



Universities UK
International

THE SCALE OF UK HIGHER EDUCATION TRANSNATIONAL EDUCATION 2015-16

**TREND ANALYSIS
OF HESA DATA**

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UNIVERSITIES UK INTERNATIONAL

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EXECUTIVE SUMMARY

Higher education transnational education (HE TNE) is an increasingly significant and successful characteristic of UK universities' international activity.

Over 700,000 students were studying for UK degrees outside the UK in 2015-16, which is 1.6 times the number of international students in the UK in the same year. Universities, sector agencies and the UK government are prioritising TNE as a growing area of activity. This report, the first of its kind, provides analysis on where UK HE TNE students are studying, at what level, through what kind of provision at global and regional levels.

The UK's UK HE TNE provision in 2015–16:¹

- **701,010** students were studying UK HE TNE programmes.
- UK HE TNE student numbers grew by **17%** from 2012-13 to 2015-16. The growth rate from 2014-15 to 2015-16 grew slightly to **5.3%** from **4.3%** between 2013-14 and 2014-15.²
- The growth rate excluding Oxford Brookes University BSc Applied Accounting was **1.4%**, a decrease in the rate of change from 2013-14 to 2014-15 of **7.1%**.
- **82%** of UK universities delivered UK HE TNE.
- **75%** of UK HE TNE students were enrolled in a programme delivered by or associated with **11%** of UK universities.
- **23** UK universities hosted more than **5,000** TNE students, an increase from **18** in 2012. **82%** of all TNE students attended these universities.
- **44%** of students were studying through collaborative provision, **25%** were studying through the reporting provider, **20%** through distance, flexible or distributed learning, **8%** through overseas campuses and **3%** through other provision.
- **65%** of students were undergraduates and **35%** were postgraduates.

Host countries for UK HE TNE students in 2015-16:³

- The **10** countries hosting the highest numbers of students in 2015-16 were the same as in 2014-15, although the order is slightly different. In both years Malaysia and Singapore hosted the highest number of students (**78,850** and **49,970** in **2015–16** respectively).
- Of the **20** countries hosting the most students, **7** are in Asia, **6** are in MENA, **4** are in Europe and **3** are in the Americas showing take-up of UK HE TNE across mature and emerging economies.
- **76%** of students are on programmes in the **20** countries with the highest volume of TNE students.
- South America had the highest average year on year growth from 2012-13 to 2015-16 (**12.6%**) although there was no change from 2013-14 to 2015-16. North America had the lowest (**1.7%**) year on year growth rate and saw a **0.8%** decrease in student numbers from 2014-15 to 2015-16. Student numbers fell by **5%** in non-EU Europe over the same period.

1. Excluding Oxford Brookes University BSc in Applied Accounting students unless otherwise stated.

2. Including Oxford Brookes BSc Applied Accounting students.

3. Excluding Oxford Brookes University BSc in Applied Accounting students unless otherwise stated.

1. INTRODUCTION

This report provides an update on the analysis included in *The Scale and Scope of UK Higher Education Transnational Education Report* which related to 2014-15 UK HE TNE student numbers. This report includes, for the first time, a detailed analysis of regional trends according to the Higher Education Statistics Agency's Aggregate Offshore Record (HESA AOR) data.

UK HE TNE is growing and diversifying and UK universities are partners of choice for TNE globally. With over 700,000 TNE students, UK universities are delivering high quality programmes complemented by strong assessment processes and pedagogical approaches around the world. UK HE TNE is integral to the internationalisation of the UK higher education sector which contributes to universities' excellence and international reputation.

UK HE TNE is growing in scale and strategic importance; latest data from HESA's snapshot Higher Education Statistics 2016-17 Summary⁴ shows that 707,915⁵ students were studying for UK degrees overseas and that 138 UK universities were delivering UK HE TNE, more than the previous year. These figures have only increased year on year since 2007-08. Comprehensive data for the previous year showed that 701,010 TNE students were studying through 132 UK universities for awards in 224 countries and territories, a growth of 17% from 2012-13. In 2014-15 TNE had an estimated value of £550m to the UK economy. The reasons that universities deliver TNE are many. It can be the origin of, or the catalyst for deeper international partnerships, including mobility, research and innovation links. They can be financial: TNE is pursued where it is at least a financially sustainable endeavour. They can be strategic: supporting capacity building in-country can lead to strong relationships with policy makers and industry. They can increase international student recruitment by creating a pathway for students to pursue further study physically in the UK.

From a policy perspective, UK HE TNE in part cements bilateral education relationships. The validity of UK issued awards, the ability for universities to deliver diverse types of TNE in-country, and the important partnerships which underpin TNE programmes support UK Government objectives to increase meaningful links between people, sectors and industry. The UK sector's capacity to deliver context-sensitive, relevant and demand-driven courses through relevant and accessible methods of delivery aim to complement the fabric of domestic higher education systems.

As a result of TNE's increased profile in the sector, sector agencies and within Government, there is an interest in better understanding UK universities' performance as a sector and knowing which students are accessing UK degrees outside of the UK, at what level, and where. This report details what we know about UK HE TNE in 2015-16 as well as trends over the last few years. Through providing the first deep-dive analysis of HESA data, this report includes insights into what is happening at a regional level. In providing this level of detail, it complements other resources (for example the British Council's *Global Gauge of Higher Education Policy* (March 2017)⁶) and studies (for example the Department for Education's *Education-related exports and transnational education activity from 2010 to 2014* (July 2017)⁷) to support universities, higher education sector bodies and relevant government departments to understand what the next steps for TNE might be.

This report is divided into three sections. It begins by highlighting how universities are performing in terms of UK HE TNE student numbers, including what type of provision students are studying through and at what level of study. This is followed by a summary of the global picture and includes the spread of students across regions, type and level of study. Finally, the third section delves into UK HE TNE patterns across the eight regions of the world.

4. <https://www.hesa.ac.uk/news/11-01-2018/sfr247-higher-education-studentstatistics/location>

5. Data retrieved in January 2018 did not include breakdowns by region or institution. At the time of publication it was therefore not possible to compare 2016-17 data with previous years.

6. <https://www.britishcouncil.org/education/ihe/knowledge-centre/global-landscape/global-gauge>

7. https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/630741/UK_Revenue_from_Educational_Exports_2010-14.pdf

A NOTE ON DEFINITIONS

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

For the purposes of this report, UK HE TNE students are defined as students studying a higher education degree programme leading to a UK qualification in a country other than the one in which the awarding institution is located. This includes joint, double or dual awards.

Data about the UK’s HE 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 subscribing UK higher education providers. Universities return data 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.”⁸

HESA collects data which relate to five categories and types of provision and universities are responsible for returning data against these. The categories are broad and universities may not always define their programmes by the terms used by HESA. **Table 1** below shows these categories, how they are referred to in this report, and includes examples of each provision. Note that these examples are not definitive and there are many other forms of UK HE TNE that might be included with each type of provision.

TABLE 1: TYPES OF TNE PROVISION		
TYPE OF PROVISION	TERMINOLOGY IN THIS REPORT	EXAMPLE OF PROVISION
Registered at overseas partner organisation – studying overseas for an award of the reporting provider.	Studying for an award of the reporting provider.	Where the majority of teaching is delivered in-country.
Registered at reporting provider – 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.
Registered at reporting provider-studying overseas for UK HEP award at overseas campus of reporting provider.	Overseas campus.	Overseas standalone or joint campus.
Registered at reporting provider-studying overseas for UK HEP award other than at an overseas campus of reporting provider.	Collaborative provision.	Joint degrees.
Any other student studying overseas for an award of the reporting provider.	Other arrangement.	Multiple UK or international partners delivering a programme or a combination of other types of provision.

8. HESA definitions found at <https://www.hesa.ac.uk/collection/c16052/coverage>.

METHODOLOGY AND LIMITATIONS

This report is based on analysis of the 2015-16 HESA AOR and was carried out in the summer of 2017. 132 universities returned TNE activity to the AOR.

This includes “all students active at any point in the reporting period, including students becoming dormant part way through the year, and those withdrawing from courses.” Universities return figures into specified categories including location, level and type of study. HESA does not collect non-aggregated data, for example student demographics or subject of study. The data therefore does not go into the same depth as Student Record data which is used to analyse student numbers studying in the UK.

The AOR is limited for three principle reasons. Firstly, universities are not asked to return subject-specific or demographic data which, if included, would provide universities with a much clearer picture of how they are performing compared to the sector as a whole. Secondly, respondents may interpret the “type of study” field differently, potentially resulting in inconsistent coding of data, which limits the reliability of this data for making comparisons between universities. Thirdly, UK HE institutions undertake some activity overseas which is not captured within the coverage of the AOR. This analysis is based on the figures returned to HESA by universities and may therefore not reflect the full picture of UK HE TNE.

Unless otherwise stated in this report, analysis excludes Oxford Brookes University BSc in Applied Accounting, Open University (OU) and University of London International Programme (UoLIP) students. Together the programmes offered in these three groups make up 55% of the 2015-16 AOR and are all categorised as ‘distance, flexible or distributed learning’ which can include blended delivery models. This affects our understanding of performance and spread of TNE more generally amongst UK universities. Throughout this report, these institutions are referred to as ‘the three main distance and blended providers’ for simplicity.

Students on Oxford Brookes’ BSc in Applied Accounting programme⁹ make up 45% of all UK HE TNE students. The programme is a professionally accredited programme delivered in partnership with the Association of Chartered Certified Accountants. According to a UK sector survey in 2016, only around one in ten programmes (9% of programmes or 15% of students)¹⁰ are professionally accredited. These tend to be either solely UK or global professional standards most commonly the AACSB (Association to Advance Collegiate Schools of Business). Students who wish to undertake a professionally qualifying Accounting programme internationally therefore must study for ACCA exams through Oxford Brookes University.

All HESA figures quoted in the report that relate to student and staff numbers have been rounded to the nearest five in accordance with HESA data protection protocols. All percentages have been calculated using raw figures and rounded, and therefore rounded figures may not sum precisely. 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 obtained from HESA sources.

This report is a snapshot of the scale of UK HE TNE in 2015-16 and trends which can be determined from previous years until 2015-16. It does not seek to identify causal links. It identifies patterns of growth and offers a basis for horizon scanning to create a more complete picture of UK TNE activity around the world.

On 11 January 2018, HESA announced its release of top-line aggregated statistics for the 2016-17 cohort¹¹. This is the first statistical release only; the full data will not be available until later this year. As such, the research presented in this report of 2015-16 data is the most up to date and comprehensive analysis possible.

9. 0.89% of all Oxford Brookes University TNE students were not undertaking the BSc Applied Accounting qualification.

10. UUKi, 2016. The Scale and Scope of UK Higher Education Transnational Education.

11. <https://www.hesa.ac.uk/news/11-01-2018/sfr247-higher-education-student-statistics/location>

2. 2015–16 AGGREGATE OFFSHORE RECORD OVERVIEW

In 2015-16 there were 701,010 UK HE TNE students returned to the HESA AOR by 132 universities.¹²

75% of those students were enrolled in a programme delivered by or associated with 11% of universities (15 out of 132). When excluding students attending the three main distance and blended providers, 75% of students studied with 25% of universities (33 out of 132), an increase from 24% the previous year. There is an increase in the number of universities delivering programmes to greater numbers of students (Table 3).

In 2015-16, 23 universities reported more than 5,000 TNE students each, representing a total of 575,065 students, or 82% of UK HE TNE students. This is the same proportion as in 2014-15 (Table 4).

FIGURE 1: UK HE TNE STUDENT NUMBERS AND HE PROVIDERS (LOGARITHMIC SCALE)

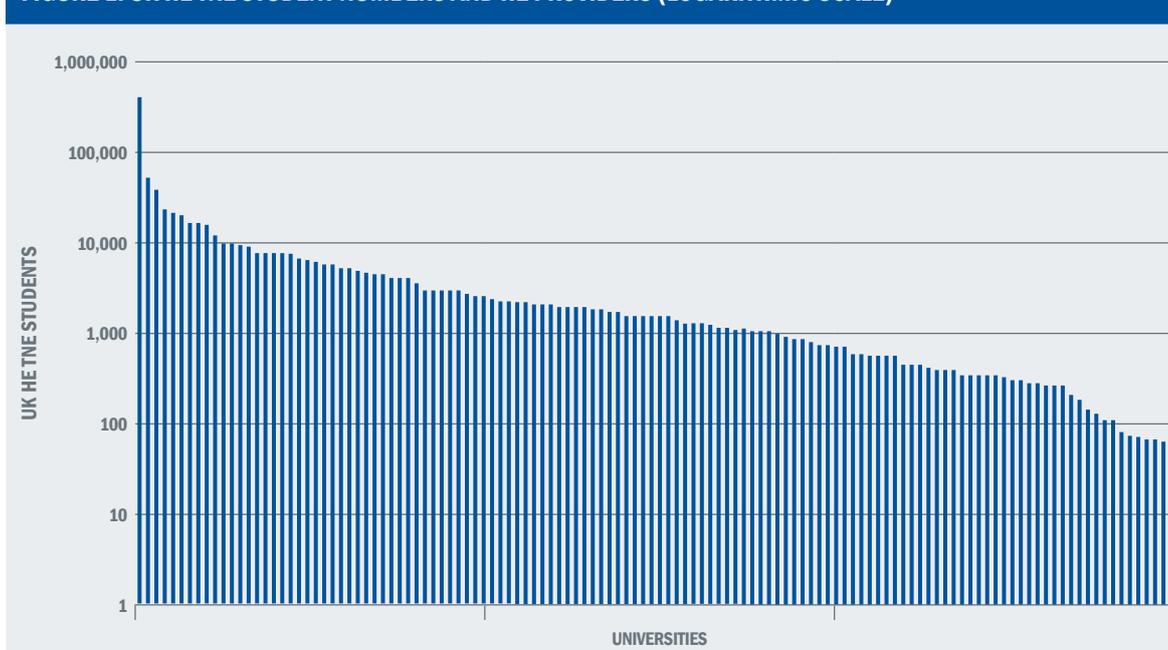


TABLE 2: PROPORTION OF UK UNIVERSITIES HOSTING UK HE TNE STUDENTS

CATEGORY	2014-15	2015-16
Number of universities which cumulatively account for less than 1% of students	39%	44%
Number of universities which cumulatively account for 75% of TNE students	14%	15%
Percentage of TNE students Oxford Brookes University accounts for	43%	45%

12. These figures increased to 707,915 and 138 in 2016-17, respectively. Comprehensive data necessary to compare figures from 2015-16 to 2016-17 was not available in HESA's top-line summary found here <https://www.hesa.ac.uk/news/11-01-2018/sfr247-higher-education-student-statistics/location>.

TABLE 3: UK HE TNE STUDENTS

CATEGORY	2014-15	2015-16
Number of universities which cumulatively account for 75% of TNE students	31%	33%
Number of universities which cumulatively account for 50% of TNE students	14%	15%
Number of universities which cumulatively account for 25% of TNE students	5%	5%
Number of universities which cumulatively account for less than 1% of students	25%	28%

TABLE 4: CHANGES IN TNE NUMBERS 2012-13 TO 2015-16

CATEGORY	2012-13	2013-14	2014-15	2015-16
All TNE Students	598,925	638,850	665,995	701,010
TNE students in universities with more than 5,000 students (number of institutions)	499,535 (18)	522,120 (19)	546,625 (22)	575,065 (23)
% of TNE students in universities with more than 5,000 students	83.40%	81.70%	82.00%	82.00%

Table 5 shows student number changes, and the rate of change, year on year for 2013-14 to 2015-16. It presents figures including all students and excluding Oxford Brookes BSc Applied Accounting, Open University and University of London International Programmes students.

TABLE 5: YEAR ON YEAR STUDENT NUMBER CHANGES INCLUDING AND EXCLUDING THE THREE MAIN DISTANCE LEARNING UNIVERSITIES

		2013-14	2014-15	2015-16	2016-17
All Students	NUMBER OF STUDENTS	638,850	665,995	701,010	707,915
	% CHANGE FROM PREVIOUS YEAR	6.67%	4.25%	5.27%	0.98%
Excluding Oxford Brookes University BSc Applied Accounting students	NUMBER OF STUDENTS	362,920	382,610	388,110	Data unavailable ¹³
	% CHANGE FROM PREVIOUS YEAR	-	7.14%	1.44%	-
Excluding the three main distance and blended providers	NUMBER OF STUDENTS	279,210	304,835	314,610	Data unavailable
	% CHANGE FROM PREVIOUS YEAR	-	9.18%	3.28%	-

13. Comprehensive data relating to 2016-17 was not available at the time of publishing; the full data will be available in 2018 and so it is not yet possible to identify the significance of these programmes.

FIGURE 2: YEAR ON YEAR UK HE TNE STUDENT NUMBER CHANGES¹⁴

Table 6 shows TNE students by mission group or sector representative organisation. Many UK universities are not in these groups, the table provides an indication of the diversity of the kinds of institutions engaging in TNE activity. It shows that, apart from GuildHE which mainly counts small and specialist institutions among its members, over 90% of mission groups' members are delivering TNE.

TABLE 6: PROPORTION OF UK UNIVERSITIES DELIVERING TNE BY MISSION GROUP¹⁵

UNIVERSITY GROUP	2014-15			2015-16			NUMBER OF STUDENTS
	TOTAL MEMBERS	NO. DELIVERING TNE	% OF MEMBERS	TOTAL MEMBERS	NO. DELIVERING TNE	% OF MEMBERS	
GuildHE	30	15	50%	28	13	46%	5,335
Million+	19	18	95%	20	18	90%	74,025
Russell Group	24	23	96%	24	22	92%	54,250
University Alliance	19	19	100%	18	18	100%	413,380 a 69,505 b

a including Oxford Brookes University BSc Applied Accounting and Open University students

b excluding Oxford Brookes University BSc Applied Accounting and Open University students

The proportion of mission group members delivering TNE is similar to the previous year. Slight changes in membership figures (GuildHE had two fewer members in 2015-16 than in the previous year) have not resulted in any significant impact on the number of mission group members delivering TNE, although Million+ and GuildHE in real terms had one fewer member in the AOR.

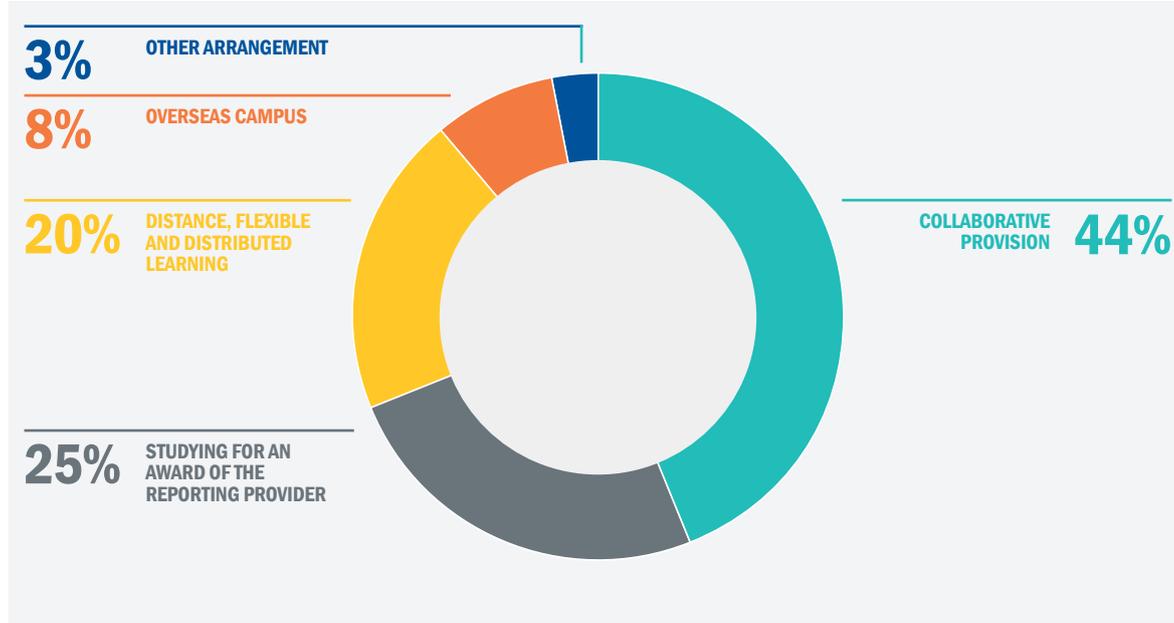
14. Comprehensive data relating to 2016-17 was not available at the time of publishing; the full data will be available in 2018 and so it is not yet possible to identify the significance of these programmes.

15. Some institutions are members of more than one of these groups.

TYPE OF PROVISION

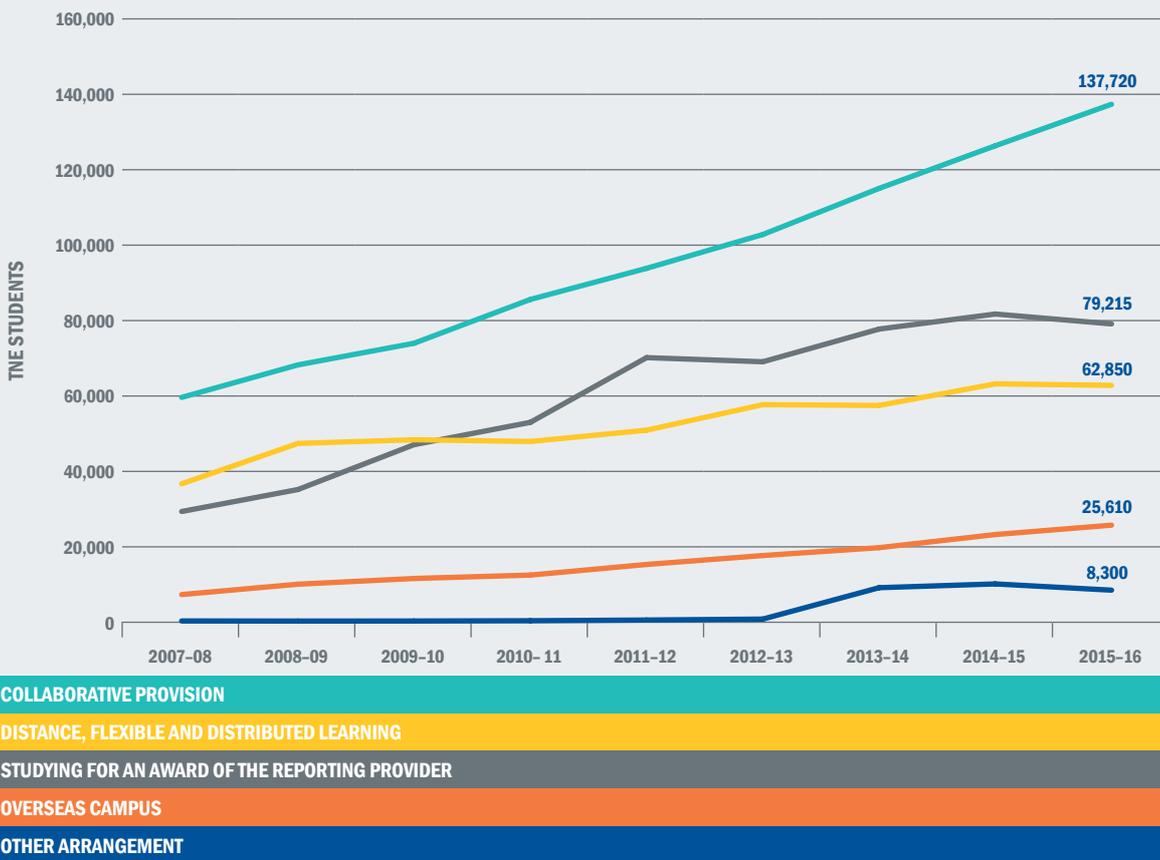
Figure 3 shows that in 2015-16, the relative majority (44%) of UK HE TNE students were studying through collaborative provision. A quarter of students were studying through an overseas partner organisation and 20% through distance, flexible or distributed learning provision, with just 8% of students studying at overseas campuses. The prominence of collaborative provision may be attributable to universities returning data through this field by default, given most types of provision can be classed as 'collaborative'.

FIGURE 3: PROPORTION OF UK HE TNE STUDENTS BY TYPE OF PROVISION (2015-16)



Since 2007-08 there has been steady growth across all types of provision. **Figure 4** shows that over time, different types of provision have maintained their relative position to each other in terms of overall student numbers. Recent growth in 'other arrangement' signifies an increase in new provision, potentially innovative, which may not be captured by the other categories.

FIGURE 4: UK HE TNE STUDENT GROWTH BY TYPE OF PROVISION (2007-08 TO 2015-16)



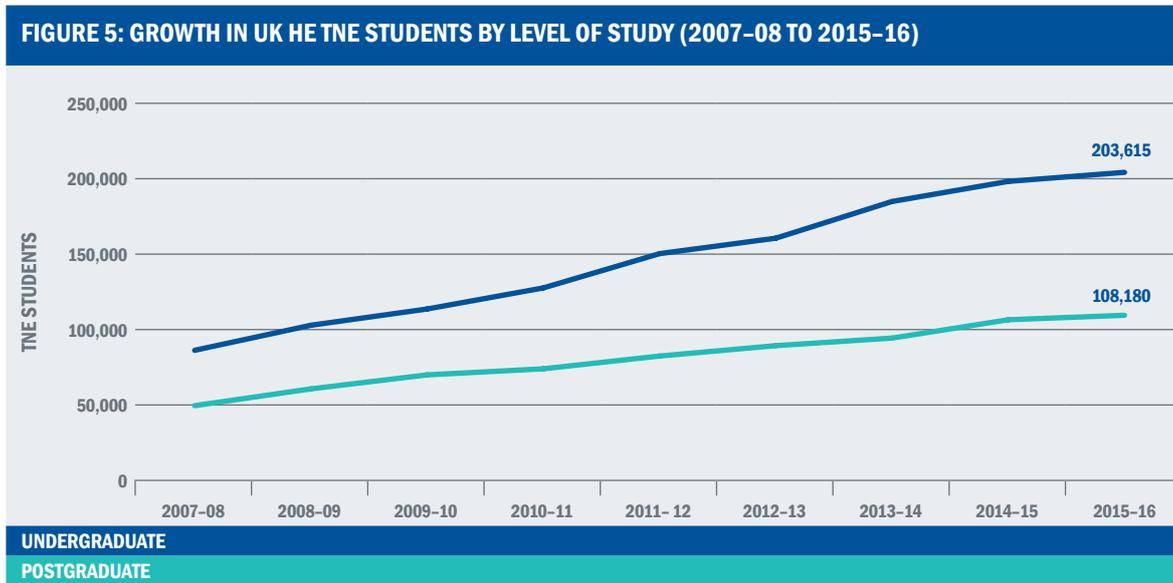
Average year on year growth since 2007-08 to 2015-16 across all types of provision apart from ‘other arrangement’ was 12.5%. Overall growth in TNE students from 2014-15 to 2015-16 is principally attributable to increases in students studying through overseas campuses and through collaborative provision which increased from 2014-15 to 2015-16 by 11% and 9%, respectively. Overseas campuses also had the sharpest year on year increase of 17.5% since 2008-09. By contrast, ‘distance, flexible and flexible learning, ‘other arrangement’ and ‘overseas partner organisation’ had decreases in students from 2014-15 to 2015-16 at -0.5%, - 16.5% and -3.0%, respectively.

TABLE 7: RATES OF CHANGE FOR UK HE TNE STUDENTS BY TYPE OF PROVISION (2007-08 TO 2015-16)

	Distance, Flexible and Distributed Learning	Other Arrangement	Collaborative Provision	Overseas Campus	Registered at Overseas Partner Organisation
Average year on year growth 2007-08 to 2015-16	7.4%	210.0%	11.1%	17.7%	14.0%
Overall growth from 2007-08 to 2015-16	71.6%	8,636.0%	130.0%	259.0%	170.8%

LEVEL OF STUDY

In 2015-16, two thirds of UK HE TNE students globally were studying at undergraduate level and one third at postgraduate level. These proportions have been relatively consistent since 2007-08. This is not consistent in all regions. In regions with emerging economies and nascent TNE markets, for example in South America, most students were studying at postgraduate level, but where UK HE TNE is more established, in Asia for example, the undergraduate to postgraduate ratio looks similar to the overall undergraduate to postgraduate ratio.



3. UK HE TNE HOST COUNTRIES

In 2015-16 UK HE TNE was delivered in 224 countries and territories around the world.¹⁶ 52% of all UK HE TNE students were based in Asia, followed by Africa (15%), the EU (13%) and the Middle East (11%).

KEY POINTS:

- As in 2014-15, in 2015-16, **Asian** and **African** countries dominated the top 10 host countries for UK HE TNE students.
- The **five countries** hosting the highest volumes of UK HE TNE student numbers were **consistent** with 2014-15; this was the same for the top five countries in each region.
- The **Middle East** and **Asia** had a majority of undergraduate students (**60%** and **81%**, respectively) in their UK HE TNE numbers. There was a more even distribution between undergraduate and postgraduate student numbers in the EU and Africa. North America, non-EU European countries, South America and Australasia had a majority of postgraduate students.
- The majority of **undergraduate (65%)** and **postgraduate (28%)** UK HE TNE students were studying in Asia.
- In regions where UK HE TNE has been established for longer, e.g. Asia, Africa and the Middle East, most student numbers were on **collaborative provision** programmes.

The 10 host countries with the highest numbers of TNE students, both including and excluding Oxford Brookes University BSc Applied Accounting students, are consistent between 2014-15 and 2015-16, with slight differences in order. Malaysia hosted the largest number of UK HE TNE students, irrespective of whether Oxford Brookes University BSc Applied Accounting students are included or excluded.

When Oxford Brookes University BSc Applied Accounting students are excluded, Nigeria, Pakistan and Ghana no longer feature in the top 10 UK HE TNE host countries. Greece, the only European country in the list, the United Arab Emirates and India feature more prominently in the adjusted host country list (**Table 8**).

The country hosting the highest TNE numbers in each region remains the same regardless of whether Oxford Brookes BSc Applied Accounting students are considered, apart from Africa.

Of the top 20 host countries (excluding Oxford Brookes University BSc Applied Accounting students), 7 are in Asia, 6 are in the Middle East and North Africa, 4 are in Europe and 3 are in the Americas showing take-up of UK HE TNE across mature and emerging economies.

The top 20 UK HE TNE host countries excluding these students represent 76% of all UK HE TNE students.

The top 19 host countries excluding Oxford Brookes University BSc Applied Accounting students remained the same from 2014-15 to 2015-16, but with slight differences in order. Canada is now in 20th place, replacing South Africa which fell to 21st.

16. In some cases HESA collects data which relates to territories which are not independent countries.

TABLE 8: TOP 20 HOST COUNTRIES FOR UK HE TNE STUDENT IN 2015–16 (EXCLUDING OXFORD BROOKES UNIVERSITY BSc APPLIED ACCOUNTING STUDENTS)

RANK	2014–2015	2015–2016	CHANGE FROM 2014–2015	% OF UK HE TNE STUDENTS IN 2015–16
1	 Malaysia	 Malaysia	-	14.20%
2	 Singapore	 Singapore	-	8.20%
3	 Hong Kong	 China	↑ UP 1 FROM 4TH	7.10%
4	 China	 Hong Kong	↓ DOWN 1 FROM 3RD	6.36%
5	 Oman	 Egypt	↑ UP 1 FROM 6TH	5.07%
6	 Egypt	 Sri Lanka	↑ UP 1 FROM 7TH	4.59%
7	 Sri Lanka	 Oman	↓ DOWN 2 FROM 5TH	4.56%
8	 Greece	 Greece	-	3.75%
9	 UAE	 UAE	-	3.31%
10	 India	 India	-	2.37%
11	 Trinidad and Tobago	 Saudi Arabia	↑ UP 2 FROM 13TH	2.09%
12	 Nigeria	 Nigeria	-	1.90%
13	 Saudi Arabia	 Trinidad and Tobago	↓ DOWN 2 FROM 11TH	1.89%
14	 Germany	 Kuwait	↑ UP 1 FROM 15TH	1.88%
15	 Kuwait	 Pakistan	↑ UP 1 FROM 16TH	1.73%
16	 Pakistan	 Switzerland	↑ UP 2 FROM 18TH	1.46%
17	 Ireland	 Germany	↓ DOWN 3 FROM 14TH	1.45%
18	 Switzerland	 USA	↑ UP 1 FROM 19TH	1.37%
19	 USA	 Ireland	↓ DOWN 2 FROM 17TH	1.31%
20	 South Africa	 Canada	↑ UP 1 FROM 21ST	1.20%

Figure 6 shows the breakdown of UK HE TNE students by region. The proportion of UK HE TNE students studying in each region has remained broadly the same since 2012-13. Minor exceptions to this include Asia, the EU and North America each decreasing by 1%, and Africa increasing by 2%. Note that South America (less than 1%) hosted the fewest students in 2015-16.

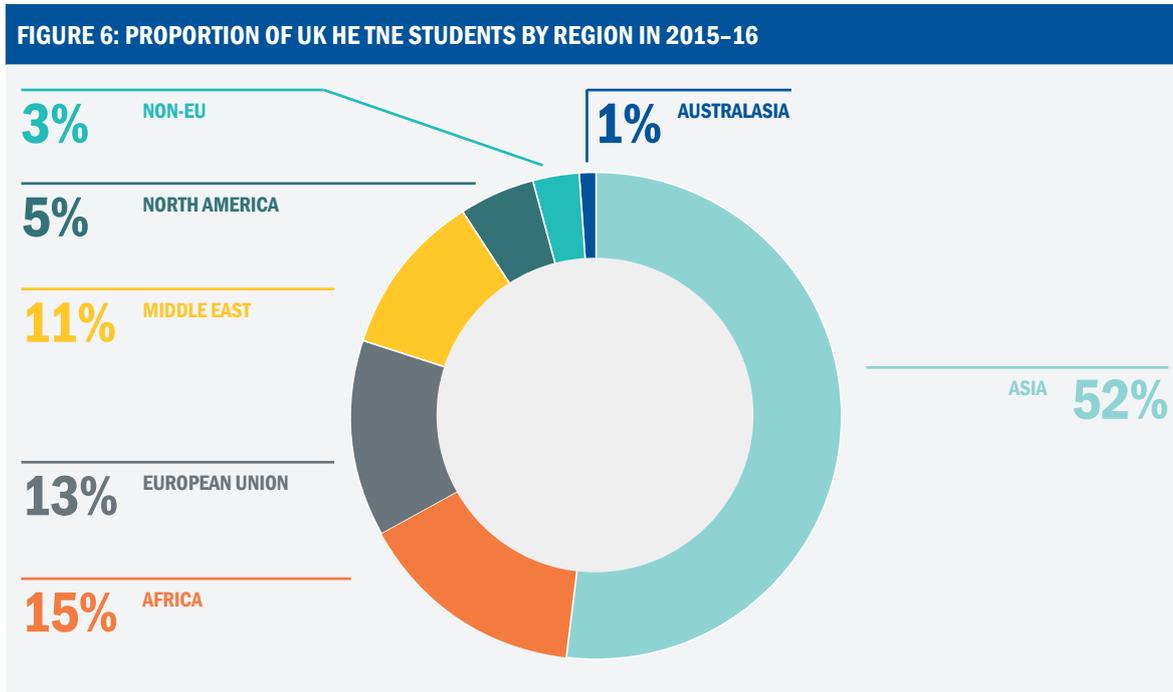
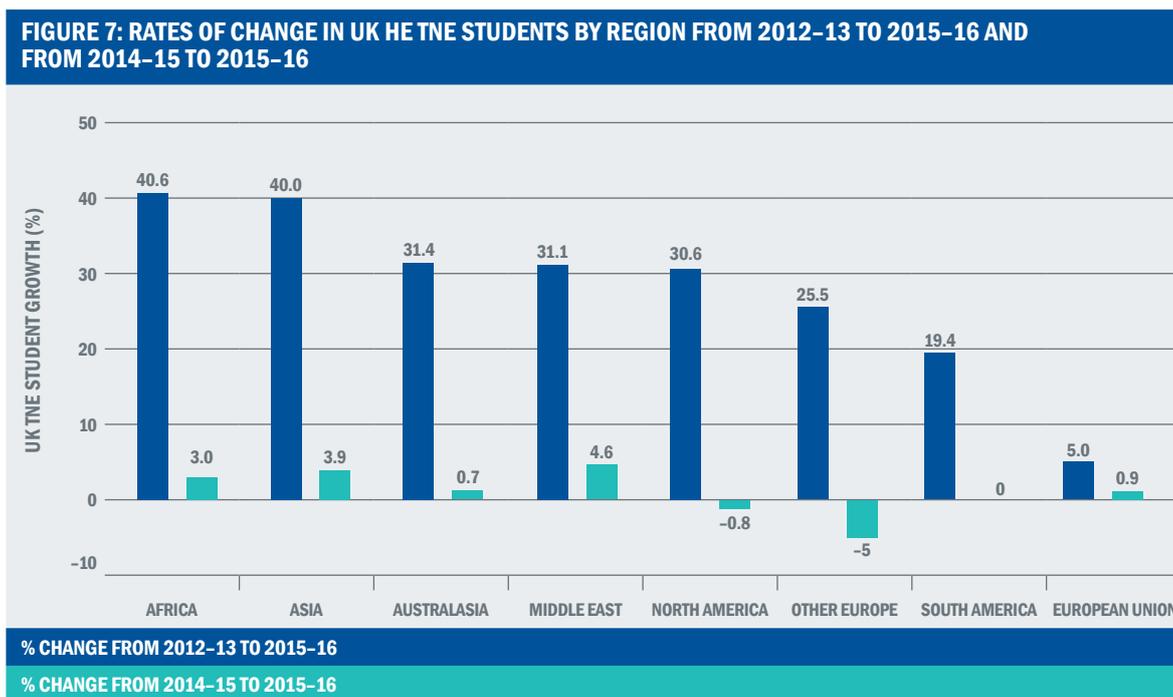
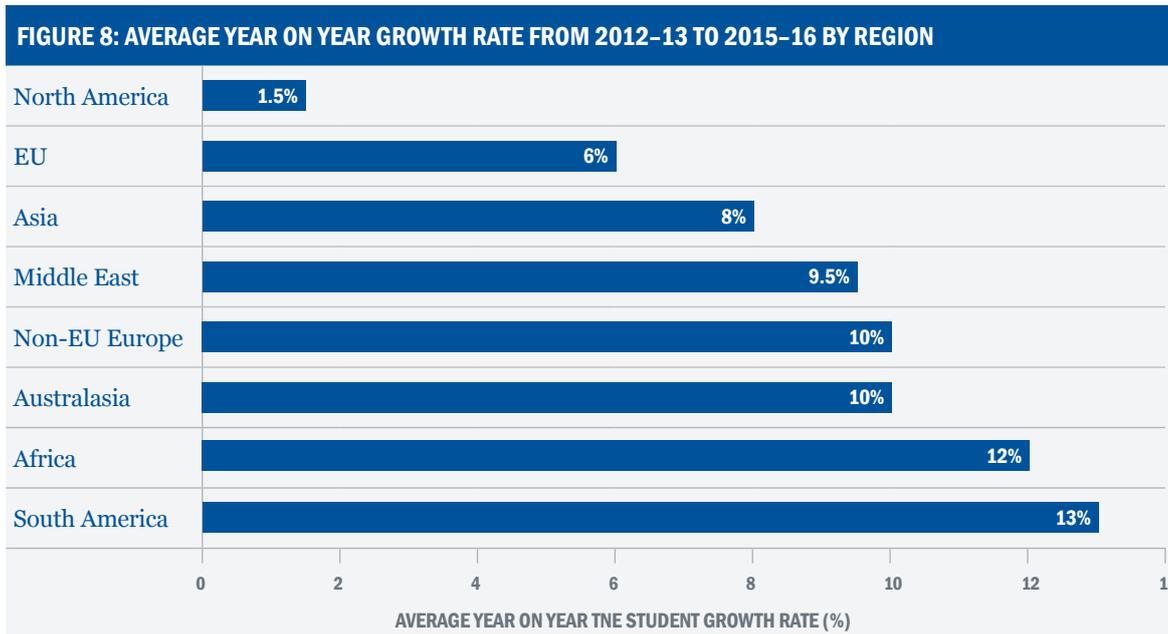


Figure 7 shows overall growth over four years from 2012-13 to 2015-16 (dark blue lines) and growth between 2014-15 to 2015-16 (teal lines). In the last four years, the number of UK HE TNE students in each region increased. However, from 2014-15 to 2015-16, TNE did not continue to expand everywhere. Growth from 2012-13 to 2015-16 was greatest in the Middle East (4.6%) followed by Asia (3.9%), Africa (3.4%), the EU (0.9%) and Australasia (0.7%). Non-EU Europe shrank by 5%, North America by 0.8% and there was 0% growth in South America.

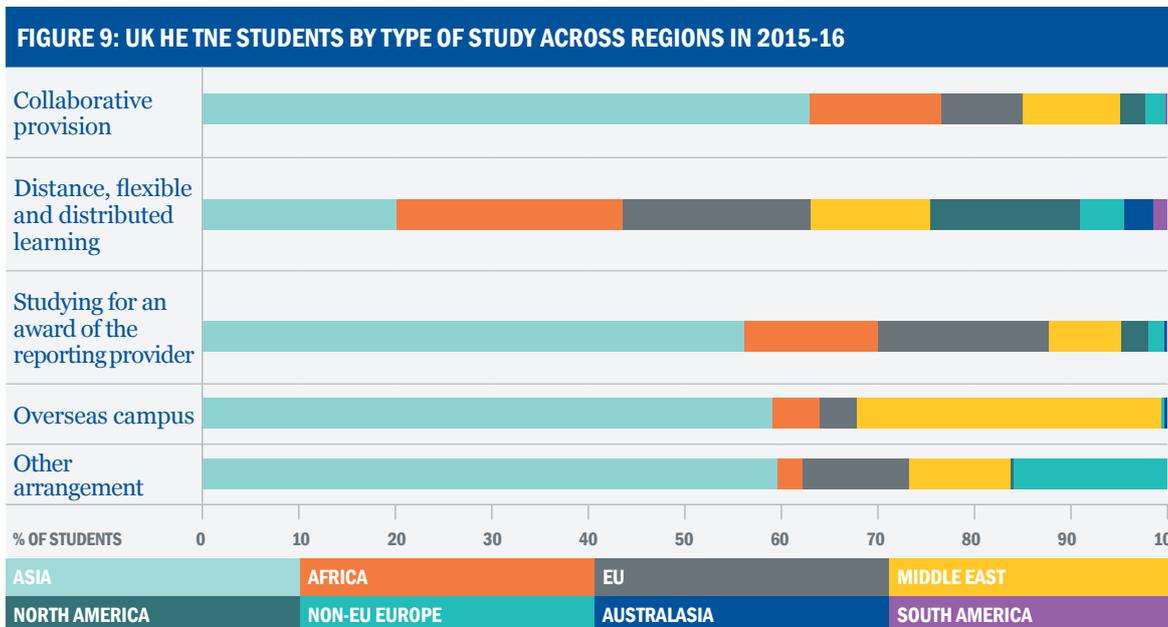


Average year on year growth in UK HE TNE students from 2013-14 to 2015-16 across all regions was 9%. **Figure 8** below shows that UK TNE students in South America and Australasia (nascent markets for TNE) had above average year on year growth over this period, by contrast Europe and Asia (established markets for TNE) had lower than average year on year growth rates.



TYPE OF PROVISION ACROSS REGIONS

Figures 9 and 10 provide insights into the spread of UK HE TNE students by type of provision across regions. **Figure 9** presents how the total number of students within each type of provision are divided across regions whereas **Figure 10** shows how the total number of students within each region are divided across types of provision.



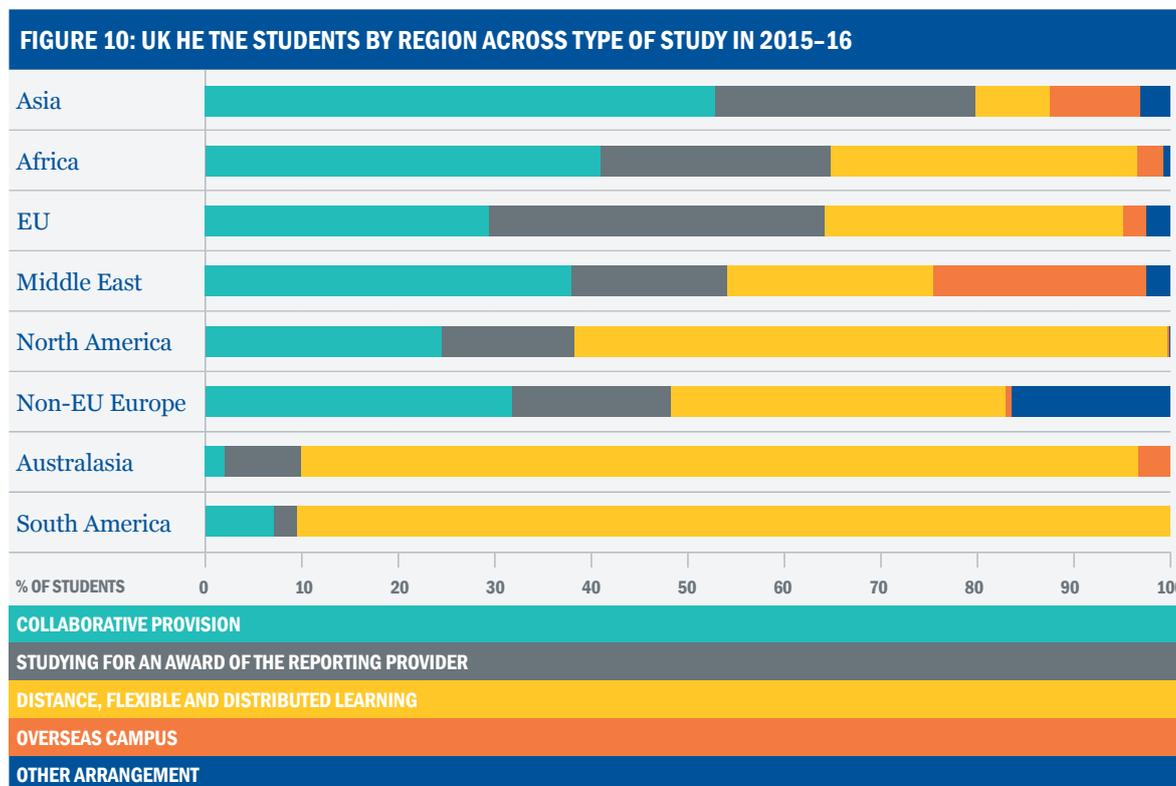
Collaborative provision, including joint degrees, has been consistently the principal type of provision through which UK HE TNE students study. In 2015-16, 63% of students on these programmes were hosted by countries in Asia, followed by Africa (13.5%), the Middle East (10%) and the EU (8.5%).

Asia hosted the most students who were studying for an **award of the reporting provider** (59%) followed by the Middle East (31.5%). Together, these regions host over 90% of students studying through this type of provision.

Overseas campuses are more prevalent in Asia (59%) and the Middle East (32%) than other regions. With new campus announcements in 2017 and more pending, the number of students attending these over time is likely to increase. At the time of research 29 UK universities were delivering programmes through 39 overseas campuses.¹⁷

Distance, flexible and distributed learning continues to increase in significance for UK HE TNE, particularly in newer or growing TNE markets. Students studying through this type of provision were more evenly spread than others. Africa led (23%) followed by Asia and the EU (20% each) and North America (16%).

Looking at students by type of provision within each region (**Figure 18**) shows that regions with long established TNE (namely Africa, Asia and the Middle East) each hosted a higher proportion of students studying through collaborative provision, whereas regions with more nascent TNE activity (namely Australasia, North America, South America and non-EU Europe) each hosted a higher proportion of students studying through distance, flexible or distributed learning. The EU is an exception to these with a more even split between students registered at reporting providers (35%), students studying through distance, flexible or distributed learning (31%) and students studying through collaborative provision (30%).



17. Data from Border Education Research Team: http://cbert.org/?page_id=34. Accessed 1 November 2017.

Tables 9 to 13 show the top host countries by type of provision. Countries in Asia make up the majority of the top host countries in three of the five types of provision. The exceptions to this are students studying through an overseas campus of the reporting provider (four each for Asia and the EU) and students studying through distance, flexible and distributed learning which is evenly spread between Africa, Asia, North America, the Middle East and the EU.

TABLE 9: TOP 10 HOST COUNTRIES OF STUDENTS STUDYING FOR AN AWARD OF THE REPORTING PROVIDER

COUNTRY	NO OF STUDENTS
 Malaysia	14,890
 China	8,905
 Singapore	6,605
 Egypt	5,945
 Hong Kong	5,105
 Greece	5,060
 Oman	4,130
 Pakistan	3,165
 Ghana	1,855
 India	1,855

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

COUNTRY	NO OF STUDENTS
 Nigeria	4,610
 South Africa	3,550
 Hong Kong	3,175
 USA	3,170
 UAE	2,770
 Canada	2,715
 Ireland	2,100
 China	1,950
 Germany	1,830
 Saudi Arabia	1,755

TABLE 11: TOP 10 HOST COUNTRIES OF STUDENTS STUDYING AT AN OVERSEAS CAMPUS

COUNTRY	NO OF STUDENTS
 Malaysia	7,670
 UAE	7,660
 China	6,610
 Mauritius	1,070
 Singapore	410
 Belgium	345
 Brazil	340
 Hong Kong	240
 Greece	215
 Malta	195

TABLE 12: TOP 10 HOST COUNTRIES OF STUDENTS STUDYING THROUGH COLLABORATIVE PROVISION

COUNTRY	NO OF STUDENTS
 Malaysia	27,520
 Sri Lanka	13,060
 Hong Kong	12,595
 Oman	11,920
 Singapore	11,875
 Egypt	11,275
 China	10,175
 Greece	5,385
 Uzbekistan	2,515
 Trinidad and Tobago	2,470

TABLE 13: TOP 10 HOST COUNTRIES OF STUDENTS STUDYING THROUGH OTHER TYPES OF PROVISION

COUNTRY	NO OF STUDENTS
 India	3,155
 Uzbekistan	960
 Oman	735
 Germany	455
 Czech Republic	330
 Singapore	270
 Zimbabwe	190
 Japan	190
 Bahrain	145
 China	130

LEVEL OF STUDY ACROSS REGIONS

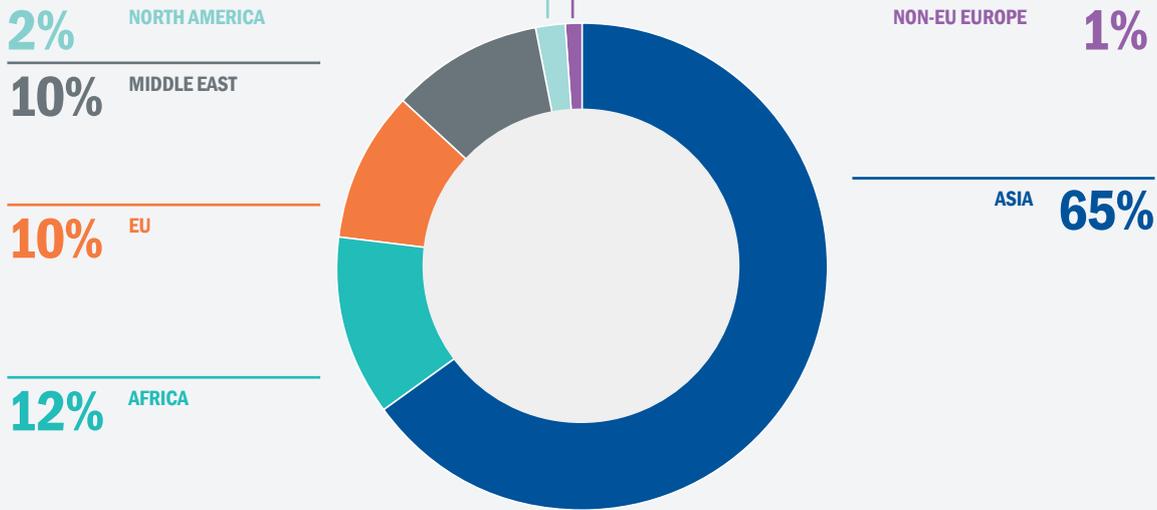
65% of UK HE TNE students were studying at undergraduate level in 2015-16 and 35% were studying at postgraduate level. While 65% of undergraduate students were based in Asia (Figure 11), there was a more even spread at postgraduate level across Asia (28%), Africa (21%), the EU (19%) and the Middle East (13%) (Figure 12). This can be seen in the spread of countries represented in Table 14 which shows the top 20 host countries for undergraduate and postgraduate students, respectively.

TABLE 14: COUNTRIES HOSTING THE MOST UK HE TNE STUDENTS BY LEVEL OF STUDY

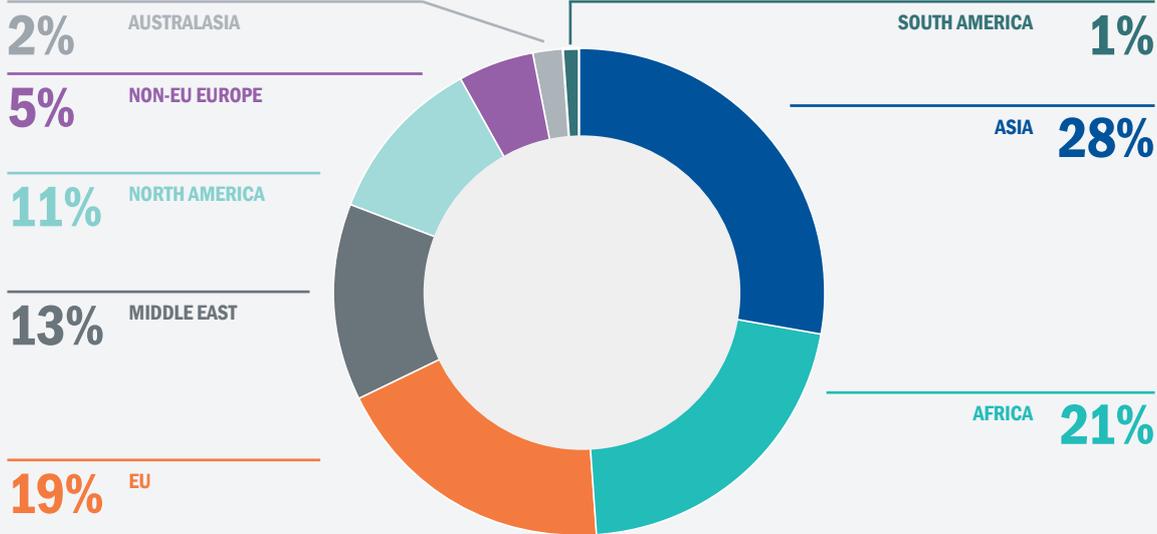
RANKING	UNDERGRADUATE		POSTGRADUATE	
	COUNTRY	NO OF STUDENTS	COUNTRY	NO OF STUDENTS
1	 Malaysia	44,690	 United Arab Emirates	6,695
2	 China	23,615	 Malaysia	6,570
3	 Hong Kong	17,430	 Nigeria	6,260
4	 Singapore	16,705	 Sri Lanka	6,230
5	 Egypt	16,535	 Singapore	4,110
6	 Oman	14,455	 Hong Kong	3,690
7	 Sri Lanka	9,480	 Greece	3,645
8	 Greece	7,720	 China	3,510
9	 India	6,015	 United States	3,260
10	 United Arab Emirates	5,615	 Canada	3,140
11	 Uzbekistan	4,100	 Switzerland	2,980
12	 Pakistan	3,175	 Trinidad and Tobago	2,950
13	 Vietnam	2,415	 South Africa	2,920
14	 Trinidad and Tobago	2,360	 Ghana	2,330
15	 Spain	1,935	 Germany	2,310
16	 Botswana	1,855	 Ireland	2,260
17	 Nepal	1,855	 Cyprus (EU)	2,190
18	 Cyprus (EU)	1,570	 India	2,095
19	 Switzerland	1,535	 Oman	2,085
20	 Germany	1,520	 Saudi Arabia	2,050

FIGURE 11: UK HE TNE STUDENTS BY LEVEL AND REGION IN 2015-16

UNDERGRADUATE



POSTGRADUATE



4. INSIGHTS BY REGION

UK HE TNE IN AFRICA

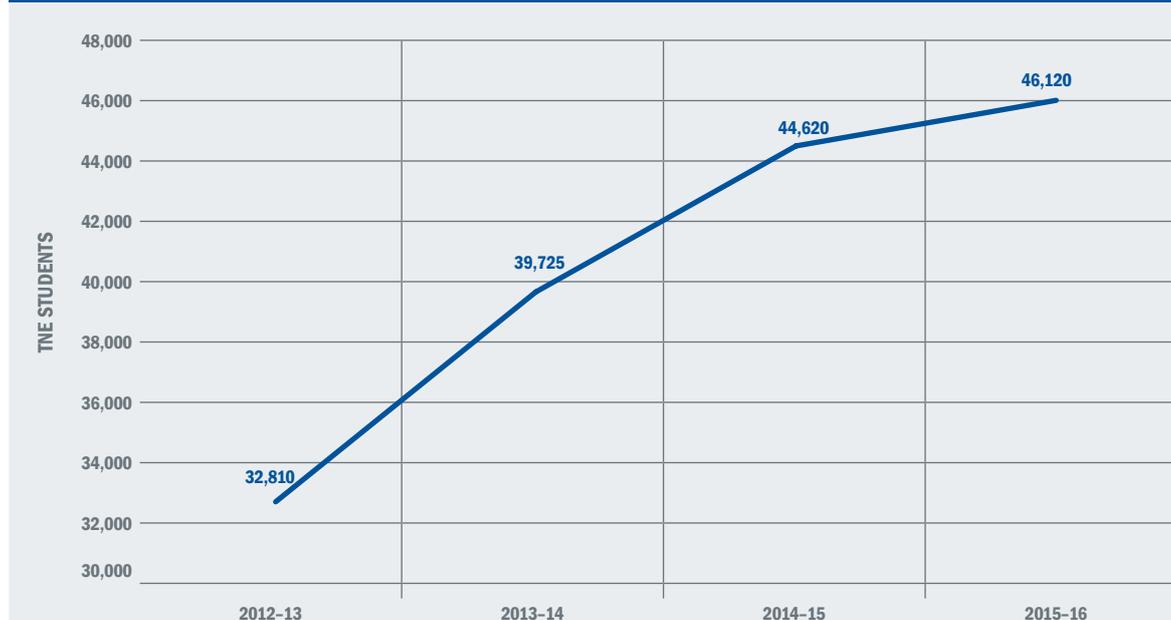


AT A GLANCE 2015-16

- Africa hosted the second highest number of UK HE TNE students (**15%**).
- UK HE TNE was delivered in **55** countries in Africa.
- Africa experienced the largest growth in UK HE TNE students over the last three years with a growth of **40.5%**. It was the second fastest growing region for UK HE TNE student numbers since 2012-13 behind South America. Average year on year growth was **12%** between 2012-13 and 2015-16, although that slowed to **3.4%** in the last year.
- Egypt, which ranks first as a host country in Africa and fifth overall, hosted **39%** of UK HE TNE students in Africa.
- The top **20** host countries remained more or less the same from 2014-15.
- The relative majority (**41%**) of UK HE TNE students studied through collaborative provision, followed by those studying through distance, flexible and distributed learning (**32%**) and those studying for an award of the reporting provider (**24%**).
- **51%** of UK HE TNE students in Africa were studying at undergraduate level.

TABLE 15: UK HE TNE STUDENTS IN AFRICA FROM 2012-13 TO 2015-16

YEAR	2012-13	2013-14	2014-15	2015-16
Excluding the three main distance and blended providers	32,810	39,725	44,620	46,120
Including the three main distance and blended providers	129,450	141,625	150,310	161,360

FIGURE 12: UK HE TNE STUDENTS IN AFRICA FROM 2012-13 TO 2015-16 (EXCLUDING THE THREE MAIN DISTANCE AND BLENDED PROVIDERS)

From 2012-13 to 2015-16, the number of UK HE TNE students studying in Africa grew by 40.5%. The year on year growth rate decreased from 2012-13 to 2014-15 from 21% from 2012-13 to the following year, to 3.4% from 2014-15 to 2015-16.

Africa hosted the second highest number of UK HE TNE students in 2015-16

161,360

Egypt, which ranks first as a host country in Africa and fifth overall by UK HE TNE student numbers in 2015-16, hosted

39%

of UK HE TNE students in Africa

TABLE 16 shows 10 African countries hosting the most UK HE TNE in 2014-15 and in 2015-16. There was little change in the distribution of UK HE TNE in Africa in the last year.

TABLE 16: COUNTRIES HOSTING THE MOST UK HE TNE STUDENTS IN AFRICA				
RANK	2014-15	2015-16	NUMBER OF STUDENTS IN 2015-16	RANKING CHANGE FROM 2014-15 TO 2015-16
1	 Egypt	 Egypt	17,905	SAME
2	 Nigeria	 Nigeria	6,680	SAME
3	 South Africa	 South Africa	4,040	SAME
4	 Botswana	 Ghana	3,020	↑ UP 1
5	 Ghana	 Botswana	2,325	↓ DOWN 1
6	 Mauritius	 Mauritius	2,150	SAME
7	 Zambia	 Zambia	1,665	SAME
8	 Kenya	 Kenya	1,525	SAME
9	 Tanzania	 Tanzania	1,300	SAME
10	 Uganda	 Uganda	800	SAME

FIGURE 13 shows that the relative majority of UK HE TNE students in Africa were studying through collaborative provision (41%), followed by those who were studying through distance, flexible and distributed learning (32%) and those studying for an award of the reporting provider (24%).

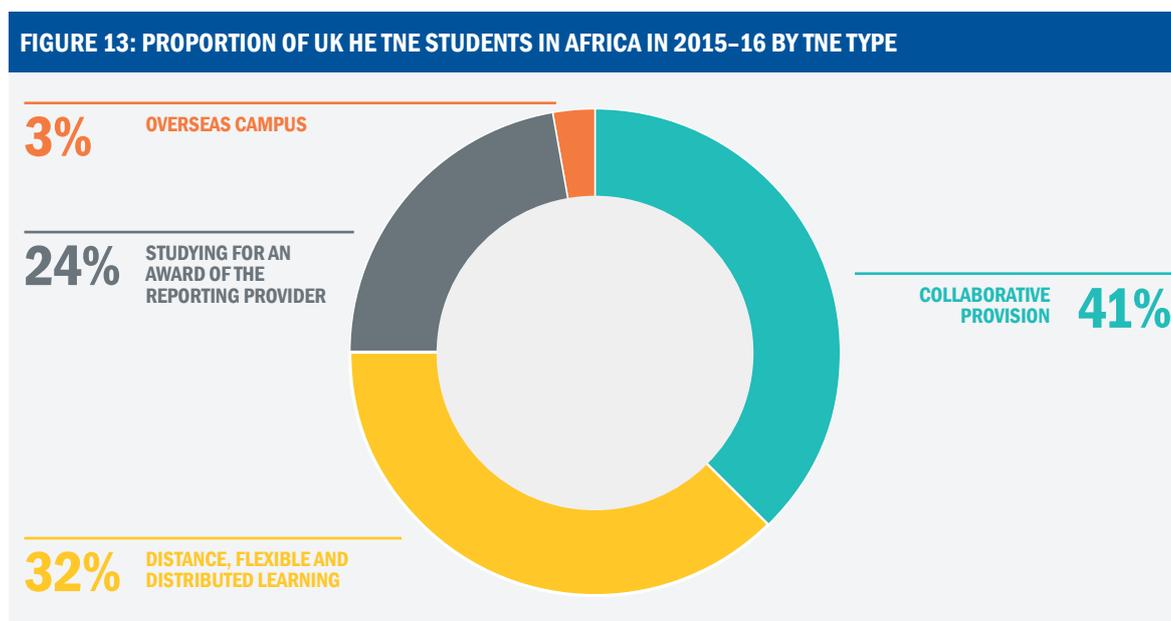


TABLE 17 shows how many students were studying through each type of provision, how many countries each type of provision was present in, and what the top host countries were by type of provision.

TABLE 17: UK HE TNE STUDENTS IN AFRICA BY TYPE OF STUDY IN 2015-16			
TYPE OF PROVISION	NUMBER OF STUDENTS	NUMBER OF COUNTRIES REPRESENTED OUT OF 55 (%)	TOP COUNTRIES
Collaborative provision	18,880	51 (93%)	Egypt (11,275) Botswana (1,840) Nigeria (1,600) Zambia (870) Morocco (520)
Studying for an award of the reporting provider	11,055	33 (60%)	Egypt (5,945) Ghana (1,855) Tanzania (745) Mauritius (460) Nigeria (440)
Distance, flexible and distributed	14,635	50 (91%)	Nigeria (4,610) South Africa (3,550) Kenya (980) Ghana (715) Egypt (685)
Overseas campus	1,280	4 (7%)	Mauritius (1,070)
Other	220	9 (16%)	Zimbabwe (109) Nigeria (30)

There is an almost even distribution between undergraduate (51%) and postgraduate (49%) UK HE TNE students in Africa. However, the picture changes when broken down by country. For example:

- Six countries host both the highest numbers of undergraduate and postgraduate students
- Botswana, Morocco and Malawi rank in the top ten host countries for undergraduate UK HE TNE student numbers (ranking second, eighth and tenth respectively) but fall outside the top ten for hosting postgraduate UK HE TNE students
- Egypt, Mauritius, Morocco and Botswana host more undergraduate than postgraduate students
- South Africa, Ghana, Zambia, Nigeria, Kenya, Tanzania and Zimbabwe host more postgraduate students than undergraduates.

51%

of UK HE TNE students in Africa were studying at undergraduate level in 2015-16

FIGURE 14: UK HE TNE STUDENTS BY LEVEL IN AFRICA IN 2015-16

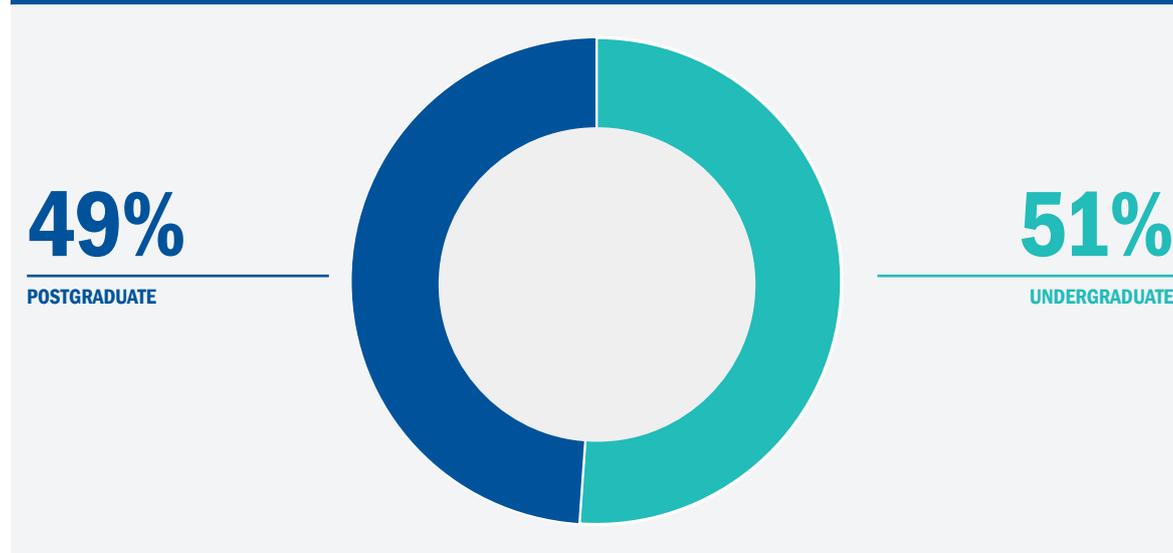


TABLE 18: COUNTRIES HOSTING THE MOST UK HE TNE STUDENTS IN AFRICA BY LEVEL OF STUDY

RANKING	UNDERGRADUATE			POSTGRADUATE		
	COUNTRY	NUMBER OF STUDENTS	PROPORTION OF UNDERGRADUATES IN AFRICA	COUNTRY	NUMBER OF STUDENTS	PROPORTION OF POSTGRADUATES IN AFRICA
1	Egypt	16,535	70.5%	Nigeria	6,260	27.7%
2	Botswana	1,855	7.9%	South Africa	2,920	12.9%
3	Mauritius	1,190	5.1%	Ghana	2,330	10.3%
4	South Africa	1,120	4.8%	Egypt	1,370	6.1%
5	Ghana	690	2.9%	Tanzania	1,215	5.4%
6	Zambia	595	2.5%	Kenya	1,210	5.3%
7	Nigeria	420	1.8%	Zambia	1,065	4.7%
8	Morocco	350	1.5%	Mauritius	960	4.2%
9	Kenya	310	1.3%	Uganda	790	3.5%
10	Malawi	130	0.6%	Zimbabwe	720	3.2%

UK HE TNE IN ASIA

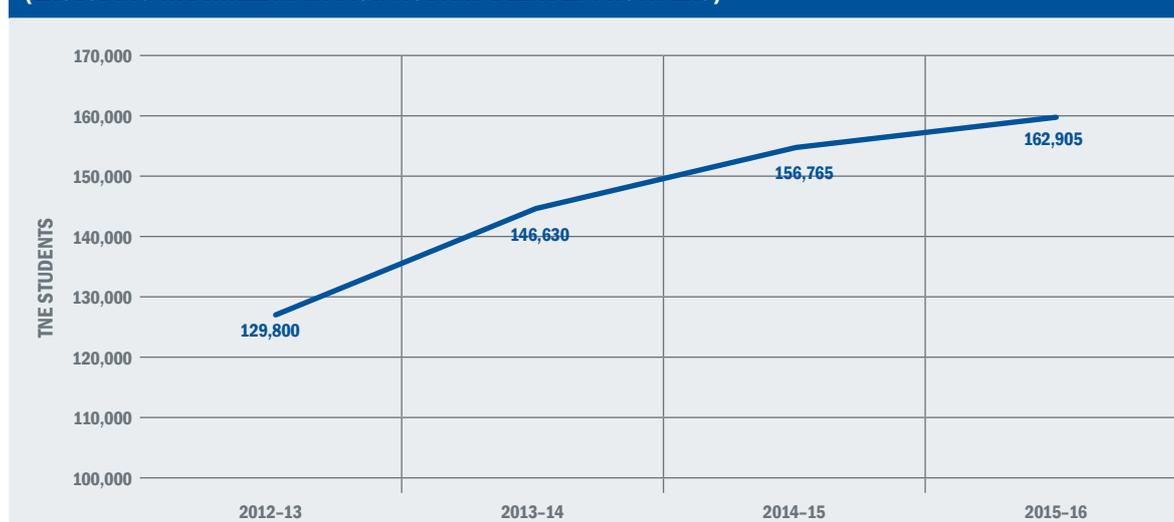


AT A GLANCE 2015-16

- Asia hosted the highest number of UK HE TNE students (**52%**).
- UK HE TNE was delivered in **32** countries in Asia.
- Asia experienced the second largest growth in UK HE TNE students over the last three years with a growth of **40%**. It was the **sixth fastest growing** region by student numbers from 2012-13 to 2015-16 with an average year on year growth of **9%** over this time. The growth rate from 2014-15 to 2015-16 was **3.9%**.
- **Malaysia**, which is the largest UK HE TNE host country overall, hosts **31%** of all students in Asia and **14%** of all UK HE TNE students overall.
- The top 20 host countries remained similar from 2014-15 to 2015-16, with significant ranking changes in **Burma** (up three places to 11th place), the **Maldives** (up nine places to 12th place), **South Korea** (down three places to 15th place) and **Kazakhstan** (down three places to 20th place).
- The majority (**53%**) of UK HE TNE students studied through **collaborative provision**, followed by those **studying through a reporting provider (27%)**.
- Asia hosts the second highest number of students studying through an **overseas campus (9%)**.
- **81%** of UK HE TNE students were studying at **undergraduate** level.

TABLE 19: UK HE TNE STUDENTS IN ASIA FROM 2012-13 TO 2015-16

YEAR	2012-13	2013-14	2014-15	2015-16
Excluding the three main distance and blended providers	129,800	146,630	156,765	162,905
Including the three main distance and blended providers	281,720	305,725	318,735	341,330

FIGURE 15: UK HE TNE STUDENTS IN ASIA FROM 2012-13 TO 2015-16 (EXCLUDING THE THREE MAIN DISTANCE AND BLENDED PROVIDERS)

From 2012-13 to 2015-16 UK HE TNE students studying in Asia have increased at an average year on year growth rate of 8%. The year on year growth rate decreased from 2012-13 to 2014-15 from 13% from 2012-13 to the following year, to 3.9% from 2014-15 to 2015-16.

Table 20 shows the top host countries in Asia in 2014-15 and in 2015-16. It shows that there is minimal change in the top ten countries from 2014-15 to the following year, but that there is movement in the volume of TNE hosted in countries ranking 11-20 by UK HE TNE student numbers. Burma, the Maldives, South Korea and Kazakhstan have each moved more than two places.

Asia hosted the majority of UK HE TNE students in 2015-16

52%

TABLE 20: COUNTRIES HOSTING THE HIGHEST NUMBER OF UK HE TNE STUDENTS IN ASIA

RANK	2014-15	2015-16	NUMBER OF STUDENTS IN 2015-16	RANKING CHANGE FROM 2014-15 TO 2015-16
1	 Malaysia	 Malaysia	51,260	SAME
2	 China	 China	27,765	SAME
3	 Hong Kong	 Hong Kong	21,120	SAME
4	 Singapore	 Singapore	20,815	SAME
5	 Sri Lanka	 Sri Lanka	15,710	SAME
6	 India	 India	8,115	SAME
7	 Pakistan	 Uzbekistan	4,290	↑ UP 1
8	 Uzbekistan	 Pakistan	3,595	↓ DOWN 1
9	 Vietnam	 Vietnam	2,985	SAME
10	 Nepal	 Nepal	1,960	SAME
11	 Japan	 Burma (Myanmar)	1,035	↑ UP 3
12	 Korea (South)	 Maldives	820	↑ UP 9
13	 Bangladesh	 Japan	800	↓ DOWN 2
14	 Burma (Myanmar)	 Bangladesh	655	↓ DOWN 1
15	 Thailand	 Korea (South)	590	↓ DOWN 3
16	 Indonesia	 Thailand	535	↓ DOWN 1
17	 Kazakhstan	 Indonesia	370	↓ DOWN 1
18	 Philippines	 Brunei	330	↑ UP 1
19	 Brunei	 Philippines	220	↓ DOWN 1
20	 Afghanistan	 Kazakhstan	195	↓ DOWN 3

The relative majority of UK HE TNE students in Asia were studying through collaborative provision (53%), followed by those studying for an award of the reporting provider (27%). **Table 21** shows how many students were studying through each type of provision, how many countries each type of provision was present in, and what the top host countries were by type of provision.

There is a prevalence of overseas campuses in Asia compared to other regions: although only 9% of UK HE TNE of students in Asia study at an overseas campus, in numerical terms this is 15,120 students. This is almost twice as many as in the Middle East which ranks second with 8,110 students studying at overseas campuses.

FIGURE 16: PROPORTION OF UK HE TNE STUDENTS IN ASIA IN 2015–16 BY TNE TYPE

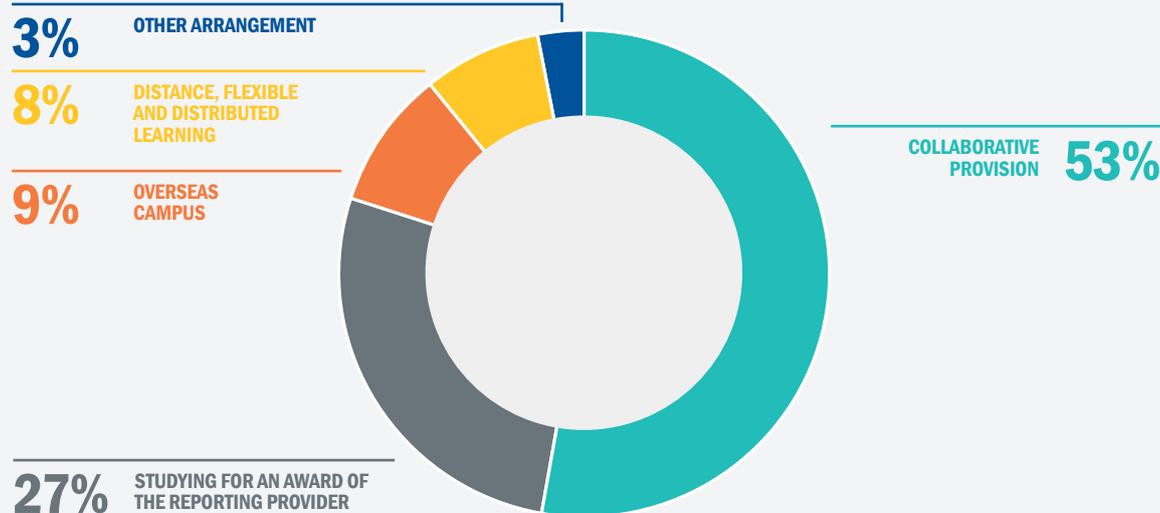


TABLE 21: UK HE TNE STUDENTS IN ASIA BY TYPE OF STUDY IN 2015–16

TYPE OF PROVISION	NUMBER OF STUDENTS	NUMBER OF COUNTRIES REPRESENTED OUT OF 32 (%)	TOP COUNTRIES
Collaborative provision	86,435	27 (84%)	Malaysia (27,520) Sri Lanka (13,060) Hong Kong (12,595) Singapore (11,875)
Studying for an award of the reporting provider	44,495	28 (88%)	Malaysia (14,890) China (8,905) Singapore (6,005) Hong Kong (5,105) Pakistan (3,165)
Overseas campus	15,120	7 (22%)	Malaysia (7,670) China (6,610)
Distance, flexible and distributed learning	12,575	32 (100%)	Hong Kong (3,175) China (1,950) Singapore (1,655) Malaysia (1,060)
Other arrangement	4,920	9 (28%)	India (3,155) Uzbekistan (960)

In 2015-16 65% of all undergraduate and 28% of all postgraduate UK HE TNE students were studying in Asia. 81% of students in Asia were undergraduates (**Figure 17**).

The top five host countries in both levels of study were also listed in the top five countries in Asia overall. All top ten host countries for undergraduate students hosted more undergraduate students than postgraduate students. Japan and Thailand were the only countries in the top ten host countries for postgraduate students which did not feature in the top ten host countries for undergraduate students. Similarly, Uzbekistan and Nepal only featured in the top ten host countries for undergraduate students.

FIGURE 17: UK HE TNE STUDENTS BY LEVEL IN ASIA IN 2015-16

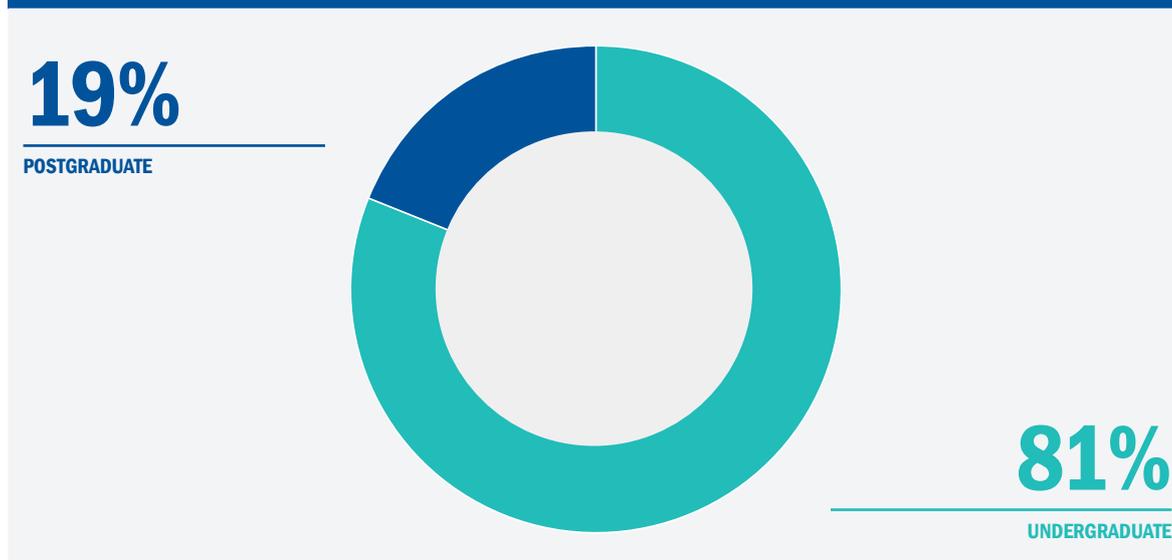


TABLE 22: COUNTRIES HOSTING THE HIGHEST NUMBER OF UK HE TNE STUDENTS IN ASIA BY LEVEL OF STUDY

RANKING	UNDERGRADUATE			POSTGRADUATE		
	COUNTRY	NUMBER OF STUDENTS	PROPORTION OF UNDERGRADUATES IN ASIA	COUNTRY	NUMBER OF STUDENTS	PROPORTION OF POSTGRADUATES IN ASIA
1	Malaysia	44,690	33.8%	Malaysia	6,570	21.5%
2	China	23,615	17.8%	Sri Lanka	6,230	20.4%
3	Hong Kong	17,430	13.2%	Singapore	4,110	13.5%
4	Singapore	16,705	12.6%	Hong Kong	3,690	12.1%
5	Sri Lanka	9,480	7.2%	China	3,510	11.5%
6	India	6,015	4.5%	India	2,095	6.9%
7	Uzbekistan	4,100	3.1%	Japan	575	1.9%
8	Pakistan	3,175	2.4%	Vietnam	565	1.9%
9	Vietnam	2,415	1.8%	Thailand	440	1.4%
10	Nepal	1,855	1.4%	Pakistan	415	1.4%

UK HE TNE IN AUSTRALASIA

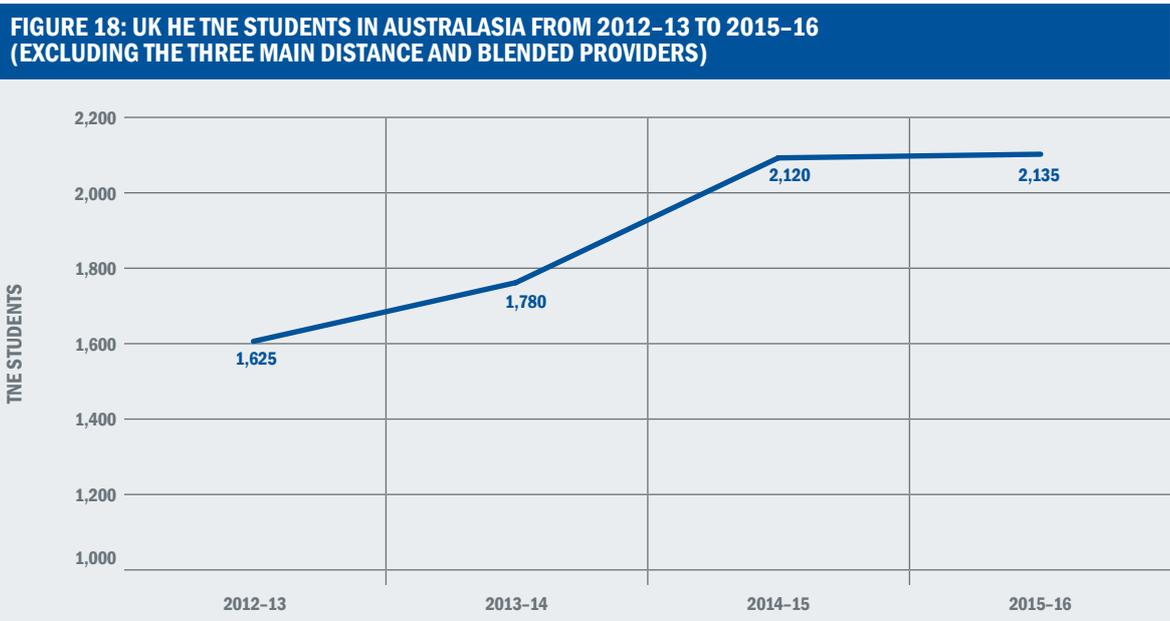


AT A GLANCE 2015-16

- Australasia hosted the **seventh highest number** of UK HE TNE students (1%).
- UK HE TNE is present in **17** countries in Australasia. **11** of these have fewer than **3** students.
- UK TNE grew by **31%** from 2012-13 to 2015-16. The growth rate from 2014-15 to 2015-16 was less than **1%**.
- **Australia** hosted **81%** of the UK HE TNE students in Australasia, with **New Zealand** representing **16%** and smaller Pacific island nations making up the remaining **4%**.
- **87%** of UK HE TNE students in Australasia were studying through **distance, distributed or flexible learning**.
- **83%** of UK HE TNE students in Australasia were studying at **postgraduate** level.

TABLE 23: UK HE TNE STUDENTS IN AUSTRALASIA FROM 2012-13 TO 2015-16

YEAR	2012-13	2013-14	2014-15	2015-16
Excluding the three main distance and blended providers	1,625	1,780	2,120	2,135
Including the three main distance and blended providers	3,210	3,395	3,660	3,975



From 2012-13 to 2015-16 UK HE TNE students studying in Australasia have increased at an average year on year growth rate of 10% although it grew by less than 1% from 2014-15 to 2015-16. The growth rate was 19% the previous year. There are clear increases in Australia, New Zealand and Fiji, with minor changes in countries hosting fewer than 20 students.

UK HE TNE was present in

17

countries in Australasia in 2015-16.

83%

of UK HE TNE students in Australasia were studying at postgraduate level in 2015-16.

Table 24 shows the top countries in Australasia in 2014-15 and 2015-16. It shows that there is some change among countries which had zero students prior to 2014-15 and that Fiji overtook Papua New Guinea to rank third in 2015-16.

Figure 19 shows that 87% of UK HE TNE students in Australasia were studying through distance, flexible and distributed learning in 2015-16, followed by 8% studying through an overseas partner organisation.

TABLE 24: TOP UK TNE HOST COUNTRIES IN AUSTRALASIA				
RANK	2014-15	2015-16	NUMBER OF STUDENTS IN 2015-16	RANKING CHANGE FROM 2014-15 TO 2015-16
1	 Australia	 Australia	1,725	SAME
2	 New Zealand	 New Zealand	345	SAME
=3	 Northern Mariana Islands	 Fiji	20	↑ UP 2
=3	 Papua New Guinea	 Papua New Guinea	20	SAME
=4	 Fiji	 Solomon Islands	5	↑ UP 2
=4	 American Samoa	 Vanuatu	5	↑ UP 7
=4	 Solomon Islands	 Samoa	5	↑ UP 7

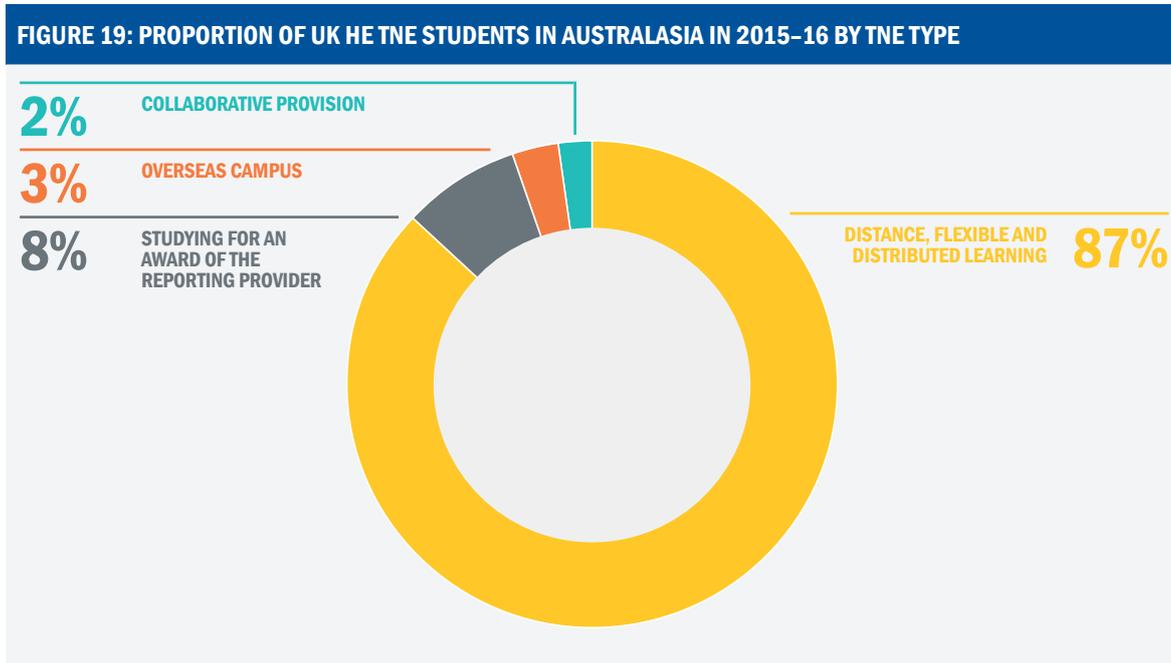


TABLE 25: UK HE TNE STUDENTS IN AUSTRALASIA BY TYPE OF STUDY IN 2015–16

TYPE OF PROVISION	NUMBER OF STUDENTS	NUMBER OF COUNTRIES REPRESENTED OUT OF 17 (%)
Distance, flexible and distributed learning	1,845	15 (88%)
Studying for an award of the reporting provider	165	6 (35%)
Overseas campus	65	1 (6%)
Collaborative provision	45	6 (35%)

83% of UK HE TNE students in Australasia were studying at postgraduate level (Figure 20). The majority of these were in Australia and New Zealand, with many countries hosting fewer than 20 UK HE TNE students at any level.

FIGURE 20: UK HE TNE STUDENTS BY LEVEL IN AUSTRALASIA IN 2015–16

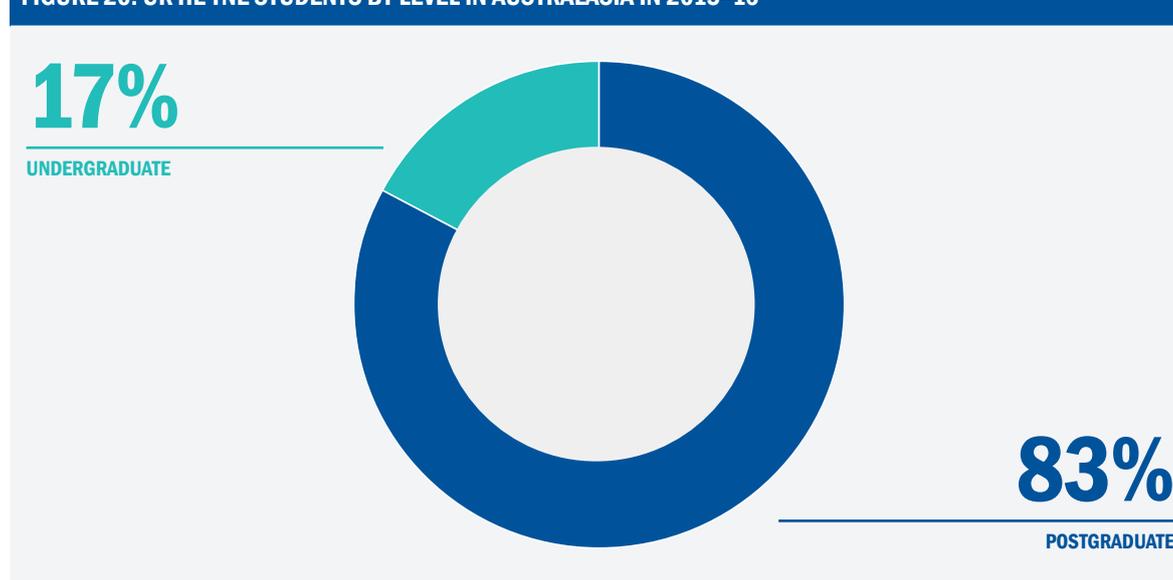


TABLE 26: COUNTRIES HOSTING THE HIGHEST VOLUME OF UK HE TNE ACTIVITY IN AUSTRALASIA BY LEVEL OF STUDY

RANKING	UNDERGRADUATE			POSTGRADUATE		
	COUNTRY	NUMBER OF STUDENTS	PROPORTION OF UNDERGRADUATES IN AUSTRALASIA	COUNTRY	NUMBER OF STUDENTS	PROPORTION OF POSTGRADUATES IN AUSTRALASIA
1	Australia	1,470	84.5%	Australia	255	66.2%
2	New Zealand	220	12.6%	New Zealand	125	32.5%
3	Papua New Guinea	20	1.1%	-	-	-
4	Fiji	15	0.9%	-	-	-
5	Samoa	5	0.3%	-	-	-
6	Solomon Islands	5	0.3%	-	-	-
7	Vanuatu	5	0.3%	-	-	-

UK HE TNE IN THE EUROPEAN UNION



AT A GLANCE 2015-16

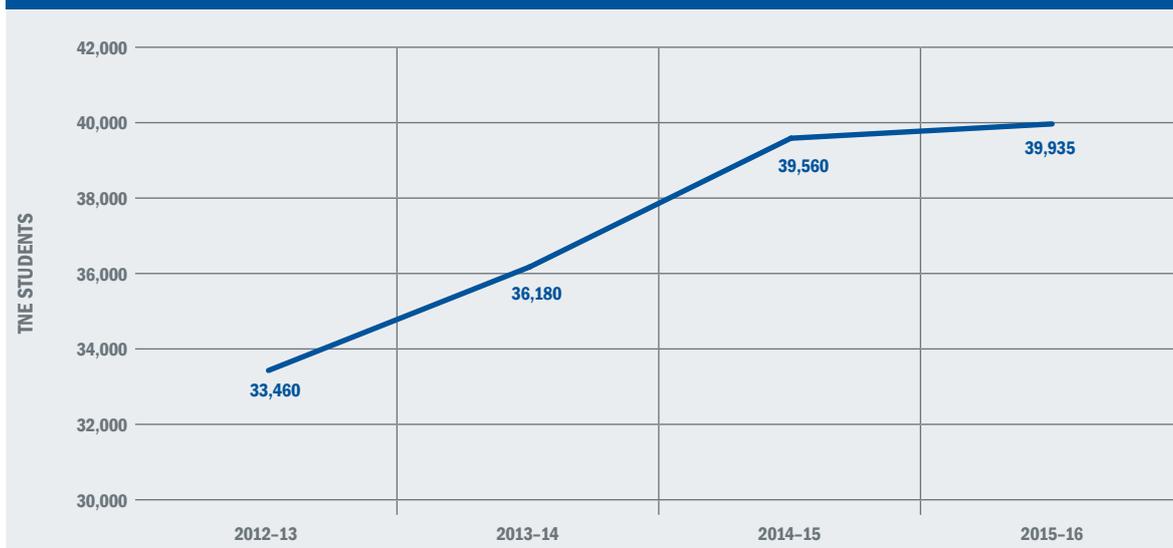
- The EU hosted the **third highest** number of UK HE TNE students (**13%**).
- UK HE TNE was delivered in **30** countries and territories in the EU.¹⁸
- UK HE TNE student numbers grew by **5%** from 2012-13 to 2015-16 in the EU, the lowest increase of all regions. The EU experienced the sixth fastest year on year growth rate (**6%**). Growth slowed from **9.3%** between 2012-13 and 2013-14 to **1%** between 2014-15 and 2015-16.
- The top 20 host countries for UK HE TNE in the EU remained the same from 2014-15 to 2015-16, with slight fluctuations in ranking, the most significant being **Austria** rising by seven places to seventh position.
- One third of students in the EU were **registered through a partner (35%)**, one third studied through **distance, flexible or distributed learning (31%)** and one third studied through **collaborative provision (30%)**.
- Half of UK HE TNE students in the EU were studying at **postgraduate** and half at **undergraduate** level.
- **One in every ten** undergraduates and **one in every five** postgraduate UK HE TNE students was studying in the EU.

18. This excludes four UK Crown Dependencies

TABLE 27: UK HE TNE STUDENTS IN THE EU FROM 2012-13 TO 2015-16

YEAR	2012-13	2013-14	2014-15	2015-16
Excluding the three main distance and blended providers	33,460	36,180	39,560	39,935
Including the three main distance and blended providers	75,770	75,170	75,265	74,965

FIGURE 21: UK HE TNE STUDENTS IN EU FROM 2012-13 TO 2015-16 (EXCLUDING THE THREE MAIN DISTANCE AND BLENDED PROVIDERS)



From 2012-13 to 2015-16, the number of UK HE TNE students in the EU increased at an average year on year growth rate of 6%. The year on year growth rate increased from 2012-13 to 2014-15 from 8.2% from 2012-13 to the following year, to 9.3% from 2014-15 to 2015-16. From 2014-15 to 2015-16, the growth rate slowed to 1%.

Table 28 shows the top 20 countries in 2014-15 and 2015-16 in the EU. It shows that these have remained the same, with slight fluctuations in how countries rank by UK HE TNE student numbers. Greece hosted almost 30% of UK HE TNE students in the EU.

The number of UK HE TNE host countries in the EU with over 1000 students grew from 11 to 13 in the last year. The number of UK HE TNE students in Austria more than tripled from 555 to 1705 students in the last year.

UK HE TNE was delivered in

30

EU countries and territories in 2015-16.

TABLE 28: EU COUNTRIES WITH THE HIGHEST NUMBER OF UK HE TNE STUDENTS

RANK	2014-15	2015-16	NUMBER OF STUDENTS IN 2015-16	RANKING CHANGE FROM 2014-15 TO 2015-16
1	 Greece	 Greece	11,360	SAME
2	 Germany	 Germany	3,830	SAME
3	 Ireland	 Cyprus (EU)	3,765	↑ UP 2
4	 Spain	 Ireland	3,165	↓ DOWN 1
5	 Cyprus (EU)	 Spain	2,415	↓ DOWN 1
6	 Italy	 France	1,775	↑ UP 1
7	 France	 Austria	1,705	↑ UP 7
8	 Netherlands	 Italy	1,635	↓ DOWN 2
9	 Malta	 Denmark	1,375	↑ UP 2
10	 Czech Republic	 Netherlands	1,260	↓ DOWN 2

Figure 22 shows that over 90% of UK HE TNE students based in EU countries and territories in 2015-16 were evenly spread across three types of provision: collaborative provision, distance, flexible and distributed learning, and studying through the reporting provider. Table 29 expands on this, showing how many students were studying through each type of provision, how many countries each type of provision was present in, and what the top host countries were by type of provision.

FIGURE 22: PROPORTION OF UK HE TNE STUDENTS IN THE EU IN 2015-16 BY TNE TYPE

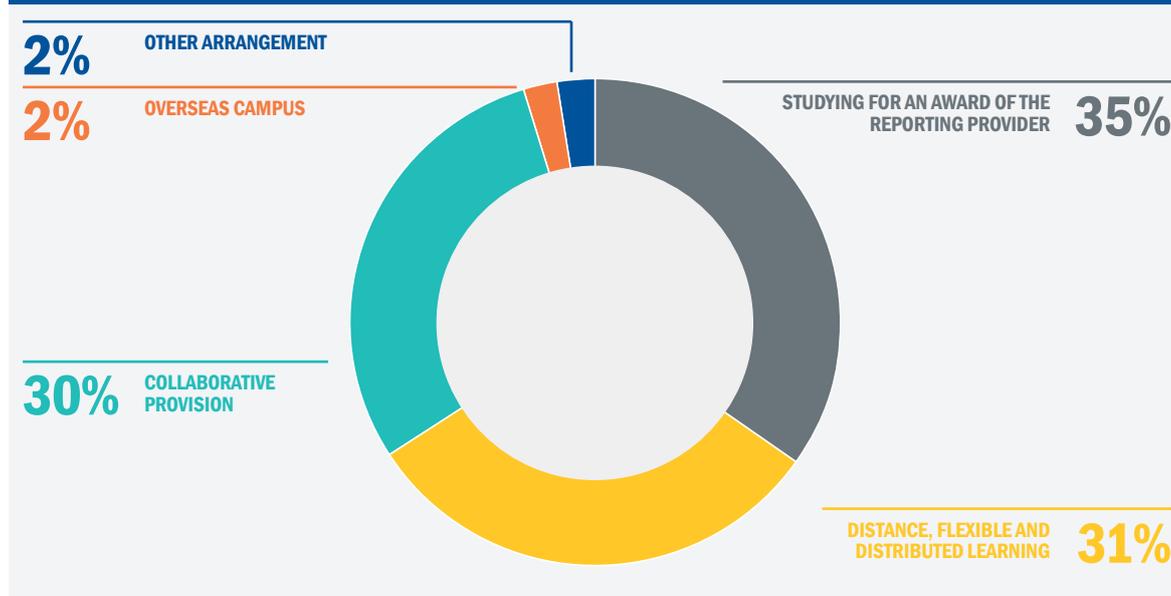


TABLE 29: UK HE TNE STUDENTS IN THE EU BY TYPE OF STUDY IN 2015-16

TYPE OF PROVISION	NUMBER OF STUDENTS	NUMBER OF COUNTRIES REPRESENTED OUT OF 32 (%)	TOP COUNTRIES
Studying for an award of the reporting provider	13,915	5 (17%)	Greece (5,060) Cyprus (EU) (1,595) Germany (1,455) Austria (1,360) Spain (1,335)
Distance, flexible and distributed learning	12,365	32 (100%)	Ireland (2,100) Germany (1,830) Cyprus (1,425) Malta (945) Netherlands (710)
Collaborative provision	11,750	29 (97%)	Greece (5,385) Denmark (800) Cyprus (740) Ireland (580) Spain (570)
Overseas campus	965	5 (17%)	Belgium (345) Greece (215) Malta (195) France (170) Ireland (40)
Other arrangement	915	7 (23%)	Italy (455) Czech Republic (330) Ireland (125) Greece (5)

FIGURE 23: UK HE TNE STUDENTS BY LEVEL IN THE EU IN 2015-16

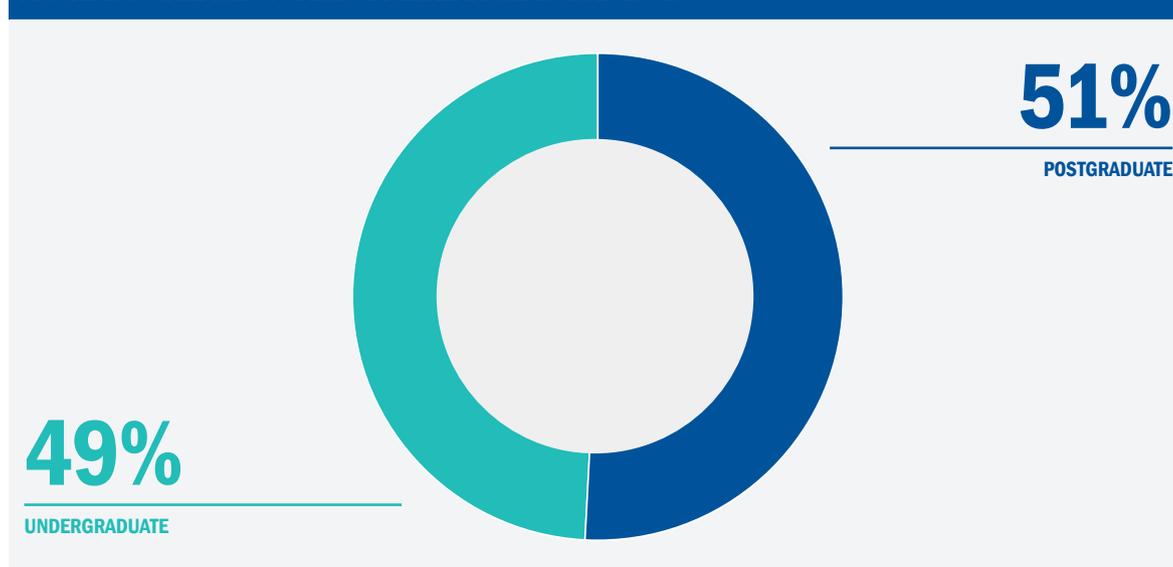


TABLE 30: TOP EU HOST COUNTRIES BY LEVEL OF STUDY

RANKING	UNDERGRADUATE			POSTGRADUATE		
	COUNTRY	NUMBER OF STUDENTS	PROPORTION OF UNDERGRADUATES IN THE EU	COUNTRY	NUMBER OF STUDENTS	PROPORTION OF POSTGRADUATES IN THE EU
1	Greece	7,720	39.6%	Greece	3,645	18.8%
2	Germany	2,310	11.9%	Spain	1,935	18.5%
3	Ireland	2,265	11.7%	Cyprus (EU)	1,570	15.0%
4	Cyprus (EU)	2,195	11.3%	Germany	1,520	14.5%
5	Austria	1,460	7.5%	Italy	1,000	9.6%
6	France	970	5.0%	Ireland	900	8.6%
7	Netherlands	965	5.0%	France	805	7.7%
8	Malta	865	4.5%	Denmark	520	5.0%
9	Denmark	855	4.4%	Malta	390	3.7%
10	Belgium	695	3.6%	Poland	320	1.6%

51%

of UK HE TNE students in the EU were studying at postgraduate level in 2015-16.

35%

of UK HE TNE students in the EU were registered through a partner in 2015-16.

UK HE TNE IN EUROPE (NON-EU)



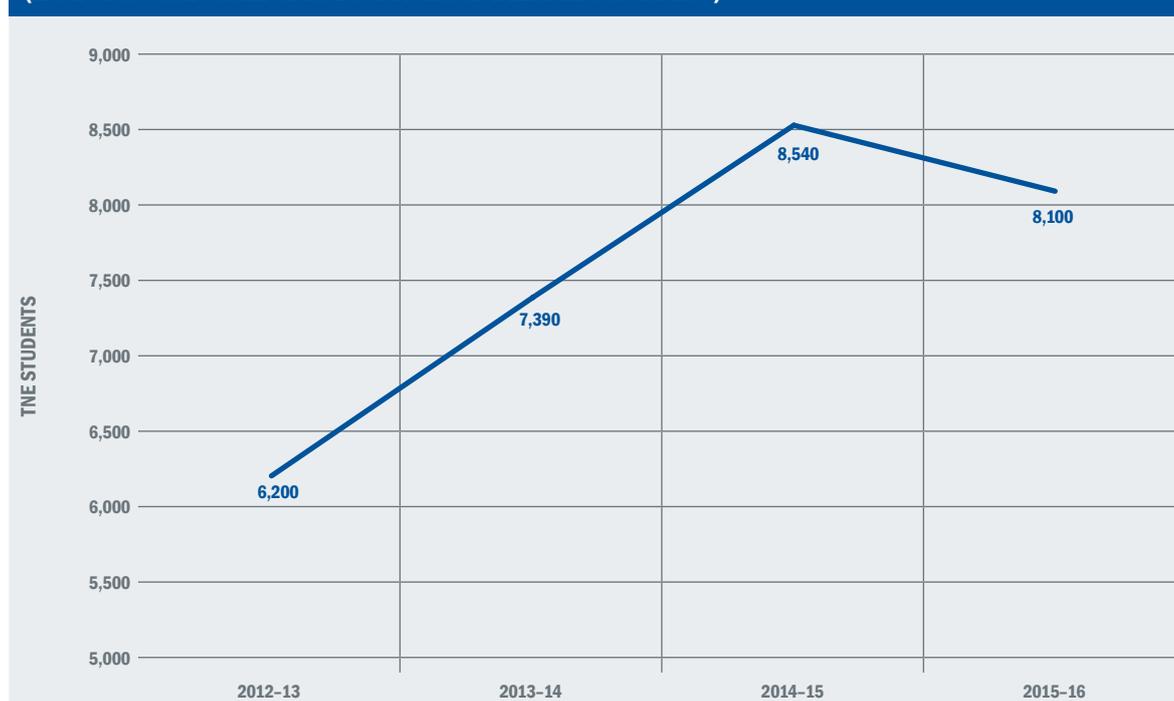
AT A GLANCE 2015-16

- Non-EU European countries hosted **3%** of all UK HE TNE students.
- UK HE TNE was delivered in **22** non-EU European countries.
- UK HE TNE student numbers in Non-EU Europe increased by **25.5%** from 2012-13 to 2015-16. It experienced an average year on year growth of **10%**. This is the result of two years of growth from 2012-13 to 2014-15 followed by a decrease of **5.2%** from 2014-15 to the following year.
- The top host countries remained largely same from 2014-15 to 2015-16 with the exception of non-EU **Cyprus** falling out of the top 10 and **Bosnia Herzegovina** moving up two places into the top 10.
- **35%** of UK HE TNE students in non-EU Europe were studying through **distance, flexible and distributed learning**, followed by **32%** who were studying through **collaborative provision**.
- The majority (**68%**) of UK HE TNE students studying in non-EU European countries were studying at **postgraduate** level.

TABLE 31: UK HE TNE STUDENTS IN NON-EU EUROPE FROM 2012-13 TO 2015-16

YEAR	2012-13	2013-14	2014-15	2015-16
Excluding the three main distance and blended providers	6,200	7,390	8,540	8,100
Including the three main distance and blended providers	19,940	20,940	20,745	19,815

FIGURE 24: UK HE TNE STUDENTS IN NON-EU EUROPE FROM 2012-13 TO 2015-16 (EXCLUDING THE THREE MAIN DISTANCE AND BLENDED PROVIDERS)



From 2012-13 to 2015-16 UK HE TNE students studying in non-EU Europe have increased at an average year on year growth rate of 10%. The year on year growth rate decreased from 2012-13 to 2013-14 from 19.2% to 15.6% from 2014-15 to 2015-16. The following year saw a 5.2% drop in student numbers.

UK HE TNE was delivered in

22

non-EU European countries in 2015-16.

Table 32 shows the Non-EU Europe countries hosting the highest numbers of UK HE TNE students in 2014-15 and 2015-16. It shows that there was minimal change from one year to the next. While Turkey, Ukraine and Bosnia Herzegovina increased their ranking, Serbia and non-EU Cyprus dropped in the ranking, with the latter falling out of the top ten list.

TABLE 32: COUNTRIES HOSTING THE HIGHEST NUMBER OF UK HE TNE STUDENTS IN NON-EU EUROPE COUNTRIES

RANK	2014-15	2015-16	NUMBER OF STUDENTS IN 2015-16	RANKING CHANGE FROM 2014-15 TO 2015-16
1	 Switzerland	 Switzerland	4,515	SAME
2	 Russia	 Russia	1,320	SAME
3	 Norway	 Norway	500	SAME
4	 Azerbaijan	 Azerbaijan	495	SAME
5	 Serbia	 Turkey	330	↑ UP 2
6	 Turkey	 Ukraine	215	↑ UP 1
7	 Ukraine	 Serbia	200	↓ DOWN 2
8	 Kosovo	 Kosovo	150	SAME
9	 Cyprus (Non-EU)	 Bosnia and Herzegovina	85	↑ UP 2
10	 Albania	 Albania	65	SAME

In 2015-16, students in non-EU European countries were spread more evenly across types of provision than in other regions. 77% of students in non-EU were studying either through distance, flexible and distributed learning (35%) or were studying through collaborative provision (32%).

FIGURE 25: PROPORTION OF UK HE TNE STUDENTS IN NON-EU EUROPE IN 2015-16 BY TNE TYPE

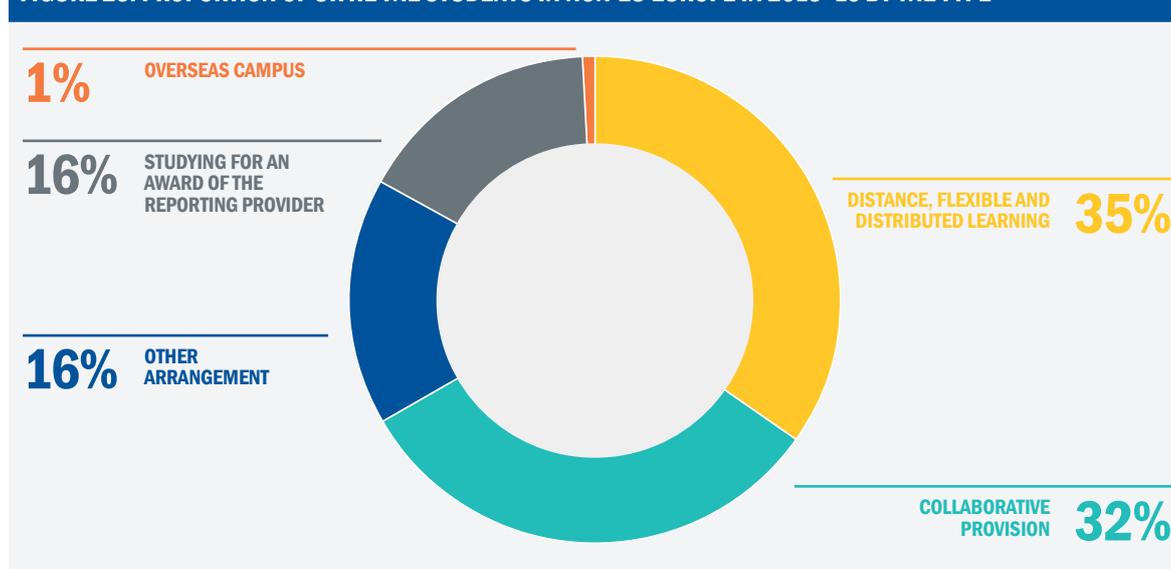


TABLE 33: UK HE TNE STUDENTS IN NON-EU EUROPE BY TYPE OF STUDY IN 2015-16

TYPE OF PROVISION	NUMBER OF STUDENTS	NUMBER OF COUNTRIES OR TERRITORIES REPRESENTED OUT OF 22 (%)	TOP COUNTRIES
Collaborative provision	2,585	17 (77%)	Switzerland (1,380) Russia (830) Kosovo (130)
Distance, flexible and distributed learning	2,820	22 (100%)	Switzerland (1,365) Russia (330) Norway (305) Turkey (270) Azerbaijan (175)
Studying for an award of the reporting provider	1,325	15 (68%)	Switzerland (460) Azerbaijan (310) Norway (185) Ukraine (140)
Other arrangement	1,320	4 (18%)	Switzerland (1,260) Russia (60)
Overseas campus	50	1 (5%)	Switzerland (50)

In 2015-16, 5% of all postgraduate and 1% of all UK HE TNE students were studying in non-EU European countries. 68% of students in the region were studying at postgraduate level. Switzerland hosted the majority of UK HE TNE students at both levels.

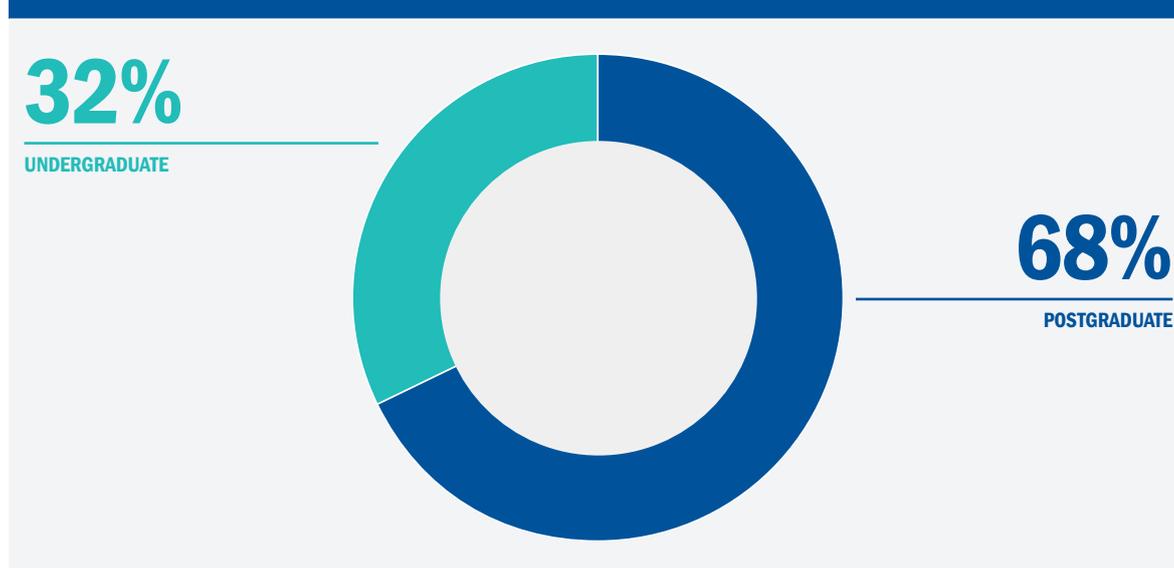
FIGURE 26: UK HE TNE STUDENTS BY LEVEL IN NON-EU EUROPE IN 2015-16

TABLE 34: COUNTRIES HOSTING THE MOST UK HE TNE STUDENTS IN NON-EU EUROPE BY LEVEL OF STUDY

RANKING	UNDERGRADUATE			POSTGRADUATE		
	COUNTRY	NUMBER OF STUDENTS	% OF UK HE TNE UNDERGRADUATES IN NON-EU EUROPE	COUNTRY	NUMBER OF STUDENTS	% OF POSTGRADUATES IN NON-EU EUROPE
1	Switzerland	1,535	60.0%	Switzerland	2,980	53.7%
2	Russia	545	21.3%	Russia	775	14.0%
3	Azerbaijan	310	12.1%	Norway	460	8.3%
4	Norway	40	1.6%	Turkey	290	5.2%
5	Kosovo	40	1.6%	Ukraine	210	3.8%
6	Turkey	35	1.4%	Serbia	195	3.5%
7	Ukraine	10	0.4%	Azerbaijan	185	3.3%
8	Albania	10	0.4%	Kosovo	110	2.0%
9	Iceland	10	0.4%	Bosnia and Herzegovina	80	1.4%
10	-	-	-	Cyprus (Non-EU)	60	1.1%

68%

of UK HE TNE students studying in non-EU European countries were studying at postgraduate level in 2015-16.

35%

of UK HE TNE students in non-EU European countries in 2015-16 were studying through distance, flexible and distributed learning.

UK HE TNE IN THE MIDDLE EAST



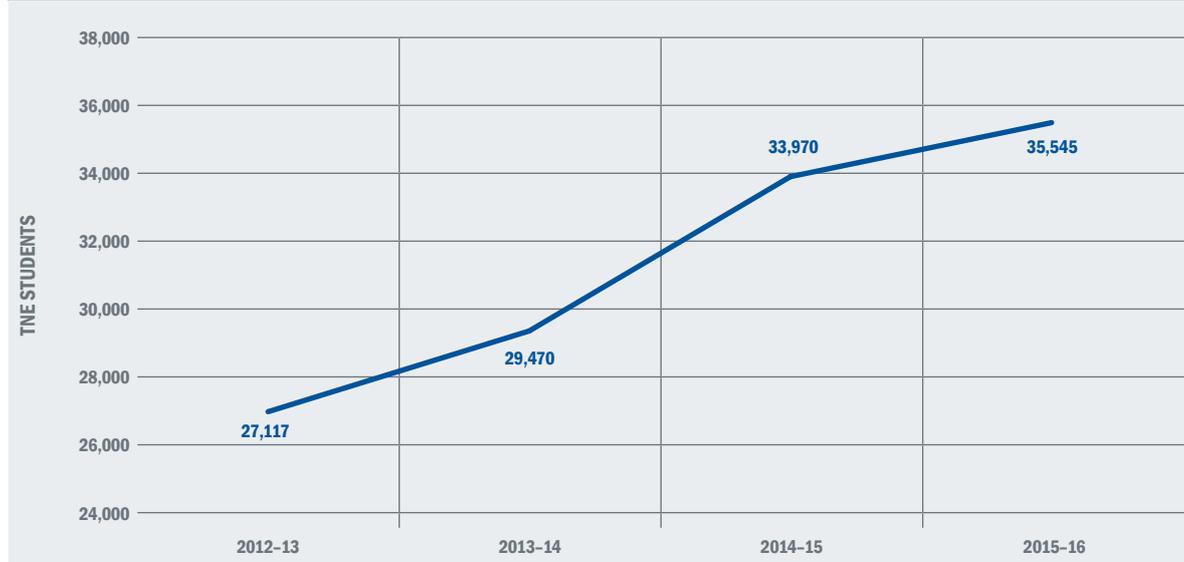
AT A GLANCE 2015-16

- The Middle East hosted the fourth highest number of UK HE TNE students (**11%**).
- UK HE TNE was delivered in **14** countries in the Middle East.
- UK HE TNE student numbers in the Middle East grew by **31%** from 2012-13 to 2015-16. The growth rate from 2014-15 to 2015-16 was **4.6%**, the largest proportional growth in the last year of any region.
- The top 20 host countries remained the same from 2014-15 to 2015-16, as did their ranking order with one exception.
- The relative majority (**38%**) of UK HE TNE students studying in the Middle East in 2015-16 were studying through collaborative provision, followed by those studying through an overseas campus (**32%**), distance, flexible and distributed learning (**21%**) and registered at overseas partner organisations (**16%**).
- The Middle East ranked second to Asia as a host region for students studying through overseas campuses.
- **60%** of UK HE TNE students in the Middle East were studying at undergraduate level.
- **10%** of undergraduate and **13%** of postgraduate UK HE TNE students were studying in the Middle East.

TABLE 35: UK HE TNE STUDENTS IN NON-EU EUROPE FROM 2012-13 TO 2015-16

YEAR	2012-13	2013-14	2014-15	2015-16
Excluding the three main distance and blended providers	27,115	29,470	33,970	35,545
Including the three main distance and blended providers	52,400	55,620	60,590	64,115

FIGURE 27: UK HE TNE STUDENTS IN THE MIDDLE EAST FROM 2012-13 TO 2015-16 (EXCLUDING THE THREE MAIN DISTANCE AND BLENDED PROVIDERS)



There was a sharp increase in UK HE TNE in the region of 15.3% between 2013-14 and 2014-15, but this fell to 4.6% in the last year. Despite the significant slowdown in UK HE TNE expansion in the region, the Middle East still showed the strongest rate of growth of any region between 2014-15 and 2015-16.

UK HE TNE was delivered in

14

countries in the Middle East in 2015-16.

Table 36 shows that the ranking of top host countries remained unchanged from 2014-15 to 2015-16 with the exception of Israel and Iran which switched positions from ranking 9th and 10th, respectively.

TABLE 36: COUNTRIES HOSTING THE HIGHEST NUMBER OF UK HE TNE STUDENTS IN THE MIDDLE EAST				
RANK	2014-15	2015-16	NUMBER OF STUDENTS IN 2015-16	RANKING CHANGE FROM 2014-15 TO 2015-16
1	 Oman	 Oman	17,495	SAME
2	 United Arab Emirates	 United Arab Emirates	12,585	SAME
3	 Saudi Arabia	 Saudi Arabia	2,620	SAME
4	 Qatar	 Qatar	1,590	SAME
5	 Bahrain	 Bahrain	645	SAME
6	 Kuwait	 Kuwait	605	SAME
7	 Lebanon	 Lebanon	485	SAME
8	 Jordan	 Jordan	360	SAME
9	 Israel	 Iran	105	↑ UP 1
10	 Iran	 Israel	100	↓ DOWN 1

Figure 28 shows that the relative majority (38%) of UK HE TNE students studying in the Middle East in 2015-16 were studying through collaborative provision, followed by those studying through an overseas campus (32%), those studying through distance, flexible and distributed learning (21%) and those registered at the overseas partner organisation (16%).

The Middle East hosted the second largest number of UK HE TNE students studying through overseas campuses, after Asia. Five countries in the Middle East host these students with the UAE hosting 7,660 students studying through overseas campuses, or 30% of all UK HE TNE students studying through an overseas campus.

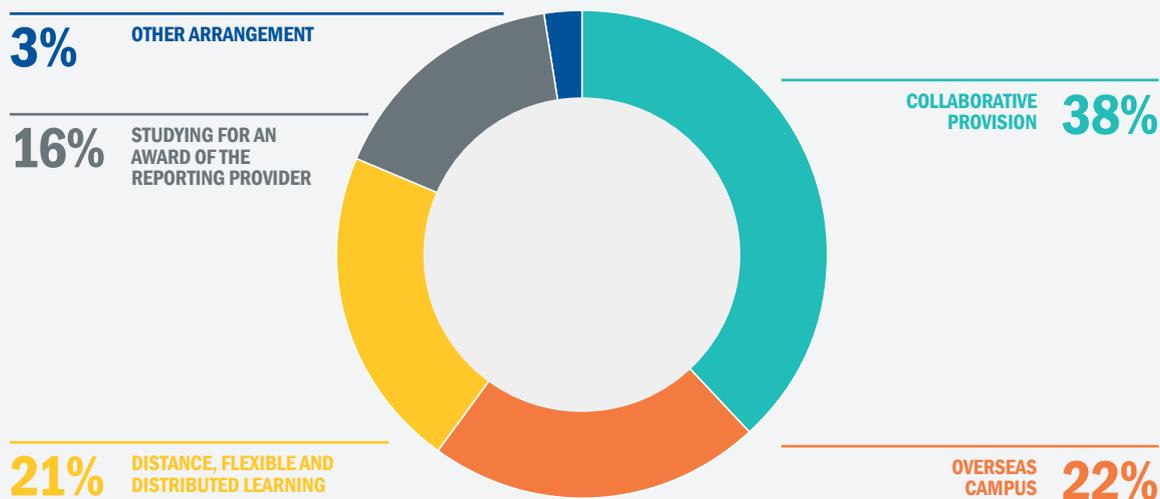
There was

4.6%

growth in UK HE TNE students studying in the Middle East from 2014-15 to 2015-16.

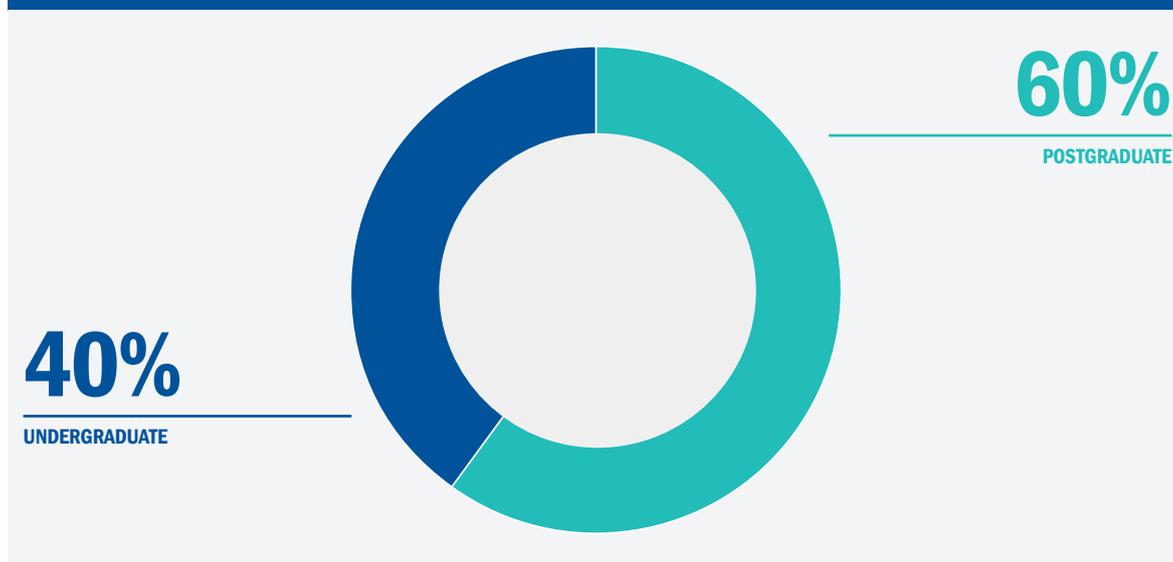
32%

of all UK HE TNE students in the Middle East were studying through overseas branch campuses in 2015-16.

FIGURE 28: PROPORTION OF UK HE TNE STUDENTS IN THE MIDDLE EAST IN 2015-16 BY TNE TYPE**TABLE 37: UK HE TNE STUDENTS IN THE MIDDLE EAST BY TYPE OF STUDY IN 2015-16**

TYPE OF PROVISION	NUMBER OF STUDENTS	NUMBER OF COUNTRIES REPRESENTED OUT OF 14 (%)	TOP COUNTRIES
Collaborative provision	13,995	13 (93%)	Oman (11,920) UAE (1,130) Saudi Arabia (335) Qatar (285) Lebanon (225)
Overseas campus	8,110	5 (36%)	UAE (7,660) Bahrain (165) Oman (155) Qatar (125) Saudi Arabia (5)
Distance, flexible and distributed learning	7,825	8 (57%)	UAE (2,770) Saudi Arabia (1,755) Qatar (1,095) Kuwait (560) Oman (550)
Studying for an award of the reporting provider	5,955	14 (100%)	Oman (4,130) UAE (1,025) Saudi Arabia (520) Jordan (115) Qatar (85)
Other arrangement	880	8 (57%)	Oman (735) Bahrain (145)

60% of UK HE TNE students in the Middle East in 2015-16 were studying at undergraduate level. 13% of all postgraduate and 10% of all undergraduate UK HE TNE students were based in the Middle East in 2015-16. While the largest host countries (namely the UAE, Oman and Saudi Arabia) have UK HE TNE more undergraduates than postgraduate, Qatar, Kuwait Bahrain Lebanon, Jordan, Iran and Israel host more postgraduates than undergraduates. The proportional differences are much greater for some of these, for example, just 13% of students based in Qatar are studying at undergraduate level.

FIGURE 29: UK HE TNE STUDENTS BY LEVEL IN THE MIDDLE EAST IN 2015-16

TABLE 38: COUNTRIES HOSTING THE MOST UK HE TNE STUDENTS IN THE MIDDLE EAST BY LEVEL OF STUDY

RANKING	UNDERGRADUATE			POSTGRADUATE		
	COUNTRY	NUMBER OF STUDENTS	% OF UK HE TNE UNDERGRADUATES IN THE MIDDLE EAST	COUNTRY	NUMBER OF STUDENTS	% OF POSTGRADUATES IN THE MIDDLE EAST
1	Oman	14,455	68.1%	United Arab Emirates	6,695	46.7%
2	United Arab Emirates	5,615	26.5%	Oman	2,085	14.5%
3	Saudi Arabia	565	2.7%	Saudi Arabia	2,050	14.3%
4	Qatar	195	0.9%	Qatar	1,395	9.7%
5	Bahrain	170	0.8%	Kuwait	580	4.0%
6	Lebanon	130	0.6%	Bahrain	475	3.3%
7	Jordan	35	0.2%	Lebanon	355	2.5%
8	Kuwait	25	0.1%	Jordan	325	2.3%
9	Israel	15	0.1%	Iran	100	0.7%
10	-	-	-	Israel	90	0.6%

UK HE TNE IN NORTH AMERICA



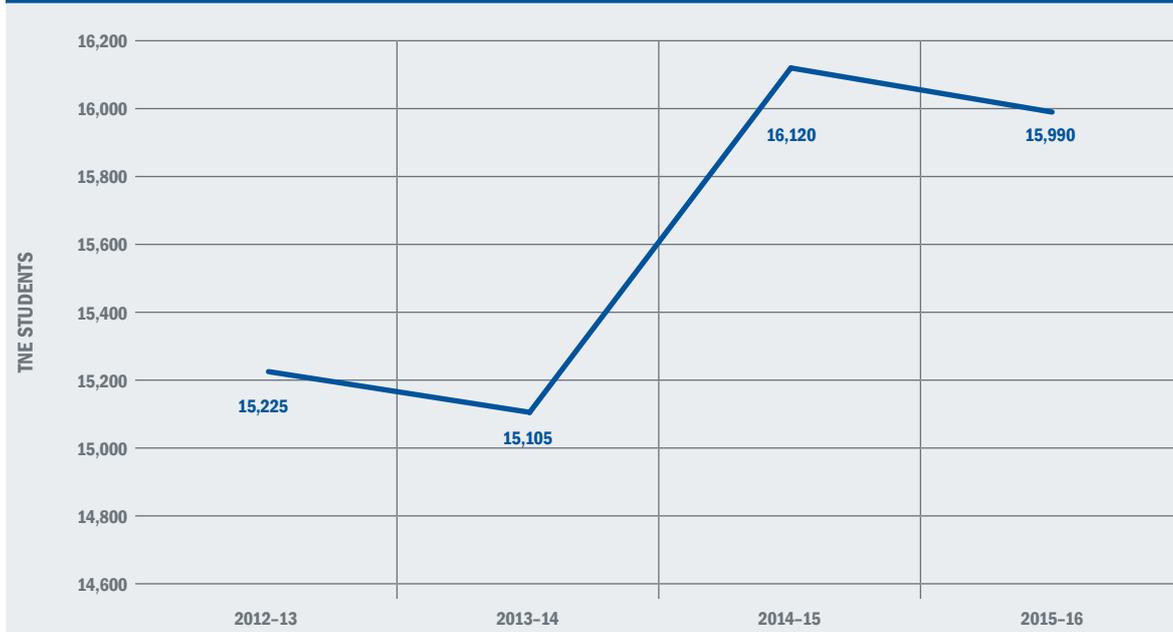
AT A GLANCE 2015-16

- North America hosted the **fifth highest** number of UK HE TNE students (**5%**).
- UK HE TNE was delivered in **36** countries and territories in North America.
- UK HE TNE student numbers in North America grew by **30.6%** from 2012-13 to 2015-16. The number of students studying in North America dropped by **0.8%** from 2014-15 to 2015-16. North America had the lowest average year on year increase out of all regions, with an average growth rate of **1.5%**.
- The top host countries remained the same from 2014-15 to 2015-16, as did their ranking order with the exception of **The Bahamas** and **The Cayman Islands**, which switched ranking positions with each other.
- The majority (**61%**) of UK HE TNE students studying in North America were studying through **distance, flexible and distributed learning**, followed by those studying through **collaborative provision (25%)** and those registered at an **overseas provider (14%)**.
- **75%** of UK HE TNE students in North America were studying at **postgraduate** level.

TABLE 39: UK HE TNE STUDENTS IN NORTH AMERICA FROM 2012-13 TO 2015-16

YEAR	2012-13	2013-14	2014-15	2015-16
Excluding the three main distance and blended providers	15,225	15,105	16,120	15,990
Including the three main distance and blended providers	32,390	31,970	32,085	32,685

FIGURE 30: UK HE TNE STUDENTS IN NORTH AMERICA FROM 2012-13 TO 2015-16 (EXCLUDING THE THREE MAIN DISTANCE AND BLENDED PROVIDERS)



From 2012-13 to 2015-16 UK HE TNE students studying in North America have increased at an average year on year growth rate of 1.5%, making it the slowest growing region over this period. This is due to shrinking student number figures from 2012-13 to 2013-14 and from 2014-15 to 2015-16. Since 2012-13 to 2015-16, student numbers grew by 30%, ranking 5th when compared with the other regions.

Trinidad and Tobago, the United States and Canada cumulatively make up 80% of UK HE TNE students in North America. The top six host countries in the region by UK HE TNE numbers ranked the same in the number of UK HE TNE students they hosted. The Bahamas and the Cayman Islands switch ranking positions from seven to eight.

UK HE TNE was delivered in

36

countries and territories in North America in 2015-16.

75%

of UK HE TNE students in North America were studying at postgraduate level in 2015-16.

TABLE 40: COUNTRIES HOSTING THE HIGHEST NUMBER OF UK HE TNE STUDENTS IN NORTH AMERICA

RANK	2014-15	2015-16	NUMBER OF STUDENTS IN 2015-16	RANKING CHANGE FROM 2014-15 TO 2015-16
1	 Trinidad and Tobago	 Trinidad and Tobago	5,310	SAME
2	 United States	 United States	3,990	SAME
3	 Canada	 Canada	3,385	SAME
4	 Jamaica	 Jamaica	765	SAME
5	 Mexico	 Mexico	505	SAME
6	 Barbados	 Barbados	490	SAME
7	 The Bahamas	 Cayman Islands	230	↑ UP 1
8	 Cayman Islands	 The Bahamas	220	↓ DOWN 1
9	 St Lucia	 St Lucia	210	SAME
10	 Bermuda	 Bermuda	110	SAME

The majority (61%) of UK HE TNE students studying in North America in 2015-16 were studying through distance, flexible and distributed learning, followed by those studying through collaborative provision (25%) and those registered at an overseas provider (14%).

FIGURE 31: PROPORTION OF UK HE TNE STUDENTS IN THE NORTH AMERICA IN 2015-16 BY TNE TYPE

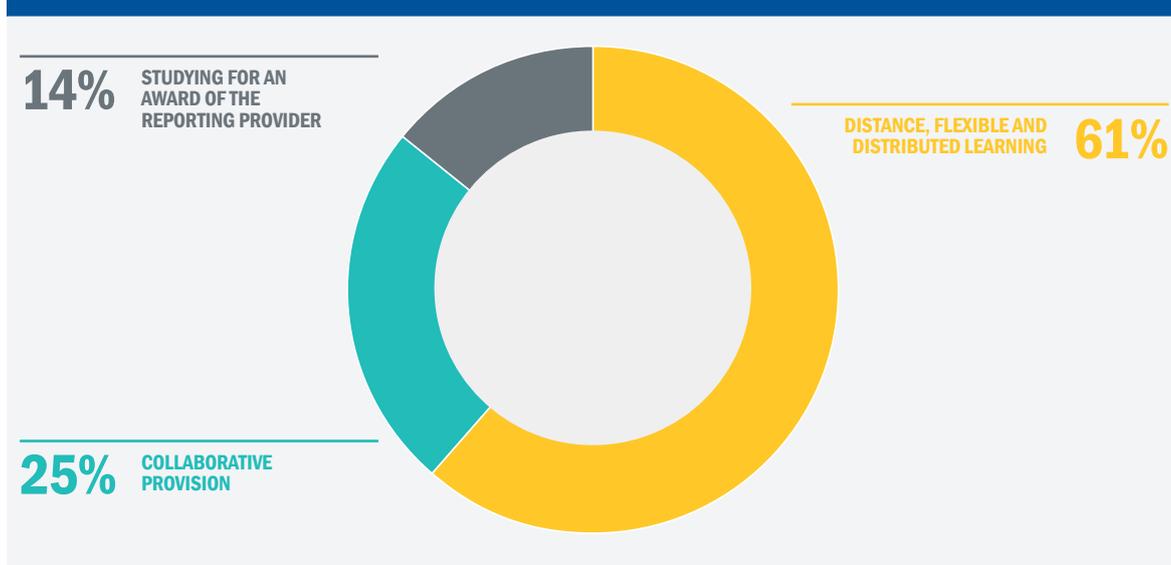


TABLE 41: UK HE TNE STUDENTS IN NORTH AMERICA BY TYPE OF STUDY

TYPE OF PROVISION	NUMBER OF STUDENTS	NUMBER OF COUNTRIES REPRESENTED OUT OF 36 (%)	TOP COUNTRIES
Distance, flexible and distributed learning	9,810	36 (100%)	United States (3,170) Canada (2,715) Trinidad and Tobago (1,390) Jamaica (475) Barbados (470)
Collaborative provision	3,910	27 (75%)	Trinidad and Tobago (2,470) United States (605) Canada (605)
Studying for an award of the reporting provider	2,220	20 (56%)	Trinidad and Tobago (1,450) Jamaica (250) Mexico (215) United States (190)
Overseas campus	15	1 (3%)	United States (15)
Other arrangement	15	2 (6%)	USA (10) Canada (5)

In 2015-16, 75% of UK HE TNE students studying in North America were studying at postgraduate level and 11% of all postgraduate and 2% of all undergraduate UK HE TNE students were based in North America. The high number of postgraduate students in the United States and Canada largely account for the disparity between undergraduates and postgraduates. Trinidad and Tobago, however, has a more even split by level of study.

FIGURE 32: UK HE TNE STUDENTS BY LEVEL IN NORTH AMERICA IN 2015-16

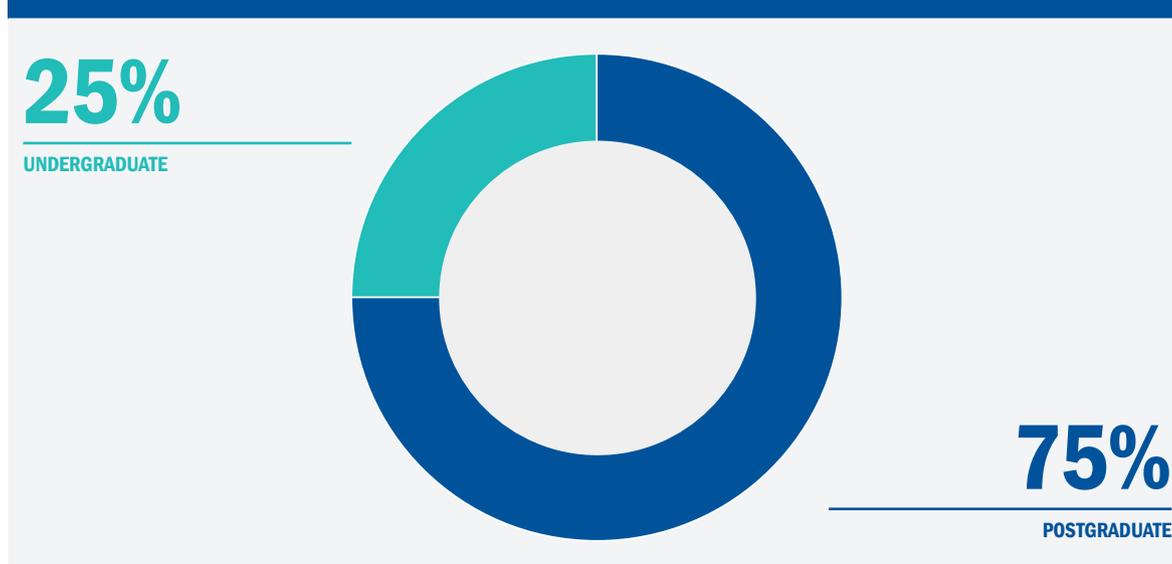


TABLE 42: COUNTRIES HOSTING THE MOST UK HE TNE STUDENTS IN NORTH AMERICA BY LEVEL OF STUDY

RANKING	UNDERGRADUATE			POSTGRADUATE		
	COUNTRY	NUMBER OF STUDENTS	% OF UK HE TNE UNDERGRADUATES IN NON-EU EUROPE	COUNTRY	NUMBER OF STUDENTS	% OF POST-GRADUATES IN NON-EU EUROPE
1	Trinidad and Tobago	2,360	58.7%	United States	3,260	27.3%
2	United States	730	18.2%	Canada	3,140	26.3%
3	Canada	245	6.1%	Trinidad and Tobago	2,950	24.7%
4	Mexico	200	5.0%	Jamaica	660	5.5%
5	Jamaica	105	2.6%	Barbados	430	3.6%
6	Cayman Islands	85	2.1%	Mexico	310	2.6%
7	The Bahamas	85	2.1%	St Lucia	170	1.4%
8	Barbados	60	1.5%	Cayman Islands	145	1.2%
9	St Lucia	40	1.0%	The Bahamas	135	1.1%
10	Bermuda	20	0.5%	Bermuda	90	0.8%

61%

of UK HE TNE students in North America were studying through distance, flexible and distributed learning in 2015-16.

UK HE TNE IN SOUTH AMERICA



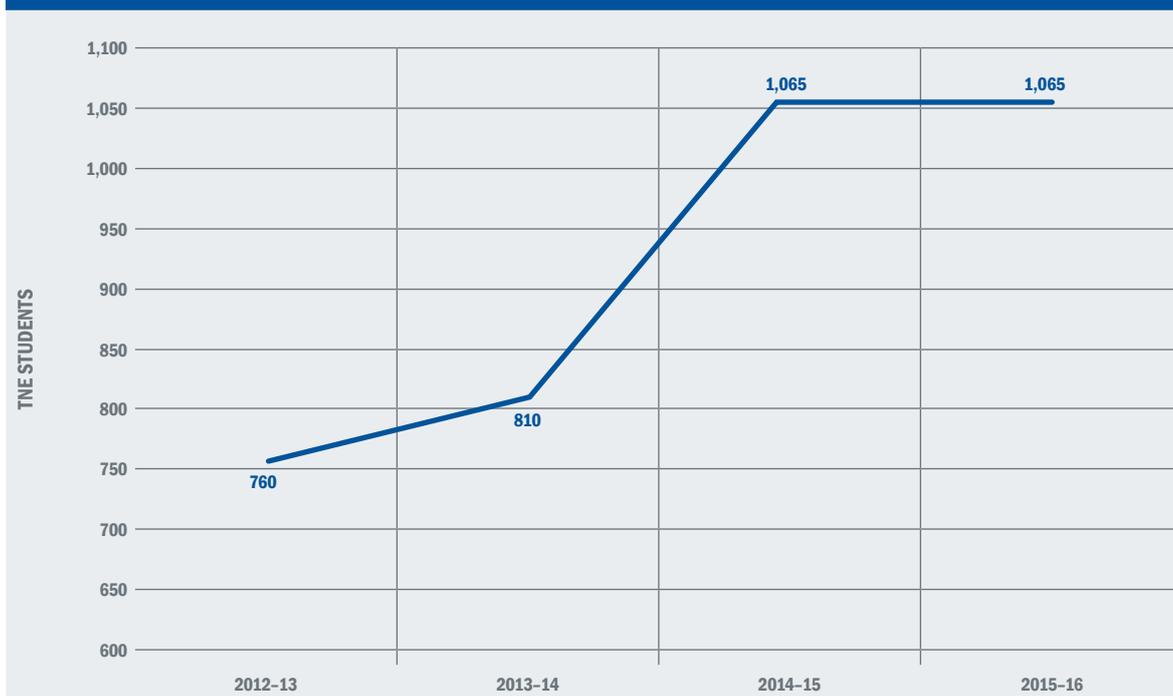
AT A GLANCE 2015-16

- South America hosted the **lowest number** of UK HE TNE students (**less than 1%**).
- UK HE TNE was delivered in **14** countries in South America.
- UK HE TNE student numbers South America grew by **19.4%** from 2012-13 to 2015-16. The number of students studying in South America did not grow from 2014-15 to 2015-16. However, South America had the fastest average year on year growth rate (**13%**) from 2012-13 to 2015-16.
- The top host countries remained the same from 2014-15 to 2015-16 with the **top five** ranking positions unchanged.
- Two thirds of UK HE TNE students in South America are in just three countries: Brazil, Colombia and Guyana. These were the only countries hosting more than 100 students.
- **91%** of UK HE TNE students studying in South America in were studying through **distance, flexible and distributed learning**.
- **92%** of UK HE TNE students in South America were studying at **postgraduate** level.

TABLE 43: UK HE TNE STUDENTS IN SOUTH AMERICA FROM 2012-13 TO 2015-16

YEAR	2012-13	2013-14	2014-15	2015-16
Excluding the three main distance and blended providers	760	810	1,065	1,065
Including the three main distance and blended providers	2,130	2,240	2,525	2,775

FIGURE 33: UK HE TNE STUDENTS IN SOUTH AMERICA FROM 2012-13 TO 2015-16 (EXCLUDING THE THREE MAIN DISTANCE AND BLENDED PROVIDERS)



Year on year growth was highest from 2013-14 to 2014-15 at 31.5%. From 2014-15 to 2015-16 this decreased to a 0% growth. However, there was a 10% growth when including the three main distance and blended providers.

Table 44 shows the top countries in 2014-15 and 2015-16. It shows that there is minimal change from one year to the next. Brazil, Colombia and Guyana hosted 65% of UK HE TNE students in South America. These were the only countries in South America hosting more than 100 UK HE TNE students.

UK HE TNE was delivered in

14

countries in South America in 2015-16.

TABLE 44: COUNTRIES HOSTING THE HIGHEST NUMBER OF UK HE TNE STUDENTS IN SOUTH AMERICA

RANK	2014-15	2015-16	NUMBER OF STUDENTS IN 2015-16	RANKING CHANGE FROM 2014-15 TO 2015-16
1	 Brazil	 Brazil	370	SAME
2	 Colombia	 Colombia	180	SAME
3	 Guyana	 Guyana	140	SAME
4	 Chile	 Chile	75	SAME
5	 Peru	 Peru	75	SAME
6	 Argentina	 Ecuador	60	↑ UP 1
7	 Ecuador	 Argentina	50	↓ DOWN 1
8	 Venezuela	 Uruguay	40	↑ UP 1
9	 Uruguay	 Venezuela	35	↓ DOWN 1
10	 Bolivia	 Bolivia	10	SAME

Figure 34 shows that the majority of UK HE TNE students in South America were studying through distance, flexible and distributed learning (91%), followed by those studying for through collaborative provision (7%) and those studying for an award of the reporting provider (2%).

FIGURE 34: PROPORTION OF UK HE TNE STUDENTS IN SOUTH AMERICA IN 2015-16 BY TNE TYPE

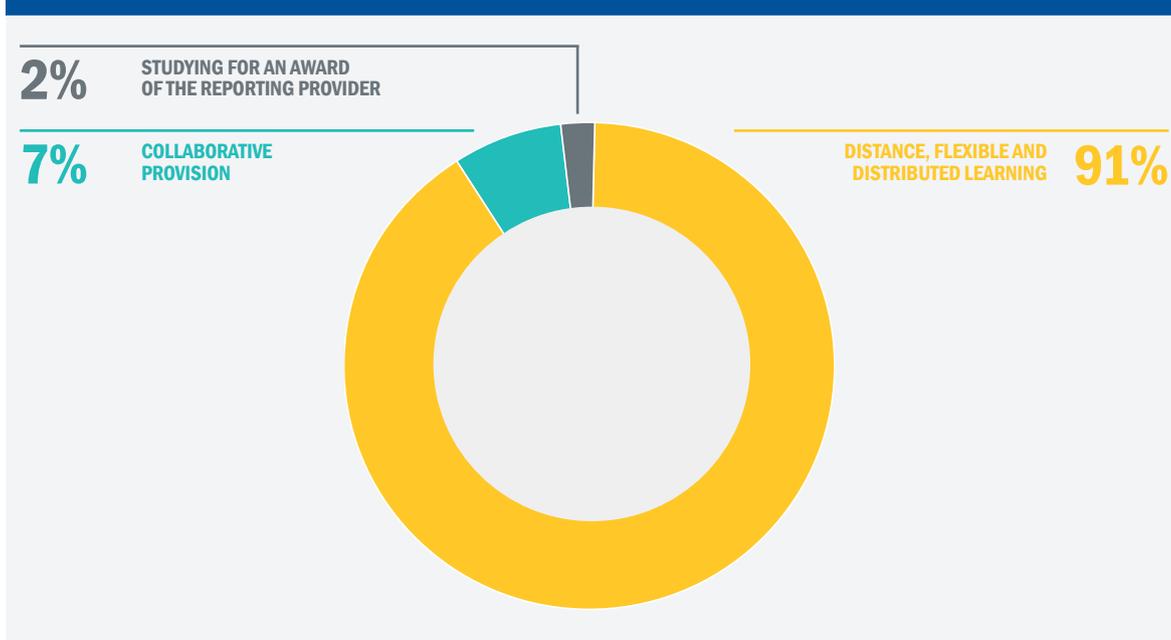


Table 45 shows how many students were studying through each type of provision, how many countries each type of provision was present in, and what the top host countries were by type of provision. Although most types of TNE provision are present in more than half of the countries in South America, they have very low numbers of students.

TABLE 45: UK HE TNE STUDENTS IN SOUTH AMERICA BY TYPE OF STUDY IN 2015-16			
TYPE OF PROVISION	NUMBER OF STUDENTS	NUMBER OF COUNTRIES REPRESENTED OUT OF 14 (%)	TOP COUNTRIES
Distance, flexible and distributed learning	950	14 (100%)	Brazil (340) Colombia (165) Guyana (130) Chile (75)
Collaborative provision	75	11 (79%)	Peru (35) Brazil (15) Colombia (10) Guyana (10) Ecuador (5)
Studying for an award of the reporting provider	25	9 (64%)	Brazil (10) Colombia (5) Ecuador (5) Argentina (5)

1% of all postgraduate and fewer than 1% of all undergraduate UK HE TNE students were based in South America. **Figure 35** shows that 92% of students in South America were studying at postgraduate level.

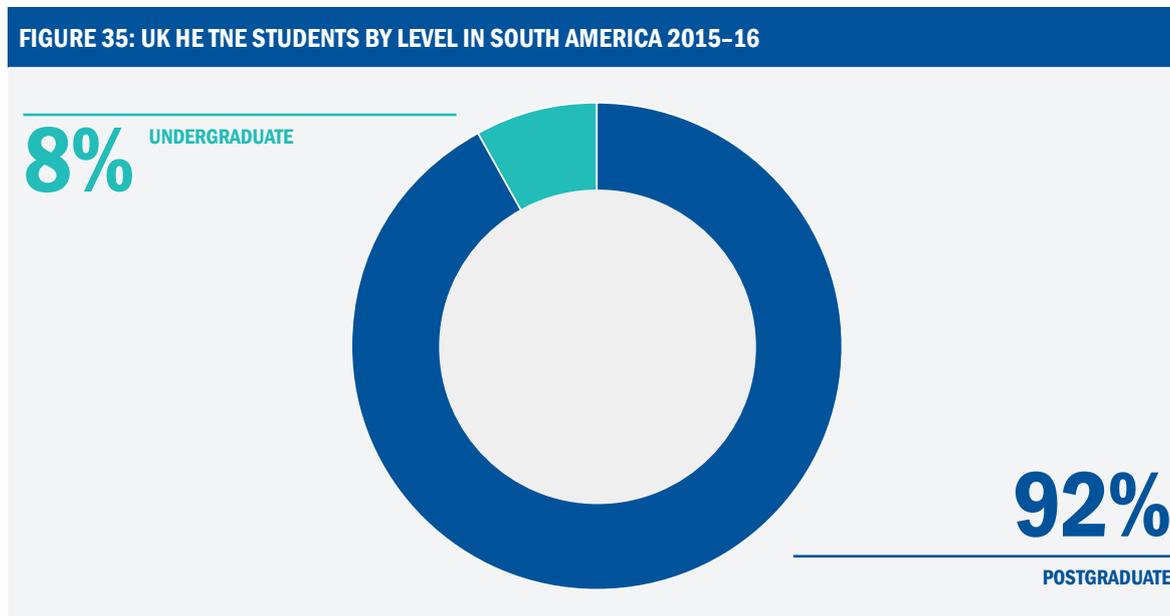


Table 46 shows that undergraduate student numbers are very low in countries which host any students studying at this level.

TABLE 46: COUNTRIES HOSTING THE MOST UK HE TNE STUDENTS IN SOUTH AMERICA BY LEVEL						
RANKING	UNDERGRADUATE			POSTGRADUATE		
	COUNTRY	NUMBER OF STUDENTS	% OF UK HE TNE UNDERGRADUATES IN SOUTH AMERICA	COUNTRY	NUMBER OF STUDENTS	% OF POST-GRADUATES IN SOUTH AMERICA
1	Brazil	30	40.0%	Brazil	340	34.3%
2	Colombia	10	13.3%	Colombia	170	17.2%
3	Chile	10	13.3%	Guyana	135	13.6%
4	Argentina	10	13.3%	Peru	75	7.6%
5	Guyana	5	6.7%	Chile	65	6.6%
6	Ecuador	5	6.7%	Ecuador	60	6.1%
7	Venezuela	5	6.7%	Argentina	45	4.5%
8	-	-	-	Uruguay	40	4.0%
9	-	-	-	Venezuela	30	3.0%
10	-	-	-	Bolivia	10	1.0%

92%

of UK HE TNE students in South America were studying at postgraduate level in 2015-16.

65%

of UK HE TNE students in South America in 2015-16 were based in Brazil.

5. CONCLUSION

TNE is a crucial part of the UK's increasingly international education offer. UK universities now provide qualifications to more students overseas than to international students in the UK.

With constantly shifting demographics, changing policy environments and increased competition from outside the UK, the sector is increasingly interested in infusing its strategic approach with analysis, tools and resources to shape its TNE priorities and destinations. This report seeks to act as one such tool.

Growth rates in institutions delivering TNE across types of provision and in host regions show an evolving picture. Although there have been year-on-year increases in UK HE TNE students since at least 2007-08, the year-on-year growth rate remained between 4%-7% between 2012-13 and 2015-16. Recent figures released by HESA in January 2018¹⁹ show that this rate dropped to 1% from 2015-16 to 2016-17. Without comprehensive data comparable to the data used to inform this report, it is not possible to extrapolate what the picture looks like when excluding the three main distance and blended providers. Indeed, since 2012-13 there have been instances where the overall student year-on-year growth rate has been either above or below the growth rate for the other institutions. This makes it impossible to project what the most recent growth means for institutions excluding the three main distance and blended providers.

Regardless of the modest overall increase from 2015-16 to 2016-17, steady rather than rapid growth between 2012-13 and 2015-16 may be the result of several factors. For example, some universities with large numbers of TNE students may be consolidating their TNE activity and may not have ambitions to grow. This report shows that 75% of students studied with just 11% of UK universities, that 80% of students were studying through universities which delivered TNE programmes to more than 5000 students and that the number of institutions delivering TNE increased to 138 in 2016-17. This signals that growth may be taking place most acutely among institutions delivering to small numbers of students and that growth among institutions delivering to large numbers of students is slowing.

As this report has outlined, there have been recent falls in student numbers in three of the five types of provision. Rapid growth in students studying through collaborative provision and at overseas campuses has off-set slight reductions in students studying through other types. It is not possible to identify a trend, however. While there have only been increases since 2007-08 in overseas campus-based students and students studying through collaborative provision, there has been a mixed picture across the other types of provision, with large growth between some years and reductions during others. Comprehensive data from 2016-17 will provide insights which may provide stronger signals about whether the reduction in students in the latter three types of provision is a trend, and if so whether increases in the other two will counterbalance enough to see continued increases in overall student numbers.

The picture is also different when comparing the eight regions included in this report. TNE expansion seems to have stabilised in traditional markets and is growing more rapidly in newer markets. Slowed rates and relatively low numbers in many cases reflect a lack of intelligence available to universities, or policy contexts which limit the volume and type of activity in-country, or domestic higher education systems which successfully meet demand.

19. HESA, January 11 2018. Higher Education Student Statistics: UK, 2016/17. Found here <https://www.hesa.ac.uk/news/11-01-2018/sfr247-higher-education-studentstatistics/location>

We have seen that UK HE TNE student numbers are continuing to grow in Asia, the Middle East and the European Union (EU). Each of these regions has its own specific challenges, for example:

- UK HE TNE student numbers in Asia continue to grow but it is becoming an increasingly crowded market for TNE. Domestic provision, particularly in ASEAN countries, is also expanding. While this could challenge the sector to remain innovative and identify niche demand, it is also a solid foundation on which to build.
- several countries in the Middle East are actively seeking UK universities to establish branch campuses, while recognition issues and anxieties over political contexts remain in some countries.
- the EU comes with its own unique set of challenges as the UK's relationship with the EU is set to change through Brexit. The ways in which this might have an impact upon existing and future partnerships are as yet unclear. Within this uncertain context, UK universities are seeking assurances that existing partnerships would not be affected and that mechanisms to create new partnerships will not be affected by Brexit.

Other regions present more of a mixed picture:

- With relatively high growth rates, Africa may be where UK universities increase their presence and partnerships most significantly; but this is characterised by strong growth in a few key countries, including Egypt and Mauritius. Africa hosts the relative majority of students studying through distance, flexible or distributed learning, which may provide an indication of the direction of travel for UK provision.
- South America, Australasia and North America have relatively low volumes of students, the majority of whom are postgraduates and studying through distance, flexible or distributed learning. In the case of the latter two this may be due to well established higher education systems. Countries in these regions with lower volumes of UK HE TNE students may present opportunities for the UK Government to work with partner governments to create conditions which would enable more diverse forms of TNE, beyond distance learning.
- UK HE TNE numbers are low in South America, but the shifts in growth over recent years suggest an openness of emerging TNE markets in the region. Lack of recognition and policy restrictions in some countries stand in the way of partnership expansion.

Changes across the globe in the relative enthusiasm to host TNE, and the recognition by several countries that they do not currently have capacity to deliver their higher education need, suggest that further new markets for TNE may open up to the UK. As such, the shifts reported here may change rapidly. To support universities and help inform policy to adapt, more country intelligence will be needed about operating environments and regulatory frameworks. Resources such as the British Council's Global Gauge of Higher Education Policy,²⁰ as well as government and British Council education experts, provide advice and guidance on the opportunities and operating conditions in key nascent markets.

This report is based on HESA AOR data which is provided by universities. The analysis is limited both by the data structure and the reliability of the student numbers captured within that record. Other information which is not currently readily available and would be valuable for future studies includes: which subject programmes are offered and where; student demographics; the economic and wider value of different types of TNE and in different locations; country-specific intelligence for nascent markets, and competitor analysis. More detailed data would allow for greater insights into granular trends in TNE which would better inform universities and the government of the direction and opportunities in TNE. This could, for example, shed light on what new models of TNE look like, how these relate to past models and what the trajectory of TNE delivered digitally has been.

20. <https://www.britishcouncil.org/education/ihe/knowledge-centre/global-landscape/global-gauge>.

New approaches and innovative models continue to keep UK higher education at the cutting edge of TNE. The popularity of UK HE TNE globally is predicated on the UK's reputation for providing quality higher education, and also having the frameworks in place to ensure these standards, such as the Quality Code. Sustaining and demonstrating this to global partners depends on continuing excellence in delivery and the involvement and support of relevant agencies and partners, including the QAA and the British Council. It also requires support from UK government departments and an understanding at a policy level of university operations and international priorities.

UK HE TNE has become a core component of many universities' strategic approach to international growth. It is not a sole institutional endeavour however; the success or failure of TNE has an impact on not just an individual university, or the higher education sector, but our wider interactions and reputation around the world. TNE directly and indirectly cements and maintains bilateral education relations between the UK and its partners. While the UK government supports the sector by leveraging opportunities overseas, universities, their staff and TNE students are global ambassadors for UK higher education and play an important role in supporting and promoting its strong reputation.

Who studies through UK HE TNE, how, where and at what level is changing and these changes stand to influence approaches to TNE. Continuing to examine the UK's HE TNE journey will provide universities and the government with evidence which informs how current and future stakeholders, including students, continue to benefit from relevant, high quality and context-relevant degrees delivered overseas.



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