

Distance, flexible and distributed learning (525, 22.2%)

Registered at overseas partner organisation (920, 38.9%)

FIGURE 9 shows that between 2015–16 and 2019–20, there was an increase in collaborative provision and distance, flexible, or distributed learning reported by Welsh providers in Africa. Over the same time period, there was a steep decrease in those registered at an overseas partner organisation, A small number of students were reported as studying at an overseas campus from 2015-16 to 2018-19.

Figure 9: Welsh HE TNE students in Africa by type of provision, 2015–16 to 2019–20



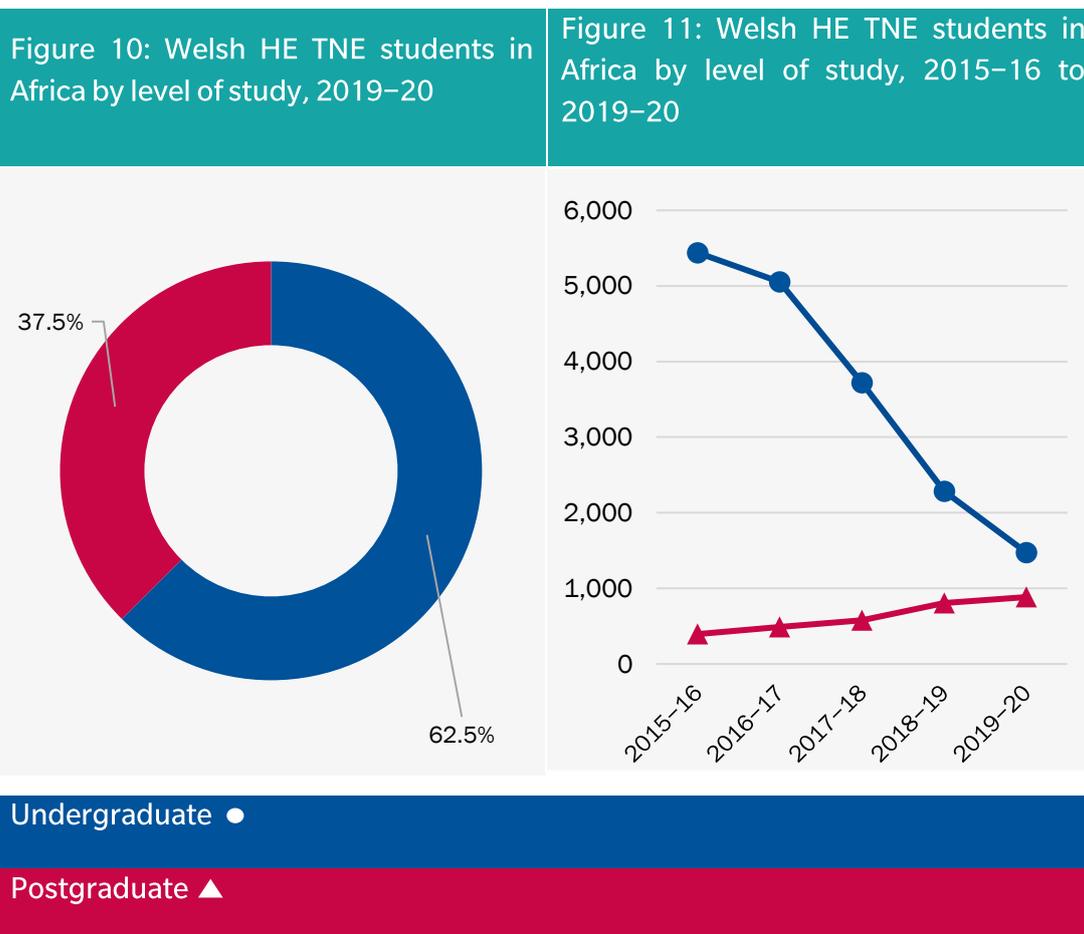
Collaborative provision ●

Distance, flexible and distributed learning ■

Registered at overseas partner organisation ▲

Overseas campus ◆

FIGURE 10 shows that 62.5% of TNE students reported by Welsh providers in 2019–20 in Africa were studying at undergraduate level, against 37.5% at postgraduate level. FIGURE 11 shows that between 2015–16 and 2019–20, there was an increase at postgraduate level and a decline in undergraduate student numbers.



Asia

FIGURE 12 shows that in 2019–20, a majority of TNE students reported by Welsh providers in Asia were studying through collaborative provision (71.2%), followed by other arrangements (11.6%), registered at an overseas partner organisation (7.3%); at an overseas campus (6.0%), and distance, flexible and distributed learning (3.9%).

Figure 12: Welsh HE TNE students in Asia by type of provision, 2019–20

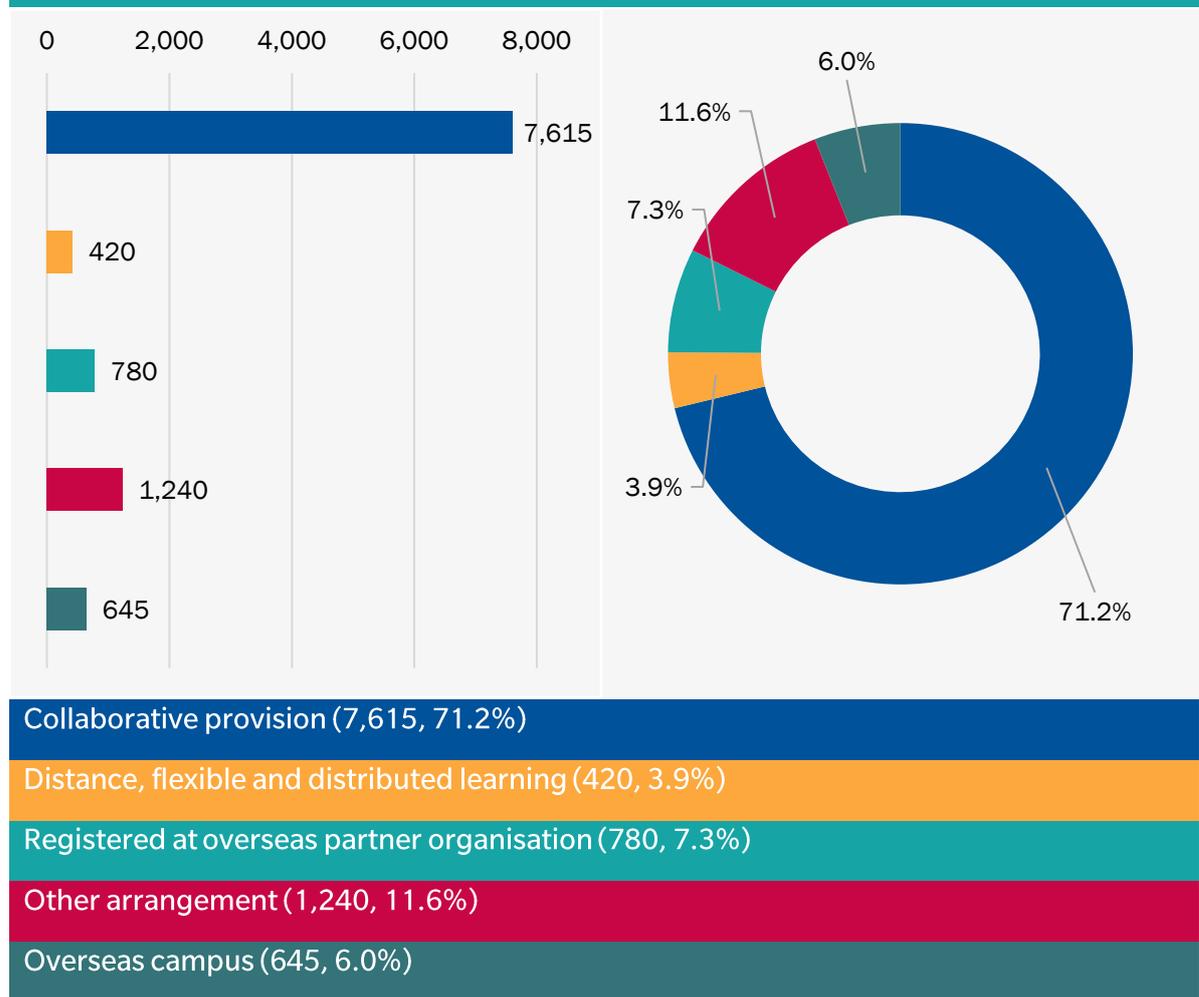
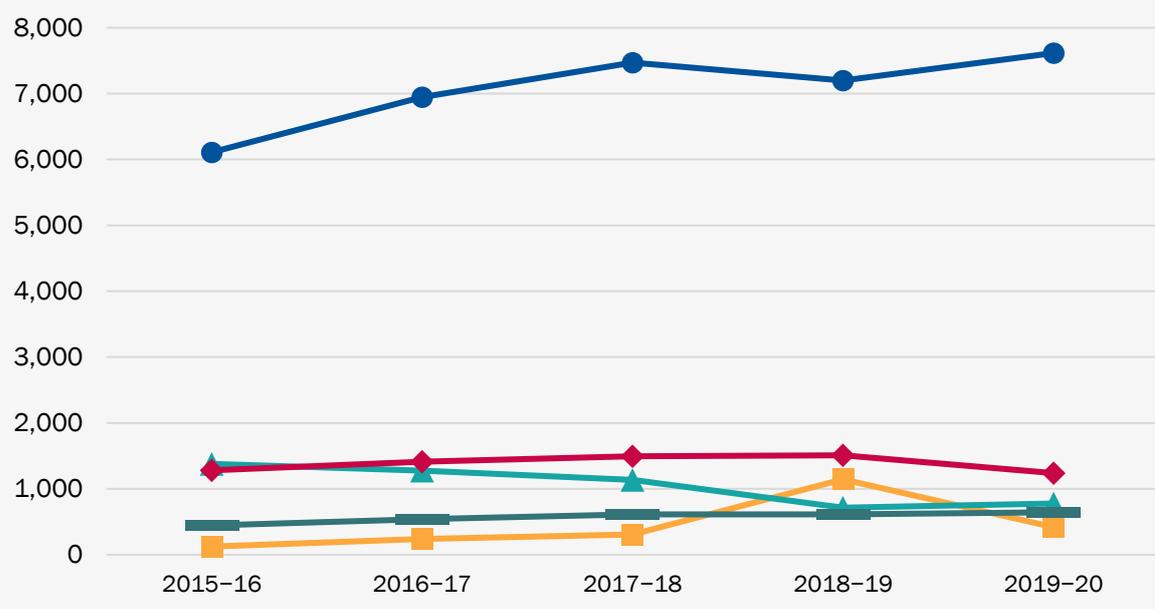


FIGURE 13 shows that between 2015–16 and 2019–20, there was an increase in all TNE modes of study reported by Welsh providers in Asia except in those registered at an overseas partner organisation and through other arrangement. Collaborative provision remained the largest type of provision and grew by 5.7% from 2018-19 to 2019-20.

Figure 13: Welsh HE TNE students in Asia by type of provision, 2015–16 to 2019–20



Collaborative provision ●

Distance, flexible and distributed learning ■

Registered at overseas partner organisation ▲

Other arrangement ◆

Overseas campus ▬

FIGURE 14 shows that 48.6% of TNE students reported by Welsh providers in 2019–20 in Asia were studying at postgraduate level, compared with 51.4% at undergraduate level. FIGURE 15 shows that between 2015–16 and 2019–20, there was an increase at undergraduate level and a decrease at the postgraduate level, with the largest proportion of students studying at undergrad level in 2019-20.

Figure 14: Welsh HE TNE students in Asia by level of study, 2019–20

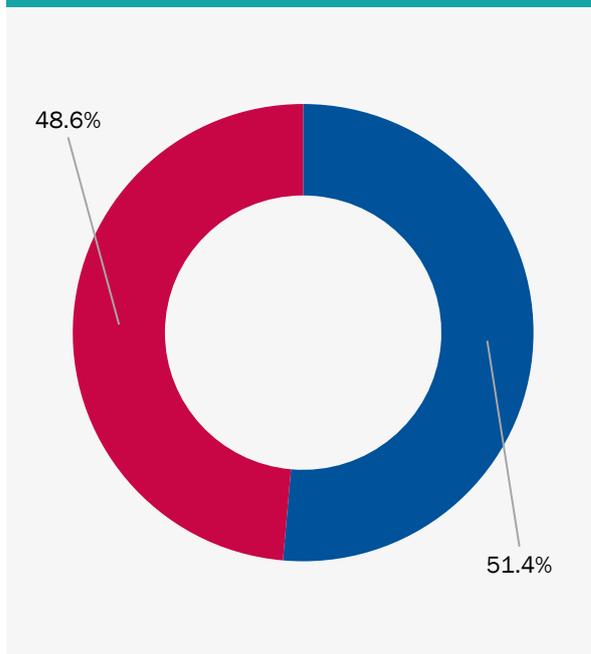
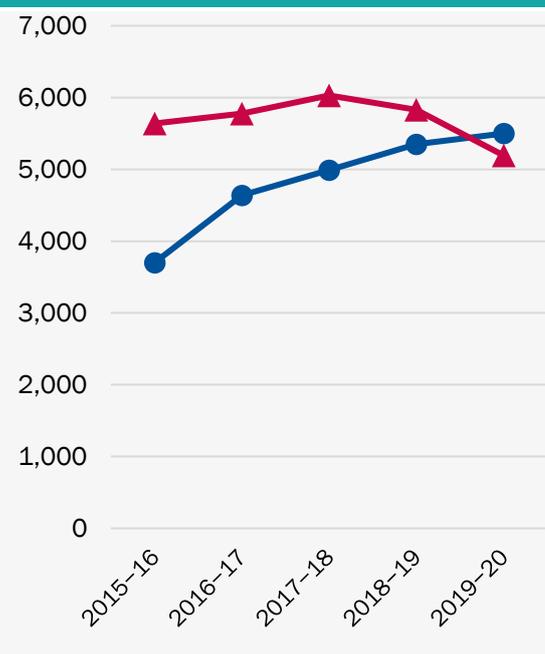


Figure 15: Welsh HE TNE students in Asia by level of study, 2015–16 to 2019–20



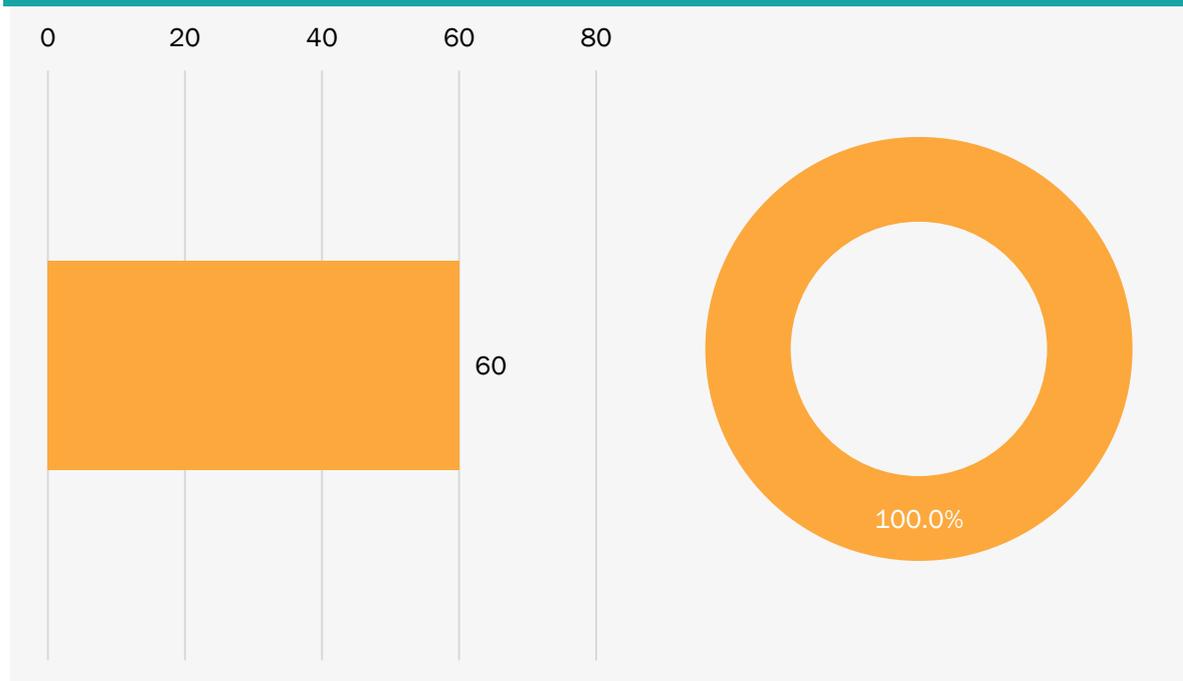
Undergraduate ●

Postgraduate ▲

Australasia

FIGURE 16 shows that all TNE students reported by Welsh providers in Australasia in 2019–20 were studying through distance, flexible and distributed learning.

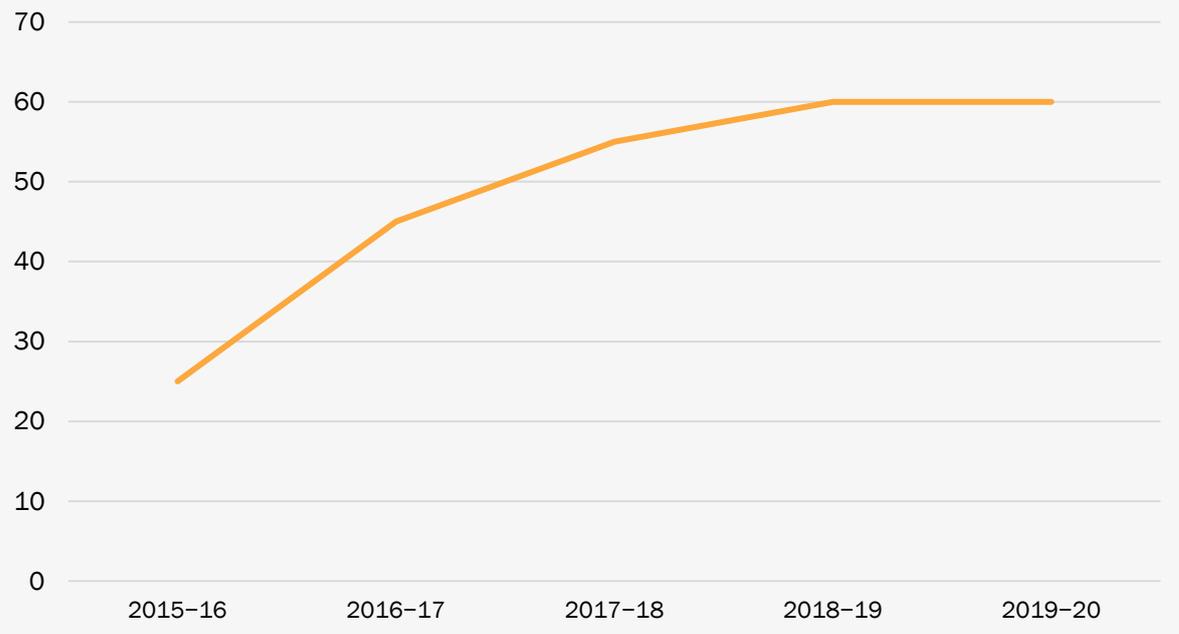
Figure 16: Welsh HE TNE students in Australasia by type of provision, 2019–20



Distance, flexible and distributed learning

FIGURE 17 shows that the number of students studying through distance, flexible and distributed learning in Australasia increased between 2015–16 and 2019–20, with growth slowing from 2017–18.

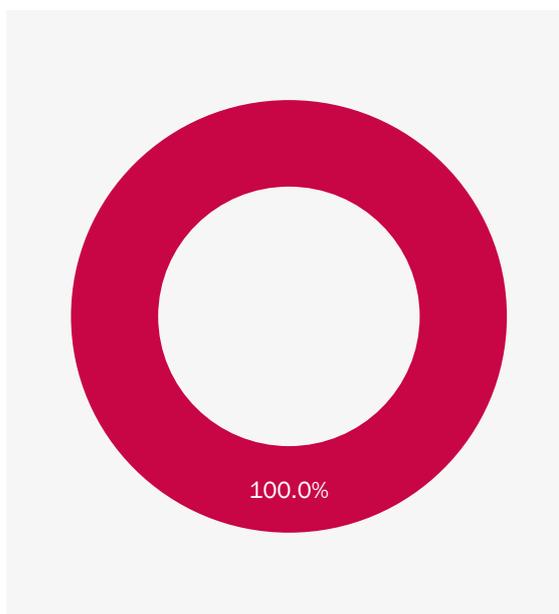
Figure 17: Welsh HE TNE students in Australasia by type of provision, 2015–16 to 2019–20



Distance, flexible and distributed learning

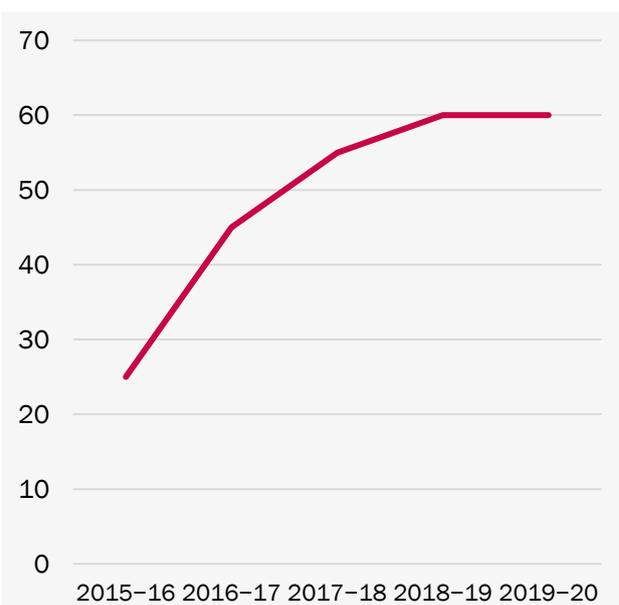
FIGURE 18 shows that all TNE students reported by Welsh providers in 2019–20 in Australasia were studying at postgraduate level. FIGURE 19 shows an increase in postgraduate student numbers between 2015–16 and 2019–20.

Figure 18: Welsh HE TNE students in Australasia by level of study, 2019–20



Postgraduate

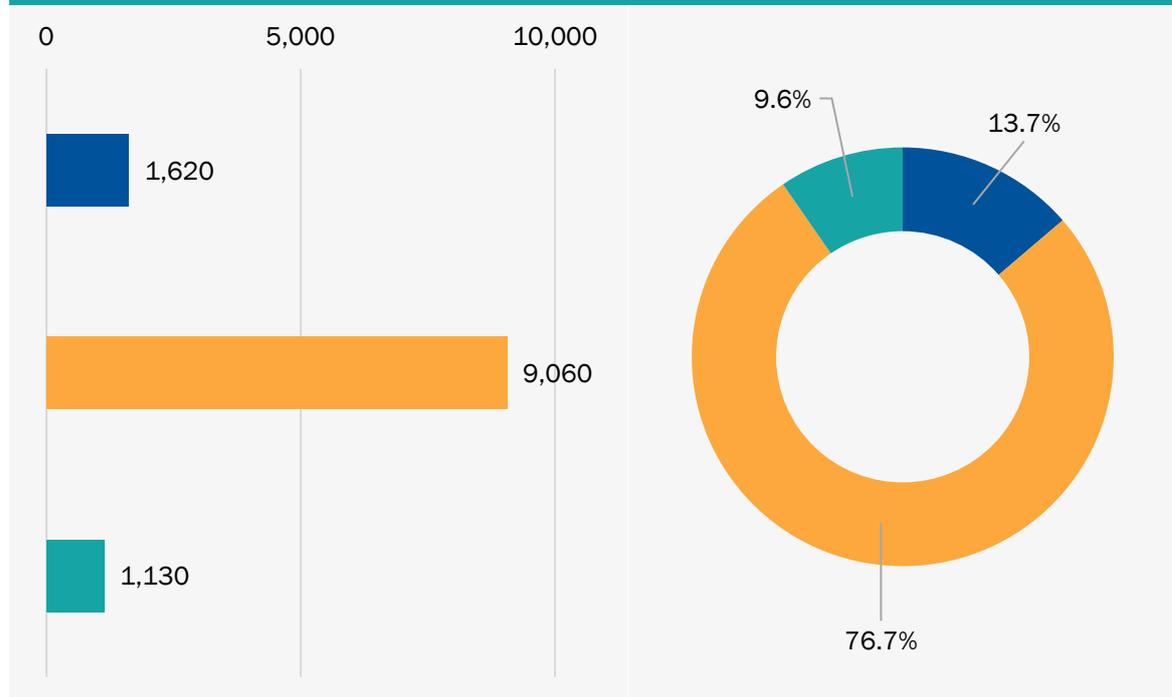
Figure 19: Welsh HE TNE students in Australasia by level of study, 2015–16 to 2019–20



European Union

FIGURE 20 shows that in 2018–19, a majority of TNE students reported by Welsh providers in the European Union were studying through distance, flexible and distributed learning (76.7%), followed by collaborative provision (13.7%) and registered at an overseas partner organisation (9.6%).

Figure 20: Welsh HE TNE students in the EU by type of provision, 2019–20



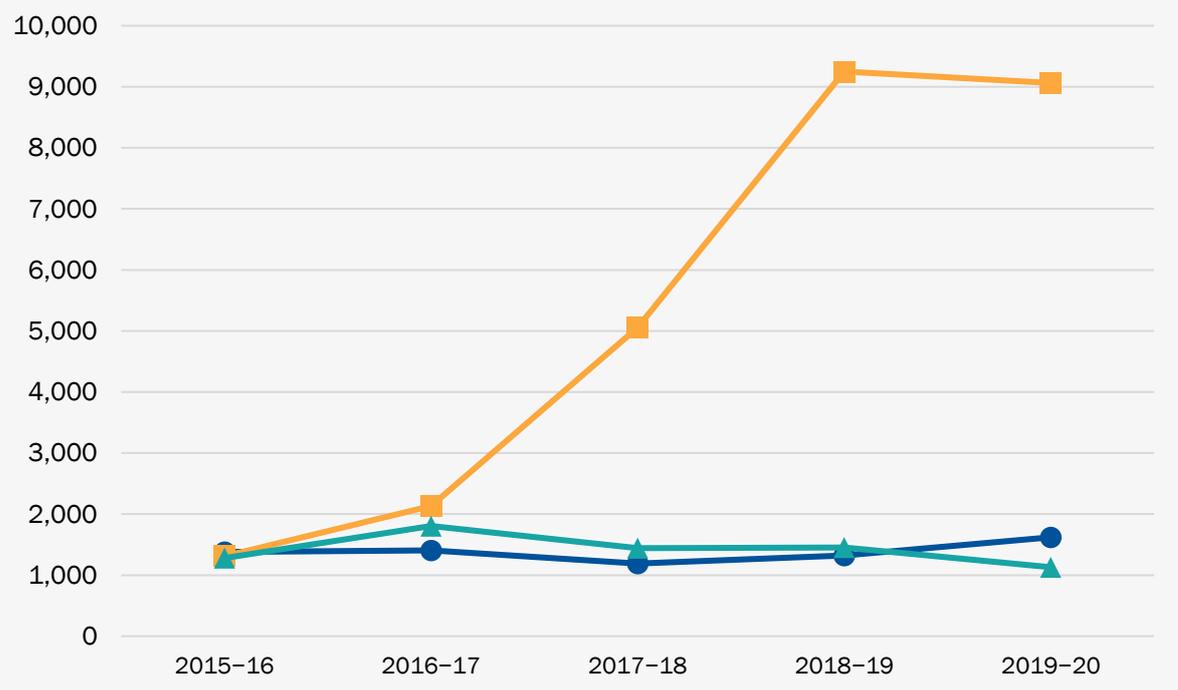
Collaborative provision (1,620, 13.7%)

Distance, flexible and distributed learning (9,060, 76.7%)

Registered at overseas partner organisation (1,130, 9.6%)

FIGURE 21 shows that between 2015–16 and 2019–20, there was a significant increase in students studying through distance, flexible and distributed learning, despite a slight decrease in the previous year. Over this same period there was a decline in students registered at an overseas partner organisation and a slight increase in collaborative provision in the European Union.

Figure 21: Welsh HE TNE students in the EU by type of provision, 2015–16 to 2019–20



Collaborative provision ●

Distance, flexible and distributed learning ■

Registered at overseas partner organisation ▲

FIGURE 22 shows that 78.9% of TNE students reported by Welsh providers in 2019–20 in the European Union were studying at postgraduate level, against 21.1% at undergraduate level. FIGURE 23 shows that between 2015–16 and 2019–20, despite starting at similar levels there was a steep increase at the postgraduate level and only a modest increase overall at the undergraduate level.

Figure 22: Welsh HE TNE students in the EU by level of study, 2019–20

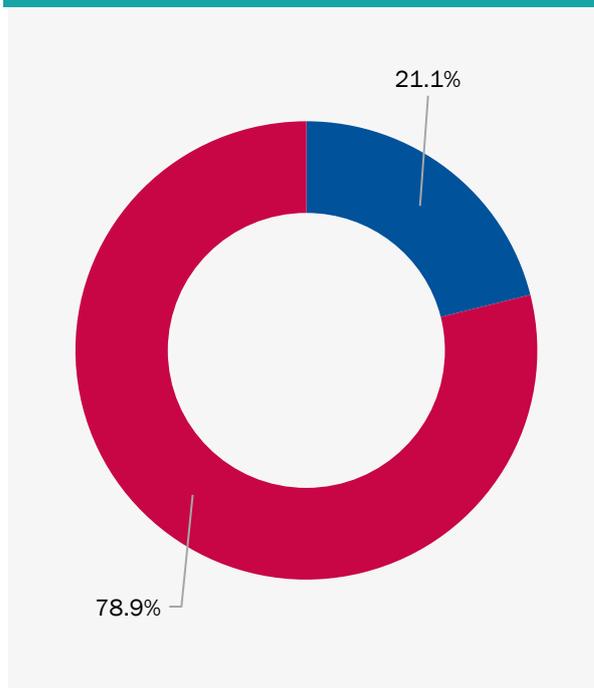
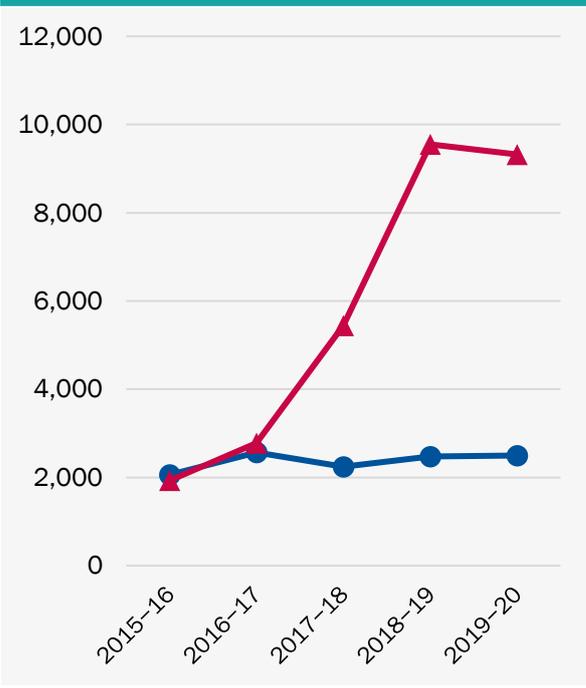


Figure 23: Welsh HE TNE students in the EU by level of study, 2015–16 to 2019–20



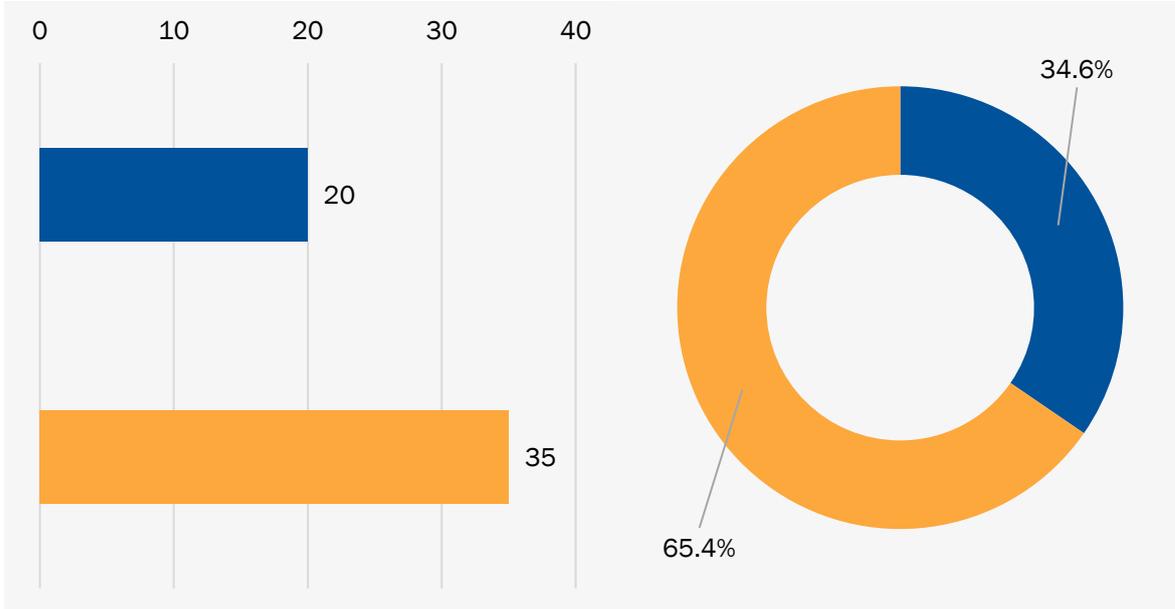
Undergraduate ●

Postgraduate ▲

Non-EU Europe

FIGURE 24 shows that in 2018–19, a majority of TNE students reported by Welsh providers in non-EU Europe were studying through distance, flexible and distributed learning (65.4%), followed by collaborative provision (34.6%).

Figure 24: Welsh HE TNE students in non-EU Europe by type of provision, 2019–20

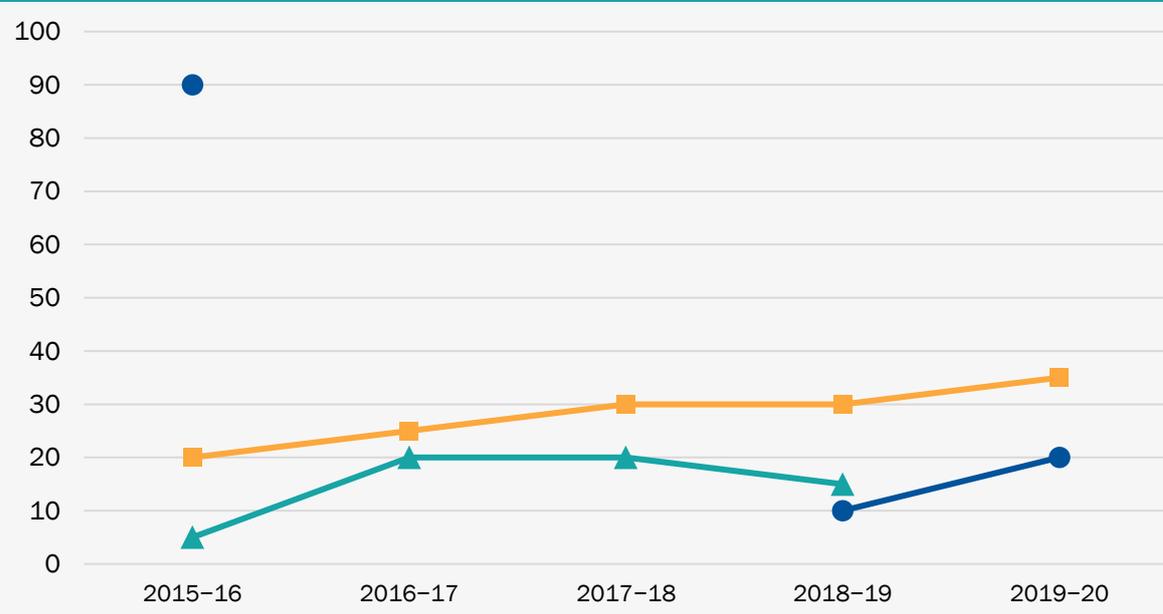


Collaborative provision (20, 34.6%)

Distance, flexible and distributed learning (35, 65.4%)

FIGURE 25 shows that between 2015–16 and 2018–19, students registered at an overseas partner organisation reported by Welsh providers in non-EU Europe increase slightly before dropping off for 2019–20. Collaborative provision was first reported in the region in 2018-19 and increased slightly in 2019-20. Welsh providers began reporting students through collaborative provision in the region again in 2018-19 after a brief hiatus of two years. Distance, flexible and distributed learning, remained the largest type of provision in the region and increased by 54.5% between 2015–16 and 2019–20.

Figure 25: Welsh HE TNE students in non-EU Europe by type of provision, 2015–16 to 2019–20



Collaborative provision ●

Distance, flexible and distributed learning ■

Registered at overseas partner organisation ▲

FIGURE 26 shows that 63.5% of TNE students reported by Welsh providers in 2019–20 in non-EU Europe were studying at postgraduate level, compared to 36.5% at undergraduate level. FIGURE 27 shows that between 2015–16 and 2017–18 there was a sharp decrease at postgraduate level; however, numbers have increased slightly between 2017–18 and 2019–20. Student numbers at undergraduate level have increased slightly, although with a slight decrease in the most recent year.

Figure 26: Welsh HE TNE students in non-EU Europe by level of study, 2019–20

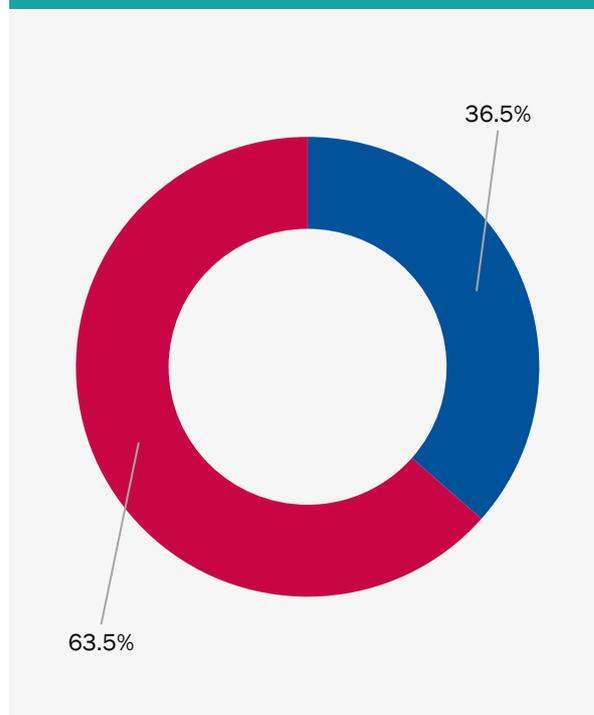
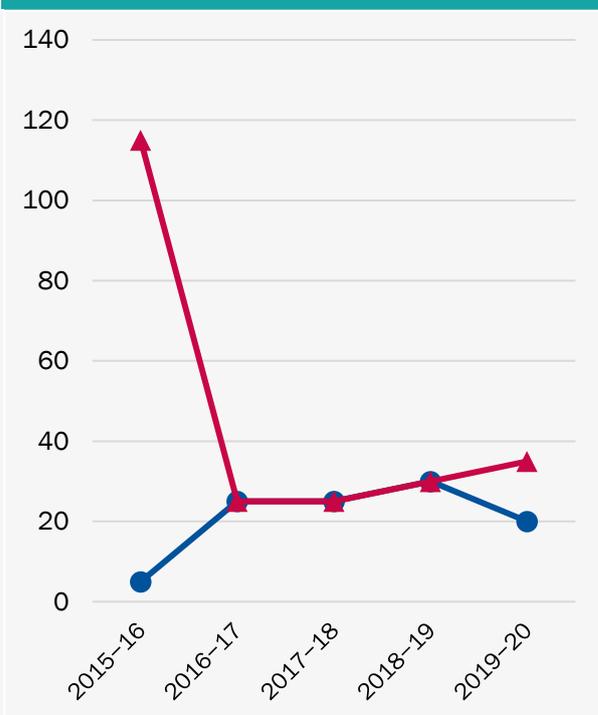


Figure 27: Welsh HE TNE students in non-EU Europe by level of study, 2015–16 to 2019–20



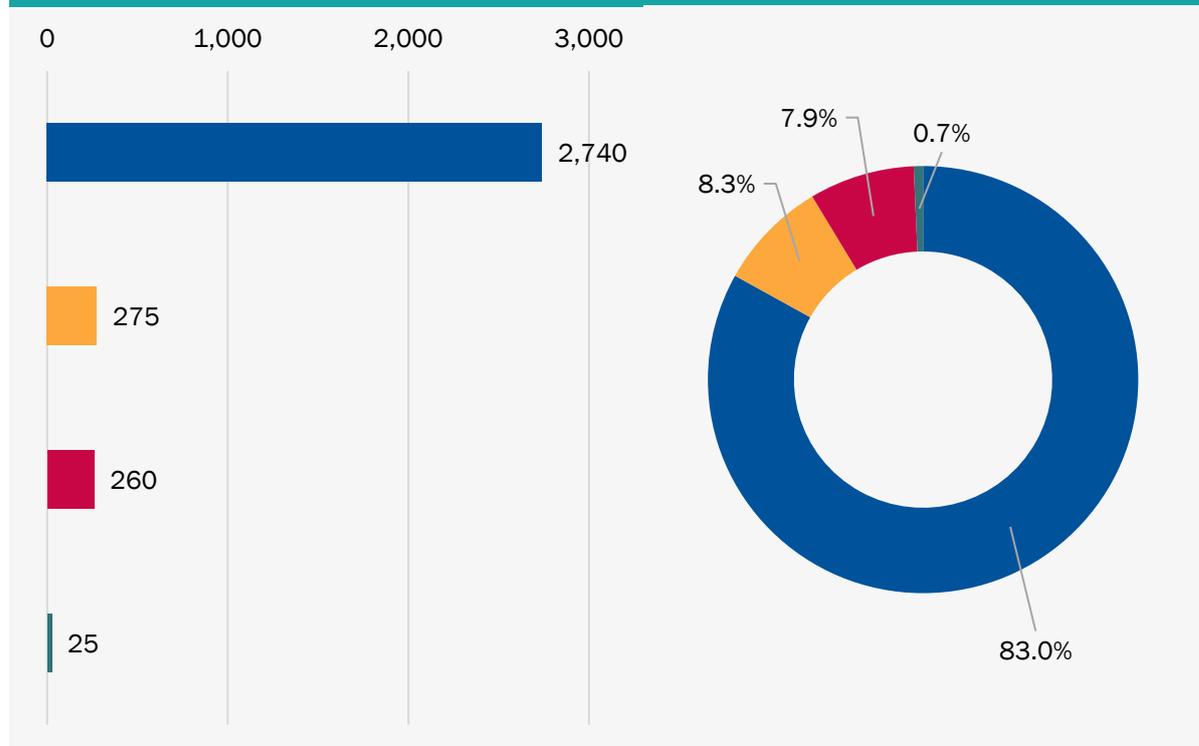
Undergraduate ●

Postgraduate ▲

Middle East

FIGURE 28 shows that that in 2019–20, a majority of TNE students reported by Welsh providers in the Middle East were studying through collaborative provision (83.0%), followed by distance, flexible and distributed learning (8.3%), other arrangements (7.9%) and at overseas campuses (0.7%).

Figure 28: Welsh HE TNE students in the Middle East by type of provision, 2019–20



Collaborative provision (2,740, 83.0%)

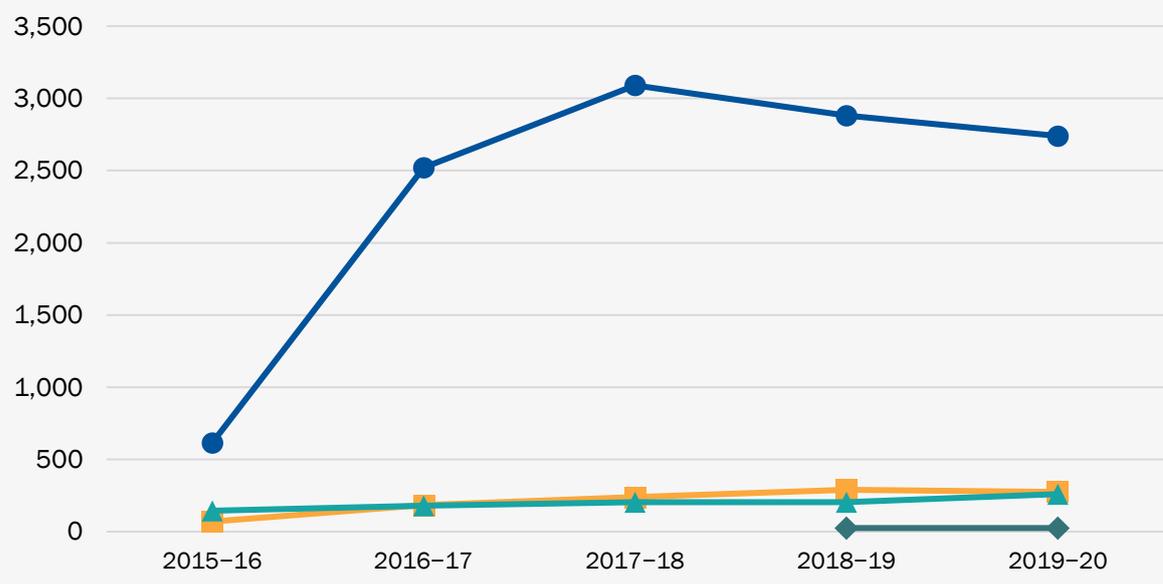
Distance, flexible and distributed learning (275, 8.3%)

Other arrangement (260, 7.9%)

Overseas campus (25, 0.7%)

FIGURE 29 shows that between 2015–16 and 2019–20, there was an increase in all TNE modes of study reported by Welsh providers in the Middle East. The number of students studying through collaborative provision increased steeply between 2015–16 and 2017–18, with a slight decrease in the last two years. Welsh providers reported students studying at an overseas campus in the Middle East for the first time in 2018–19.

Figure 29: Welsh HE TNE students in the Middle East by type of provision, 2015–16 to 2019–20



Collaborative provision ●

Distance, flexible and distributed learning ■

Registered at overseas partner organisation ▲

Overseas campus ◆

FIGURE 30 shows that 81.7% of TNE students reported by Welsh providers in 2019–20 in the Middle East were studying at undergraduate level, compared with 18.3% at postgraduate level. FIGURE 31 shows that between 2015–16 and 2019–20, there were increases at both levels of provision, with a large increase at undergraduate level between 2015–16 and 2017–18 before slight decreases in 2018–19 and 2019–20.

Figure 30: Welsh HE TNE students in the Middle East by level of study, 2019–20

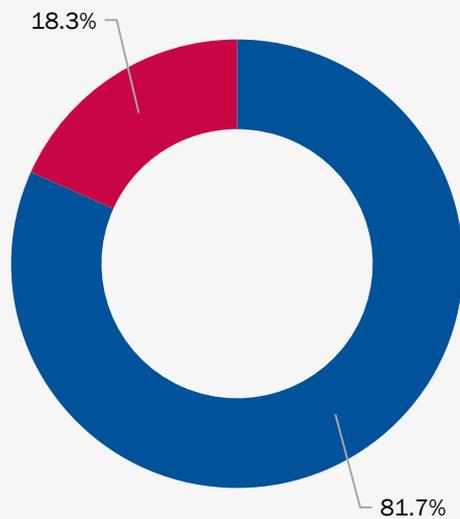
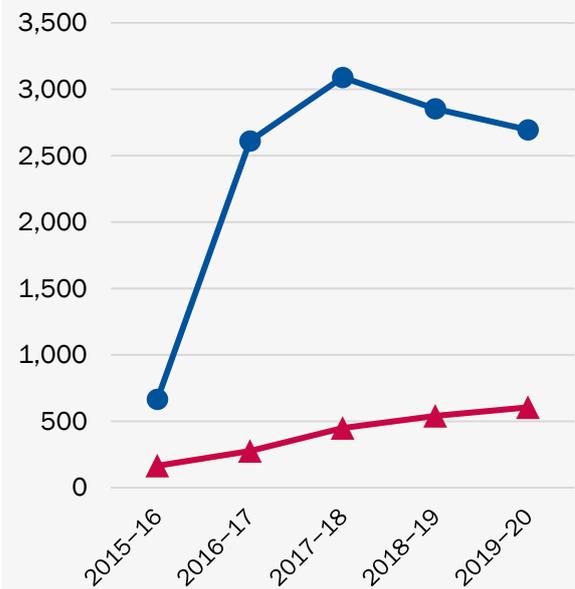


Figure 31: Welsh HE TNE students in the Middle East by level of study, 2015–16 to 2019–20



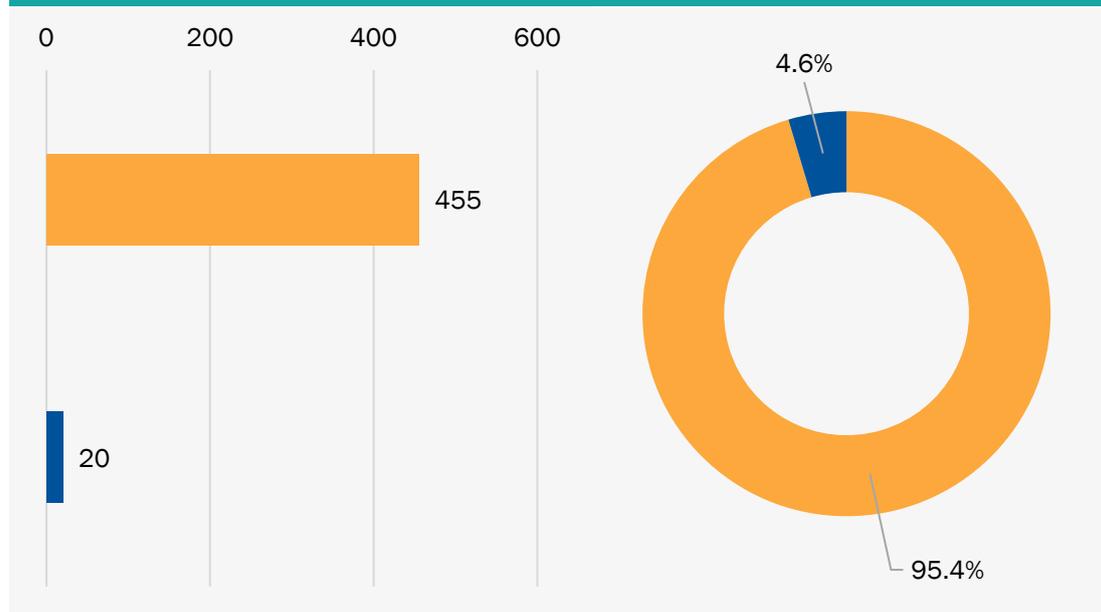
Undergraduate ●

Postgraduate ▲

North America

FIGURE 32 shows that in 2018–19, a majority of TNE students reported by Welsh providers in North America were studying through distance, flexible and distributed learning (95.4%), followed by collaborative provision (4.6%).

Figure 32: Welsh HE TNE students in North America by type of provision, 2019–20

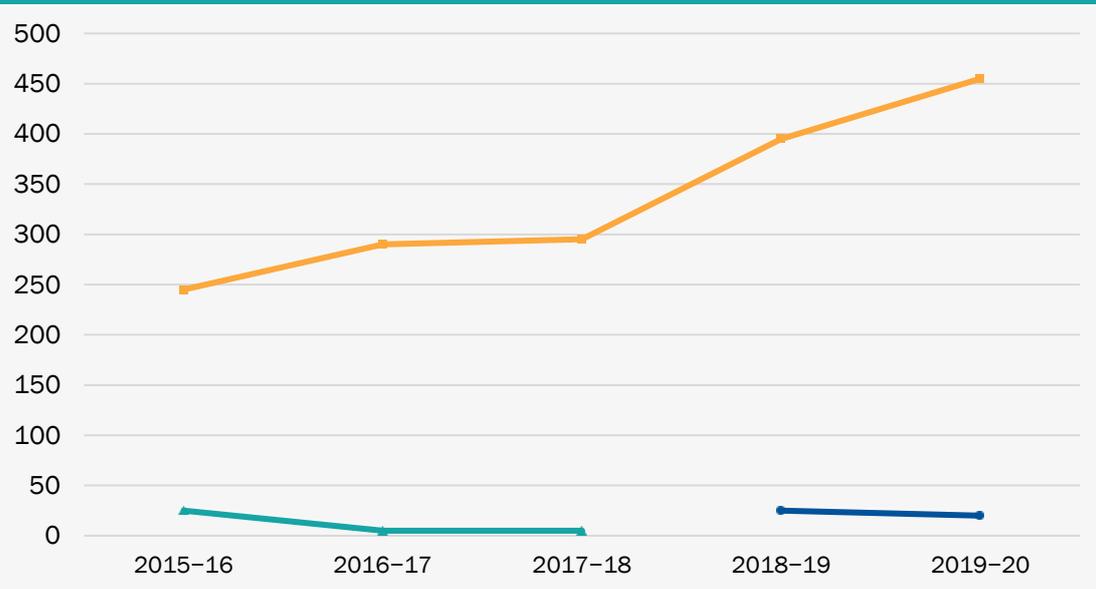


Distance, flexible and distributed learning (455, 95.4%)

Collaborative provision (20, 4.6%)

FIGURE 33 shows that between 2015–16 and 2019–20, there was an increase in students studying through distance, flexible and distributed learning. No students were reported registered at an overseas partner organisation by Welsh providers after 2016-17, and the first-time students were reported through collaborative provision in North America was in 2018–19.

Figure 33: Welsh HE TNE students in North America by type of provision, 2015–16 to 2019–20



Distance, flexible and distributed learning ■

Registered at overseas partner organisation ▲

Collaborative provision ●

FIGURE 34 shows that 93.3% of TNE students reported by Welsh institutions in 2019–20 in North America were studying at postgraduate level, compared with 6.7% at undergraduate level. FIGURE 35 shows that between 2015–16 and 2019–20, there was an increase in the numbers of students studying at postgraduate level, especially in the last two academic years, and a steady decrease in the numbers of students studying at undergraduate level.

Figure 34: Welsh HE TNE students in North America by level of study, 2019–20

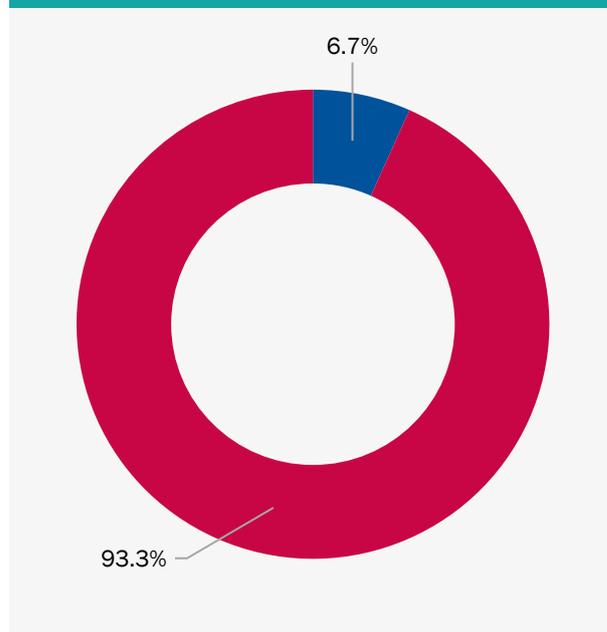
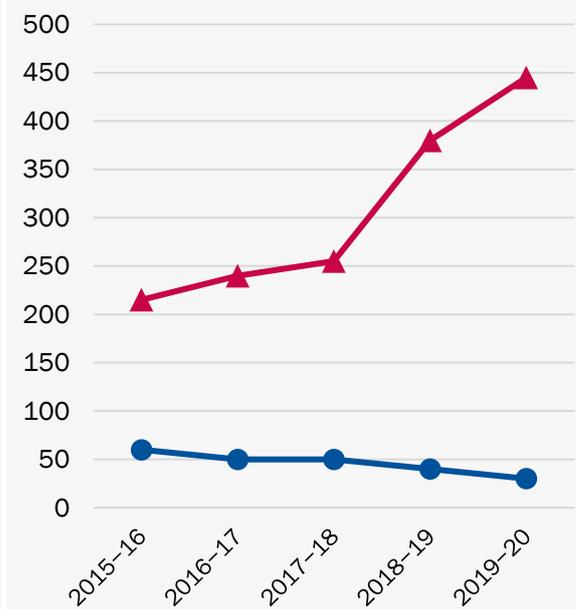


Figure 35: Welsh HE TNE students in North America by level of study, 2015–16 to 2019–20



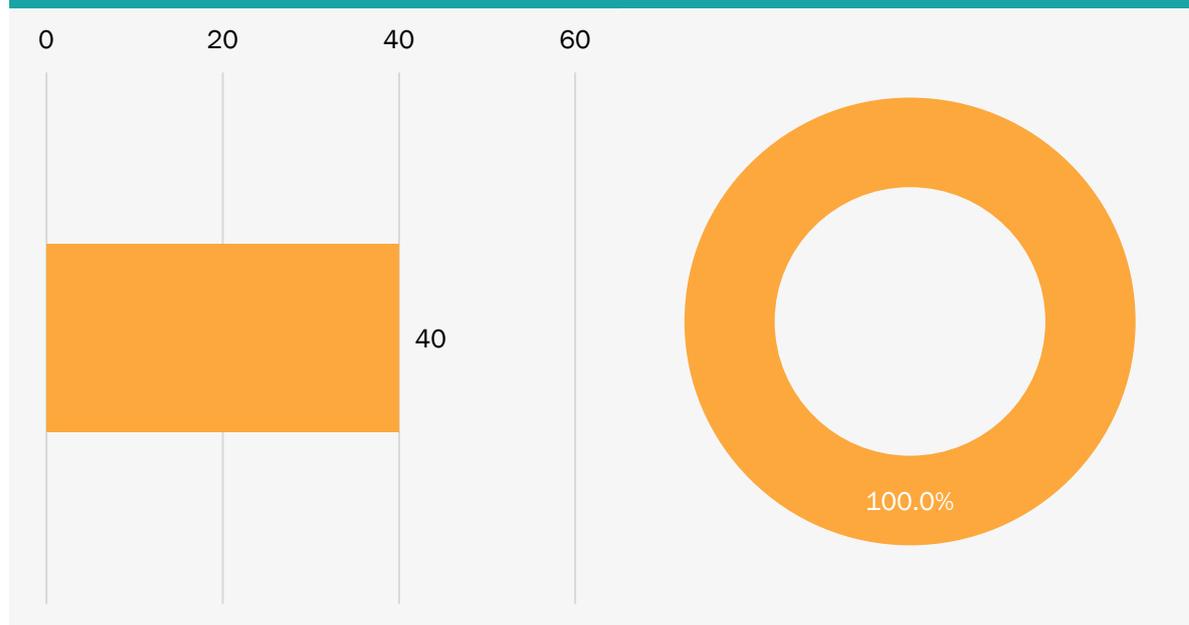
Undergraduate ●

Postgraduate ▲

South America

FIGURE 36 shows that all TNE students reported by Welsh providers in South America were studying through distance, flexible and distributed learning.

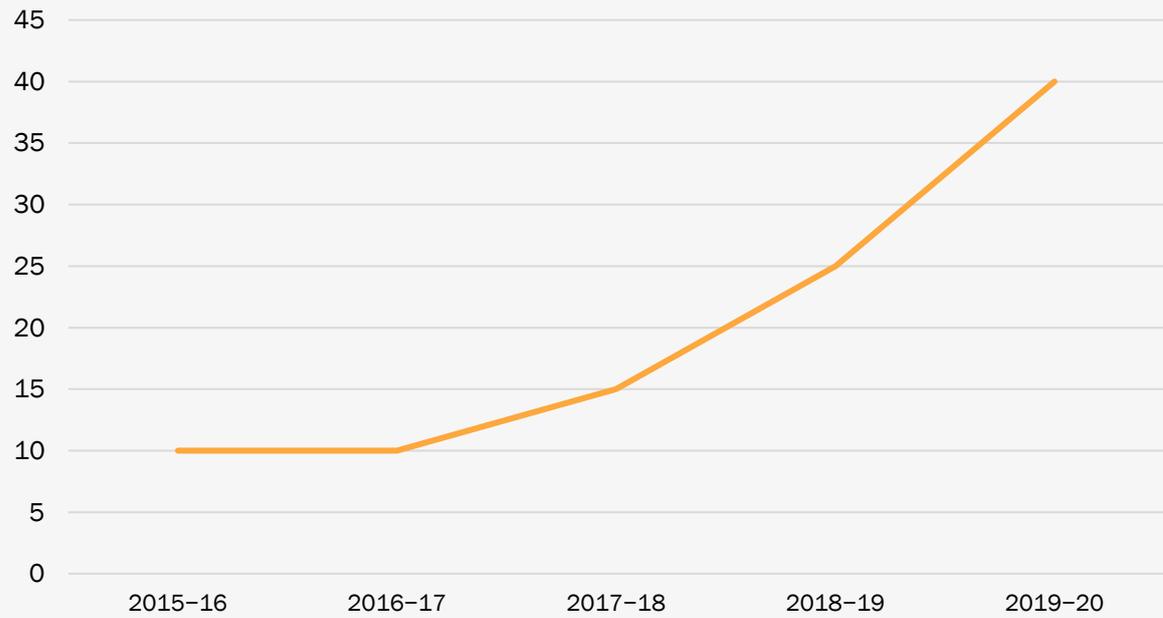
Figure 36: Welsh HE TNE students in South America by type of provision, 2019–20



Distance, flexible and distributed learning

FIGURE 37 shows that between 2015–16 and 2019–20, there was an increase in students studying through distance, flexible and distributed learning reported by Welsh providers in South America, especially between 2016–17 and 2019–20.

Figure 37: Welsh HE TNE students in South America by type of provision, 2015–16 to 2019–20



Distance, flexible and distributed learning

FIGURE 38 shows that all TNE students reported by Welsh institutions in 2019–20 in South America were studying at postgraduate level. FIGURE 39 shows that between 2015–16 and 2019–20, there was an increase in the number of students studying at postgraduate level.

Figure 38: Welsh HE TNE students in South America by level of study, 2019–20

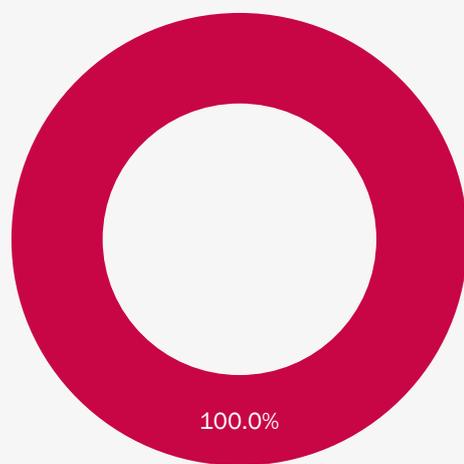
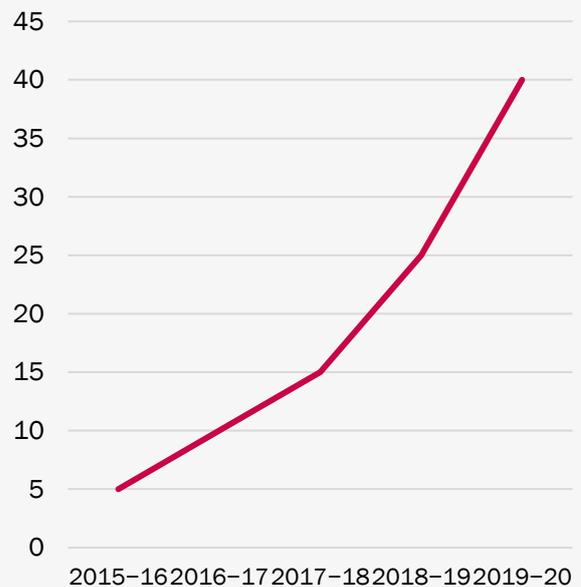


Figure 39: Welsh HE TNE students in south America by level of study, 2015–16 to 2019–20



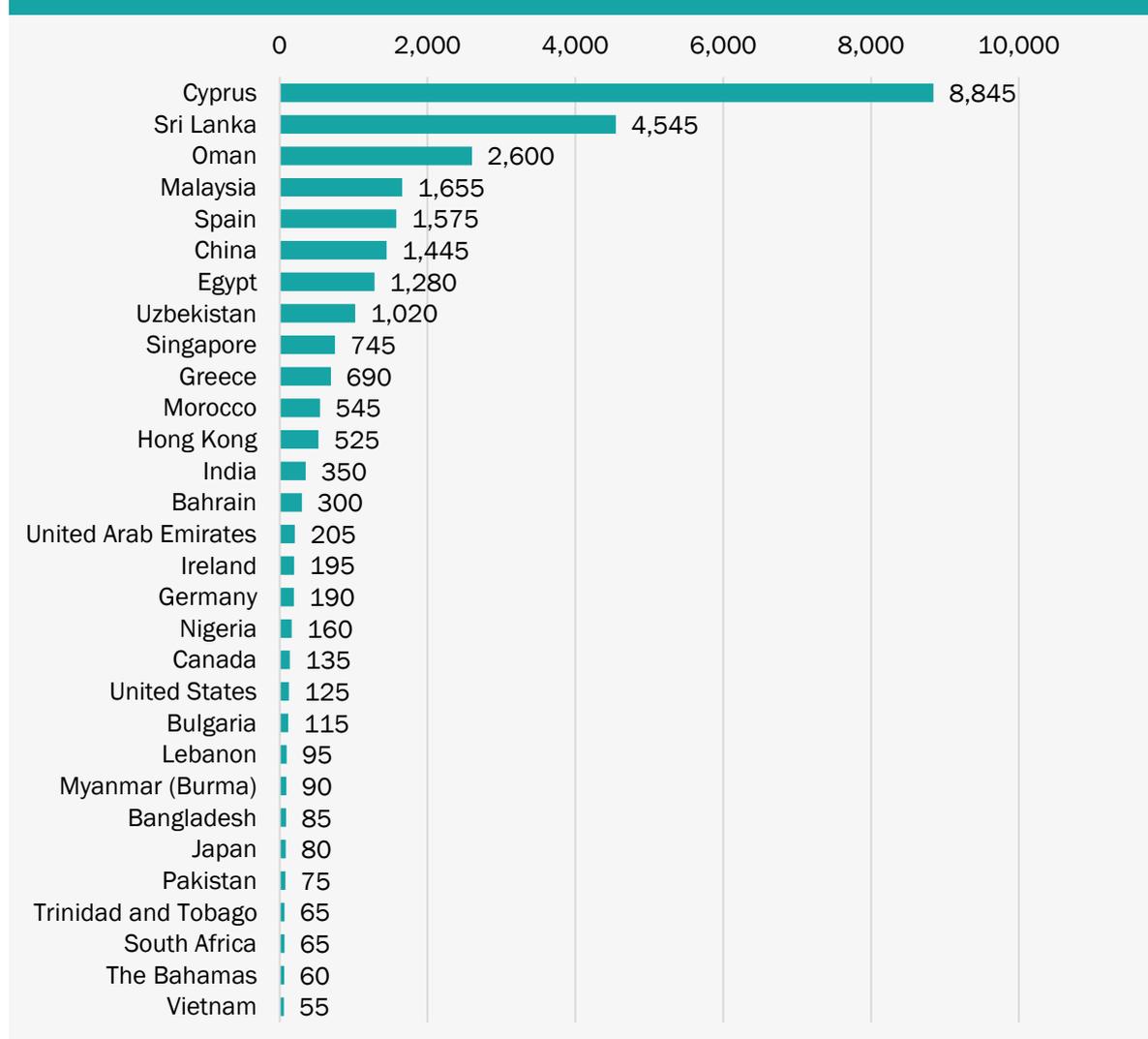
Postgraduate

Host countries and territories

Note: UK total excludes Oxford Brookes University.

Welsh providers delivered TNE in a total of 136 countries and territories in 2019–20. **FIGURE 40** shows a breakdown of TNE students reported by Welsh providers by country in 2019–20. The top three countries host 55.5% of all students, with Cyprus alone accounting for 30.7%. Cyprus, Sri Lanka, Oman, Spain, Uzbekistan, Morocco, Bahrain, Ireland, Bangladesh, Nigeria, Canada and Lebanon have a higher relative position in Wales than in the UK overall, while Malaysia, China, Singapore, Greece, Hong Kong, the United Arab Emirates (UAE) and Germany have a lower relative position.

Figure 40: Top 30 countries and territories hosting Welsh HE TNE students, 2019–20



Welsh providers reported TNE students in 32 countries in Africa in 2019–20, up from 30 the previous year. **TABLE 5** shows the five **African** countries hosting the most TNE students from Welsh providers in 2019–20.

Table 5: Top five host countries and territories of Welsh HE TNE students in Africa, 2019–20

Host country	Students	%
Egypt	1,280	54.3%
Morocco	545	23.0%
Nigeria	160	6.8%
South Africa	65	2.8%
Mauritius	40	1.7%

Welsh providers reported TNE students in 22 countries in Asia in 2019–20, down from 24 the previous year. **TABLE 6** shows the five **Asian** countries hosting the most TNE students from Welsh providers in 2019–20.

Table 6: Top five host countries and territories of Welsh HE TNE students in Asia, 2019–20

Host country	Students	%
Sri Lanka	4,545	42.5%
Malaysia	1,655	15.5%
China	1,445	13.5%
Uzbekistan	1,020	9.5%
Singapore	745	7.0%

Welsh providers reported TNE students in six countries in Australasia in 2019–20, up from five the previous year. **TABLE 7** shows the top five **Australasian** countries hosting TNE students from Welsh providers in 2019–20.

Table 7: Top five host countries and territories of Welsh HE TNE students in Australasia, 2019–20

Host country	Students	%
Australia	50	77.4%
New Zealand	10	14.5%
Papua New Guinea	<5	..%
Micronesia	<5	..%
Kiribati	<5	..%

Welsh providers reported TNE students in 25 countries in the European Union in 2019–20, down from 26 the previous year. **TABLE 8** shows the five **European Union** countries hosting the most TNE students from Welsh providers in 2019–20.

Table 8: Top five host countries and territories of Welsh HE TNE students in the EU, 2019–20

Host country	Students	%
Cyprus (EU)	8,845	74.9%
Spain	1,575	13.3%
Greece	690	5.8%
Ireland	195	1.6%
Germany	190	1.6%

Welsh providers reported TNE students in six countries in non-EU Europe in 2019–20, down from eight the previous year. **TABLE 9** shows the five **non-EU European** countries hosting the most TNE students from Welsh providers in 2019–20.

Table 9: Top five host countries and territories of Welsh HE TNE students in non-EU Europe, 2019–20

Host country	Students	%
Ukraine	20	..%
Switzerland	20	..%
Turkey	5	..%
Russia	5	..%
Norway	5	..%

Welsh providers reported TNE students in 14 countries in the Middle East in 2019–20, the same number as the previous year. **TABLE 10** shows the five **Middle Eastern** countries hosting the most TNE students from Welsh providers in 2019–20.

Table 10: Top five host countries and territories of Welsh HE TNE students in the Middle East, 2019–20

Host country	Students	%
Oman	2,600	78.9%
Bahrain	300	9.1%
United Arab Emirates	205	6.3%
Lebanon	95	2.9%
Saudi Arabia	35	1.0%

Welsh providers reported TNE students in 21 countries in North America in 2019–20, down from 24 the previous year. [TABLE 11](#) shows the five **North American** countries hosting the most TNE students from Welsh providers in 2019–20.

Table 11: Top five host countries and territories of Welsh HE TNE students in North America 2019–20

Host country	Students	%
Canada	135	28.2%
United States	125	25.9%
Trinidad and Tobago	65	13.9%
The Bahamas	60	13.1%
Jamaica	35	6.9%

Welsh providers reported TNE students in eight countries in South America in 2019–20, up from seven the previous year. [TABLE 12](#) shows the five **South American** countries hosting the most TNE students from Welsh providers in 2019–20.

Table 12: Top two host countries and territories of Welsh HE TNE students in South America, 2019–20

Host country	Students	%
Guyana	20	..%
Ecuador	5	..%
Colombia	5	..%
Brazil	5	..%
Uruguay	<5	..%

Conclusions

Transnational education provision is a vital component of international activities for Welsh higher education providers, and the findings of this report confirm its growing importance. Welsh providers are responsible for almost double the proportion of the UK's total TNE student population (6.4%) than they are for the proportion of full time international students studying in the UK (3.8%) in 2019–20. TNE student numbers for Welsh providers grew between 2015–16 and 2019–20 by 40.9%, compared to slower growth for the UK as a whole of 16.7%, despite a marginal decrease in the last year on record (-4.8%).

Distance, flexible and distributed learning provision from Welsh providers increased dramatically since 2015–16. This has been largely driven by two providers expanding their provision in the European Union and Asia. As a result, in 2019–20, Welsh providers reported a larger proportion of students studying through distance, flexible and distributed learning (37.8%) compared to the proportion reported by all UK providers (31.2%). In other categories, a larger proportion of TNE students at Welsh providers were studying through collaborative provision (44.9%), compared with the UK (39.1%).

The significant increase in distance, flexible and distributed learning in the EU has contributed to the EU overtaking Asia as the largest host region for Welsh providers' TNE students and (41.0% in Wales vs 16.6% in the UK), while Asia remains the largest host region for the UK as a whole (37.1% in Wales vs 50.2% in the UK). It has also contributed to a larger proportion of postgraduate TNE provision from Welsh providers (57.6%) than in the UK as a whole (31.7%).

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

Looking at the future, there are several inferences that could be drawn from the data:

- The preference of Welsh providers for partnership-based TNE. Collaborative provision is the largest category of provision in the Middle East (83.0%), Asia (71.2%) and Africa (38.9%), and it's significant in non-EU Europe (34.6%) and the European Union (13.7%). It is a fair assumption to estimate that Welsh providers' standards and quality are a crucial contribution to making them partners of choice for TNE provision globally. The review of tertiary education regulation in Wales will have to take stock of the transnational dimension of Welsh' higher education provision to ensure the continuity of this success story.

- The ongoing commitment of Welsh providers with partners in the European Union. The European Union hosts the largest contingent of TNE students reported by Welsh providers in 2019–20, 11,810, which make for a higher proportion of students than in the UK (41.0% in Wales vs 16.6% in the UK). Growth in TNE in the EU is a reflection of the importance that Welsh providers place on the region. Careful monitoring of the implementation of the UK-EU trade and co-operation agreement and host country regulatory environment will be crucial to ensure continuing market access.
- The remarkable presence of Welsh providers in emerging TNE markets. Examples of territories with significant student numbers include Sri Lanka (4,545), Egypt (1,280), Spain (1,575), Uzbekistan (1,020) or Morocco (545). The flagship Global Wales initiative has adopted a country-wide collaborative approach to boosting Wales' profile in key international markets and increasing Wales' long term soft power. Focused initially on the USA, India and Vietnam (with Europe soon to be added), in the future it'd be interesting to watch the contribution of TNE in emerging markets to meeting the initiative's strategic goals.

In sum, this edition of the Scale of UK Higher Education Transnational Education: Welsh Providers shows a healthy picture of Welsh TNE. In 2019-20 there were proportionally more students accessing a Welsh higher education overseas than international students in the country, compared with the rest of the UK. With continuing support from the UK and devolved administration as signalled in the commitments of the UK International Education Strategy and the Global Wales initiative, we hope the sector will continue growing and improving the life chances of students globally.

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January 2022

ISBN: 978-1-84036-477-4