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# SCALE OF UK HIGHER EDUCATION TRANSNATIONAL EDUCATION 2018–19: WELSH PROVIDERS TREND ANALYSIS OF HESA DATA

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## **Executive summary:**

This report provides trend analysis of UK transnational education (TNE) in relation to Welsh providers. It examines where students studied, at what level and through what kind of provision during the 2018–19 academic year. It also puts some of the figures into context, by providing a longitudinal overview of trends in TNE.

## **Audience:**

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

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## **DECEMBER 2020**

# EXECUTIVE SUMMARY

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

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

## OVERVIEW

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

- **Nine** higher education providers reported students studying through TNE.
- **55.5%** of Welsh providers reported more than 1,000 TNE students each.
- Welsh providers reported **30,265** students in TNE, which is **9.0%** of the total reported by UK providers.
- Welsh TNE student numbers increased by **3,285** students (**12.2%**) from 2017–18.
- Welsh TNE was reported in **138** countries and territories, more than ever before.
- Welsh providers reported that **43.1%** of TNE students were studying at undergraduate level and **56.9%** at postgraduate level.
- **40.8%** of TNE students at Welsh providers were studying through collaborative provision, followed by **38.6%** studying through distance, flexible and distributed learning, **12.8%** registered at an overseas partner organisation, and **2.2%** registered at an overseas campus.
- The European Union hosted the largest contingent of TNE students reported by Welsh providers in 2018–19 (**39.7%**), followed by Asia (**37.0%**), the Middle East (**11.2%**), Africa (**10.2%**), North America (**1.4%**), non-EU Europe (**0.2%**), Australasia (**0.2%**) and South America (**0.1%**).

# 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.

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

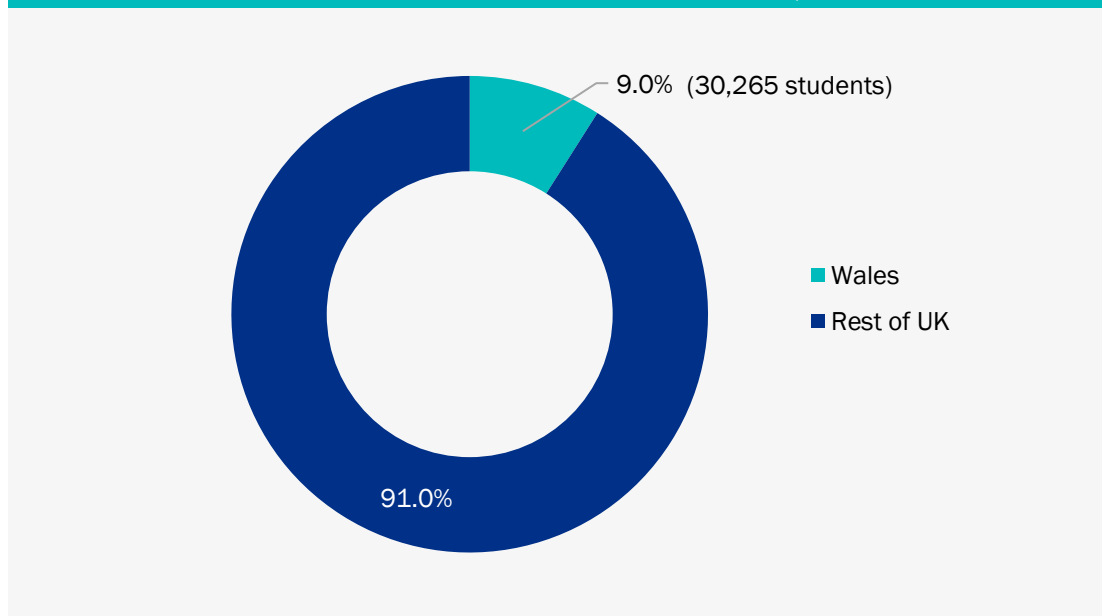
# REPORTING PROVIDERS

**Note: UK total excludes three main reporting providers of distance, flexible and blended TNE: Oxford Brookes University, the Open University and the University of London.**

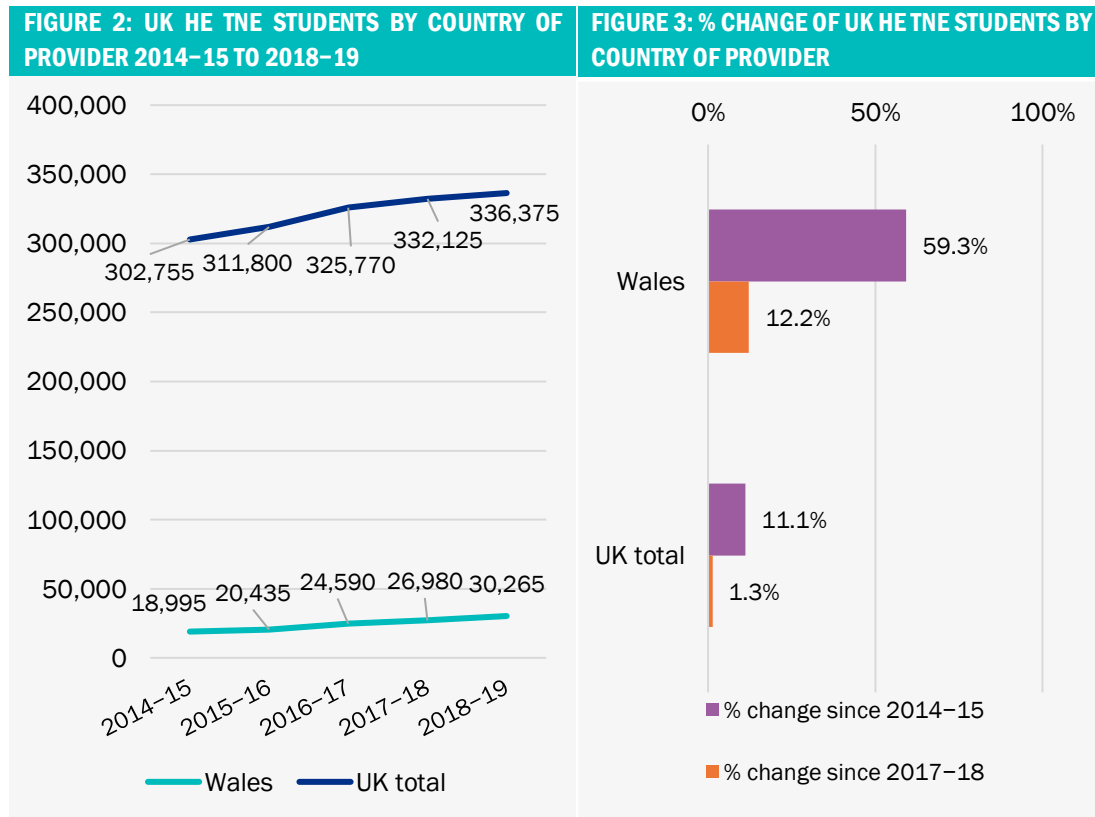
In 2018–19, these three providers made up 49.6% of the AOR and relatively small variations in one of them can have an impact on our understanding of the performance and spread of TNE more generally among UK universities.

As shown in **FIGURE 1**, in 2018–19 Welsh providers reported 30,265 students in TNE, which is 9.0% of the total reported by UK providers. By way of comparison, Welsh providers hosted 4.3% of the international (non-UK) students in the UK in 2018–19.

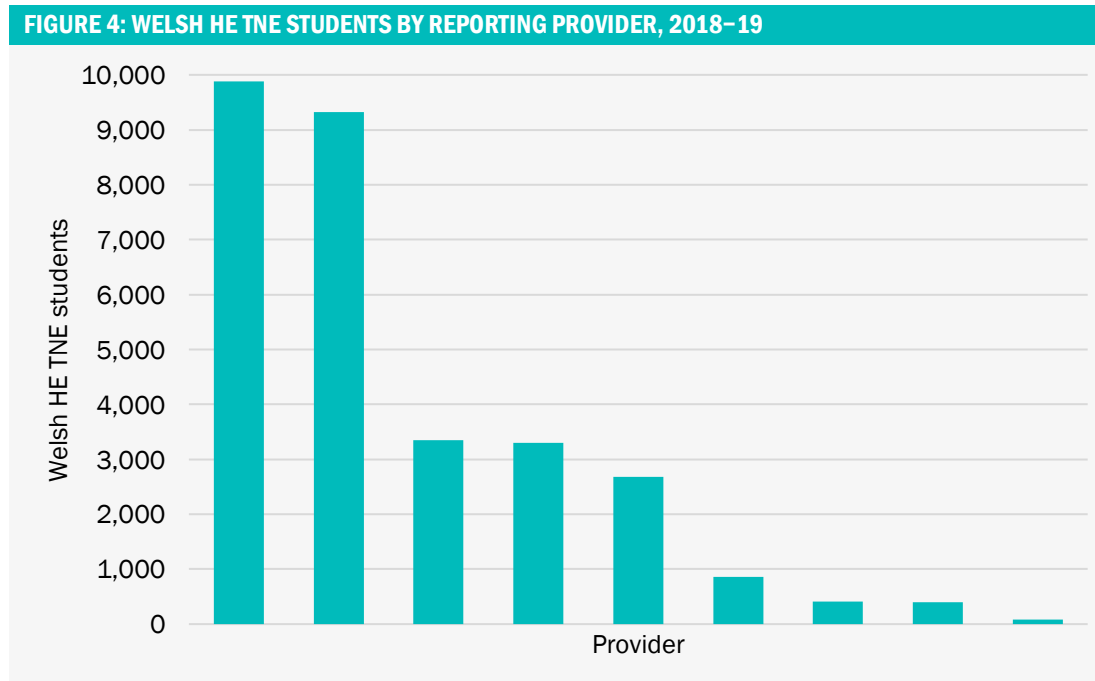
**FIGURE 1: PROPORTION OF UK HE TNE STUDENTS BY COUNTRY OF PROVIDER, 2018–19**



**FIGURE 2** and **FIGURE 3** show that between 2014–15 and 2018–19, TNE student numbers grew by 59.3% in Wales, compared to 11.1% in the UK (excluding the three main providers of distance, flexible and blended TNE). From 2017–18 to 2018–19, growth was 12.2% in Wales against 1.3% in the UK.



In 2018–19, five 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.

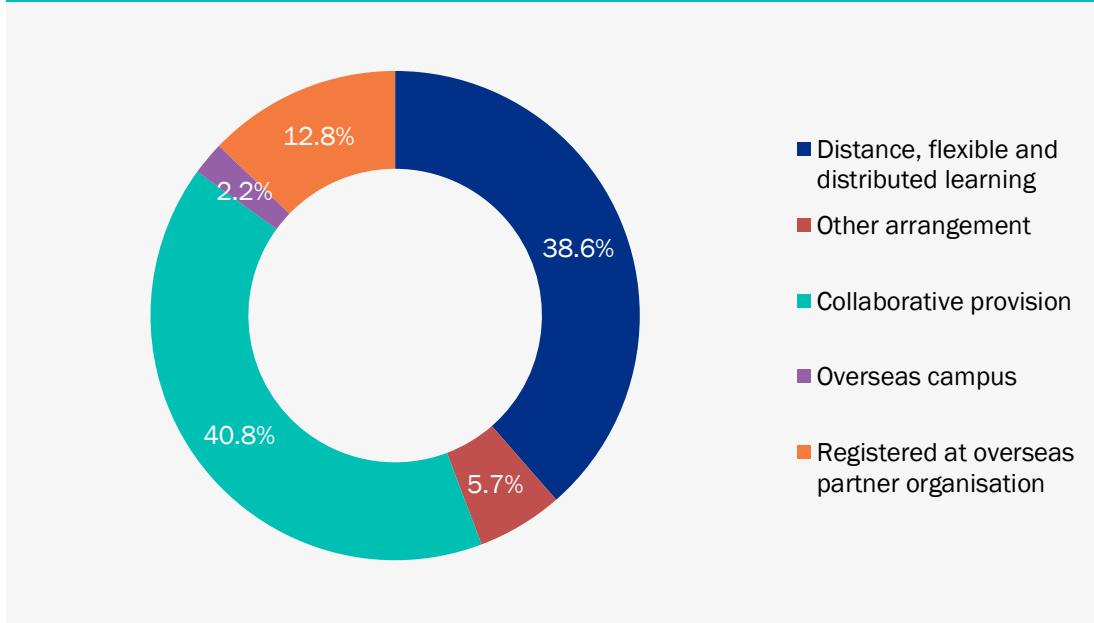


# TYPE OF PROVISION

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

**FIGURE 5** shows that in 2018–19, 40.8% of TNE students at Welsh providers were studying through collaborative provision, compared with 48.5% overall in the UK; 38.6% were studying through distance, flexible and distributed learning, compared with 21.3% overall in the UK; 2.2% were registered at an overseas campus, compared with 8.6% overall in the UK and 12.8% were registered at an overseas partner organisation, compared with 19.9% overall in the UK.

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



**TABLE 2** shows that the fastest growing TNE type of provision in Wales between 2014–15 and 2018–19 was distance, flexible and distributed learning with a 2089.5% increase. This method of provision saw a much slower increase for UK providers overall, with a 13.4% 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 a single provider which accounts for 82.4% of all students through this type of provision for Welsh providers in 2018–19.

Between 2017–18 and 2018–19, the fastest growing category in Wales was also distance, flexible and distributed learning, which increased by 87.4%, compared to 4.5% in the UK as a whole. There has been a marked decline in Wales in TNE students registered at an overseas partner organisation (-60.6%) compared with a smaller decrease in the UK as a whole (-18.0%) from 2014–15 to 2018–19.

**TABLE 2: WELSH HE TNE STUDENTS BY TYPE OF PROVISION, 2014–15 TO 2018–19**

Type of provision	Academic year					Change since 2014–15	Change since 2017–18
	2014–15	2015–16	2016–17	2017–18	2018–19		
Distance, flexible and distributed learning	535	1,870	3,085	6,230	11,670	2089.5%	87.4%
Other arrangement	805	1,425	1,590	1,700	1,715	113.2%	0.8%
Collaborative provision	7,525	9,035	11,780	12,730	12,345	64.0%	-3.0%
Overseas campus	325	505	630	685	670	106.8%	-2.2%
Registered at overseas partner organisation	9,810	7,605	7,505	5,635	3,865	-60.6%	-31.4%
Total	18,995	20,435	24,590	26,980	30,265	59.3%	12.2%

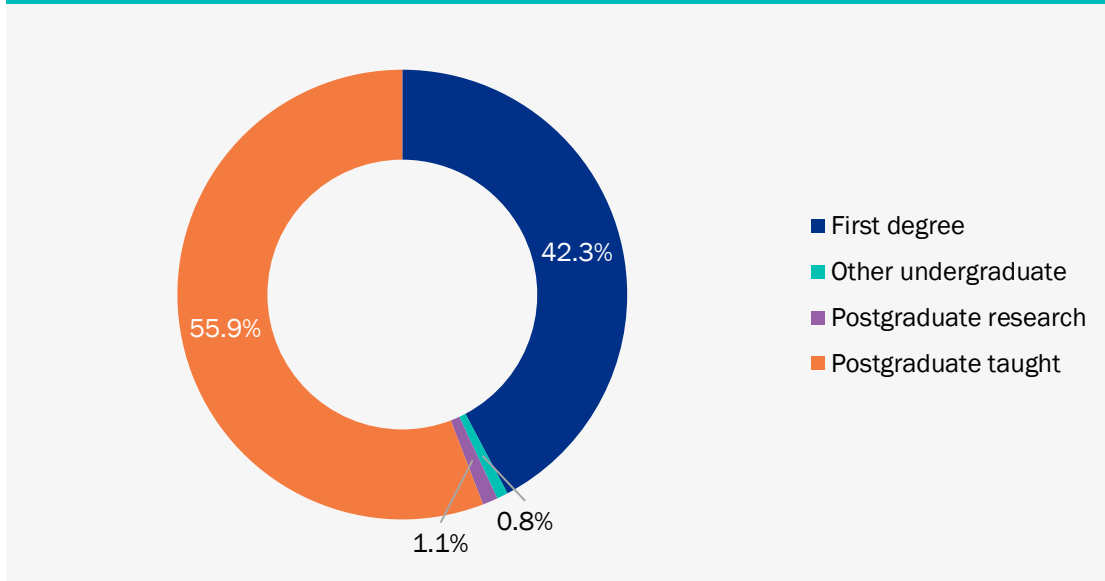


# LEVEL OF PROVISION

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

FIGURE 6 shows that in 2018–19, Welsh providers reported that 43.1% of TNE students were studying at undergraduate level and 56.9% at postgraduate level. The proportion for the UK as a whole was 65.5% undergraduate and 34.5% postgraduate.

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



As shown in **TABLE 3**, in 2018–19 Welsh providers reported 13,035 TNE students at undergraduate level, an increase of 16.6% since 2014–15; and 17,230 TNE students at postgraduate level, an increase of 120.5% since 2014–15. In the UK as a whole, the increases were 11.5% and 10.3% respectively.

**TABLE 3: WELSH HE TNE STUDENTS BY LEVEL OF STUDY, 2014–15 TO 2018–19**

Level of study		Academic Year					Change since 2014–15	Change since 2017–18
		2014–15	2015–16	2016–17	2017–18	2018–19		
UG	First degree	11,050	11,760	14,755	13,880	12,805	15.9%	-7.7%
	Other UG	130	175	190	235	230	74.8%	-1.7%
	Total	11,180	11,935	14,945	14,115	13,035	16.6%	-7.6%
PG	PG research	25	80	160	285	320	1,225.0%	11.2%
	PG taught	7,790	8,420	9,490	12,575	16,910	117.1%	34.5%
	Total	7,815	8,500	9,650	12,865	17,230	120.5%	33.9%
Total		18,995	20,435	24,590	26,980	30,265	59.3%	12.2%

# HOST REGIONS

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

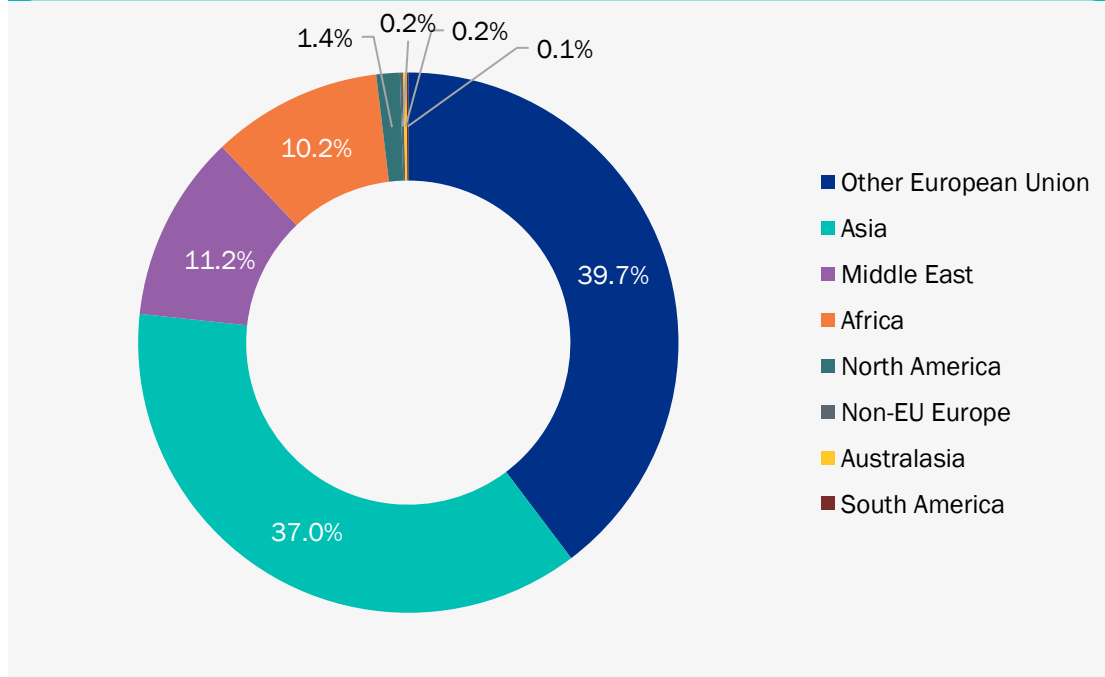
TABLE 4 shows that the European Union hosted the largest contingent of TNE students reported by Welsh providers in 2018–19, followed by Asia, the Middle East, Africa, North America, non-EU Europe, Australasia and South America.

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

Region	%	Students
European Union	39.7%	12,025
Asia	37.0%	11,185
Middle East	11.2%	3,395
Africa	10.2%	3,090
North America	1.4%	415
Non-EU Europe	0.2%	60
Australasia	0.2%	60
South America	0.1%	25

FIGURE 7 shows a breakdown of TNE students reported by Welsh providers by region in 2018–19. Compared with the UK as a whole, Wales offered provision to a higher proportion of students in the European Union (39.7% in Wales vs 16.3% in the UK) and the Middle East (11.2% in Wales vs 10.7% in the UK), and to a lower proportion in Asia (37.0% in Wales vs 53.3% in the UK), Africa (10.2% in Wales vs 11.9% in the UK), North America (1.4% in Wales vs 4.4% in the UK), non-EU Europe (0.2% in Wales vs 2.5% in the UK), Australasia (0.2% in Wales vs 0.6% in the UK) and South America (0.1% in Wales vs 0.4% in the UK).

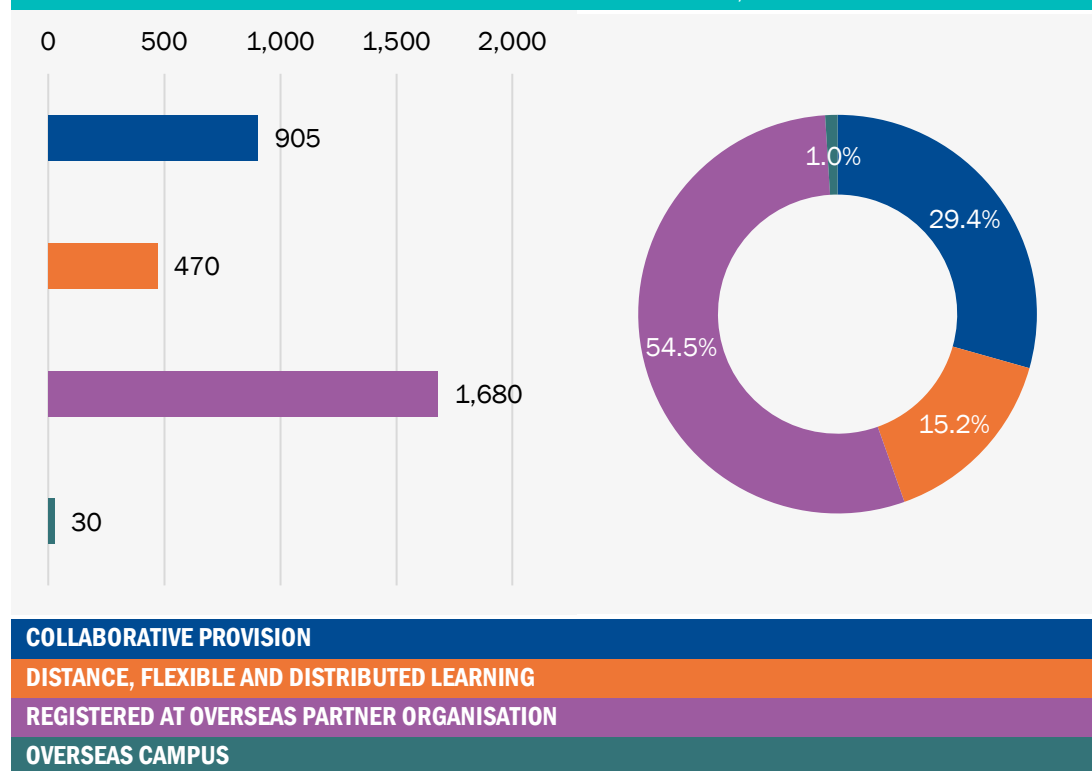
FIGURE 7: WELSH HE TNE STUDENTS BY HOST REGION, 2018–19



## Africa

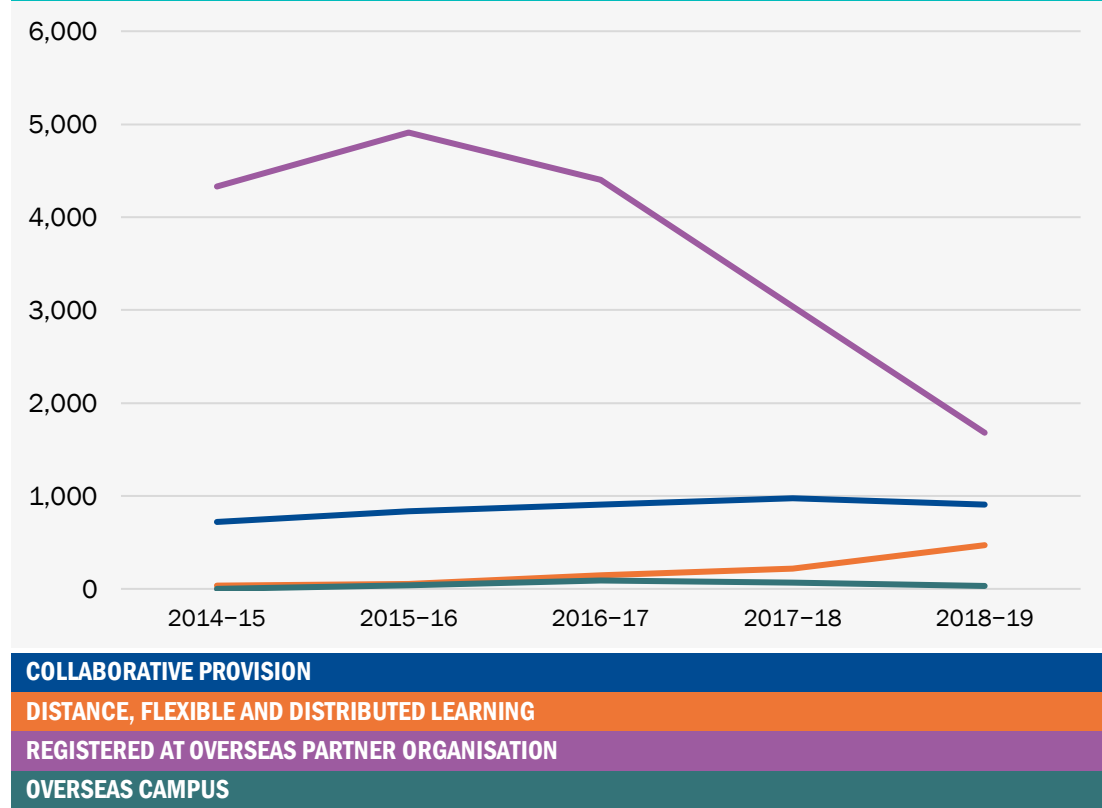
**FIGURE 8** shows that in 2018–19, a majority of TNE students reported by Welsh providers in Africa were registered at an overseas partner organisation (54.5%), followed by collaborative provision (29.4%), distance, flexible and distributed learning (15.2%) and registered at an overseas campus (1.0%).

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

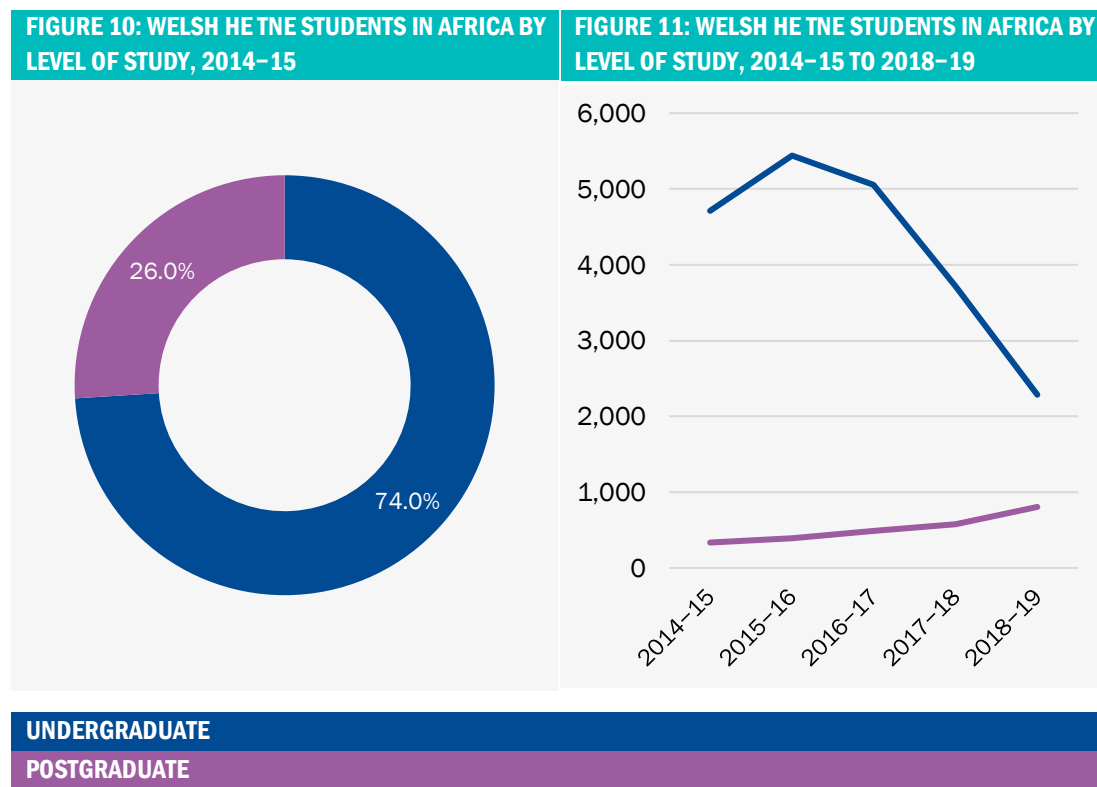


**FIGURE 9** shows that between 2014–15 and 2018–19, there was an increase in collaborative provision and distance, flexible, or distributed learning reported by Welsh providers in Africa. Over the same time period, there was a decrease in those registered at an overseas partner organisation, with a marked decline after reaching a peak in 2015–16, and a slight decrease in those registered at an overseas campus after a peak in 2016–17.

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

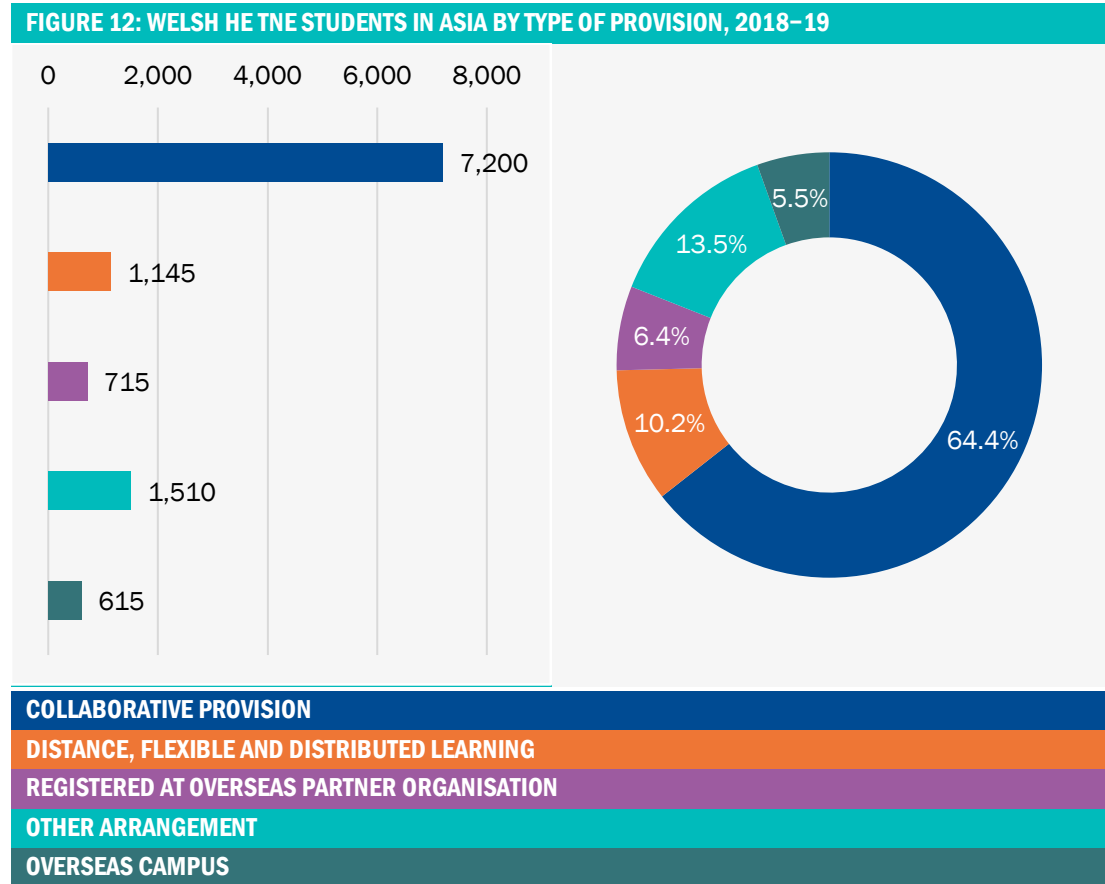


**FIGURE 10** shows that 74.0% of TNE students reported by Welsh providers in 2018–19 in Africa were studying at undergraduate level, against 26.0% at postgraduate level. **FIGURE 11** shows that between 2014–15 and 2018–19, there was an increase at postgraduate level and a decline in undergraduate student numbers after reaching a peak in 2015–16.



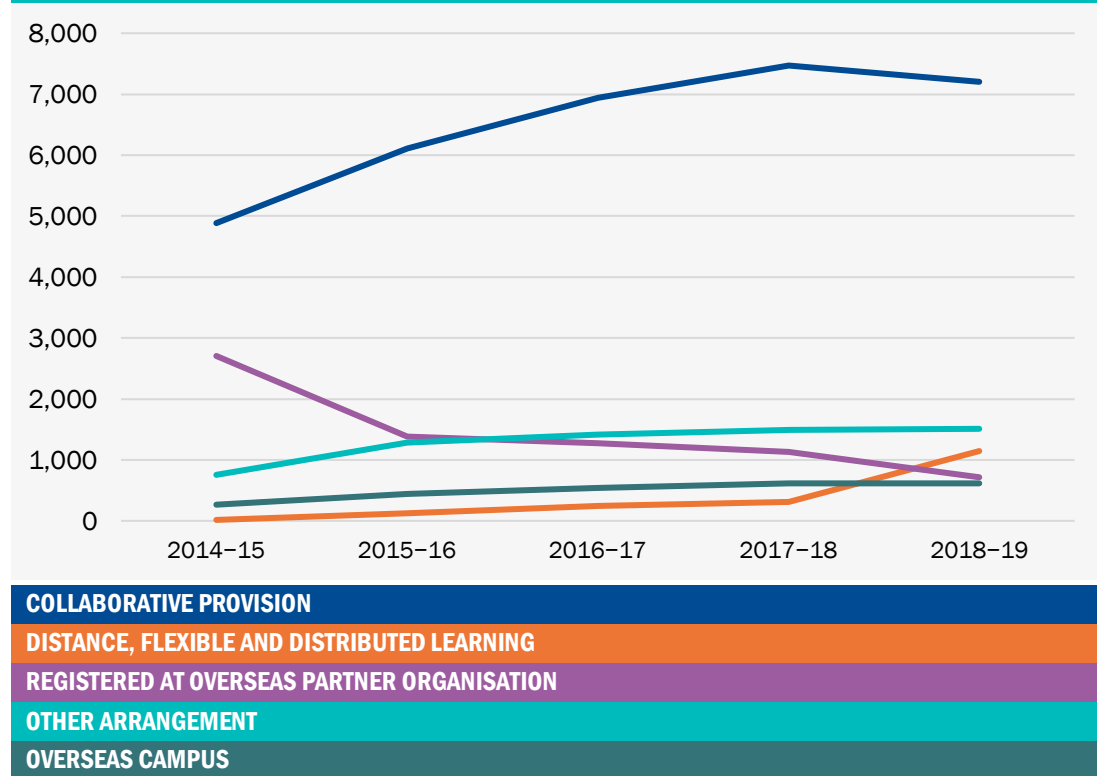
## Asia

**FIGURE 12** shows that in 2018–19, a majority of TNE students reported by Welsh providers in Asia were studying through collaborative provision (64.4%), followed by other arrangements (13.5%), distance, flexible and distributed learning (10.2%), registered at an overseas partner organisation (6.4%); and at an overseas campus (5.5%).



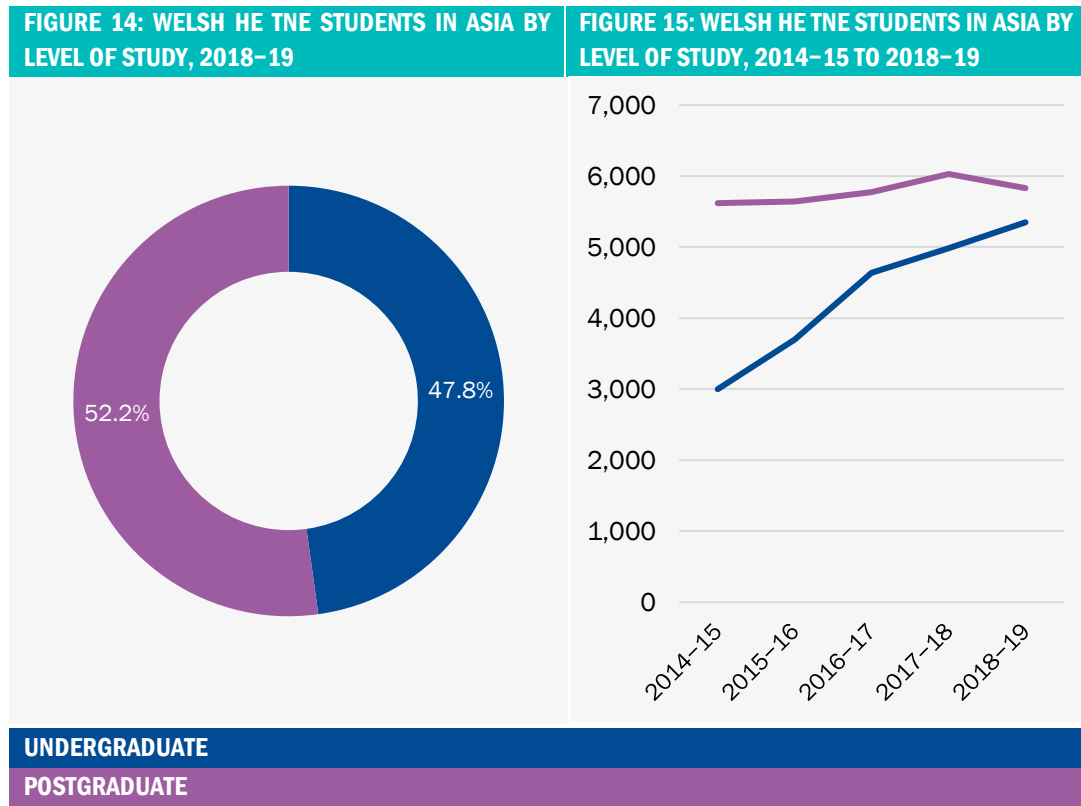
**FIGURE 13** shows that between 2014–15 and 2018–19, there was an increase in all TNE modes of study reported by Welsh providers in Asia except in those registered at an overseas partner organisation. From a near zero baseline in 2014–15, the number of students studying through distance, flexible, or distributed learning in Asia increased by 8071.4% in this time, and student numbers on overseas campuses increased by 131.7%.

**FIGURE 13: WELSH HE TNE STUDENTS IN ASIA BY TYPE OF PROVISION, 2014–15 TO 2018–19**





**FIGURE 14** shows that 52.2% of TNE students reported by Welsh providers in 2018–19 in Asia were studying at postgraduate level, against 47.8% at undergraduate level. **FIGURE 15** shows that between 2014–15 and 2018–19, there was an increase at both levels of study, with a slight decrease between 2017–18 and 2018–19 at the postgraduate level (-3.3%).



## Australasia

FIGURE 16 shows that all TNE students reported by Welsh providers in Australasia in 2018–19 were studying through distance, flexible and distributed learning.

FIGURE 16: WELSH HE TNE STUDENTS IN AUSTRALASIA BY TYPE OF PROVISION, 2018–19

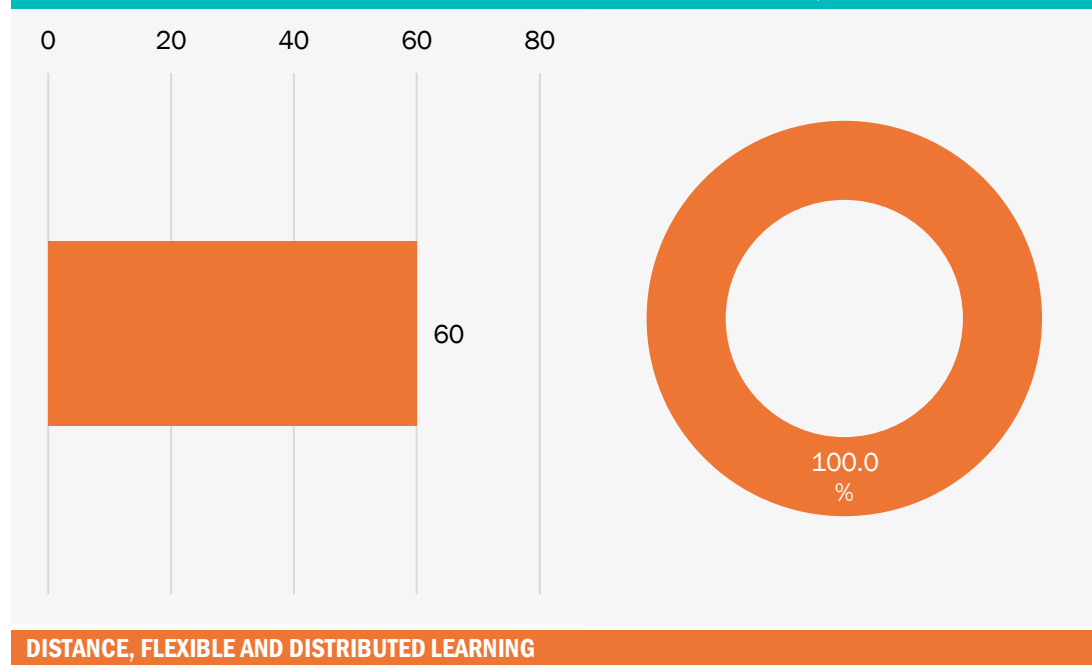
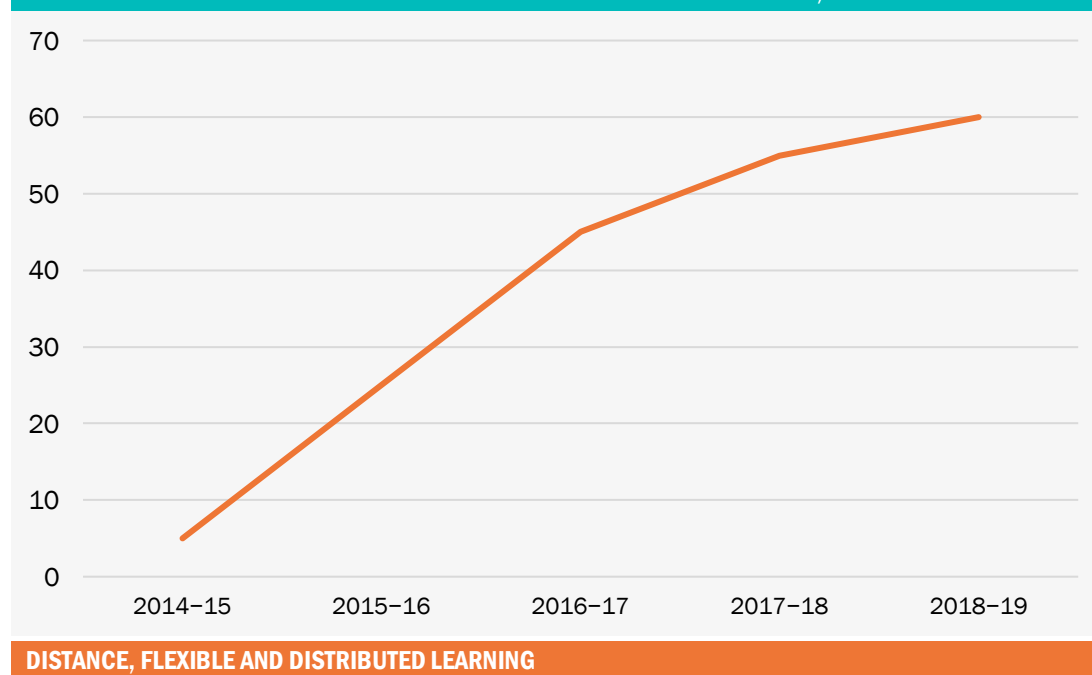
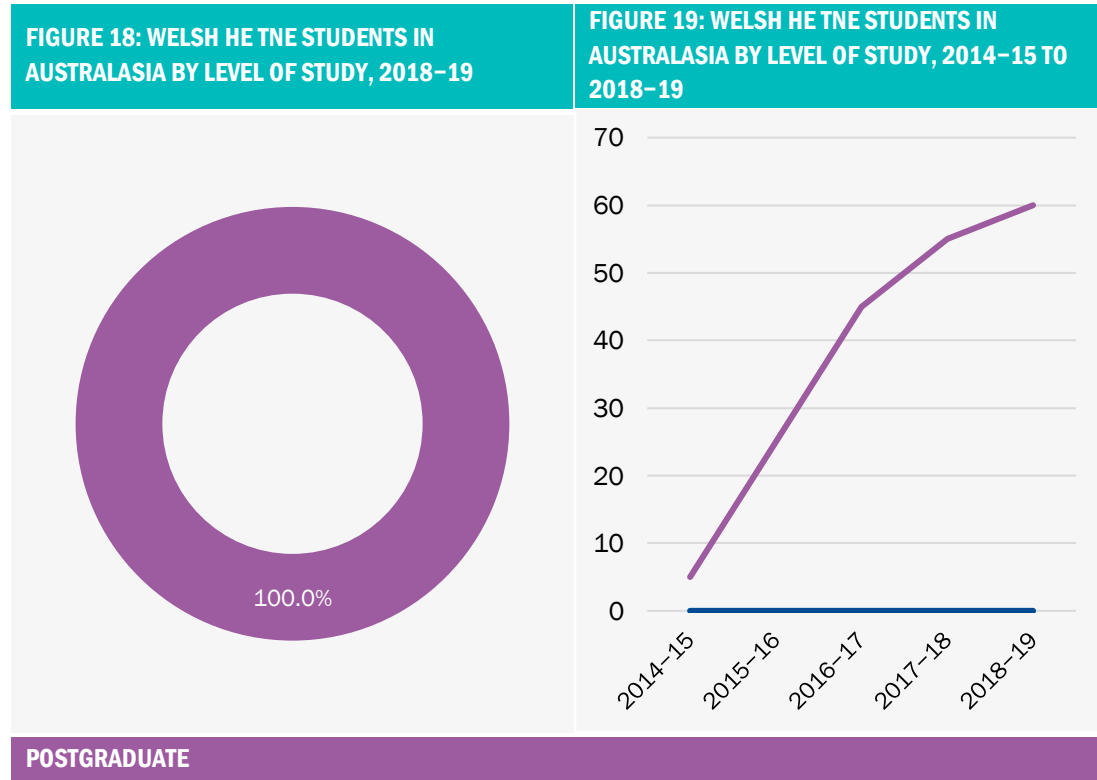


FIGURE 17 shows that the number of students studying through distance, flexible and distributed learning in Australasia increased between 2014–15 and 2018–19, with growth slowing slightly from 2016–17.

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



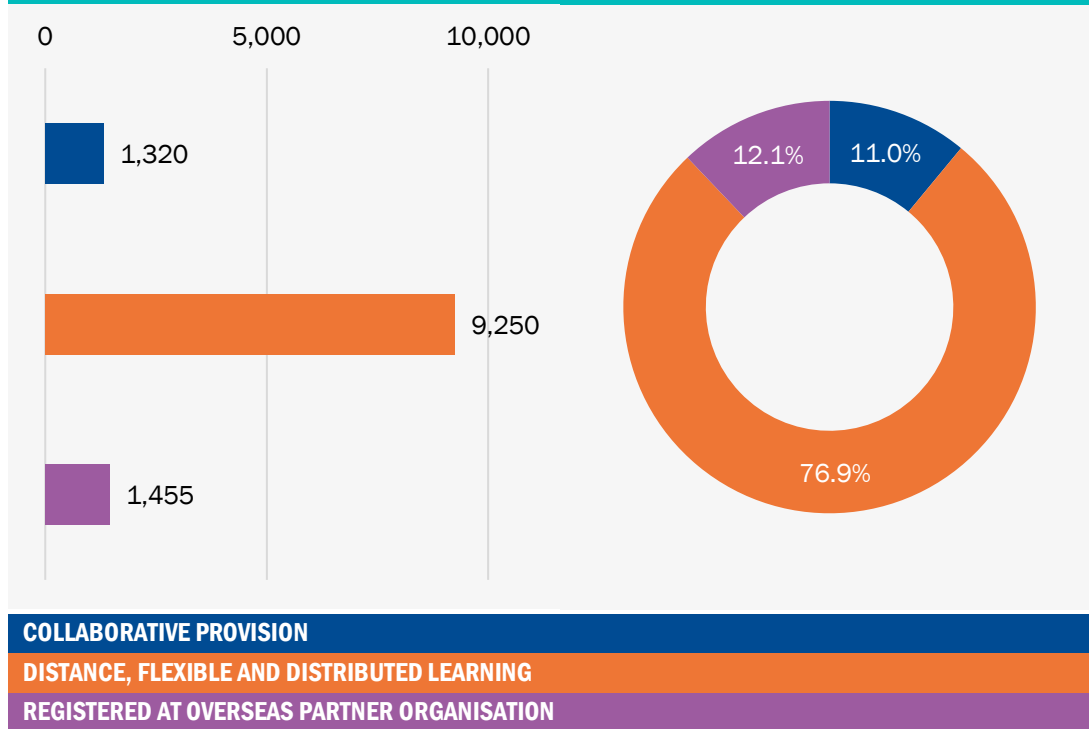
**FIGURE 18** shows that all TNE students reported by Welsh providers in 2018–19 in Australasia were studying at postgraduate level. **FIGURE 19** shows that there was an increase in postgraduate student numbers between 2014–15 and 2018–19, with very low undergraduate student numbers last reported in 2014–15.



## European Union

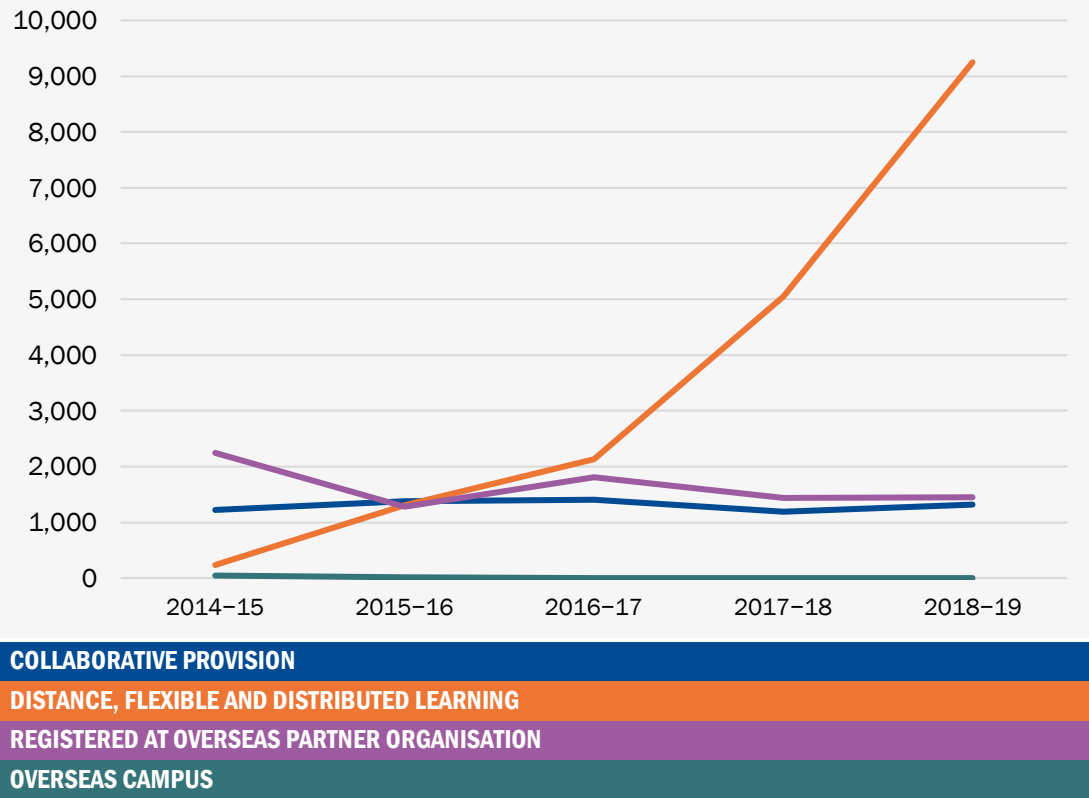
**FIGURE 20** shows that in 2018–19, a majority of TNE students reported by Welsh providers in the European Union were studying through distance, flexible and distributed learning (76.9%), followed by registered at an overseas partner organisation (12.1%) and through collaborative provision (11.0%).

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

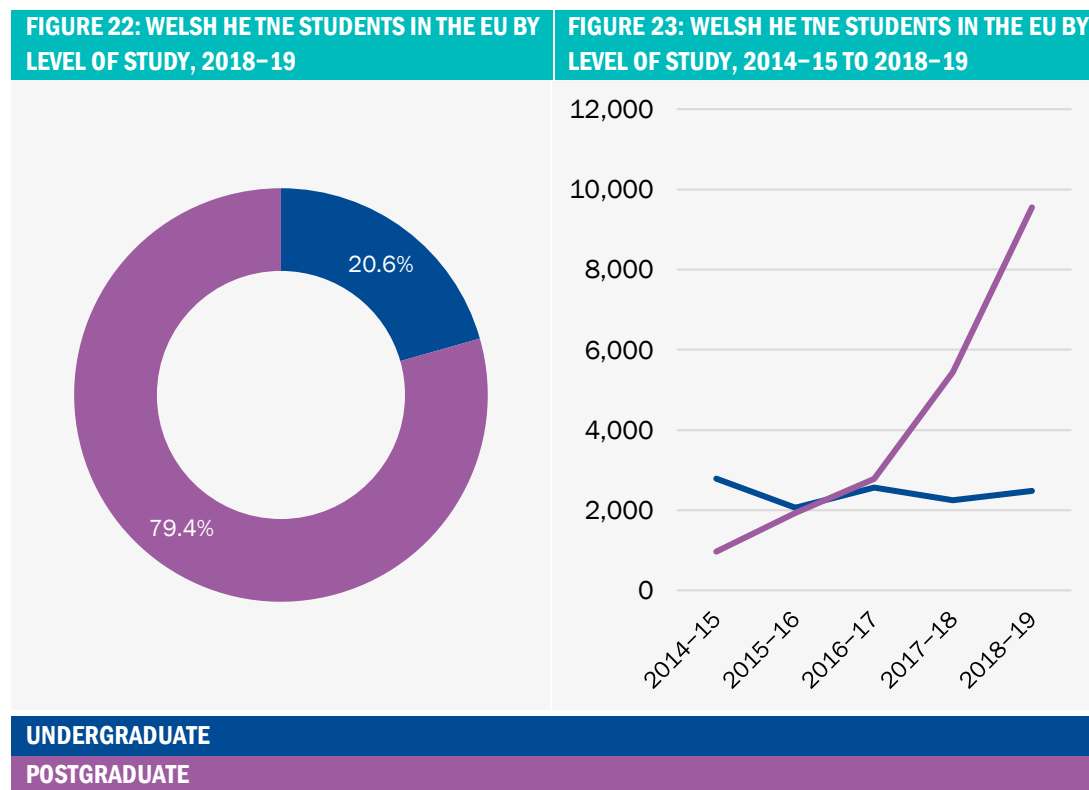


**FIGURE 21** shows that between 2014–15 and 2018–19, there was a significant increase in students studying through distance, flexible and distributed learning, a decline in students registered at an overseas partner organisation and a slight increase in collaborative provision in the European Union. No students were registered at an overseas campus in 2018–19.

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



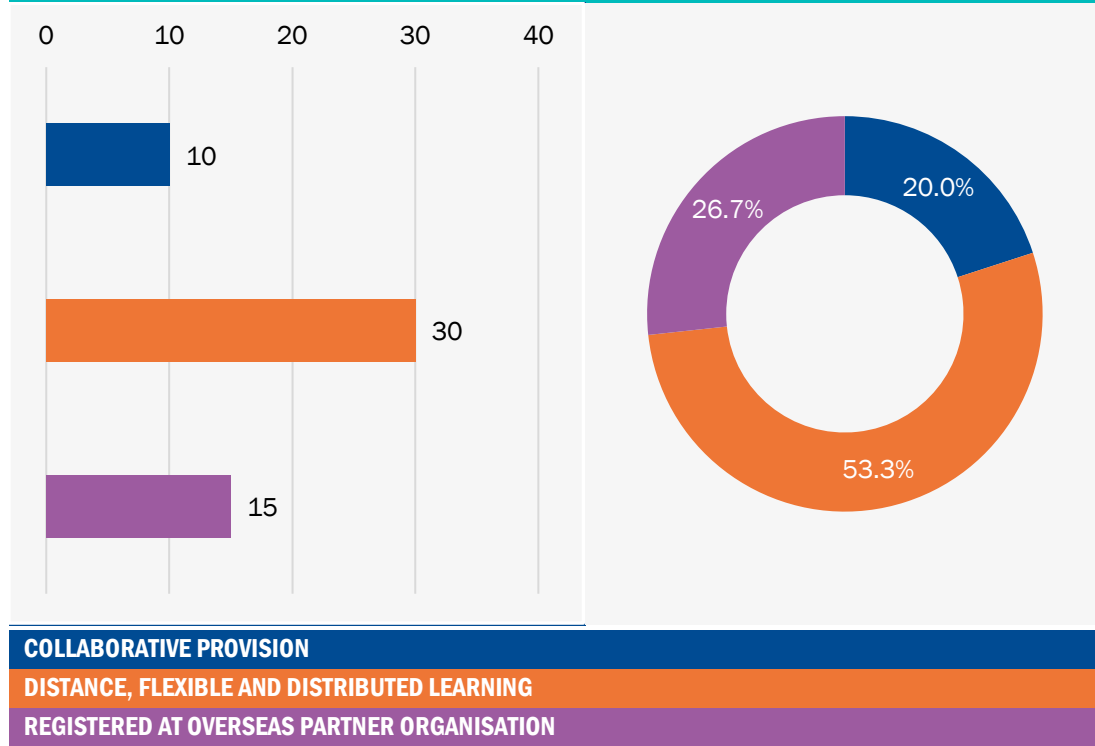
**FIGURE 22** shows that 79.4% of TNE students reported by Welsh providers in 2018–19 in the European Union were studying at postgraduate level, against 20.6% at undergraduate level. **FIGURE 23** shows that between 2014–15 and 2018–19, there was a steep increase at the postgraduate level (890.7%) and a modest decrease overall at the undergraduate level (-11.1%).



## Non-EU Europe

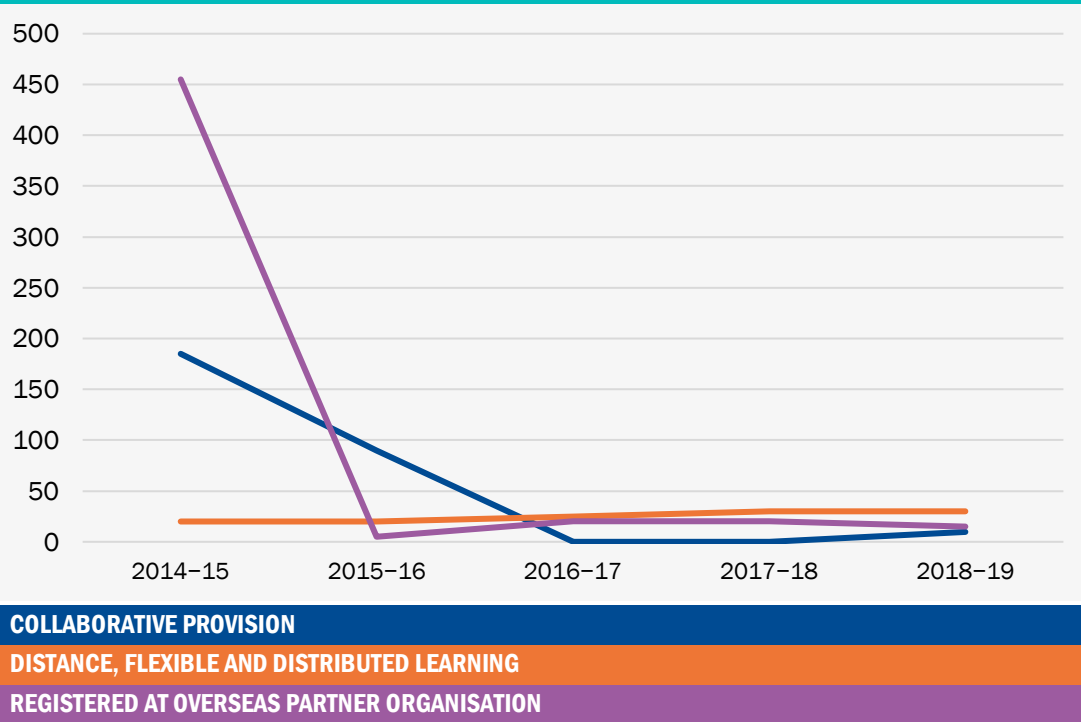
**FIGURE 24** shows that in 2018–19, a majority of TNE students reported by Welsh providers in non-EU Europe were studying through distance, flexible and distributed learning (53.3%), followed by those registered at an overseas partner organisation (26.7%) and through collaborative provision (20.0%).

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



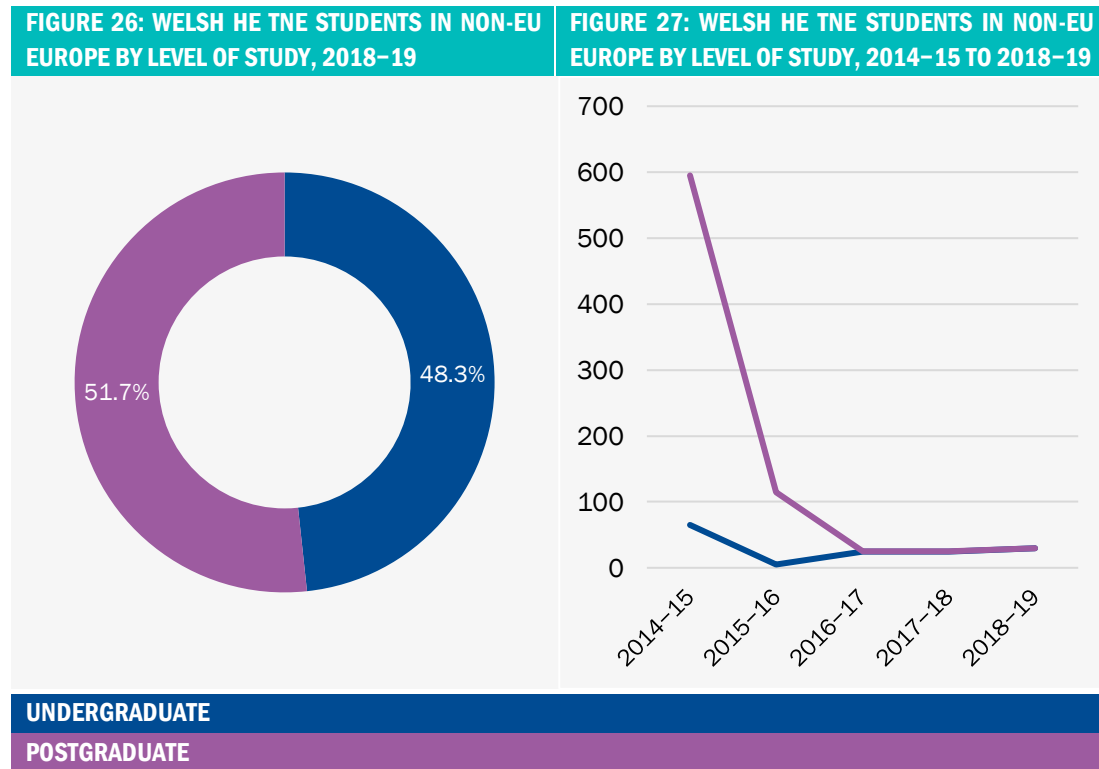
**FIGURE 25** shows that between 2014–15 and 2018–19, there was a decrease in all TNE modes of study reported by Welsh providers in non-EU Europe except in distance, flexible and distributed learning, where numbers increased slightly.

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





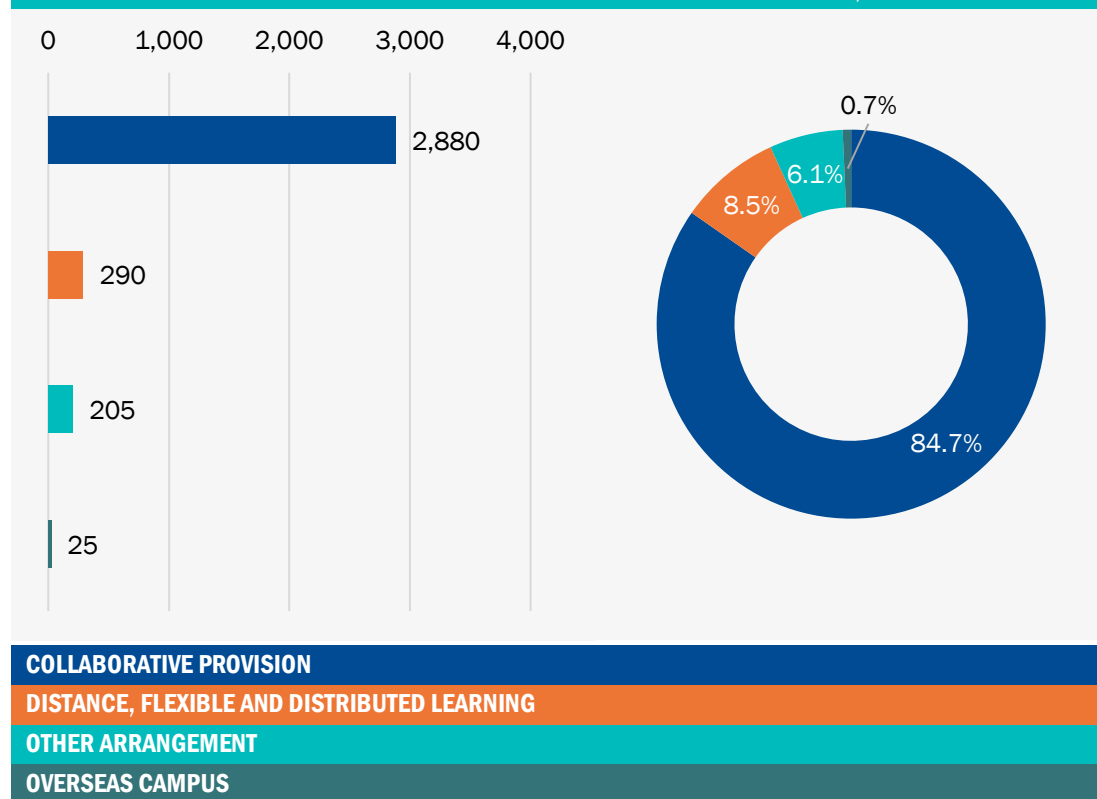
**FIGURE 26** shows that 51.7% of TNE students reported by Welsh providers in 2018–19 in non-EU Europe were studying at postgraduate level, compared to 48.3% at undergraduate level. **FIGURE 27** shows that between 2014–15 and 2016–17 there was a decrease at all levels of study, especially at postgraduate level; however, numbers have remained stable between 2016–17 and 2018–19.



## Middle East

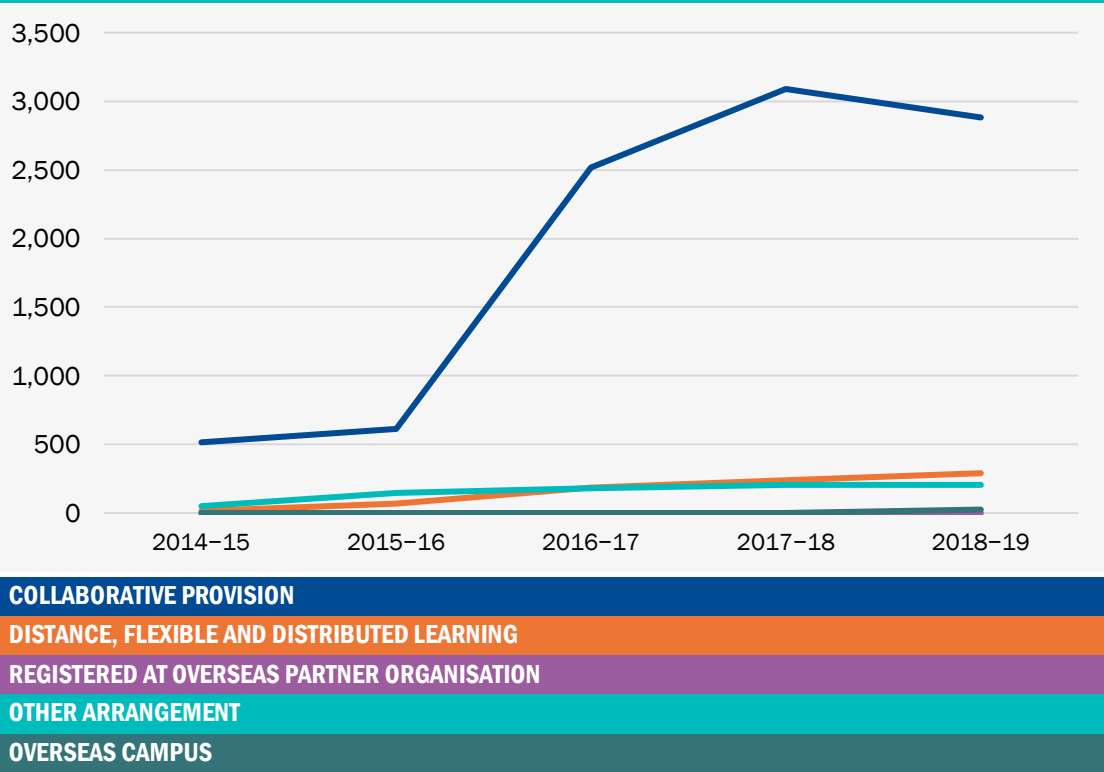
**FIGURE 28** shows that in 2018–19, a majority of TNE students reported by Welsh providers in the Middle East were studying through collaborative provision (84.7%), followed by distance, flexible and distributed learning (8.5%), other arrangements (6.1%) and at overseas campuses (0.7%).

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

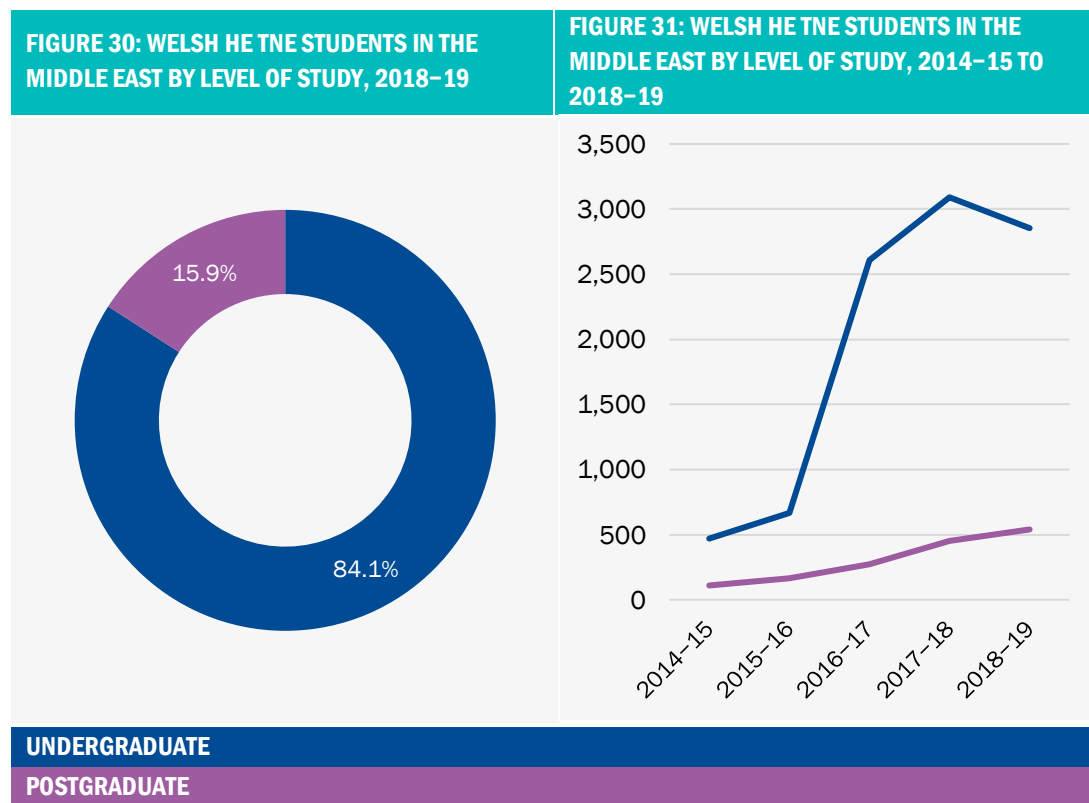


**FIGURE 29** shows that between 2014–15 and 2018–19, there was an increase in all TNE modes of study reported by Welsh providers in the Middle East. The number of students studying through collaborative provision increased steeply between 2015–16 and 2017–18, with a slight decrease in the last year. 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, 2014–15 TO 2018–19**

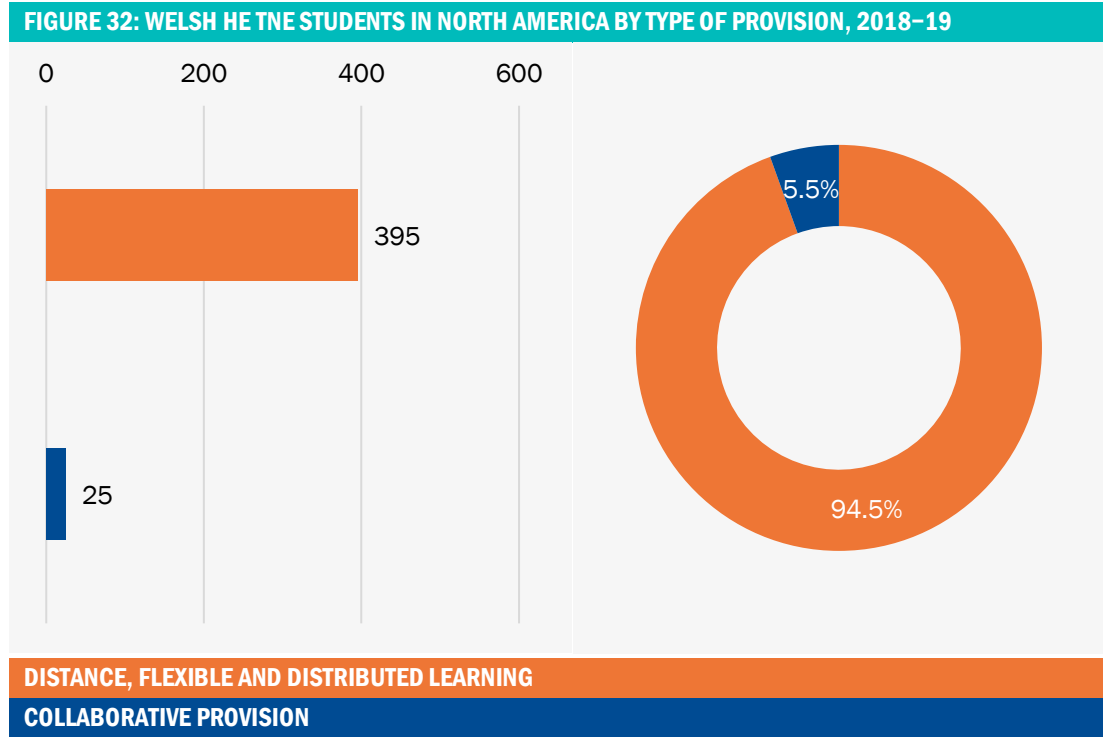


**FIGURE 30** shows that 84.1% of TNE students reported by Welsh providers in 2018–19 in the Middle East were studying at undergraduate level, against 15.9% at postgraduate level. **FIGURE 31** shows that between 2014–15 and 2018–19, there were increases at both levels of provision, with a large increase at undergraduate level between 2015–16 and 2017–18 before a decrease to 2018–19.



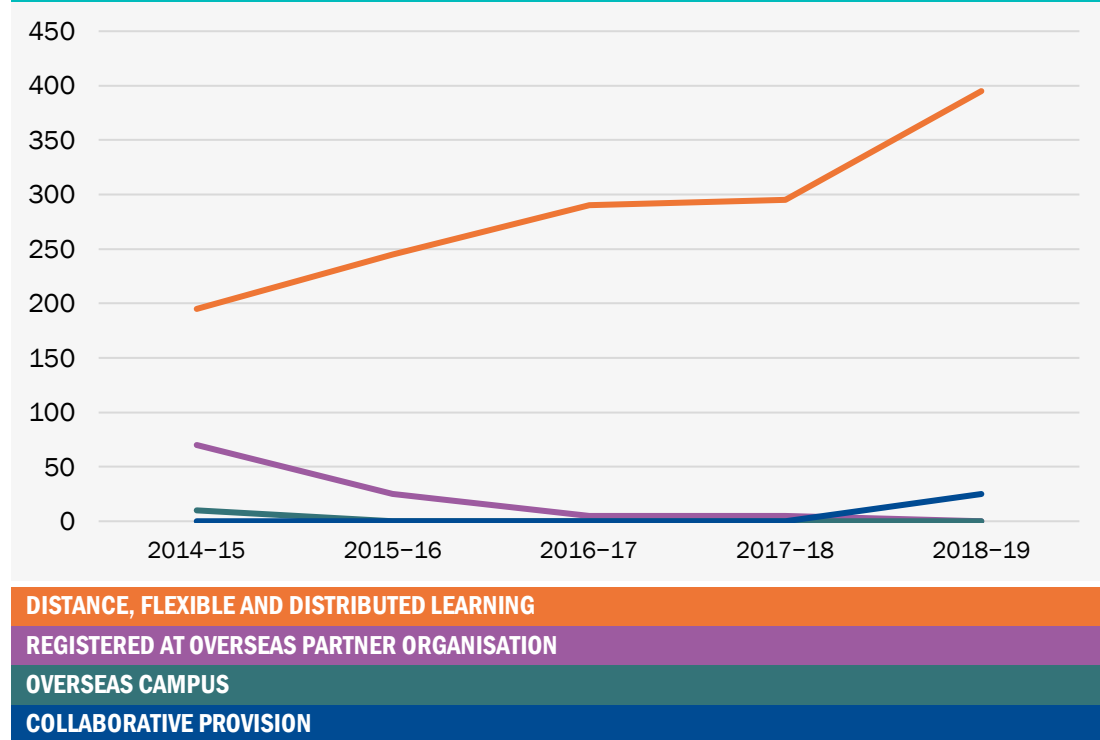
## North America

**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 (94.5%), followed by collaborative provision (5.5%).

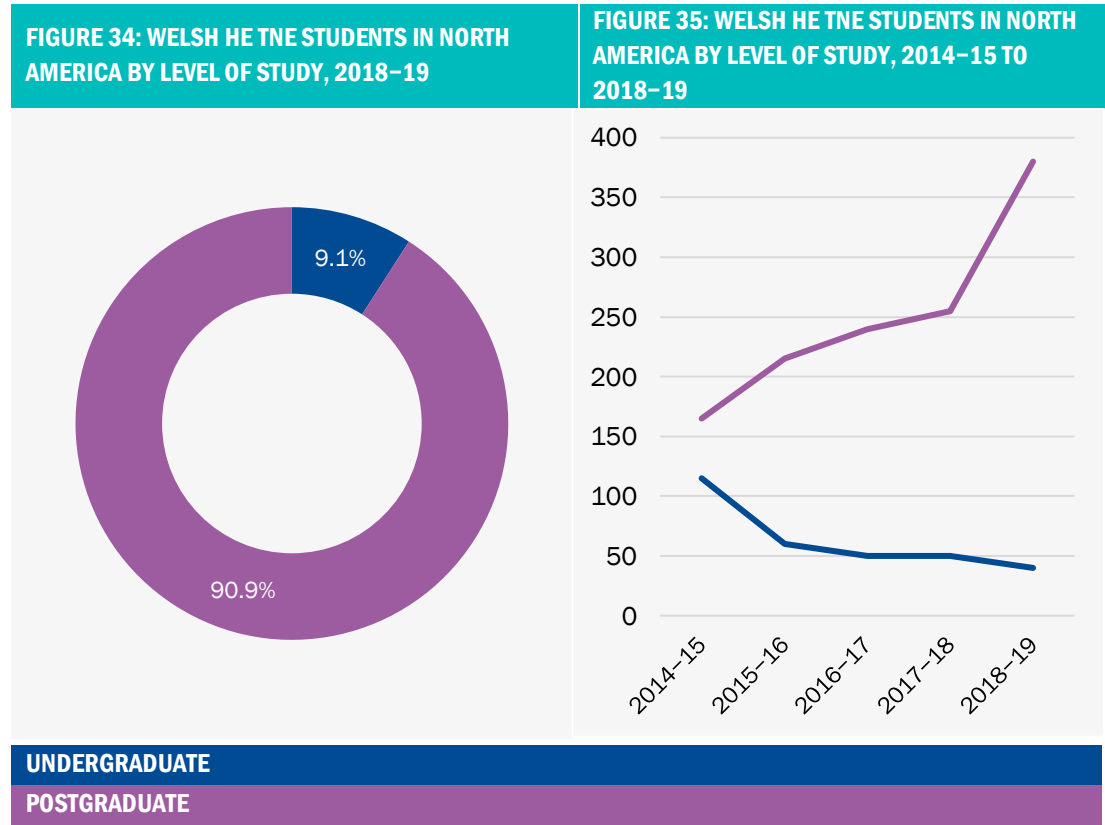


**FIGURE 33** shows that between 2014–15 and 2018–19, there was an increase in students studying through distance, flexible and distributed learning and a decrease in students registered at an overseas partner organisation reported by Welsh providers in North America. In 2018-19, Welsh providers reported students studying through collaborative provision in North America for the first time since 2011–12 in 2018–19.

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



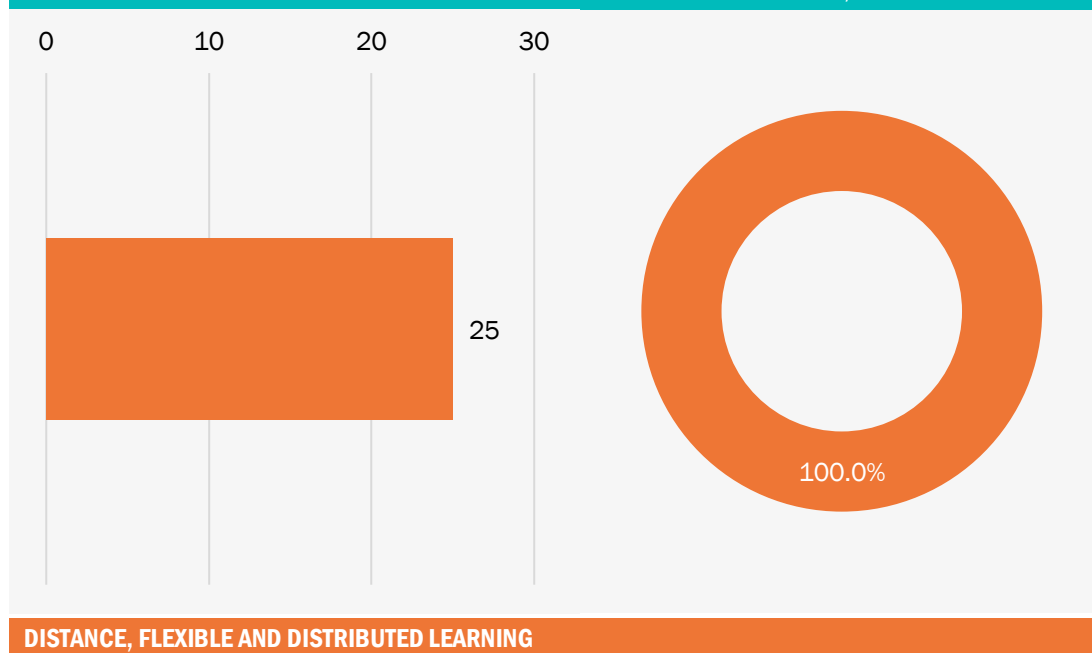
**FIGURE 34** shows that 90.9% of TNE students reported by Welsh institutions in 2018–19 in North America were studying at postgraduate level, against 9.1% at undergraduate level. **FIGURE 35** shows that between 2014–15 and 2018–19, there was an increase in the numbers of students studying at postgraduate level, especially in the last academic year, and a steady decrease in the numbers of students studying at undergraduate level.



## South America

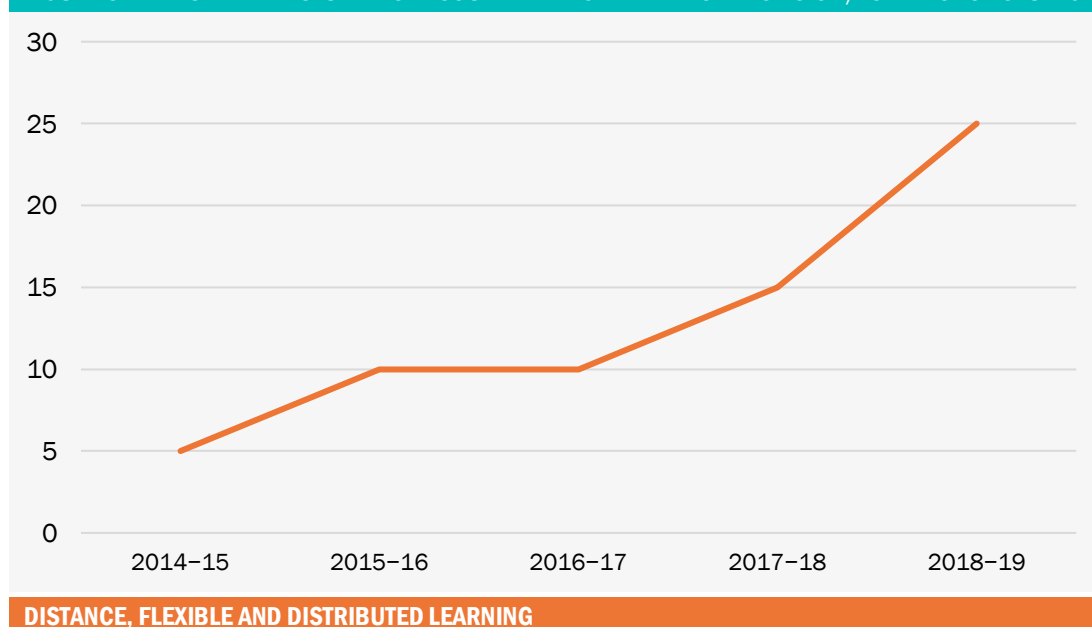
**FIGURE 36** shows that all TNE students reported by Welsh providers in South America were studying through distance, flexible and distributed learning.

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



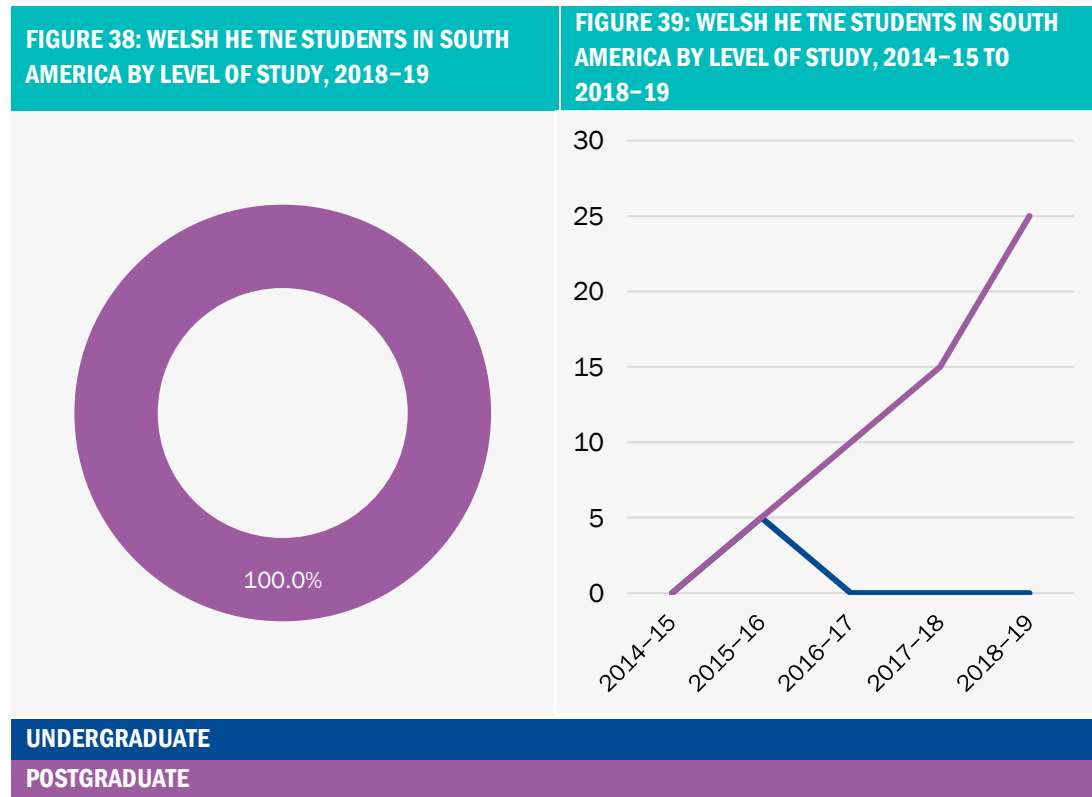
**FIGURE 37** shows that between 2014–15 and 2018–19, there was an increase in students studying through distance, flexible and distributed learning reported by Welsh providers in South America.

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





**FIGURE 38** shows that all TNE students reported by Welsh institutions in 2018–19 in South America were studying at postgraduate level. **FIGURE 39** shows that between 2014–15 and 2018–19, there was an increase in the number of students studying at postgraduate level, with the last students at undergraduate level reported in 2015–16.



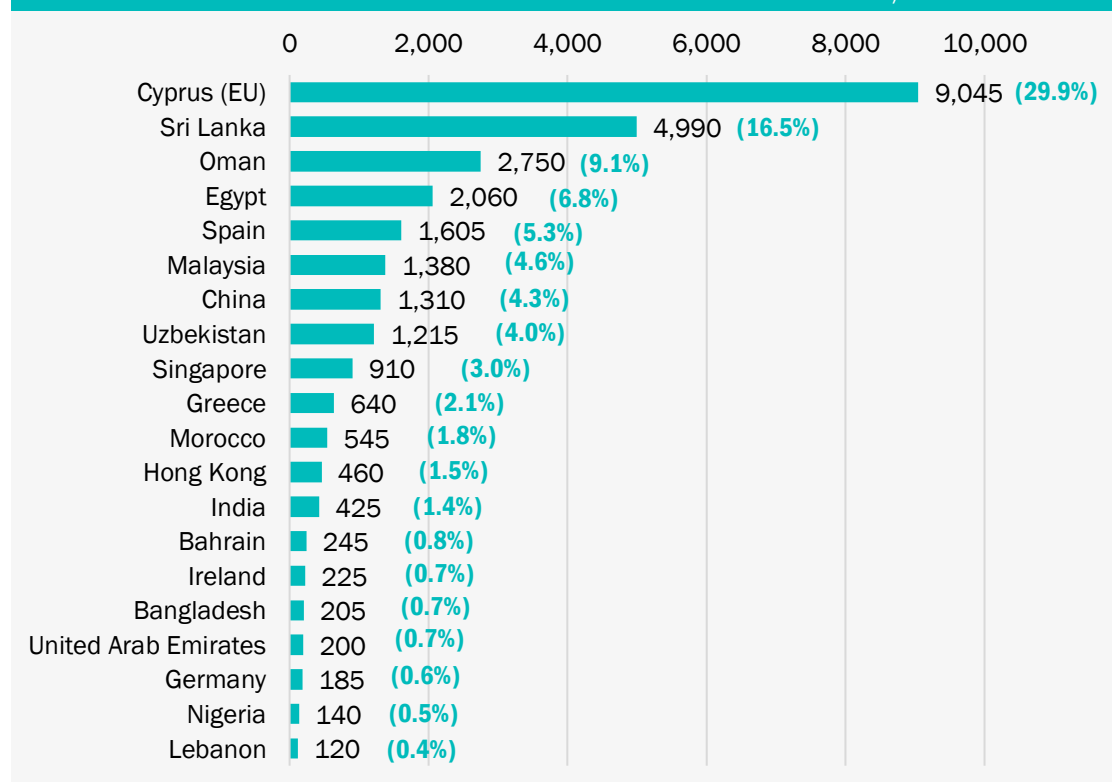
# HOST COUNTRIES AND TERRITORIES

## Notes:

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

Welsh providers delivered TNE in a total of 138 countries and territories in 2018–19. **FIGURE 40** shows a breakdown of TNE students reported by Welsh providers by country in 2018–19. Welsh providers reported students in 138 countries and territories in 2018–19. The top three countries host 55.5% of all students. Cyprus, Sri Lanka, Oman, Egypt, Spain, Uzbekistan, Morocco, Bahrain, Ireland, Bangladesh, Nigeria and Lebanon have a higher relative position in Wales than in the UK overall, while Malaysia, China, Singapore, Greece, Hong Kong, India, the United Arab Emirates (UAE) and Germany have a lower relative position.

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



Welsh providers reported TNE students in 30 countries in Africa in 2018–19. **TABLE 5** shows the five **African** countries hosting the most TNE students from Welsh providers in 2018–19. Morocco, Nigeria and Kenya have a higher relative position than for the rest of the UK, while South Africa has a lower relative position. Egypt is the leading host country both for Welsh providers and for the UK as a whole.

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

Host country	Students	%
Egypt	2,060	66.7%
Morocco	545	17.7%
Nigeria	140	4.6%
South Africa	65	2.2%
Mauritius	65	2.0%

Welsh providers reported TNE students in 24 countries in Asia in 2018–19. **TABLE 6** shows the five **Asian** countries hosting the most TNE students from Welsh providers in 2018–19. Sri Lanka and Uzbekistan have a higher relative position than for the rest of the UK, while Malaysia, China and Singapore have a lower relative position.

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

Host country	Students	%
Sri Lanka	4,990	44.6%
Malaysia	1,380	12.3%
China	1,310	11.7%
Uzbekistan	1,215	10.9%
Singapore	910	8.1%

**TABLE 7** shows the five **Australasian** countries hosting TNE students from Welsh providers in 2018–19. Papua New Guinea has a higher relative position than for the rest of the UK, while Fiji has a lower relative position. Australia and New Zealand are the leading host countries both for Welsh providers and for the UK as a whole.

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

Host country	Students	%
Australia	45	78.3%
New Zealand	5	..%
Papua New Guinea	5	..%
Fiji	<5	..%
Micronesia	<5	..%

Welsh providers reported TNE students in 26 countries in the European Union in 2018–19. **TABLE 8** shows the five **European Union** countries hosting the most TNE students from Welsh providers in 2018–19. Cyprus and Spain have a higher relative position than for the rest of the UK, while Greece and Germany have a lower relative position. The same position is held by Ireland.

**TABLE 8: TOP FIVE HOST COUNTRIES AND TERRITORIES OF UK HE TNE STUDENTS IN THE EU, 2018–19**

Host country	Students	%
Cyprus (EU)	9,045	75.2%
Spain	1,605	13.3%
Greece	640	5.3%
Ireland	225	1.9%
Germany	185	1.5%

Welsh providers reported TNE students in eight countries in non-EU Europe in 2018–19. **TABLE 9** shows the five **non-EU European** countries hosting the most TNE students from Welsh providers in 2018–19. Ukraine and Turkey have a higher relative position than for the rest of the UK, while Switzerland, Norway and Russia have a lower relative position.

**TABLE 9: TOP FIVE HOST COUNTRIES AND TERRITORIES OF UK HE TNE STUDENTS IN NON-EU EUROPE, 2018–19**

Host country	Students	%
Ukraine	30	46.7%
Switzerland	15	..%
Turkey	5	..%
Norway	5	..%
Russia	<5	..%

Welsh providers reported TNE students in 14 countries in the Middle East in 2018–19. **TABLE 10** shows the five **Middle Eastern** countries hosting the most TNE students from Welsh providers in 2018–19. Bahrain and Lebanon have a higher relative position than for the rest of the UK, while UAE and Saudi Arabia have a lower relative position. Oman has the same leading position.

**TABLE 10: TOP FIVE HOST COUNTRIES AND TERRITORIES OF WELSH HE TNE STUDENTS IN THE MIDDLE EAST, 2018–19**

Host country	Students	%
Oman	2,750	80.9%
Bahrain	245	7.3%
United Arab Emirates	200	5.9%
Lebanon	120	3.5%
Saudi Arabia	25	0.8%

Welsh providers reported TNE students in 24 countries in North America in 2018–19. **TABLE 11** shows the five **North American** countries hosting the most TNE students from Welsh providers in 2018–19. Canada and The Bahamas have a higher relative position than for the rest of the UK, while the United States, Trinidad and Tobago and Jamaica have a lower relative position.

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

Host country	Students	%
Canada	105	25.5%
United States	90	21.9%
Trinidad and Tobago	60	14.2%
The Bahamas	55	13.5%
Jamaica	35	7.9%

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

Host country	Students	%
Guyana	10	..%
Brazil	5	..%
Colombia	5	..%
Suriname	<5	..%
Ecuador	<5	..%

# CONCLUSIONS

Transnational education provision is a vital component of internationalisation activity for Welsh higher education providers, and the findings of this report confirm its growing importance. Welsh providers are responsible for more than double the proportion of the UK's total TNE student population (9.0%) than they are for the proportion of international students studying in the UK (4.3%) in 2018–19. TNE student numbers for Welsh providers grew between 2014–15 and 2018–19 by 59.3%, compared to slower growth for the UK as a whole of 11.1%. TNE student numbers also grew faster for Welsh providers between 2017–18 and 2018–19, with growth of 12.2% against 1.3% in the UK.

Distance, flexible and distributed learning provision from Welsh providers has increased dramatically since 2014–15. This has been driven largely by two providers, one expanding their provision in Asia significantly, and another provider seeing even larger growth in student numbers in the European Union. As a result, in 2018–19, Welsh providers reported a larger proportion of students studying through distance, flexible and distributed learning (38.6%) compared to the proportion reported by all UK providers (21.3%).

Conversely, in 2018–19, a smaller proportion of Welsh TNE students were studying through collaborative provision (40.8%), or registered at an overseas partner organisation (12.8%), or studying at an overseas campus (2.2%) compared to the proportion reported by all UK providers (48.5%, 19.9% and 8.6% respectively).

The significant increase in distance, flexible and distributed learning from a single provider in the EU has contributed to the EU overtaking Asia as the largest host region for Welsh providers' TNE students and (39.7% in Wales vs 16.3% in the UK), while Asia remains the largest host region for the UK as a whole (37.0% in Wales vs 53.3% in the UK). It has also contributed to rapid growth in student numbers at the postgraduate level, as between 2014–15 and 2018–19, postgraduate TNE provision from Welsh providers grew significantly faster (120.5% growth) than in the UK as a whole (10.3%).

Outside of the European Union, the only other region where there is a higher proportion of TNE students from Welsh providers relative to the UK as a whole is the Middle East (11.2% in Wales vs 10.7% in the UK). Globally, nine Welsh providers together reported TNE students in a total of 138 countries and territories, with especially large student populations in Cyprus, Sri Lanka, Oman, Egypt and Spain.

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.