



Universities UK
International

THE SCALE OF UK HE TNE 2017-18

**TREND ANALYSIS
OF HESA DATA**



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EXECUTIVE SUMMARY

More UK universities were delivering transnational education (TNE) in 2017–18 than ever before, although the total number of students decreased for the first time. Behind the headline figures lies a complex picture at regional, institutional and programme level.

This report, now in its third edition, sheds light on the complex extent of UK TNE, providing analysis of where students studied, at what level, and through what kind of provision during the 2017–18 academic year. It also puts some of the figures into context, by providing a longitudinal overview of trends in TNE, disaggregating the analysis to show where providers with large provision have an impact on the overall figures, and including case studies of TNE provision that show the diversity, complexity and impact of UK TNE.

OVERVIEW

The UK's HE TNE provision in 2017–18:

- **139** higher education providers reported students studying through HE TNE in 2017–18, more than ever before.
- **84.2%** of UK higher education providers¹ delivered TNE degree programmes. However, **75.2%** of UK TNE students were learning through **18** universities.
- **693,695** students were studying on UK TNE programmes, which was **1.5** times the number of international students in the UK in the same year.
- UK TNE student numbers decreased by **2.0%** between 2016–17 and 2017–18. The annual average growth had been **3.6%** between 2013–14 and 2016–17.
- The decrease since 2016–17 was mainly due to the reduction in students studying for an award of the reporting provider whilst registered at an overseas partner organisation. Two of the three main providers of distance, flexible and blended TNE report a large number of TNE students in this category.
- More than half of students were registered at an overseas partner organisation (**56.5%**).
- Students studying at an overseas campus experienced the greatest proportional growth between 2016–17 and 2017–18 (**10.7%**).

Three main programme providers of distance, flexible and blended TNE² together make up **52.1%** of the total number of TNE students. Excluding these providers:

- **332,125** students were studying on UK TNE programmes in 2017–18, an increase of **2.0%** over the previous year. Student numbers grew by **19.9%** from 2013–14 to 2017–18.
- **51.5%** of providers reported more than 1,000 students in TNE in 2017–18, compared to **44.5%** in 2013–14.
- The largest contingent of students was studying through collaborative provision (**44.3%**). Numbers studying through this type of provision increased **27.5%** from 2013–14.
- Most students were studying for an undergraduate degree (**64.9%**). Students studying for postgraduate research degrees increased by **11.0%** between 2016–17 and 2017–18.

1. This report includes the 164 higher education institutions who reported to HESA in 2017–18, plus the University of Buckingham.

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

INSIGHTS BY REGION

- Overall, UK TNE was delivered in **225** countries and territories in 2017–18.
- Overall, Asia hosted **49.5%** of students, followed by Africa (**21.5%**), the European Union (**11.5%**), the Middle East (**9.4%**), North America (**4.4%**), non-EU Europe (**2.8%**), Australasia (**0.5%**) and South America (**0.4%**).
- In 2017–18 China was the country hosting the most TNE students (**10.9%**, **75,925**), followed by Malaysia (**10.4%**, **72,480**), Singapore (**6.5%**, **44,805**), Pakistan (**5.8%**, **40,210**) and Nigeria (**4.3%**, **29,865**). Together, the top 5 host territories account for **38.0%** of all student numbers.
- Students registered with an overseas partner organisation are prevalent in Africa (**73.5%**) and Asia (**54.6%**), while distance, flexible and distributed learning is the main type of delivery in Australasia (**67.4%**), South America (**55.3%**) and North America (**51.6%**).
- Most students in overseas campuses are located in Asia (**66.2%**) and the Middle East (**26.4%**).
- When the three main providers of distance, flexible and blended TNE are excluded, the European Union became the second region with the largest number of students, **49,010** in total, an increase of **11.1%** between 2016–17 and 2017–18.

1. INTRODUCTION

UK higher education providers reported 693,695 students studying through transnational education (TNE) in 2017–18, a decrease of 2.0% over the previous year. The overall figure hides significant variances by provider, location, type and level of provision.

Overall, UK TNE student numbers decreased for the first time since HESA began collecting data returns through the Aggregate Offshore Record (AOR). This report sheds light on the complexity of the landscape that lies behind this overall figure. For example, the report shows that more institutions are reporting students on HE TNE than ever before and the gap between providers with very large student numbers and those with smaller provision is closing; that student numbers are growing rapidly in the European Union and China and are stagnating or decreasing in a number of long-standing host locations; and that the number of students at overseas campuses and studying through distance learning is increasing at a steady pace, while universities report fewer students in other TNE types.

This report builds on previous research jointly published in 2016 by UUKi (then the UK HE International Unit) and the British Council. *The Scale and Scope of UK Higher Education* report produced the first systematic analysis of transnational education data up to the academic year 2014–15, showing trends in UK TNE provision by provider, location, type and level.

UUKi's *The Scale of UK TNE* report series succeeded this research in 2018, providing a longitudinal analysis of trends in TNE provision based on the Aggregate Offshore Record (AOR) data. The AOR is a data return that publicly funded higher education providers in the UK complete every year and submit to the Higher Education Statistics Agency (HESA). It represents one of the world's most comprehensive datasets of students located in a country other than that where the awarding institution is located. Its analysis has become a useful tool for policy makers and institutional leaders when making strategic decisions on the allocation of resources, management of risks and development of partnerships. The AOR has, however, a number of limitations. It does not show non-aggregated data such as student demographics or subject of study, and it collects information in five categories ('types') that may be interpreted differently by different reporting providers.

This report focuses on the AOR data covering students on TNE programmes between 2013–14 and 2017–18. It is divided into three sections. It begins by analysing overall figures and highlighting diversification trends in UK TNE student numbers, locations, providers, type of provision and 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 TNE patterns across eight world regions. It also incorporates a number of case studies of TNE that contextualise the diversity of approaches taken by UK universities.

We have disaggregated datasets into two main groups **All providers** and **Excluding the three main providers of distance, flexible and blended TNE**. The latter category excludes Oxford Brookes University, the Open University and University of London students. These three providers make up 52.1% 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 amongst UK universities. The TNE models of these three providers deserve closer attention and we have included a description of their approaches in the report.

A NOTE ON DEFINITIONS

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

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

Data about TNE is collected annually by HESA via the AOR. AOR data has been collected since 2007–08 from UK higher education providers who subscribe to HESA. Universities provide data in their AOR return about “students that are studying wholly outside the UK who are either registered with the reporting provider or who are studying for an award of the reporting provider”.

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 report, and an example for each. These examples are not exhaustive, and there are many other ways that TNE programmes operate which may be included in each category.

In accordance with HESA’s [Standard Rounding Methodology](#):

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

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

TABLE 1: TYPES OF TNE PROVISION			
TYPE OF PROVISION TERMINOLOGY IN HESA AOR		TERMINOLOGY IN THIS REPORT	EXAMPLE OF PROVISION
Students registered at the reporting provider.	Studying overseas for UK HEP award at overseas campus of reporting provider.	Overseas campus.	Overseas standalone or joint campus.
	Distance, flexible and distributed learning for UK HEP award where the location of the student is known to be overseas.	Distance, flexible or 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.

THE THREE LARGEST PROVIDERS OF DISTANCE, FLEXIBLE AND BLENDED TNE

OXFORD BROOKES UNIVERSITY

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

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

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

THE OPEN UNIVERSITY

Celebrating its 50th year of operation in 2019, the Open University carries its wealth of experience as one of the world's first successful distance teaching universities through to its transnational education provision. Through a validation model managed by Open University Validation Partnerships (OUVP) and also through content licensing partnerships, Open University provision reaches learners in 151 countries and territories around the world.

Established in 1992, OUVP now supports over 40 partner institutions in the UK and abroad who delivered 390 programmes in 2018–19. The University's group of partner institutions includes institutions across Europe and the Middle East. Once approved, institutions offer Open University-validated awards, granted under the University's UK Royal Charter.

Through its content licensing model, the Open University works with 23 education institutions in 24 countries worldwide, helping build capacity and capability leading to long-term sustainable growth. Through partnership with the Open University, institutions have access to world class teaching materials supported by Open University research covering a wide range of subject areas at undergraduate and postgraduate levels.

UNIVERSITY OF LONDON

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

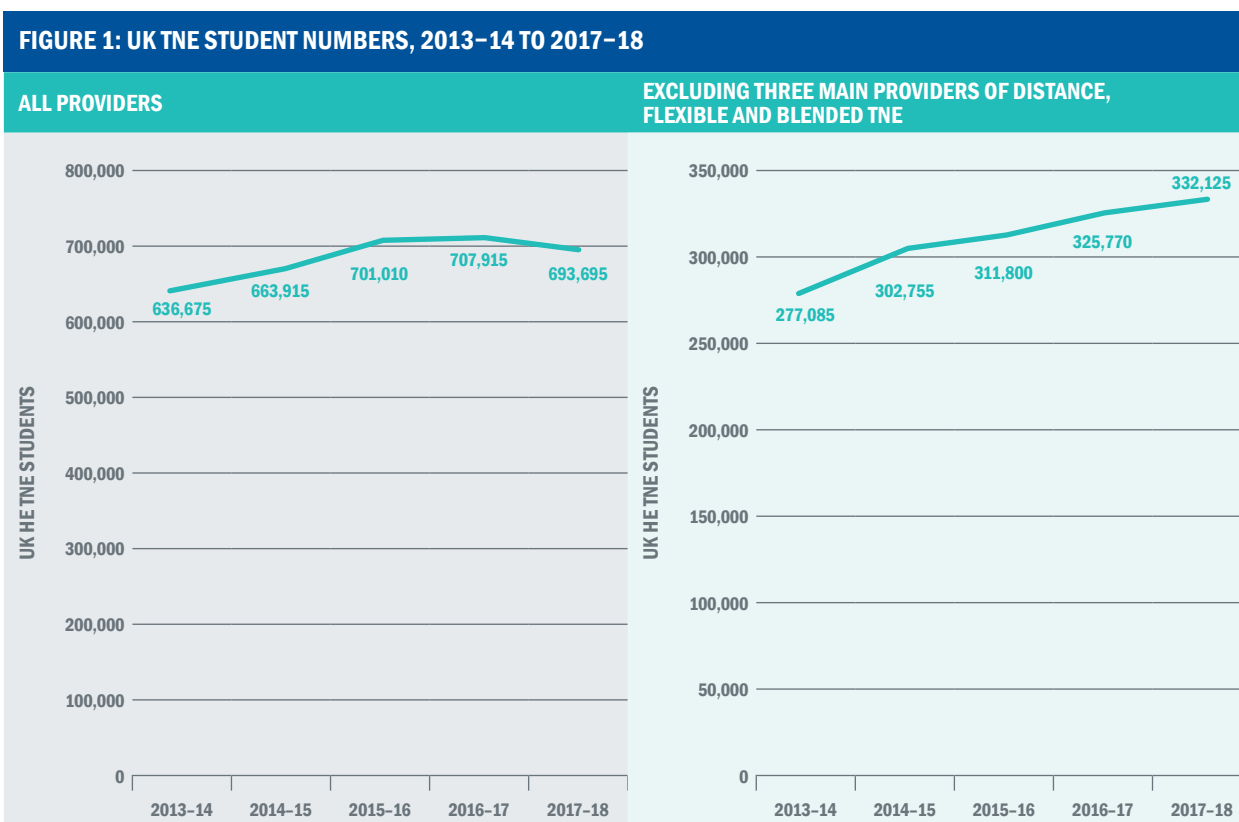
UoL works with over 100 Recognised Teaching Centres in 40 countries, handpicked through a robust recognition process. These are independent institutions, many of them also universities, which offer face-to-face academic and pastoral support for UoL students. 80% of their undergraduates choose to study face-to-face in this way, most of them full-time.

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

2. OVERVIEW

In 2017-18, 139 UK higher education providers reported that there were 693,695 students learning through transnational education (TNE) in 225 territories worldwide.

UK TNE data shows a decrease of 2.0% in student numbers compared to 2016-17 (14,220 fewer students). Approximately 41.8% of the total number of students were enrolled in programmes delivered by one single provider. When the three main providers of distance, flexible and blended TNE are excluded, records show an increase of 2.0% year-on-year (6,360 more students), compared to the 4.5% increase between 2015-16 and 2016-17. Average annual growth between 2013-14 and 2017-18 was 4.7% which points to a slowdown in the rate of growth, as shown in **Figure 1**.



DIVERSIFICATION

Figure 2 shows that just over half of providers reported more than 1,000 registered TNE students in 2017-18. This is up from 45.8% in 2013-14. In 2016-17, 16 providers accounted for 74.9% of all UK TNE provision, while 43 providers accounted for less than 1%. In 2017-18, 18 providers accounted for 75.2% of UK TNE provision, while 42 providers accounted for less than 1%.

FIGURE 2: (ALL PROVIDERS) UK TNE STUDENT NUMBERS, 2017-18

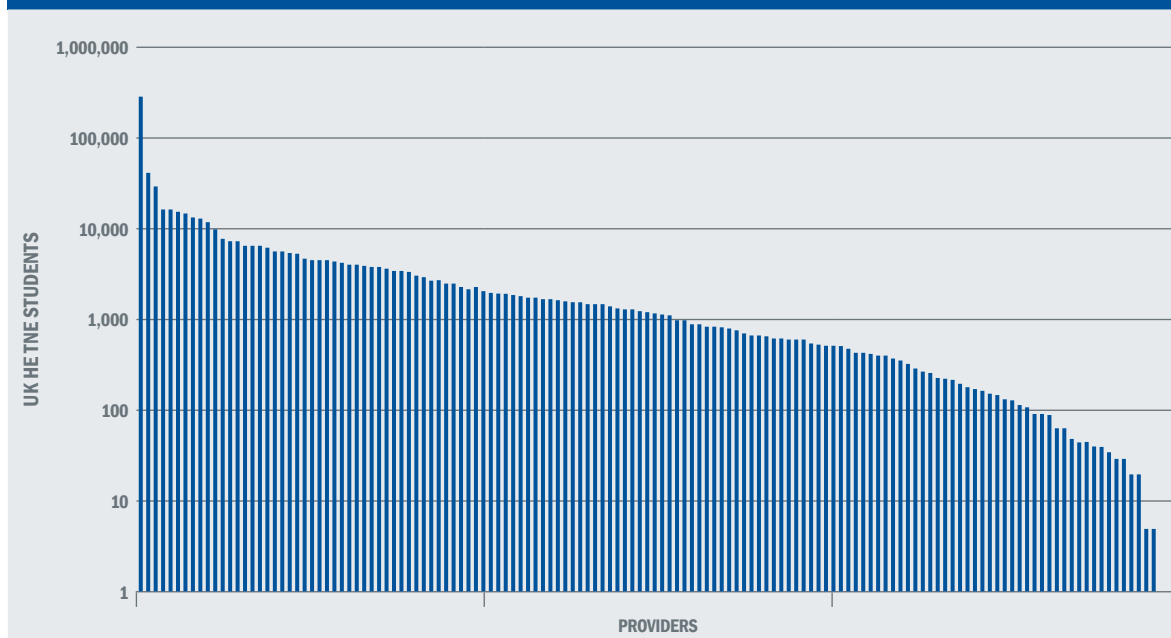


Figure 3 shows the distribution of UK TNE students across providers excluding the three main providers of distance, flexible and blended TNE. There is a relatively small number of providers which individually account for a share of more than 3% of all students, with most providers accounting for less than 1% of total student numbers. 109 providers reported fewer than 4,000 students in TNE in 2017-18, while 20 reported between 4,000 and 12,000. Only 7 reported more than 12,000 students in TNE in 2017-18.

FIGURE 3: (EXCLUDING THE THREE MAIN PROVIDERS OF DISTANCE, FLEXIBLE AND BLENDED TNE) DISTRIBUTION OF UK TNE STUDENTS ACROSS PROVIDERS, 2017-18

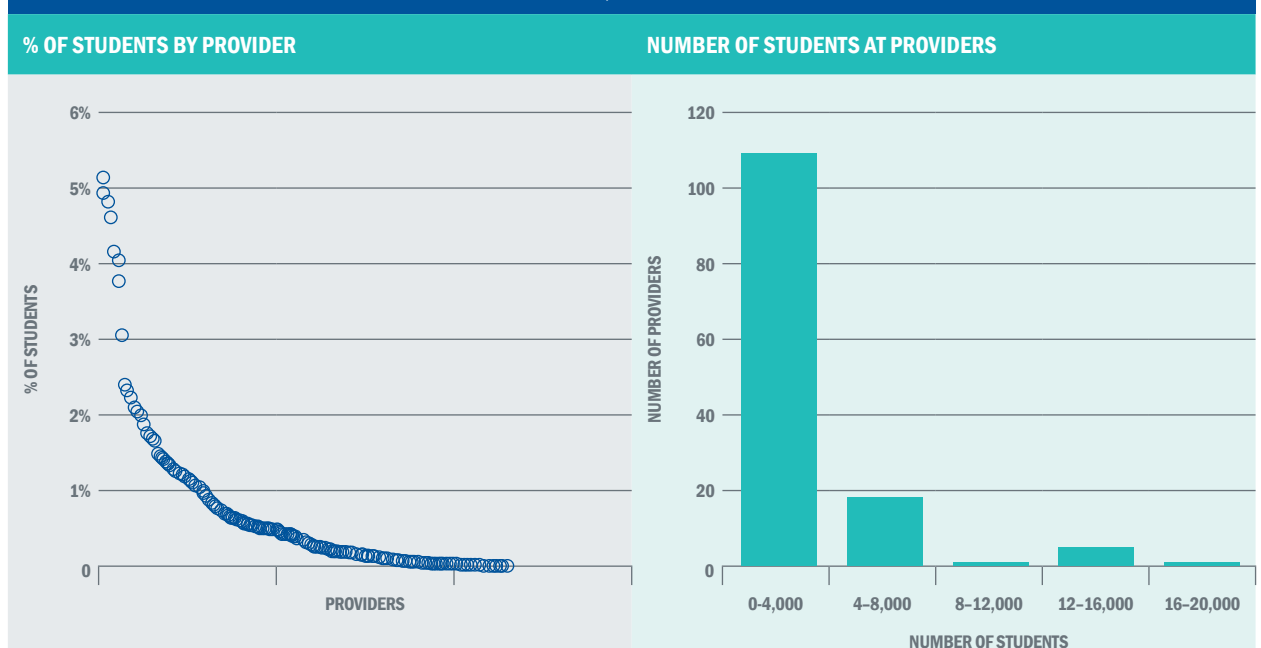


Table 2 shows that the number of providers delivering TNE programmes increased from 131 in 2013-14 to 139 in 2017-18. The share of students at providers with large TNE numbers (more than 5,000 students) continued to fall in 2017-18.

TABLE 2: (ALL PROVIDERS) CHANGES IN UK TNE NUMBERS, 2013-14 TO 2017-18					
CATEGORY	2013-14	2014-15	2015-16	2016-17	2017-18
Number of providers reporting UK TNE student numbers	131	134	132	138	139
% of TNE students at UK TNE providers with more than 5,000 UK TNE students	81.7%	82.1%	82.0%	79.4%	78.4%

TYPE OF PROVISION

In 2017-18, 56.5% of UK TNE students were studying whilst registered at an overseas partner organisation, with an additional 21.4% studying through collaborative provision and 17.0% through distance, flexible or distributed learning. Excluding the three main providers of distance, flexible and blended TNE, most students were studying through collaborative provision (44.3%) and the relative proportion of students in distance learning also increased substantially (to 20.7%), as shown in **Figure 4**. At 8.5%, students studying at overseas campuses make a relatively small but growing proportion of the total.

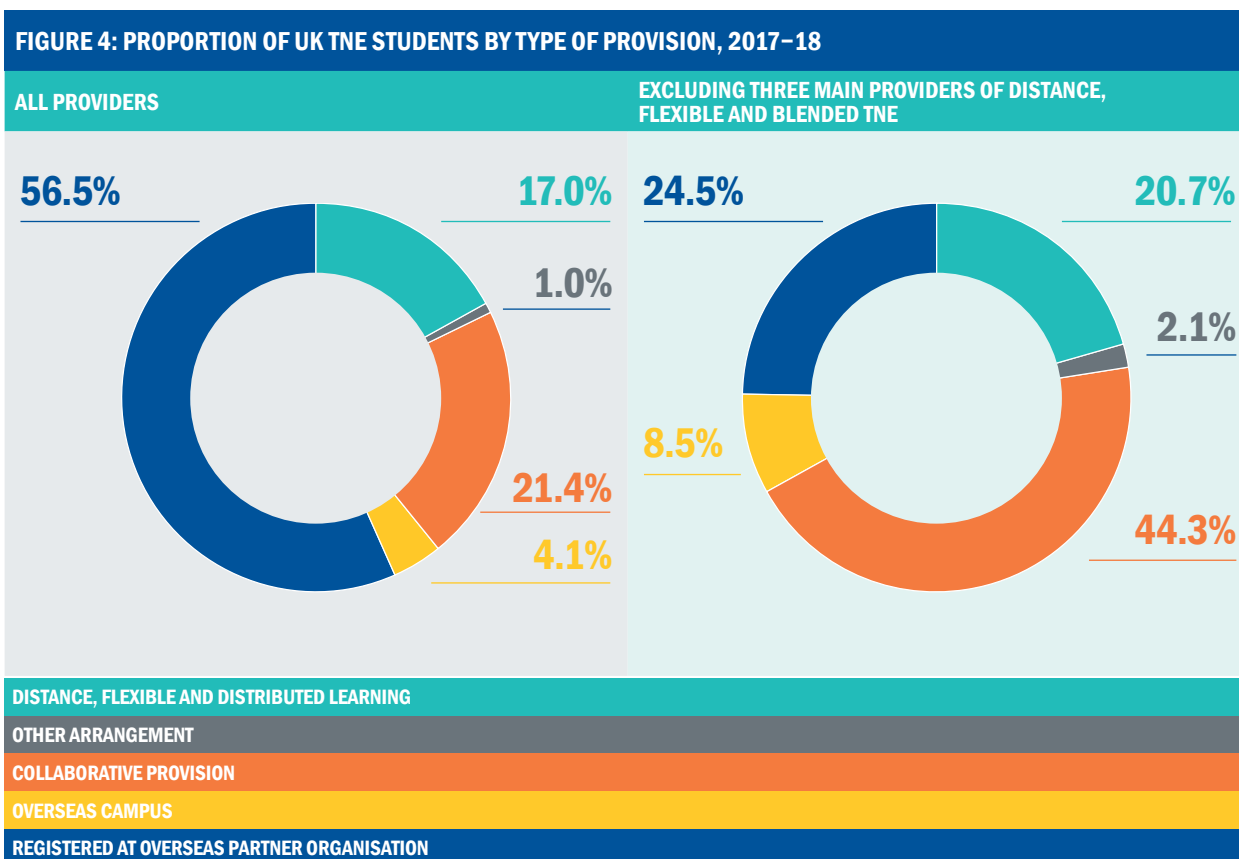
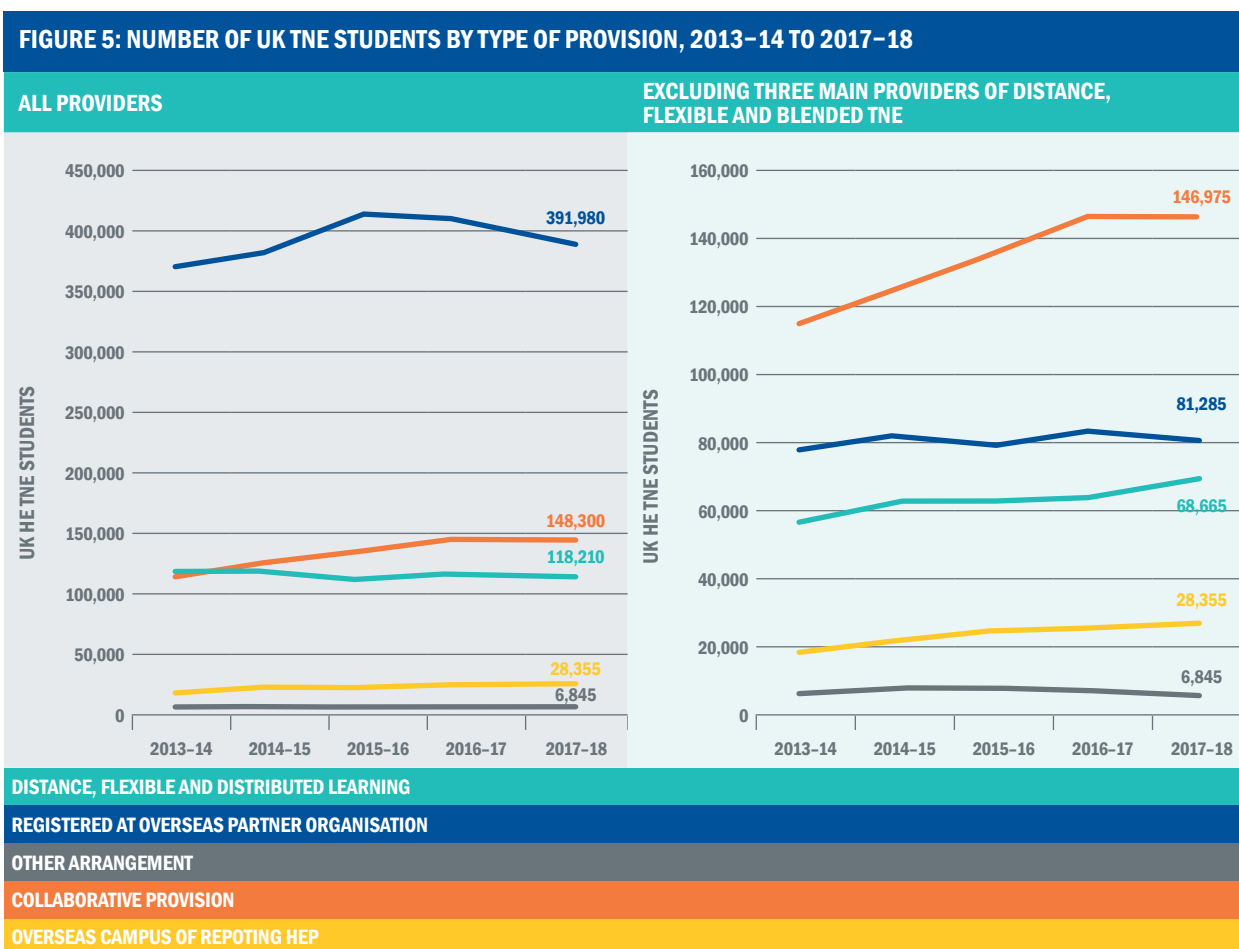


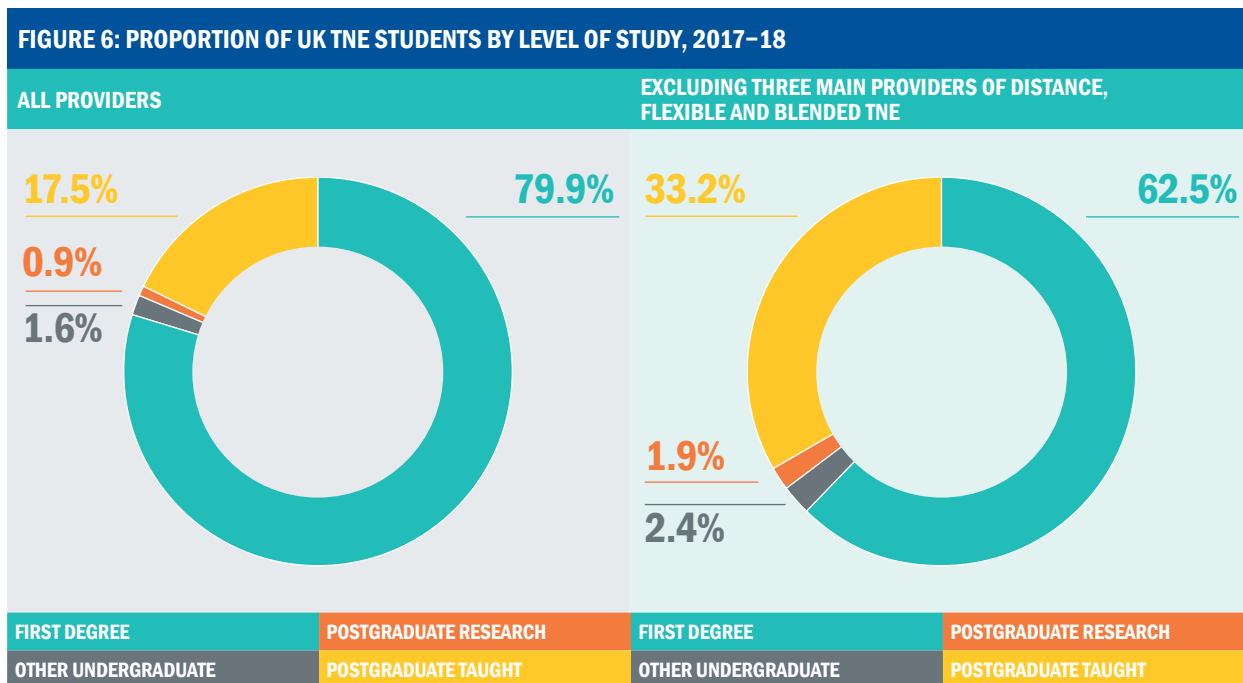
Figure 5 shows that between 2013-14 and 2017-18 students registered at an overseas partner organisation was the category where UK HE TNE providers reported the most students. Student numbers in this category peaked in 2015-16 and declined since. The categories with the largest proportional growth were students at overseas campuses (47.5%) and studying through collaborative provision (27.8%) while students in distance, flexible and distributed learning (-1.2%) and in other arrangements (-6%) experienced decreases.

Most of the decrease in total student numbers between 2016-17 and 2017-18 was in students registered at an overseas partner, which is the category in which two of the three main providers of distance, flexible and blended TNE report a large number of students. When these providers are excluded, collaborative provision was the most common delivery mode of TNE, with a 27.5% increase in the period under study. The proportion of students undertaking TNE at an overseas campus grew proportionally the most between 2013-14 and 2017-18 (47.5%). Students in distance, flexible or distributed learning (19.4%) and registered at an overseas partner organisation (4.5%) also grew while students in other arrangements decreased (-6.0%).



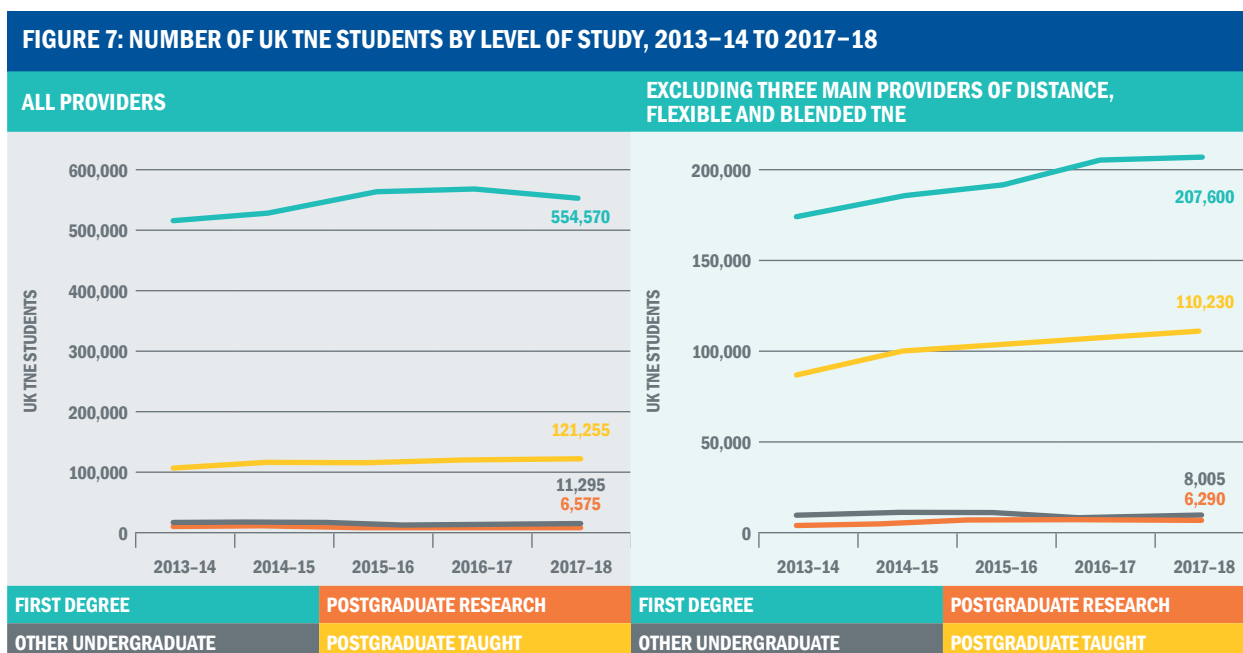
LEVEL OF STUDY

Excluding the three main providers of distance, flexible and blended TNE, the proportion of students at undergraduate and postgraduate level has remained fairly stable between 2013-14 and 2017-18, at two thirds and one third respectively (see **Figure 6**). The percentage of undergraduate students is larger if we count the three main providers of distance, flexible and blended TNE, partly due to the large number of students registered on the Oxford Brookes University BSc in Applied Accounting.



As **Figure 7** shows, for the first time since HESA first published AOR data in 2007-08³, there has been a decrease in students studying for a first degree through TNE (-2.9%). This is the main driver of the total decrease in student numbers, with students in postgraduate and other undergraduate programmes increasing.

Excluding the three main providers of distance, flexible and blended TNE, the number of postgraduate students increased more rapidly than undergraduate students both between 2016-17 and 2017-18 (2.9% increase) and since 2013-14 (25.4%). Postgraduate research students experienced the largest percentage growth since 2013-14 (30.9%).



³ See <https://www.hesa.ac.uk/collection/c17052/introduction>

3. HOST COUNTRIES AND REGIONS⁴

In 2017–18, UK TNE was delivered in 225 countries and territories around the world. 49.5% of all UK TNE students were studying in Asia, followed by Africa (21.5%), the EU (11.5%) and the Middle East (9.4%).

KEY POINTS:

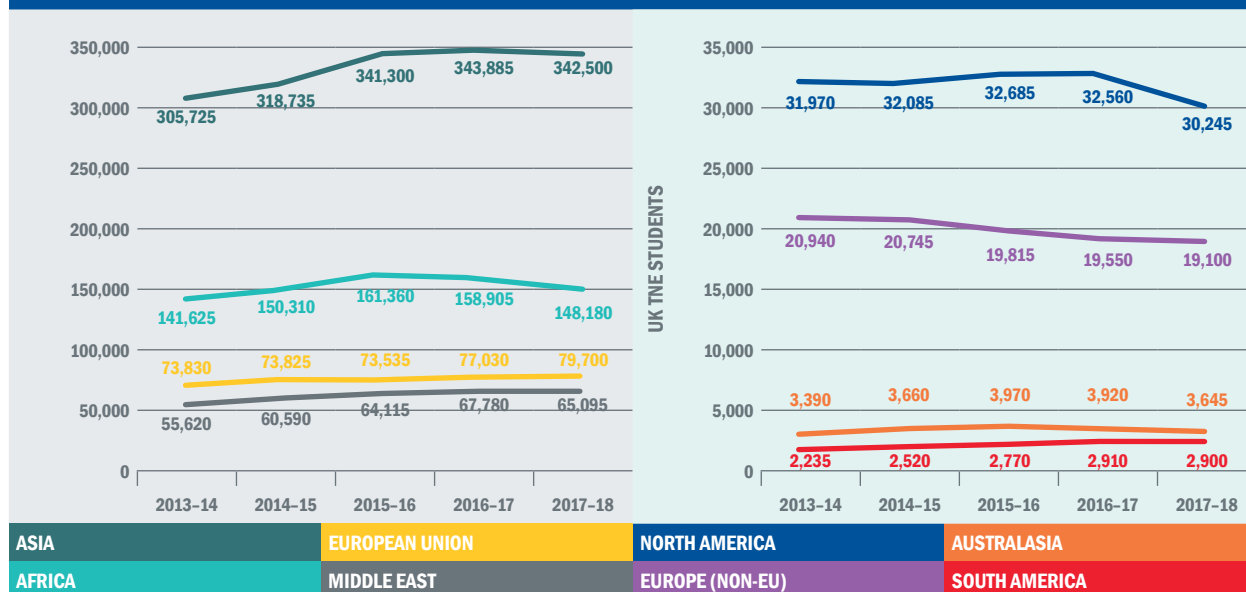
- Asia kept its prime position both in total student numbers and in the top host countries.
- Increase in student numbers on the previous year was sharpest in the European Union.
- China has become the country hosting the most TNE students, surpassing Malaysia.
- Traditional host countries such as Malaysia, Singapore, Hong Kong, Egypt and Nigeria have experienced stagnation or decreases in student numbers.
- Sri Lanka, Greece, Cyprus and Zimbabwe have increased their relative position within the top 20 countries with the largest provision.
- The pattern of provision is markedly different by world region, with distance, flexible or distributed learning prevalent in North America, South America and Australasia; studying with an overseas provider dominant in Africa; and a more even distribution of types in other parts of the world.

REGIONAL OVERVIEW

As shown in **Figure 8**, between 2013–14 and 2017–18 there were increases in student numbers in South America (29.6%), the Middle East (17.0%), Asia (12.0%), the EU (7.9%), Australasia (7.5%) and Africa (5.3%) and decreases in non-EU Europe (-8.8%) and North America (-5.4%).

The progression in student numbers is different by region. In Africa, North America and Australasia student numbers peaked in 2015–16 and have declined since. Asia, the Middle East and South America peaked slightly later, in 2016–17 but declined in 2017–18. Student numbers in the European Union have grown steadily and in Europe (non-EU) they have decreased continuously between 2013–14 and 2017–18.

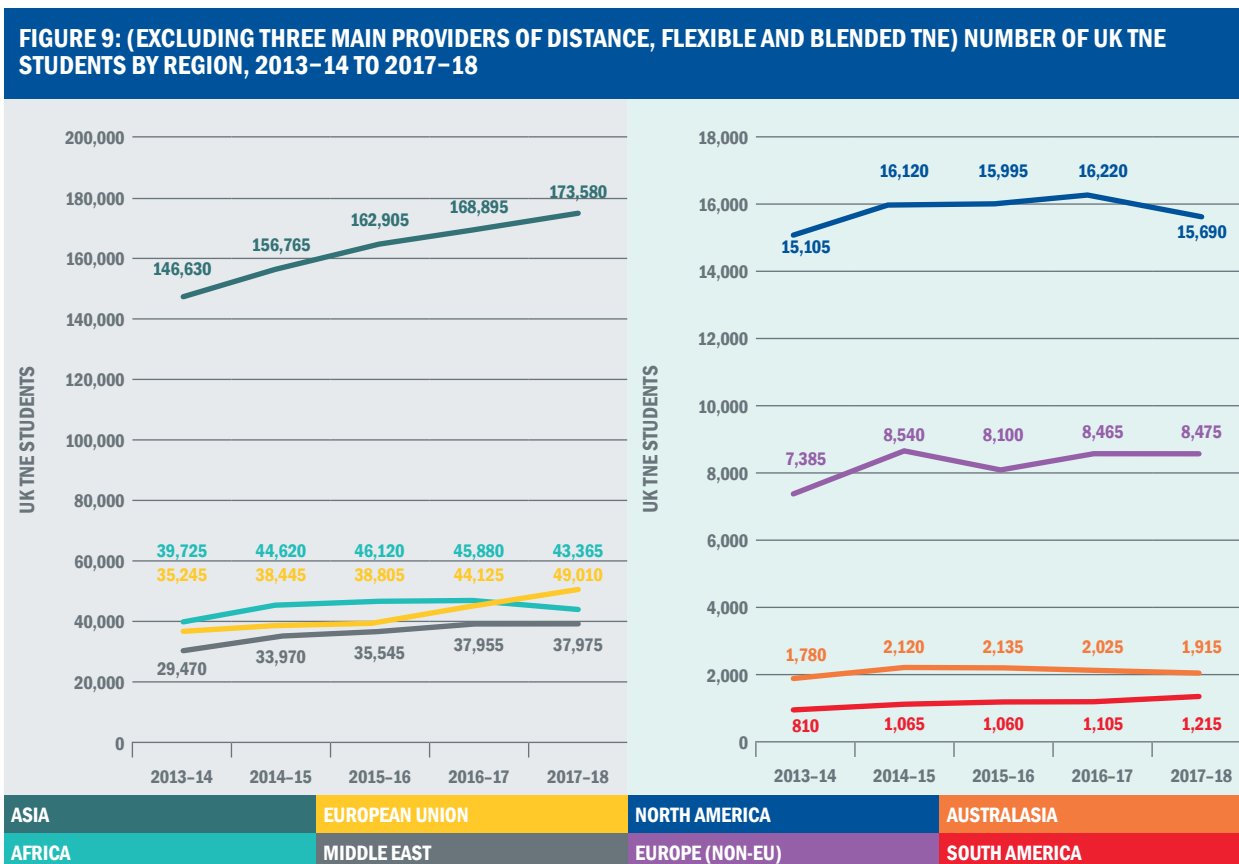
FIGURE 8: (ALL PROVIDERS) NUMBER OF UK TNE STUDENTS BY REGION, 2013–14 TO 2017–18



4. European Union excludes Isle of Man and the Channel Islands.

Figure 9 shows that, when the three main providers of distance, flexible and blended TNE are excluded, the increase in TNE student numbers is more pronounced. Between 2013-14 and 2017-18 student numbers increased most rapidly in South America (49.9%) and the European Union (39.1%), but regions with much larger student numbers such as the Middle East (28.5%) and Asia (18.4%) also experienced substantial increases.

Growth between 2016-17 and 2017-18 presents a more nuanced picture. There were increases in the European Union (11.1%), South America (9.7%), Asia (2.8%) and non-EU European countries (0.1%) and decreases in Africa (-5.5%), Australasia (-5.2%), North America (-3.3%) and the Middle East (-0.2%). Growth was highest in the European Union, both in student numbers (4,885) and as a percentage of the total, overtaking Africa to become the second largest host region by TNE student numbers when the three main providers of distance, flexible and blended TNE are excluded.























Excluding the three main providers of distance, flexible and blended TNE we observe differences in the pattern of regional distribution of students. In some regions provision is concentrated in a relatively small number of countries that host large student numbers. This is the case of the Middle East, where Oman and the UAE account for 82.7% of student numbers; Europe (non-EU), where Switzerland and Russia host 74.4% of all students; and Africa, where Egypt and Nigeria account more than half of all students in TNE programmes.

The picture is more varied in other world regions. In Asia, excluding the three main providers the top five host countries (China, Malaysia, Singapore, Pakistan and Sri Lanka) account for 83.8% of student numbers but there is also substantial provision in other territories. In the European Union, Greece hosts one in four students but Cyprus, Germany, Ireland and Spain also have significant student numbers.

As shown in **Table 5**, China became the country hosting the most TNE students in 2017-18, with an 8.7% increase over 2016-17. Malaysia (-2.3%), Singapore (-7.2%), Pakistan (-8.3%) and Nigeria (-9.3%) have all reduced their total student numbers.

Other countries where there has been an increase in numbers include Sri Lanka (12.1%), Greece (4.9%), UAE (2.2%), Zimbabwe (0.7%) and India (0.4%). The only new country to make the top 20 list is Cyprus, which occupies 17th place following an increase of 32.3% from 2016-17.





















TABLE 5: (ALL PROVIDERS) TOP 20 COUNTRIES FOR UK TNE STUDENTS, 2016-17 AND 2017-18

RANK	2017-2018	CHANGE FROM 2016-2017	% OF UK HETNE STUDENTS IN 2017-18
1	 China	↑ UP 1 FROM 2ND	11.0%
2	 Malaysia	↓ DOWN 1 FROM 1ST	10.5%
3	 Singapore	-	6.5%
4	 Pakistan	-	5.8%
5	 Nigeria	-	4.3%
6	 Sri Lanka	↑ UP 1 FROM 7TH	4.0%
7	 Hong Kong	↓ DOWN 1 FROM 6TH	3.7%
8	 Egypt	-	3.0%
9	 Oman	-	2.9%
10	 United Arab Emirates	-	2.5%
11	 Greece	↑ UP 1 FROM 12TH	2.5%
12	 India	↓ DOWN 1 FROM 11TH	2.5%
13	 Ghana	-	2.2%
14	 Mauritius	-	2.2%
15	 Kenya	-	1.7%
16	 Ireland	-	1.7%
17	 Cyprus (EU)	↑ UP 6 FROM 23RD	1.4%
18	 Zimbabwe	↑ UP 1 FROM 19TH	1.4%
19	 Saudi Arabia	↓ DOWN 1 FROM 18TH	1.4%
20	 Trinidad and Tobago	↓ DOWN 3 FROM 17TH	1.4%

Note: Percentages exclude UK territories.

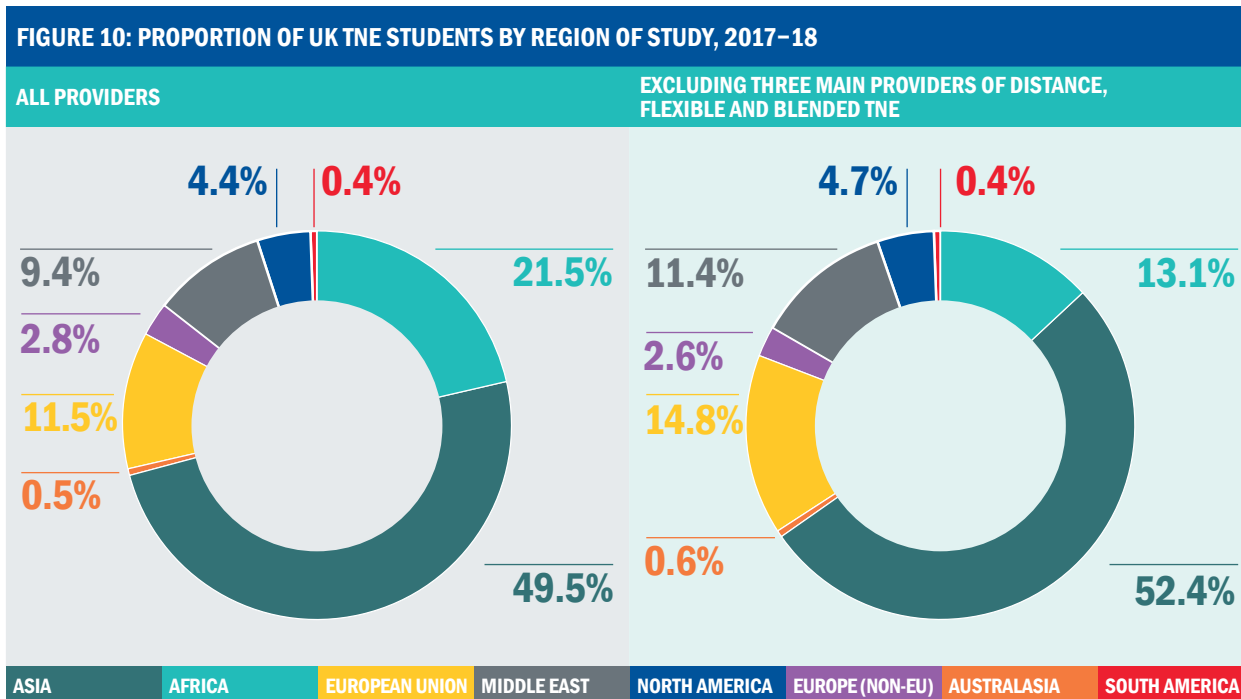
Table 6 shows that if we exclude the three main providers of distance, flexible and blended TNE, Malaysia is still the top country for TNE provision compared to 2016–17, even with a slight decrease of -1.9% from 2016–17.

There have been substantial increases in Cyprus (57.6%), China (15.8%) and Sri Lanka (15.8%) and significant decreases in Nigeria (-19.4%) and Trinidad and Tobago (-18.9%). Ghana is the only new country to enter the top 20 in 2017–18, with an increase of 2.6%.

TABLE 6: (EXCLUDING THE THREE MAIN PROVIDERS OF DISTANCE, FLEXIBLE AND BLENDED TNE) TOP 20 HOST COUNTRIES FOR UK TNE STUDENTS IN 2017-18 AND CHANGE SINCE 2016-17			
RANK	2017-2018	CHANGE FROM 2016-2017	% OF UK HE TNE STUDENTS IN 2017-18
1	 Malaysia	-	14.0%
2	 China	-	11.2%
3	 Sri Lanka	↑ UP 3 FROM 6TH	6.8%
4	 Singapore	↓ DOWN 1 FROM 3RD	6.3%
5	 Hong Kong	↓ DOWN 1 FROM 4TH	5.7%
6	 Egypt	↓ DOWN 1 FROM 5TH	5.6%
7	 Oman	-	5.5%
8	 United Arab Emirates	-	4.0%
9	 Greece	-	3.9%
10	 India	-	2.3%
11	 Cyprus (EU)	↑ UP 4 FROM 15TH	2.2%
12	 Uzbekistan	↑ UP 1 FROM 13TH	1.7%
13	 Germany	↑ UP 3 FROM 16TH	1.6%
14	 Switzerland	-	1.6%
15	 Nigeria	↓ DOWN 4 FROM 11TH	1.4%
16	 United States	↑ UP 1 FROM 17TH	1.4%
17	 Trinidad and Tobago	↓ DOWN 5 FROM 12TH	1.3%
18	 Ireland	-	1.2%
19	 South Africa	-	1.1%
20	 Ghana	↑ UP 2 FROM 22ND	1.0%

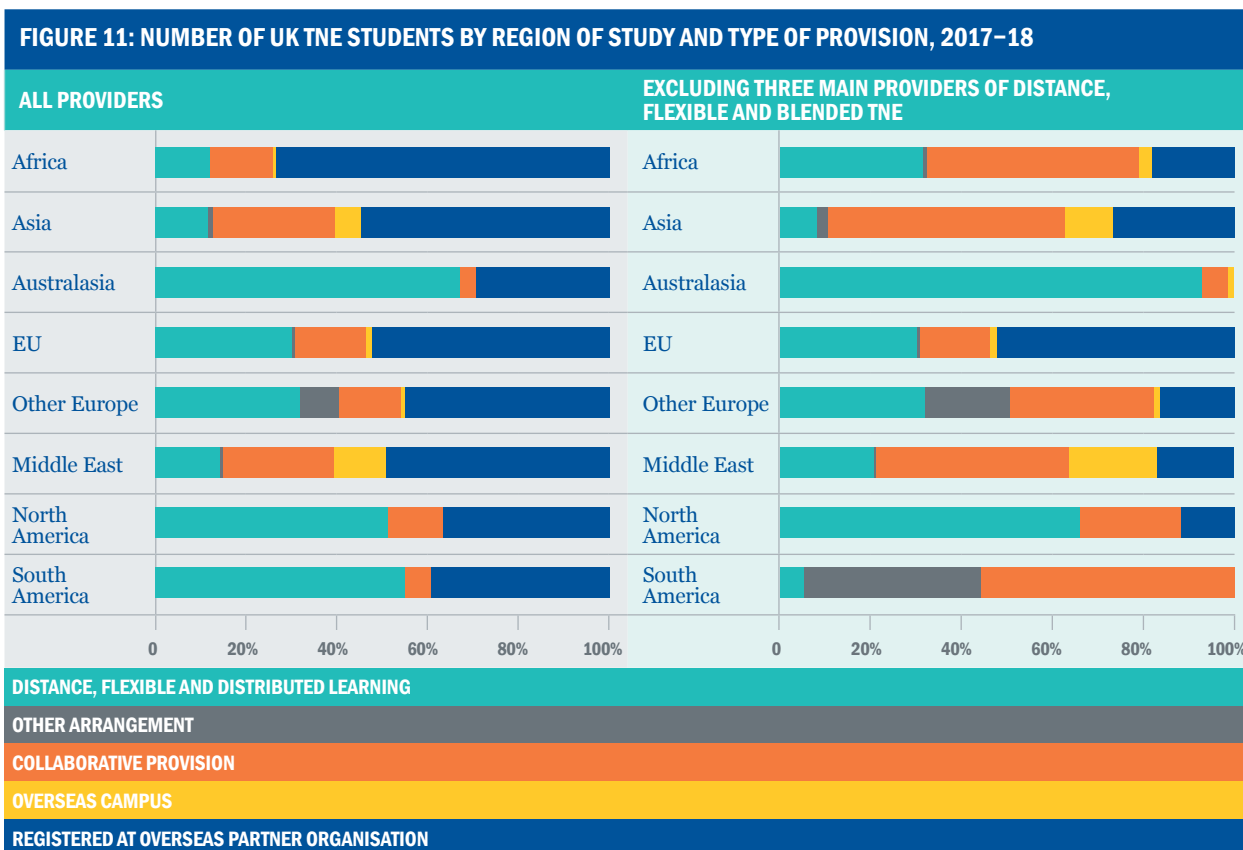
Note: Percentages exclude UK territories.

Figure 10 shows a breakdown of students by region in 2017–18. Asia, Africa and the European Union combined host around eight in each 10 students. When the three main providers of distance, flexible and blended TNE are excluded, the percentage of students in the European Union is 1.7 percentage points higher than that in Africa, and the Middle East region is much closer to Africa in percentage of TNE students hosted. South America and Australasia host the fewest students with 0.5% and 0.4% respectively.



TYPE OF PROVISION BY REGION

Figure 11 disaggregates the type of TNE study by region of study in 2017-18. Students registered at an overseas partner organisation and through distance, flexible or distributed learning are the two most popular types of TNE across all regions when the three main providers of distance, flexible and blended TNE are included. Excluding these three providers, collaborative provision is prevalent in Asia, Africa, the Middle East and South America; distance learning is dominant in Australasia and North America; and there is substantial overseas campus provision in the Middle East and Asia.



Tables 7 to 11 show the top host countries by type of provision in 2017-18, excluding the three main providers of distance, flexible and blended TNE.

Countries in Asia made up the majority of the host countries in four of the five types of provision. The exception to this was students studying through distance, flexible or distributed learning which was evenly spread between Africa, Asia, North America, the Middle East and the EU.

TABLE 7: TOP 10 HOST COUNTRIES OF STUDENTS REGISTERED AT AN OVERSEAS PARTNER ORGANISATION, 2017-18











COUNTRY	NO OF STUDENTS
 Malaysia	14,375
 China	12,230
 Singapore	6,830
 Greece	5,735
 Hong Kong	4,305
 Oman	4,115
 Egypt	3,615
 Sri Lanka	3,440
 Ghana	2,355
 Germany	2,280

TABLE 8: TOP 10 HOST COUNTRIES OF STUDENTS STUDYING THROUGH DISTANCE, FLEXIBLE OR DISTRIBUTED LEARNING, 2017-18











COUNTRY	NO OF STUDENTS
 Cyprus (EU)	5,085
 United States	3,745
 South Africa	3,445
 Nigeria	3,410
 United Arab Emirates	3,090
 Canada	2,780
 Sri Lanka	2,750
 China	2,300
 Ireland	2,185
 Hong Kong	2,125

TABLE 9: TOP 10 HOST COUNTRIES OF STUDENTS STUDYING AT AN OVERSEAS CAMPUS, 2017-18











COUNTRY	NO OF STUDENTS
 Malaysia	9,180
 China	8,255
 United Arab Emirates	6,960
 Hong Kong	1,060
 Mauritius	1,035
 Belgium	315
 Malta	235
 Qatar	230
 Singapore	195
 Greece	175

TABLE 10: TOP 10 HOST COUNTRIES OF STUDENTS STUDYING THROUGH COLLABORATIVE PROVISION, 2017-18





















COUNTRY	NO OF STUDENTS
 Malaysia	21,935
 Sri Lanka	16,160
 Egypt	14,315
 China	14,155
 Oman	13,485
 Singapore	11,885
 Hong Kong	11,240
 Greece	6,645
 Uzbekistan	3,235
 India	2,400

TABLE 11: TOP 10 HOST COUNTRIES OF STUDENTS STUDYING THROUGH OTHER TYPES OF PROVISION, 2017-18

COUNTRY	NO OF STUDENTS
 India	2,730
 Switzerland	1,475
 Uzbekistan	1,215
 Singapore	295
 Bahrain	205
 Ireland	185
 Zimbabwe	185
 Malaysia	155
 Italy	105
 Czech Republic	100

LEVEL OF STUDY ACROSS REGIONS

Table 12 shows the top host countries by level of provision in 2017–18, excluding the three main providers of distance, flexible and blended TNE. There have been some noticeable changes in the ranking of the top 20 host countries compared to 2016–17. Oman, UAE, Germany, Switzerland, Vietnam, Cyprus and Ireland increased their relative position in undergraduate student numbers while Hong Kong, India, Spain, Nepal and Trinidad and Tobago fell one or more positions. Myanmar, with 1,500 undergraduate students, joins the list while Pakistan fell out of the top 20.

In the list of the 20 host countries with the most postgraduate provision, Cyprus made a significant jump, rising to 4th position from 13th last year due to an 88.5% increase in student numbers. China also experienced significant growth, reaching 5th position from 7th last year. Most other countries saw decreases or relatively modest increases in TNE student numbers. Austria is the only new addition to the top 20, while Saudi Arabia fell off the list.

TABLE 12: (EXCLUDING THREE MAIN PROVIDERS OF DISTANCE, FLEXIBLE AND BLENDED TNE) TOP 20 HOST COUNTRIES FOR UK TNE STUDENTS BY LEVEL OF STUDY, 2017-18

RANKING	UNDERGRADUATE		POSTGRADUATE	
	COUNTRY	NO OF STUDENTS	COUNTRY	NO OF STUDENTS
1	 Malaysia	39,510	 Sri Lanka	9,380
2	 China	32,180	 United Arab Emirates	7,140
3	 Egypt	17,310	 Malaysia	6,980
4	 Singapore	16,695	 Cyprus (EU)	5,600
5	 Oman	15,595	 China	4,760
6	 Hong Kong	14,950	 Nigeria	4,425
7	 Sri Lanka	12,970	 Singapore	4,175
8	 Greece	9,175	 Greece	3,890
9	 United Arab Emirates	5,970	 United States	3,820
10	 India	5,595	 Hong Kong	3,780
11	 Uzbekistan	5,380	 Switzerland	3,265
12	 Germany	2,920	 Canada	3,005
13	 Spain	2,780	 South Africa	2,970
14	 Nepal	2,320	 Oman	2,600
15	 Switzerland	1,940	 Trinidad and Tobago	2,530
16	 Vietnam	1,795	 Ghana	2,435
17	 Trinidad and Tobago	1,705	 Ireland	2,405
18	 Cyprus (EU)	1,660	 Germany	2,300
19	 Ireland	1,650	 Austria	2,040
20	 Myanmar	1,500	 India	1,895

4. INSIGHTS BY REGION

This section provides a detailed analysis showing different patterns of provision by region. For the remainder of this section, the regional trend analysis excludes the three main programme providers of distance, flexible and blended TNE, unless specified otherwise.

AFRICA



AT A GLANCE: UK HE TNE IN AFRICA IN 2017-18

- Africa hosted the third highest number of students by region (**13.1%**).
- The number of students decreased by **5.5%** between 2016-17 and 2017-18.
- TNE was delivered in **55** African countries.
- The countries with the most students were Egypt, Nigeria and South Africa.
- Zimbabwe entered the top **10** African host countries by student numbers, replacing Tanzania.
- Collaborative provision (**47.0%**) and distance, flexible or distributed learning (**32.2%**) increased their relative weight, at the expense of registered at an overseas partner organisation (**17.8%**).
- The percentage of students studying at undergraduate level continued its progression reaching **53.2%** in 2017-18.

TREND ANALYSIS

As shown in **Figure 12**, total student numbers increased by 9.2% between 2013-14 and 2017-18 but have decreased by 2,515 students since 2016-17. There has been a 5.9% two-year decrease following an all-time high in 2015-16.

FIGURE 12: UK HE TNE STUDENTS IN AFRICA FROM 2013-14 TO 2017-18



UK HE TNE was delivered in

55

African countries and territories in 2017-18.

Africa hosted

13.1%

of UK TNE students in 2017-18.

HOST COUNTRIES

Table 13 shows the 10 African countries hosting the most students in 2017–18 excluding the three main providers of distance, flexible and blended TNE. Zimbabwe entered the top 10, replacing Tanzania. Egypt and Nigeria continue to account for over 50% of all UK TNE students in the continent, although, as can be seen in **Figure 13**, their share is decreasing.

TABLE 13: TOP 10 HOST COUNTRIES IN AFRICA FOR UK TNE STUDENTS, 2017–18


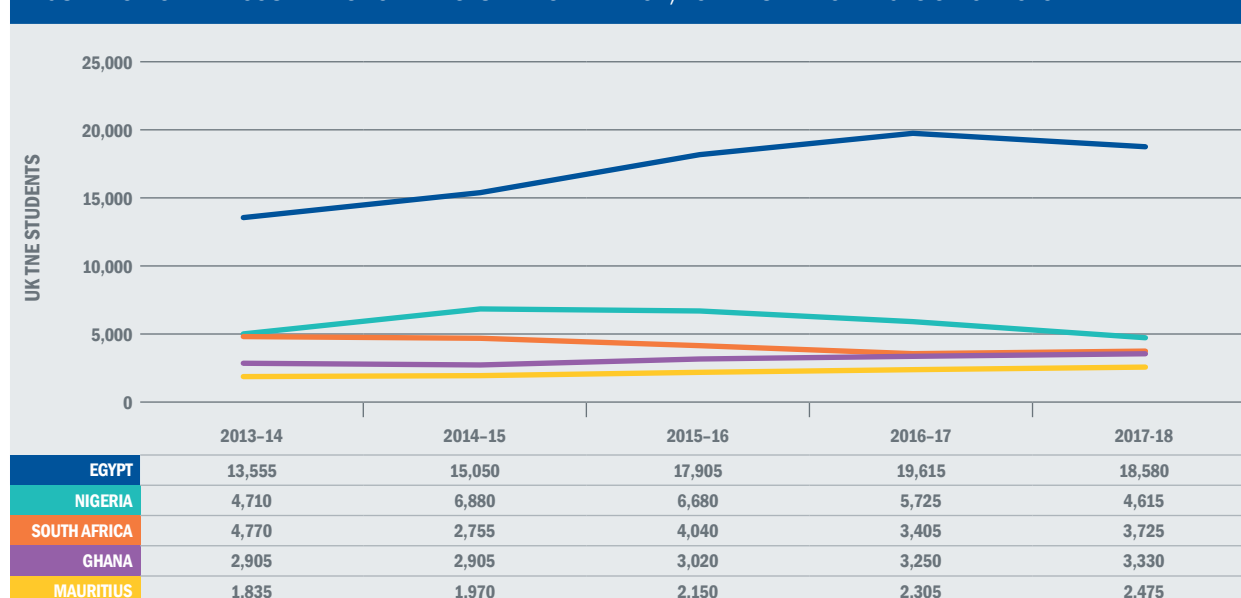
RANK	HOST COUNTRIES	NUMBER OF STUDENTS	PERCENTAGE OF STUDENTS
1	 Egypt	18,580	42.8%
2	 Nigeria	4,615	10.6%
3	 South Africa	3,725	8.6%
4	 Ghana	3,330	7.7%
5	 Mauritius	2,475	5.7%
6	 Botswana	1,565	3.6%
7	 Kenya	1,500	3.5%
8	 Zambia	1,265	2.9%
9	 Uganda	890	2.1%
10	 Zimbabwe	790	1.8%

Figure 13 shows the different progression of student numbers in the top 5 host countries, which cumulatively account for over 75% of all students. From 2013–14 to 2017–18 student numbers increased in Egypt (37.1%), Mauritius (34.9%) and Ghana (14.6%) and decreased in South Africa (-21.9%) and Nigeria (-2%). Between 2016–17 and 2017–18 student numbers increased in South Africa (9.4%), Mauritius (7.4%) and Ghana (2.4%) while there were significant decreases in Nigeria (-19.4%) and Egypt (-5.3%).













FIGURE 13: TOP FIVE COUNTRIES FOR TNE STUDENTS IN AFRICA, 2017–18 AND CHANGES SINCE 2013–14



TYPE OF PROVISION

In 2017–18, 47% of students in Africa studied through collaborative provision (up from 45% in 2016–17). Provision by distance, flexible or distributed learning experienced significant growth and now represents 32% of the total (up from 29% in 2016–17). Provision of UK qualifications to students registered at an overseas partner organisation represented 18% of the total in 2017–18 (down from 24% in 2016–17) while the proportion studying at overseas branch campuses has remained fairly stable at 3% of the total.

Table 14 shows how many students were studying through each type of TNE provision, how many countries hosted each provision, and what the top countries were for each provision. Collaborative provision is delivered in a large number of countries, but most students are located in Egypt, while students in distance, flexible or distributed learning are more evenly distributed and present in all countries but one. Providers reported students registered at an overseas campus in three countries only, with provision concentrated in Mauritius.

RANK	TYPE OF PROVISION	NUMBER OF STUDENTS	NUMBER OF COUNTRIES REPRESENTED OUT OF 55 (%)	TOP COUNTRIES (% OF PROVISION TYPE)
1	Collaborative provision	20,395	47 (85%)	 Egypt (70.2%)  Nigeria (5.5%)  Botswana (5.3%)
2	Distance, flexible and distributed learning	13,945	54 (98%)	 South Africa (24.7%)  Nigeria (24.5%)  Kenya (7.6%)
3	Registered at overseas partner organisation	7,700	10 (18%)	 Egypt (46.9%)  Ghana (30.6%)  Uganda (5.8%)
4	Overseas campus	1,140	3 (5%)	 Mauritius (91.0%)  Tanzania (8.9%)
5	Other arrangement	185	1 (2%)	 Zimbabwe (100%)

LEVEL OF STUDY

In Africa, the relative proportion of undergraduate to postgraduate students in UK TNE was 53: 47, compared to 65: 35 globally, showing that postgraduate provision is particularly significant in Africa. However the proportion of undergraduate students has been increasing steadily since 2015–16.

As shown in **Table 15**, the distribution between undergraduate and postgraduate TNE study varies across African countries:

- Egypt alone accounts for 75.1% of UK HE TNE undergraduates in Africa. There was a noticeable progression in undergraduate students in South Africa (+210 students) and Mauritius also made modest gains (+75 students).
- Undergraduate student numbers fell in five countries from 2016–17 to 2017–18. The most significant declines were in Botswana (-485 students) and Nigeria (-80 students).
- At postgraduate level, there is a wider spread of student numbers by country. Only South Africa and Mauritius experienced modest gains in postgraduate student numbers (+75 students each). The largest decrease in student numbers at postgraduate level took place in Nigeria (-1,030 students).

TABLE 15: TOP 10 HOST COUNTRIES IN AFRICA FOR UK TNE STUDENTS BY LEVEL OF STUDY, 2017–18

RANK	UNDERGRADUATES			POSTGRADUATE		
	COUNTRY	NUMBER OF STUDENTS	% OF UG IN AFRICA	COUNTRY	NUMBER OF STUDENTS	% OF PG IN AFRICA
1	 Egypt	17,310	75.1%	 Nigeria	4,425	21.8%
2	 Mauritius	1,435	6.2%	 South Africa	2,970	14.6%
3	 Botswana	910	3.9%	 Ghana	2,435	12.0%
4	 Ghana	900	3.9%	 Egypt	1,270	6.3%
5	 South Africa	755	3.3%	 Kenya	1,185	5.8%
6	 Zambia	465	2.0%	 Mauritius	1,040	5.1%
7	 Morocco	385	1.7%	 Uganda	865	4.3%
8	 Kenya	310	1.3%	 Zambia	800	3.9%
9	 Nigeria	190	0.8%	 Zimbabwe	750	3.7%
10	 Malawi	165	0.7%	 Tanzania	670	3.3%

Case study

CARDIFF METROPOLITAN UNIVERSITY – MOROCCO

Cardiff Metropolitan University is currently celebrating its 10th year of partnership with SIST, Morocco, which has now seen more than 1,000 graduates on undergraduate and postgraduate TNE programmes. SIST deliver Cardiff Met programmes via a franchised provision model approved by the Moroccan Education Ministry, and is the only institution in Morocco that offers full UK qualifications across its three campuses in Casablanca, Rabat and Tangier.

SIST programmes follow UK quality standards and Cardiff Met staff visit regularly to monitor, enhance and support staff and students alike. Mobility schemes are used frequently for visiting staff to share best practice, which strengthens the association of students with Cardiff Metropolitan, leading to large numbers of students transferring and progressing to Level 6 and Masters levels programmes in Cardiff.

SIST have specialised in business-related TNE programmes to date, but, in response to high local demand for programmes in areas such as education and technology, have recently extended their provision to offer a greater range of courses and subjects across other Cardiff Metropolitan schools, including a new MA in Education. Cardiff Met work with high schools in Morocco to assist with marketing SIST and students are encouraged to partake in social integration visits to Cardiff Met as part of the wider partnership model.

ASIA

Unless stated otherwise, the regional trend analysis excludes the three main programme providers of distance, flexible and blended TNE.



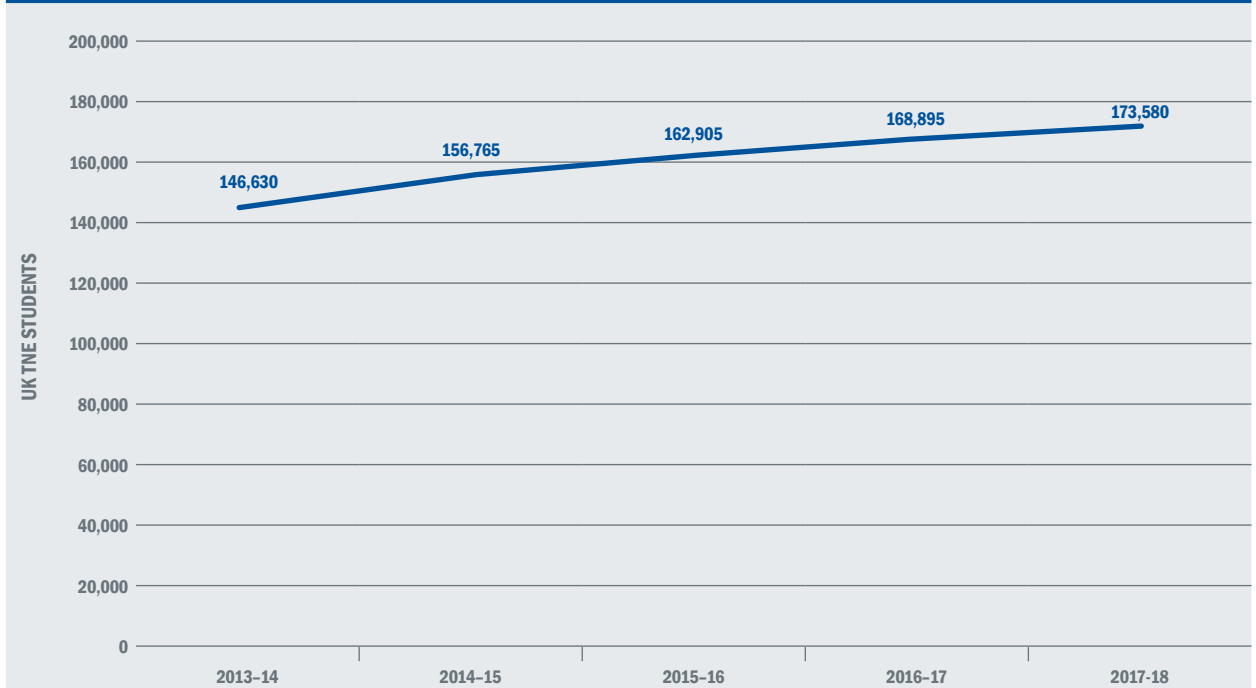
AT A GLANCE: UK HETNE IN ASIA IN 2017–18

- Asia hosted the highest number of students of all regions (**52.4%**).
- The number of students increased by **2.8%** between 2016–17 and 2017–18.
- TNE was delivered in **32** Asian countries.
- The countries with the most students were Malaysia, China and Sri Lanka.
- China is rapidly increasing its share of students in the region (**21.3%** against **14.8%** in 2013–14).
- Relative declines in total student numbers in Singapore and Pakistan have been partly offset by increases in Sri Lanka, Uzbekistan and Myanmar.
- **52.1%** of students studied through collaborative provision. This is followed by those registered at an overseas partner organisation (**26.1%**); at an overseas campus (**10.8%**); distance, flexible or distributed learning (**8.4%**) and via other arrangements (**2.6%**).
- **79.2%** of students were studying at undergraduate level.

TREND ANALYSIS

Asia continues to host approximately half of all UK TNE students worldwide. As **Figure 14** shows, total student numbers increased by 18.4% between 2013-14 and 2017-18. The increase from 2016-17 was 2.8% whereas the average yearly increase from 2013-14 to 2016-17 had been 5%.

FIGURE 14: NUMBER OF UK TNE STUDENTS IN ASIA, 2013-14 TO 2017-18



UK TNE was delivered in

32

Asian countries and territories in 2017-18.

Asia hosted

52.4%

of UK TNE students in 2017-18.

HOST COUNTRIES

Table 15 shows the 10 Asian countries hosting the most students in 2017-18.











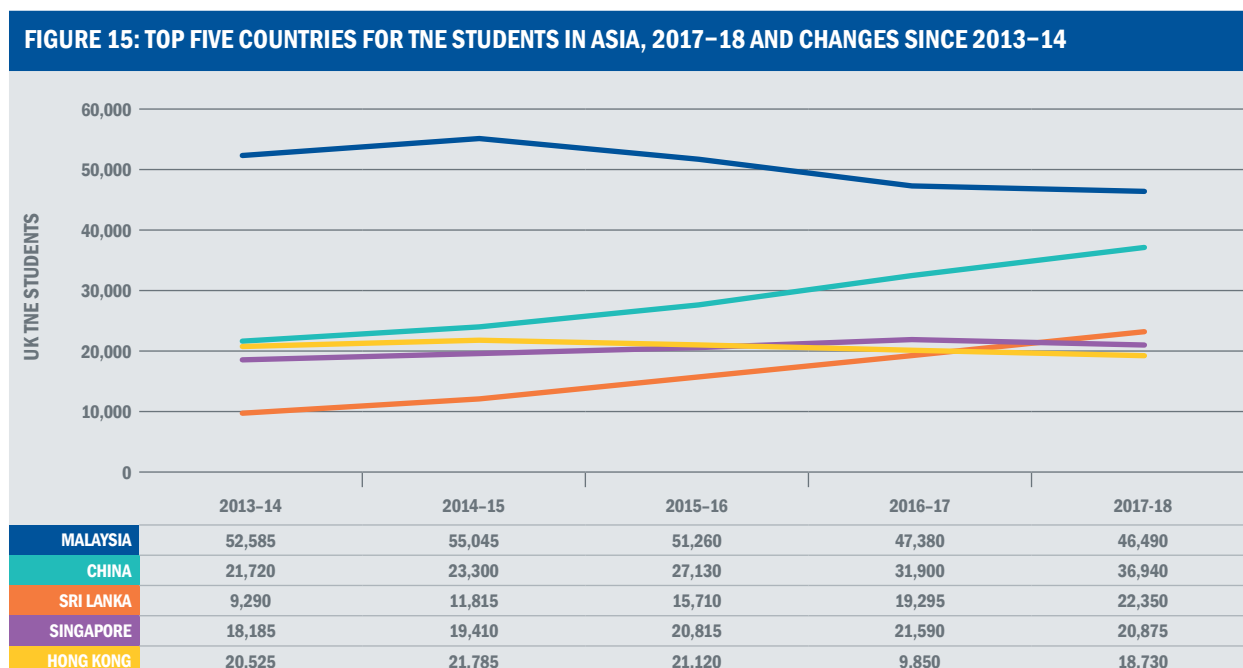
TABLE 15: TOP 10 HOST COUNTRIES IN ASIA FOR UK TNE STUDENTS, 2017-18			
RANK	HOST COUNTRIES	NUMBER OF STUDENTS	PERCENTAGE OF STUDENTS
1	 Malaysia	46,490	26.8%
2	 China	36,940	21.3%
3	 Sri Lanka	22,350	12.9%
4	 Singapore	20,875	12.0%
5	 Hong Kong	18,730	10.8%
6	 India	7,485	4.3%
7	 Uzbekistan	5,625	3.2%
8	 Nepal	2,645	1.5%
9	 Vietnam	2,270	1.3%
10	 Myanmar	2,005	1.2%

Figure 15 shows the progression from 2013-14 to 2017-18 of student numbers in the top five host countries, which cumulatively account for over 80% of all students. Malaysia has experienced an 11.5% decrease in student numbers since 2013-14 (-1.9% in the last year of data), yet remains the country with the most students, followed by China, where numbers have grown significantly (70%). Sri Lanka, where TNE provision has grown by 140% since 2013-14, has surged past Singapore and Hong Kong to become the country with the third-largest share of students. As well as Malaysia, there have been decreases in Hong Kong (-8.7%). Numbers are flattening in Singapore after a peak reached in 2016-17. Although a long way below the numbers of the top five, and hence not shown in Figure 15, Uzbekistan and Myanmar are slowly gaining ground.



TYPE OF PROVISION

In 2017–18, 52.1% of students in Asia studied through collaborative provision. This is followed by those registered at an overseas partner organisation (26.1%); at an overseas campus (10.8%); through distance, flexible or distributed learning (8.4%); and via other arrangements (2.6%). The number of students registered at an overseas campus experienced the largest year-on-year increase (15.9%). The number of students registered at an overseas partner organisation increased by 3.9%, and numbers studying through collaborative provision increased by 1.6%, while distance, flexible or distributed learning decreased by 0.8% and students studying via other arrangements decreased by 17.1%.

Table 16 shows how many students were studying through each type of TNE provision, how many countries hosted each provision, and what the top countries were for each provision. Malaysia topped three types of provision, while Uzbekistan and India only appeared in one category each. The types of provision most spread out were distance, flexible or distributed learning and collaborative provision, while provision through an overseas campus is concentrated in only six countries.

TABLE 16: UK TNE STUDENTS IN ASIA BY TYPE OF PROVISION, 2017–18

RANK	TYPE OF PROVISION	NUMBER OF STUDENTS	NUMBER OF COUNTRIES REPRESENTED OUT OF 32 (%)	TOP COUNTRIES (% OF PROVISION TYPE)
1	Collaborative provision	90,400	27 (84%)	 Malaysia (24.3%)  Sri Lanka (17.9%)  China (15.7%)
2	Registered at overseas partner organisation	45,320	19 (59%)	 Malaysia (31.7%)  China (27.0%)  Singapore (15.1%)
3	Overseas campus	18,770	6 (19%)	 Malaysia (48.9%)  China (44.0%)  Hong Kong (5.6%)
4	Distance, flexible and distributed learning	14,600	32 (100%)	 Sri Lanka (18.8%)  China (15.8%)  Hong Kong (14.5%)
5	Other arrangement	4,490	6 (19%)	 India (60.8%)  Uzbekistan (27.0%)  Singapore (6.5%)

LEVEL OF STUDY

The vast majority of students in TNE programmes in Asia were studying for a first degree in 2017–18 (76.6%). The proportion of students on postgraduate programmes increased from 20.2% in 2016–17 to 20.8% in 2017–18.

As shown in **Table 17**, the distribution between undergraduate and postgraduate TNE study varies across Asian countries:

- Malaysia and China combined account for more than half of all UK HE TNE undergraduate students in Asia. There were significant increases in undergraduate students in China (+4,020 students) and Sri Lanka (+1,780 students), and to a lesser extent in Uzbekistan (+575 students) and the Maldives (+360 students).
- Undergraduate student numbers fell in six of the top 10 countries from 2016–17 to 2017–18. The most significant declines were in Hong Kong (-1,035 students) and Malaysia (-970 students).
- At postgraduate level, there is a wider spread of student numbers by country. Sri Lanka tops the list for the second year in a row (+1,275 students), increasing its share of students as well. Also significant is the increase in China (+1,015 students). Myanmar enters the top 10 in both undergraduates (1,500 students) and postgraduates (505 students) in 2017–18.

TABLE 17: TOP 10 HOST COUNTRIES IN ASIA FOR UK TNE STUDENTS BY LEVEL OF STUDY, 2017–18

RANK	UNDERGRADUATES			POSTGRADUATE		
	COUNTRY	NUMBER OF STUDENTS	% OF UG IN AFRICA	COUNTRY	NUMBER OF STUDENTS	% OF PG IN AFRICA
1	 Malaysia	39,510	28.7%	 Sri Lanka	9,380	26.1%
2	 China	32,180	23.4%	 Malaysia	6,980	19.4%
3	 Singapore	16,695	12.1%	 China	4,760	13.2%
4	 Hong Kong	14,950	10.9%	 Singapore	4,175	11.6%
5	 Sri Lanka	12,970	9.4%	 Hong Kong	3,780	10.5%
6	 India	5,595	4.1%	 India	1,895	5.3%
7	 Uzbekistan	5,380	3.9%	 Pakistan	525	1.5%
8	 Nepal	2,320	1.7%	 Myanmar	505	1.4%
9	 Vietnam	1,795	1.3%	 Maldives	490	1.4%
10	 Myanmar	1,500	1.1%	 Japan	490	1.4%

Case study

CANTERBURY CHRIST CHURCH UNIVERSITY – SRI LANKA

Canterbury Christ Church University (CCCU) has signed a significant partnership agreement with Saegis Campus based in Colombo, a leading non-state higher education institution approved by the Sri Lankan Ministry of Education. This partnership, which has been operating for two years, supports the development, delivery and quality assurance of a range of undergraduate and postgraduate degrees to be taught in the Sri Lankan capital.

The University's decision to partner with Saegis Campus is based in common values and a commitment to providing the best possible access to professional higher education in and for the local context.

The partnership operates on a franchise model, with Saegis Campus teaching students to CCCU curricula and CCCU providing academic support, quality assurance according to QAA regulations and certification.

Canterbury Christ Church University and Saegis Campus currently offer BSc (Hons) Business Management, BSc (Hons) Marketing, BSc (Hons) Accounting & Finance, BSc (Hons) Computer Science, BEng (Hons) Software Engineering and Master of Business Administration degree programmes, enabling more students to access high-quality UK higher education and fulfilling Saegis' aspiration to meet the needs of the next generation of graduates in Sri Lanka.

The partnership has worked to bridge the gap between SQA qualifications and Honours degree awards to ensure a clear pathway for Sri Lankan students to achieve UK awards.

AUSTRALASIA

Unless stated otherwise, the regional trend analysis excludes the three main programme providers of distance, flexible and blended TNE.



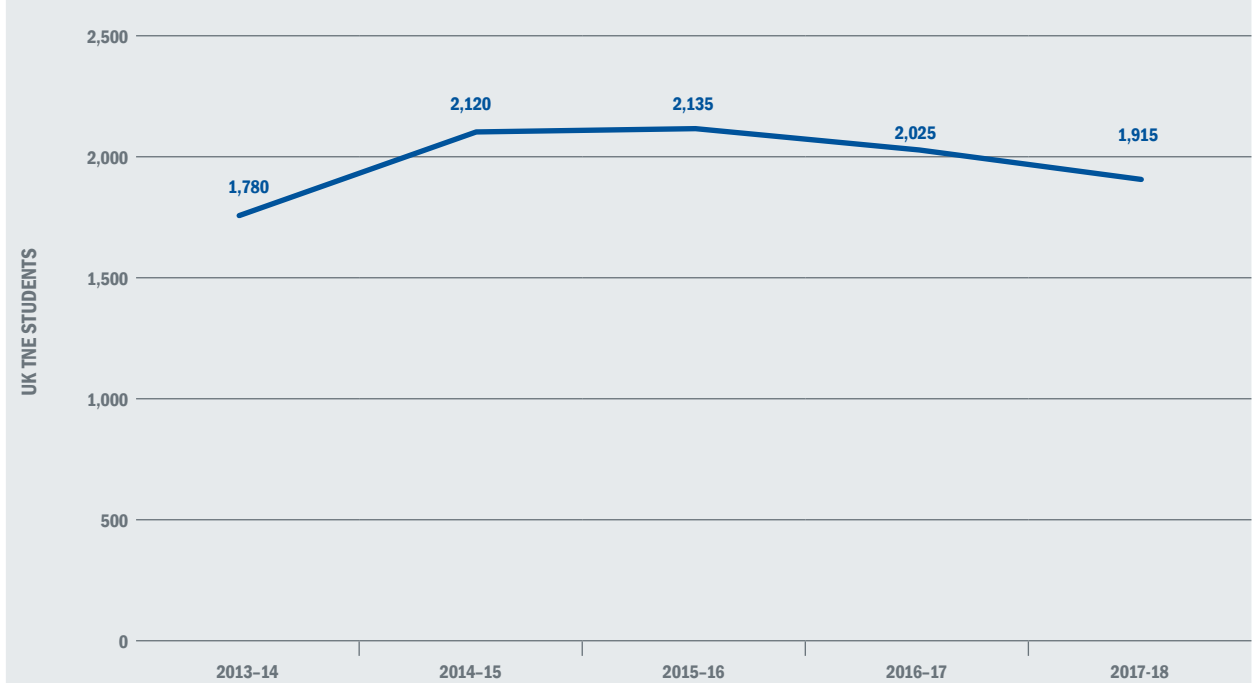
AT A GLANCE: UK HE TNE IN AUSTRALASIA IN 2017–18

- Australasia hosted the second lowest number of students by region (**0.6%**).
- The number of students decreased by **5.2%** between 2016–17 and 2017–18.
- TNE was delivered in **15** Australasian countries, which was three less than in 2016–17.
- The majority of students were in Australia, followed by New Zealand. Other countries in the region hosted very small numbers of students.
- **88.3%** of students studied through distance, flexible or distributed learning. This is followed by those registered at an overseas partner organisation (**7.6%**); at an overseas campus (**2.4%**) and through collaborative provision (**7.6%**).
- **84.0%** of students were studying at postgraduate level.

TREND ANALYSIS

As shown in **Figure 16**, student numbers increased overall by 7.6% in Australasia between 2013-14 and 2017-18, but they decreased by 5.2% between 2016-17 and 2017-18.

FIGURE 16: NUMBER OF UK TNE STUDENTS IN AUSTRALASIA, 2013-14 TO 2017-18



UK TNE was delivered in

15

Australasian countries and territories in 2017-18.






Australasia hosted

0.6%

of UK TNE students in 2017-18.

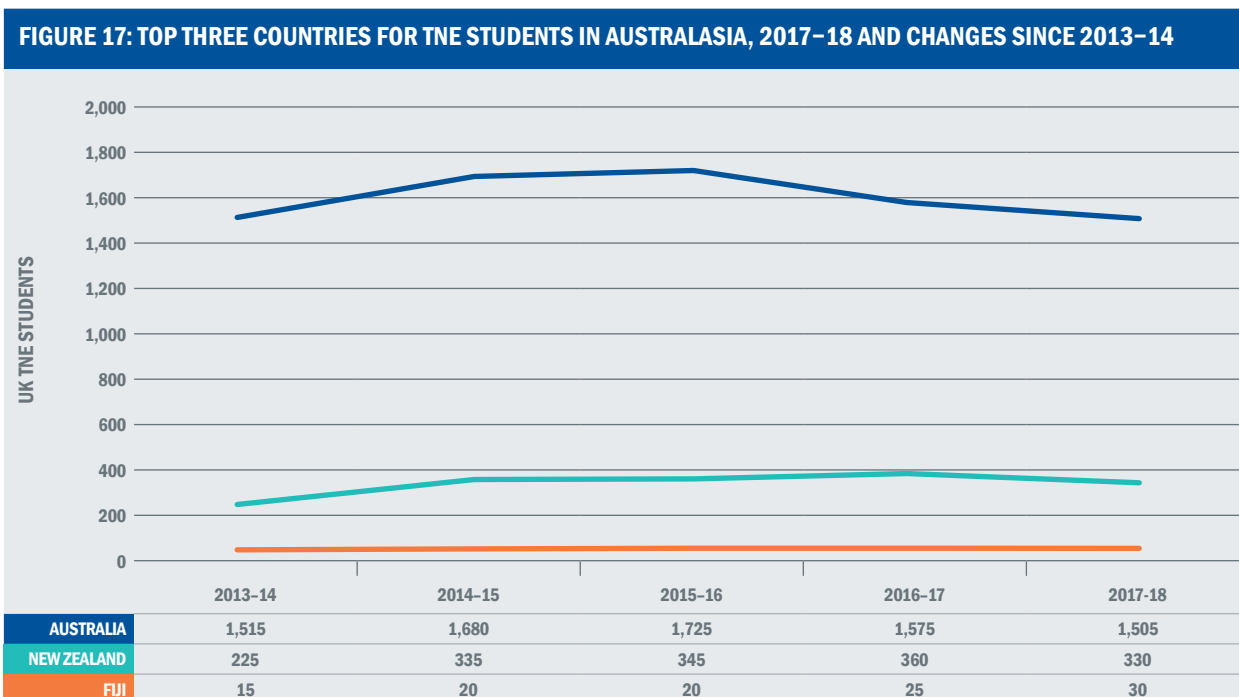
HOST COUNTRIES

Table 18 shows the Australasian countries hosting the most students in 2016-17 and 2017-18.

RANK	HOST COUNTRIES	NUMBER OF STUDENTS	PERCENTAGE OF STUDENTS
1	 Australia	1,505	78.6%
2	 New Zealand	330	17.3%
3	 Fiji	30	1.5%
4	 Papua New Guinea	20	1.1%
5	 Samoa	5	0.2%

Note: Top five shown due to small numbers of students.

Figure 17 shows the progression from 2013-14 to 2017-18 of student numbers in the top three host countries, which cumulatively account for over 95% of all students. Student numbers increased in New Zealand (46.6%) and decreased slightly in Australia (-0.6%) during this period, although Australia has in fact seen a marked decrease of -14.6% since a peak in 2015-16.










TYPE OF PROVISION

In 2017–18, 93.8% of students in Australasia studied through distance, flexible or distributed learning (up from 88.3% in 2016–17). This is followed by those studying through collaborative provision (5.6%) and at an overseas campus (0.5%).

Table 19 shows how many students were studying through each type of TNE provision, how many countries hosted each provision, and what the top countries were for each provision. The only country with an overseas campus was Australia.

TABLE 19: UK TNE STUDENTS IN AUSTRALASIA BY TYPE OF PROVISION, 2017–18







RANK	TYPE OF PROVISION	NUMBER OF STUDENTS	NUMBER OF COUNTRIES REPRESENTED OUT OF 15 (%)	TOP COUNTRIES (% OF PROVISION TYPE)
1	Distance, flexible and distributed learning	1,800	15 (100%)	 Australia (81.7%)  New Zealand (14.2%)  Fiji (1.6%)
2	Collaborative provision	110	5 (33%)	 New Zealand (71.3%)  Australia (24.1%)  Papua New Guinea (2.8%)
3	Overseas campus	10	1 (7%)	 Australia (100%)

LEVEL OF STUDY

Most students (81.7%) study at postgraduate level in Australasia, but the scale of undergraduate UK TNE provision increased by 1.4% compared to 2016–17 (17.4% compared to 16%).

The distribution between undergraduate and postgraduate TNE study varied across Australasian countries, as seen in **Table 20**. Australia's share of the undergraduate UK HE TNE student population in Australasia increased by over 10% compared to 2016–17.

TABLE 20: TOP 3 HOST COUNTRIES IN AUSTRALASIA FOR UK TNE STUDENTS BY LEVEL OF STUDY 2017–18

RANK	UNDERGRADUATES			POSTGRADUATE		
	COUNTRY	NUMBER OF STUDENTS	% OF UG IN AUSTRALASIA	COUNTRY	NUMBER OF STUDENTS	% OF PG IN AUSTRALASIA
1	 Australia	210	63.5%	 Australia	1,295	81.7%
2	 New Zealand	115	34.4%	 New Zealand	215	13.7%
3	 Tonga	5	1.8%	 Fiji	30	1.8%

Note: Top three shown due to small numbers of students.

EUROPEAN UNION⁵

Unless stated otherwise, the regional trend analysis excludes the three main programme providers of distance, flexible and blended TNE.

AT A GLANCE: UK HE TNE IN THE EUROPEAN UNION IN 2017–18

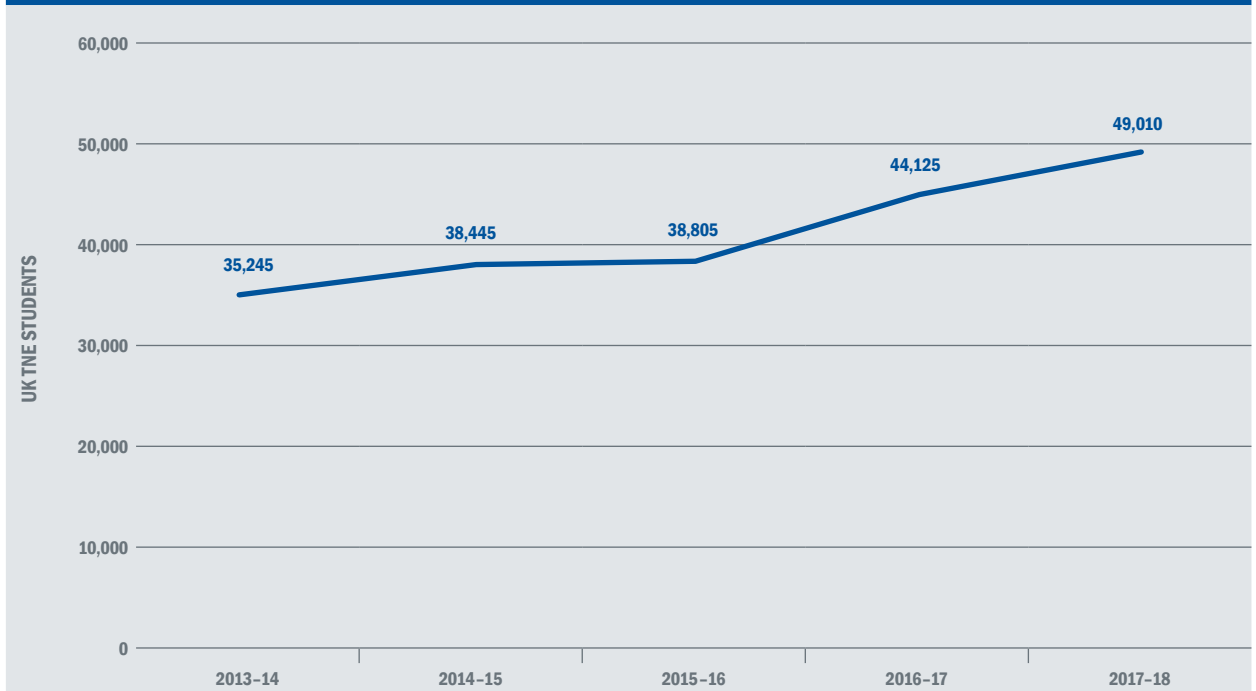
- The EU hosted the second highest number of students by region (**14.8%**).
- The number of students increased by **11.1%** between 2016–17 and 2017–18.
- TNE was delivered in **32** EU countries, territories and administrations.
- The countries with the most students were Greece, Cyprus (EU) and Germany.
- **40.5%** of students were studying for an award of the reporting provider whilst registered at an overseas partner organisation. The next most popular ways to study were by distance, flexible or distributed learning (**29.3%**); through collaborative provision (**26.7%**); at an overseas campus (**2.2%**); and via other arrangements (**1.3%**).
- **50.6%** of students were studying at undergraduate level.

⁵ Excludes the Isle of Man and the Channel Islands.

TREND ANALYSIS

Figure 18 shows the progression in student numbers between 2013-14 and 2017-18. The number of TNE students in the EU increased by 39.1% in this period. Growth has accelerated significantly since 2015-16 including an 11.1% increase from 2016-17 to 2017-18.

FIGURE 18: NUMBER OF UK TNE STUDENTS IN THE EUROPEAN UNION, 2013-14 TO 2017-18



UK TNE was delivered in

32

EU countries and territories in 2017-18.

The EU hosted

14.8%

of UK TNE students in 2017-18.

HOST COUNTRIES

Table 21 shows the 10 EU countries hosting the most students in 2017-18. The relative positions are constant with the exception of Denmark, which falls out of the top 10, and Malta and the Netherlands which gain one position each. The top three host countries account for over 50% of all provision.

TABLE 21: TOP 10 HOST COUNTRIES IN THE EU FOR UK TNE STUDENTS, 2017-18











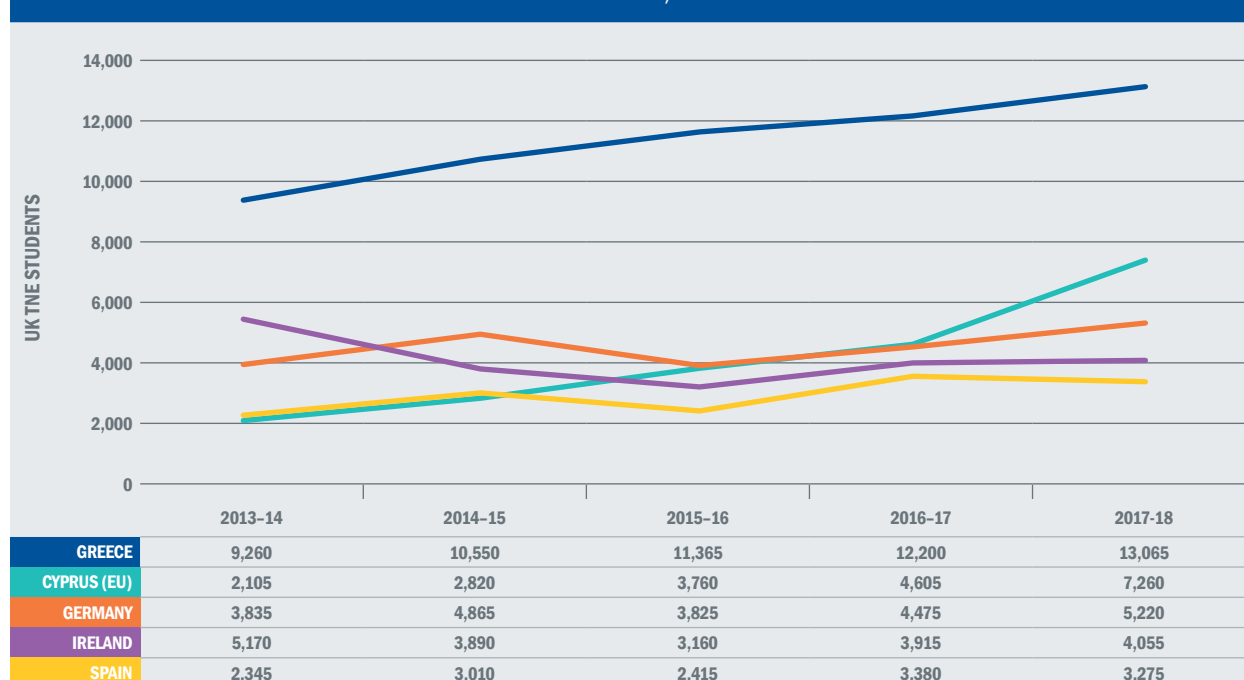
RANK	HOST COUNTRIES	NUMBER OF STUDENTS	PERCENTAGE OF STUDENTS
1	 Greece	13,065	26.7%
2	 Cyprus (EU)	7,260	14.8%
3	 Germany	5,220	10.7%
4	 Ireland	4,055	8.3%
5	 Spain	3,275	6.7%
6	 Austria	2,350	4.8%
7	 France	1,920	3.9%
8	 Italy	1,770	3.6%
9	 Malta	1,425	2.9%
10	 Netherlands	1,390	2.8%

Figure 19 shows the progression in student numbers from 2013-14 to 2017-18 in the top five host countries, which cumulatively account for over 67% of all students. There have been significant increases in student numbers in Cyprus (244%), Greece (41%) and Germany (36%). Only Ireland experienced a decrease (-21%), although numbers have grown by 21% since a low point in 2015-16. Student numbers increased by 39% in Spain, although they decreased slightly between 2016-17 and 2017-18.

FIGURE 19: TOP FIVE COUNTRIES FOR TNE STUDENTS IN THE EU, 2017-18 AND CHANGES SINCE 2013-14




TYPE OF PROVISION

In 2017–18, 38.6% of students in the EU were registered at an overseas partner organisation studying for an award of the reporting provider. This was followed by distance, flexible or distributed learning (33.1%); collaborative provision (25.7%); overseas campus (1.8%); and via other arrangements (0.8%).

Table 22 shows how many students were studying through each type of provision, how many countries hosted each provision, and what the top countries were for each type.

- Cyprus hosts the largest number of students on distance, flexible or distributed learning followed by Ireland and Germany.
- Greece has a noticeable lead in the number of students in collaborative provision and registered at a partner organisation.
- Germany and Spain also host significant numbers of students in collaborative provision and registered at a partner organisation.
- Providers reported students studying at an overseas campus in five EU countries, with a more even spread in terms of student numbers.

TABLE 22: UK TNE STUDENTS IN THE EU BY TYPE OF PROVISION, 2017-18

RANK	TYPE OF PROVISION	NUMBER OF STUDENTS	NUMBER OF COUNTRIES REPRESENTED OUT OF 32 (%)	TOP COUNTRIES (% OF PROVISION TYPE)
1	Registered at overseas partner organisation	18,910	24 (75%)	 Greece (30.3%)  Germany (12.1%)  Spain (10.7%)
2	Distance, flexible or distributed learning	16,230	32 (100%)	 Cyprus (EU) (31.3%)  Ireland (13.5%)  Germany (11.8%)
3	Collaborative provision	12,600	26 (81%)	 Greece (52.7%)  Germany (8.2%)  Spain (5.8%)
4	Overseas campus	875	5 (16%)	 Belgium (36.2%)  Malta (26.9%)  Greece (19.8%)
5	Other arrangement	395	4 (13%)	 Ireland (46.5%)  Italy (26.5%)  Czech Republic (25.0%)





















LEVEL OF STUDY

There is an almost even split between undergraduate and postgraduate TNE provision in the EU. The proportion of undergraduates decreased slightly compared to 2016–17 (49.2% compared to 51%).

Table 23 shows the distribution between undergraduate and postgraduate TNE across EU countries:

- Greece accounts for 38% of UK HE undergraduate students in the EU. There were significant increases in undergraduate students in Germany (+750 students) and to a lesser extent in France (+275 students), Italy (+120 students) and Ireland (+100 students).
- At postgraduate level, over 38% of all students are hosted in Cyprus and Greece, with increases in student numbers of 2,630 and 175 respectively compared to 2016–17. Ireland, Germany and Austria also have significant numbers.
- Cyprus has become the top country in the EU for UK HE TNE provision at postgraduate level with an 88.5% increase in student numbers between 2016–17 and 2017–18.

TABLE 23: TOP 10 HOST COUNTRIES IN THE EUROPEAN UNION FOR UK TNE STUDENTS BY LEVEL OF STUDY, 2017–18

RANK	UNDERGRADUATES			POSTGRADUATE		
	COUNTRY	NUMBER OF STUDENTS	% OF UG IN THE EU	COUNTRY	NUMBER OF STUDENTS	% OF PG IN THE EU
1	 Greece	9,175	38.0%	 Cyprus (EU)	5,600	22.5%
2	 Germany	2,920	12.1%	 Greece	3,890	15.6%
3	 Spain	2,780	11.5%	 Ireland	2,405	9.7%
4	 Cyprus (EU)	1,660	6.9%	 Germany	2,300	9.2%
5	 Ireland	1,650	6.8%	 Austria	2,040	8.2%
6	 Italy	1,065	4.4%	 Malta	970	3.9%
7	 France	980	4.1%	 France	940	3.8%
8	 Hungary	770	3.2%	 Netherlands	915	3.7%
9	 Netherlands	475	2.0%	 Denmark	865	3.5%
10	 Malta	455	1.9%	 Italy	705	2.8%

Case study

DE MONTFORT UNIVERSITY – DENMARK

Niels Brock Copenhagen Business College based in Denmark is one of the longest standing collaborative partners of De Montfort University (DMU). The partnership was established in 1994, initially focusing on study abroad opportunities. The top-up BA (Hons) in Business Administration was introduced in 1999 and the partnership soon expanded to include delivery of the Graduate Certificate in Business, providing a pathway to the International Business and Management MSc.

The partnership and the programmes delivered regularly obtain favourable comments from internal and external collaborative reviews; in 2017 there was commendation for the relationship and its ‘committed approach and reciprocal knowledge sharing that has provided Copenhagen staff and students with a voice at DMU...’. The role of the Link Tutor remains key to providing operational and quality oversight and the Faculty have proactively engaged with Niels Brock as part of their journey to secure AACSB accreditation.

The programmes have traditionally attracted 300 new enrolments per year with above average attainment and success figures. Both institutions have engaged proactively to ensure ongoing development and success of the partnership. This has involved the formulation of a new joint marketing strategy and the recent launch of a new programme, a new three-year Business Studies BSc programme, approved for delivery from September 2019 on which 130 students have already been accepted.

EUROPE (NON-EU)

Unless stated otherwise, the regional trend analysis excludes the three main programme providers of distance, flexible and blended TNE.

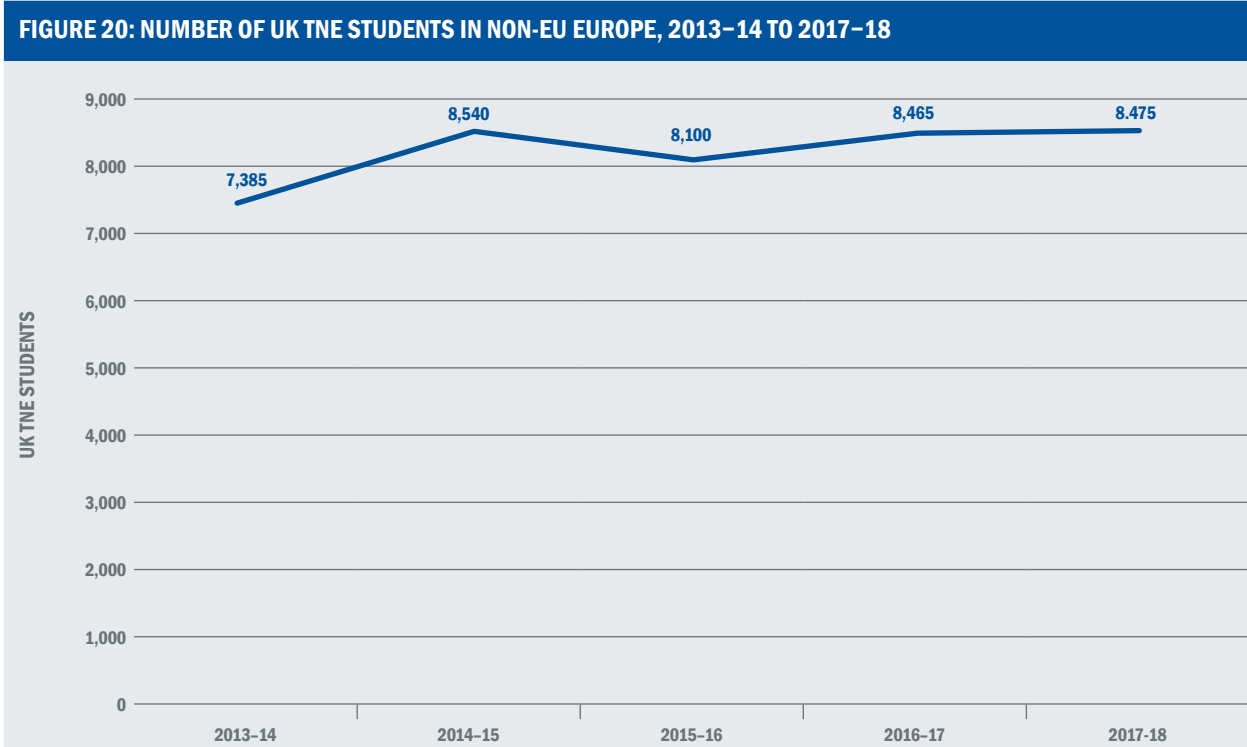


AT A GLANCE: UK HE TNE IN EUROPE (NON-EU) IN 2017–18

- Non-EU European countries hosted the third lowest number of students by region (**2.6%**).
- The number of students increased by **0.1%** between 2016–17 and 2017–18.
- TNE was delivered in **22** non-EU European countries.
- Provision is dominated by Switzerland, which hosts the most students in every type of provision, followed by Russia and Norway.
- **32.5%** of students studied through distance, flexible or distributed learning. This is followed by study through collaborative provision (**32.4%**); via other arrangements (**18.5%**); registered at an overseas partner organisation (**15.9%**); and at an overseas campus (**0.8%**).
- **64.1%** of students were studying at postgraduate level.

TREND ANALYSIS

Figure 20 shows the progression in UK TNE student numbers in non-EU European countries. There were 8,475 students in 2017-18, an increase of 15.6% from 2013-14. Student numbers have remained mostly flat from 2014-15 onwards.



UK TNE was delivered in

22

Non-EU European countries and territories in 2017-18.

The Non-EU hosted

2.6%

of UK TNE students in 2017-18.

HOST COUNTRIES

As shown in **Table 24**, UK HE TNE in non-EU European countries remains heavily concentrated in Switzerland, followed by Russia. Turkey became the fifth largest host of TNE students in 2017-18 from being sixth in 2016-17, while Bosnia and Herzegovina fell to the sixth position.

TABLE 24: TOP 10 HOST COUNTRIES IN THE NON-EU EUROPE FOR UK TNE STUDENTS, 2017-18











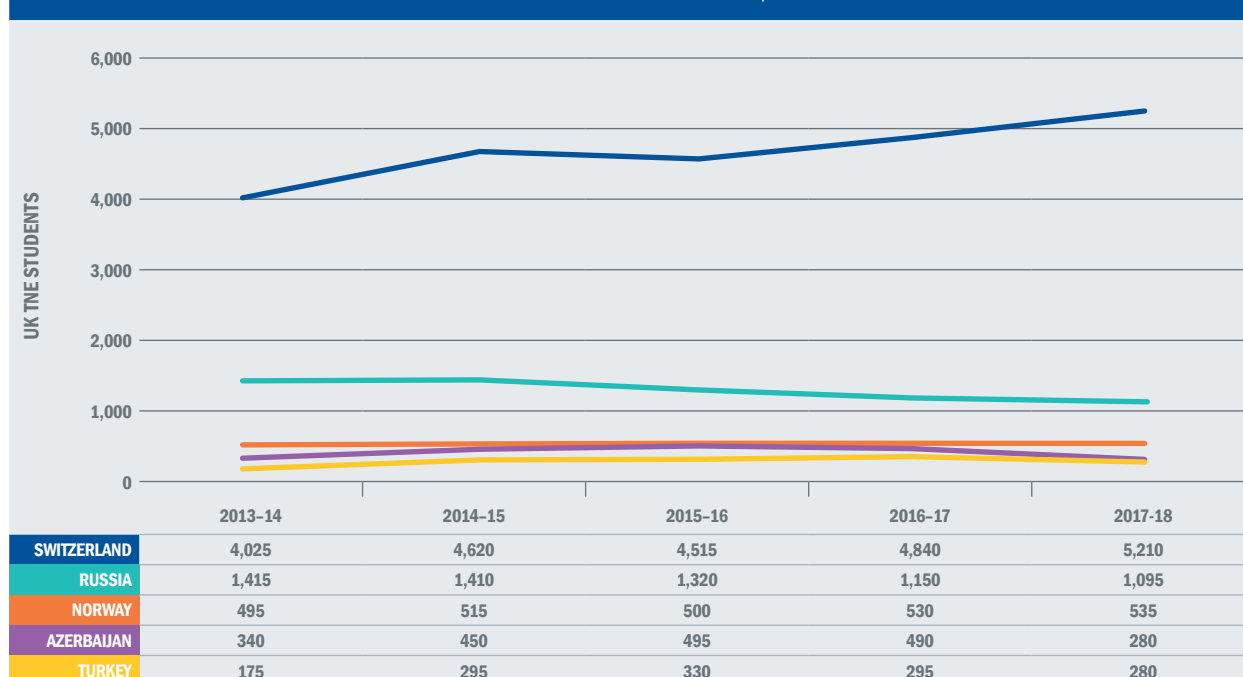
RANK	HOST COUNTRIES	NUMBER OF STUDENTS	PERCENTAGE OF STUDENTS
1	 Switzerland	5,210	61.5%
2	 Russia	1,095	12.9%
3	 Norway	535	6.3%
4	 Azerbaijan	280	3.3%
5	 Turkey	280	3.3%
6	 Bosnia and Herzegovina	275	3.3%
7	 Ukraine	220	2.6%
8	 Kosovo	155	1.8%
9	 Serbia	90	1.1%
10	 Cyprus (non-EU)	70	0.8%

Figure 21 shows the progression in student numbers from 2013-14 to 2017-18 in the top five host countries, which cumulatively account for over 87% of all students. There have been increases in student numbers in Switzerland (29%) and Turkey (60%) and decreases in Russia (-22%) and Azerbaijan (-17%). Student numbers remained fairly constant in Norway.

FIGURE 21: TOP FIVE COUNTRIES FOR TNE STUDENTS IN NON-EU EUROPE, 2017-18 AND CHANGES SINCE 2013-14




TYPE OF PROVISION

In 2017–18, in non-EU European countries, very similar proportions of students were studying through distance, flexible or distributed learning (32.5%) and through collaborative provision (32.4%). The next most popular categories were studying through other arrangements (18.5%) and registered at overseas partner organisations (15.9%), while only 0.8% studied at overseas campuses of UK higher education providers.

Table 25 shows how many students were studying through each type of provision, how many countries hosted each provision, and what the top countries were for each type. Switzerland has the highest number of students in all categories. All non-EU European countries host some students in distance, flexible or distributed learning while overseas campuses and other arrangements are concentrated in only two countries each.

TABLE 25: TOP 10 HOST COUNTRIES IN THE NON-EU EUROPE FOR UK TNE STUDENTS, 2017–18




RANK	TYPE OF PROVISION	NUMBER OF STUDENTS	NUMBER OF COUNTRIES REPRESENTED OUT OF 22 (%)	TOP COUNTRIES (% OF PROVISION TYPE)
1	Distance, flexible or distributed learning	2,750	22 (100%)	 Switzerland (48.1%)  Norway (12.4%)  Russia (10.0%)
2	Collaborative provision	2,745	14 (64%)	 Switzerland (65.7%)  Russia (24.6%)  Kosovo (4.5%)
3	Other arrangement	1,570	2 (9%)	 Switzerland (94.1%)  Russia (5.9%)
4	Registered at overseas partner organisation	1,345	9 (41%)	 Switzerland (65.7%)  Bosnia and Herzegovina (14.8%)  Norway (12.9%)
5	Overseas campus	65	2 (9%)	 Switzerland (92.3%)  Turkey (7.7%)

LEVEL OF STUDY

The majority of students in non-EU Europe were on postgraduate courses (64.1%). This is 29 percentage points higher than the average for UK TNE. The proportion of TNE students on postgraduate programmes increased 0.9% compared to 2016-17. As shown in **Table 26**, the distribution between undergraduate and postgraduate TNE study varied across the region. For example:

- Switzerland dominated both undergraduate and postgraduate student numbers and increased at both levels of provision, exceeding 60% of the share of student numbers in the region.
- Russia was the second biggest host at both undergraduate and postgraduate level. It had similar student numbers at each level (560 and 520), but they made up different shares of student numbers in the region (19% and 9% respectively).
- Aside from the two countries above, only Azerbaijan and Bosnia and Herzegovina had more than 100 students at undergraduate level, while at postgraduate level, Norway, Turkey, Ukraine, Azerbaijan, Bosnia and Herzegovina and Kosovo had more than 100 students.

TABLE 26: TOP 10 HOST COUNTRIES IN NON-EU EUROPE FOR UK TNE STUDENTS BY LEVEL OF STUDY, 2017-18

RANK	UNDERGRADUATES			POSTGRADUATE		
	COUNTRY	NUMBER OF STUDENTS	% OF UG IN NON EU EUROPE	COUNTRY	NUMBER OF STUDENTS	% OF PG IN NON EU EUROPE
1	 Switzerland	1,940	63.9%	 Switzerland	3,265	60.1%
2	 Russia	580	19.1%	 Russia	520	9.5%
3	 Bosnia and Herzegovina	165	5.4%	 Norway	465	8.5%
4	 Azerbaijan	140	4.5%	 Turkey	245	4.5%
5	 Norway	70	2.3%	 Ukraine	195	3.6%
6	 Kosovo	45	1.5%	 Azerbaijan	145	2.6%
7	 Turkey	35	1.2%	 Bosnia and Herzegovina	110	2.1%
8	 Ukraine	30	1.0%	 Kosovo	110	2.0%
9	 Iceland	15	0.4%	 Serbia	85	1.5%
10	 Serbia	5	0.2%	 Cyprus (non-EU)	65	1.2%

Case study

UNIVERSITY OF READING – RUSSIA

The University of Reading and MGIMO University have worked together for a number of years with Double Masters programmes in law, international relations, and business, as well as study visits and staff exchanges.

In 2017 the relationship was expanded to include the first UK-Russia double undergraduate degrees that involve study in both countries. The two institutions have co-designed a series of double degree programmes in Politics and International Relations, Investment Banking and Finance, and International Business and Finance, consisting of two years of study at MGIMO before progressing to complete the final two years at Reading. A unique element of the programme is the additional language requirement; students will study in English and Russian with at least one additional language alongside their study.

MGIMO and Reading have also launched a double PhD programme in Business, with two students already studying across both sites.

After years of working together, the expansion of programmes has come about as a result of increased student demand for international programmes in Russia, and both institutions looking to create interesting and unique opportunities for their students. Future plans include further student exchange and joint student projects, as well as summer and short programmes for students not able to study abroad for long periods of time.

THE MIDDLE EAST

Unless stated otherwise, the regional trend analysis excludes the three main programme providers of distance, flexible and blended TNE.

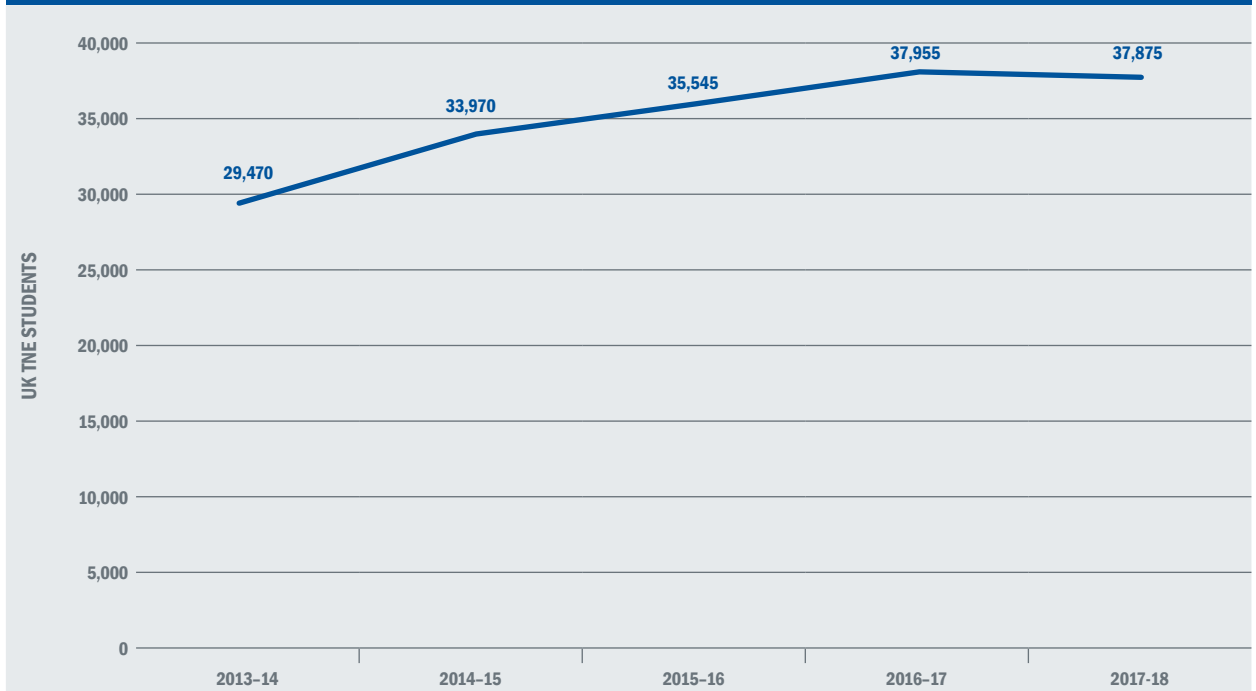
AT A GLANCE: UK HE TNE IN THE MIDDLE EAST IN 2017–18

- The Middle East hosted the fourth highest number of students by region (**11.4%**).
- The number of students decreased by **0.2%** between 2016–17 and 2017–18.
- UK TNE was delivered in **14** countries.
- The countries with the most students were Oman, the United Arab Emirates and Saudi Arabia.
- Iraq enters the list of the top 10 countries with the largest number of students.
- The Middle East has the largest proportion of students registered at overseas campuses (**19.8%**).
- **61%** of students were studying at undergraduate level.

TREND ANALYSIS

The Middle East hosted 65,095 students in 2017-18. **Figure 22** shows that between 2013-14 and 2017-18 the number of students increased by 28.5% overall, with a slight decrease of 0.2% between 2016-17 and 2017-18.

FIGURE 22: NUMBER OF UK TNE STUDENTS IN THE MIDDLE EAST, 2013-14 TO 2017-18



UK TNE was delivered in

14

Middle Eastern countries and territories in 2017-18.

The Middle East hosted

11.4%

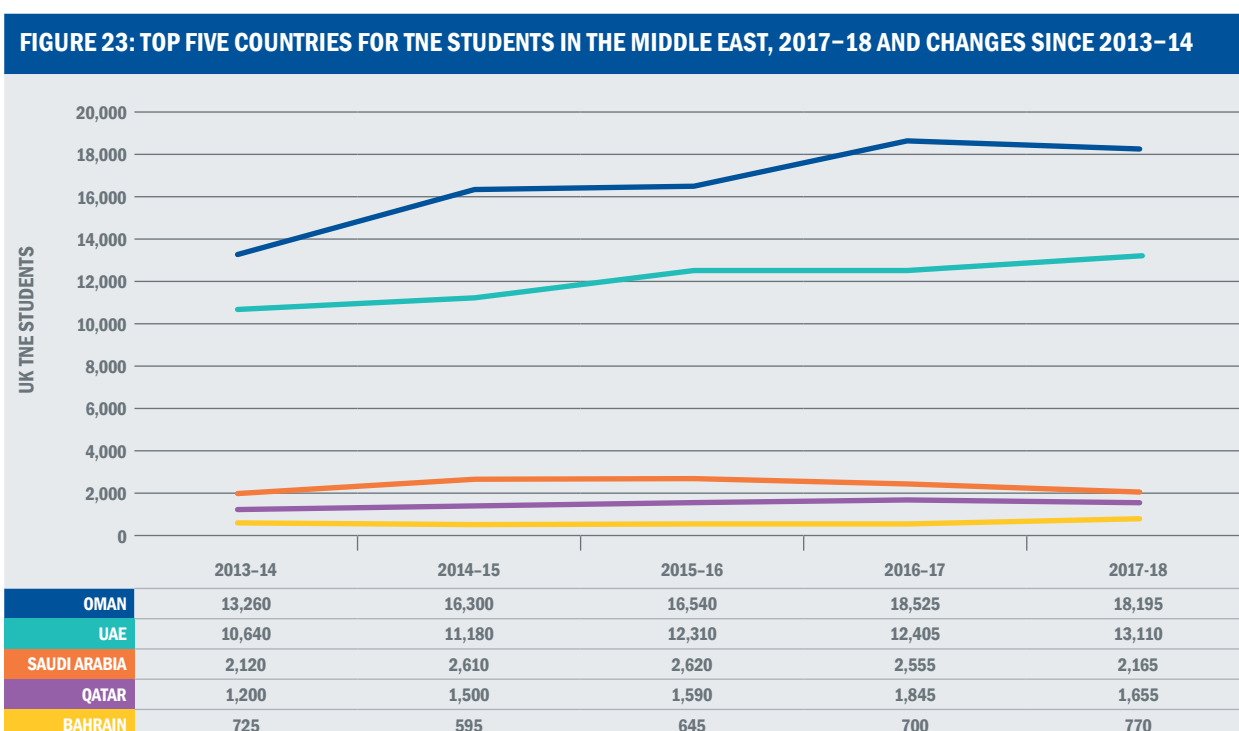
of UK TNE students in 2017-18.

HOST COUNTRIES

Table 27 shows the 10 countries in the Middle East hosting the most students in 2017-18. Provision is heavily concentrated in Oman and the UAE. Student numbers increased in the UAE (+705 students), Jordan (+80 students), Bahrain (+70 students) and Israel (+5 students). Iraq entered the top 10 in 2017-18, with 110 students, while Iran fell off the list.

TABLE 27: TOP 10 HOST COUNTRIES IN THE MIDDLE EAST FOR UK TNE STUDENTS, 2017-18			
RANK	HOST COUNTRIES	NUMBER OF STUDENTS	PERCENTAGE OF STUDENTS
1	 Oman	18,195	48.0%
2	 United Arab Emirates	13,110	34.6%
3	 Saudi Arabia	2,165	5.7%
4	 Qatar	1,655	4.4%
5	 Bahrain	770	2.0%
6	 Jordan	560	1.5%
7	 Kuwait	490	1.3%
8	 Lebanon	440	1.2%
9	 Iraq	120	0.3%
10	 Israel	110	0.3%

Figure 23 shows the progression in student numbers from 2013-14 to 2017-18 in the top five host countries, which cumulatively account for nearly 95% of all students. There were significant increases in student numbers in Qatar (38%), Oman (37%) and the UAE (23%). The pace of growth slowed down or reversed between 2016-17 and 2017-18 in all countries except the UAE.
















TYPE OF PROVISION

In 2017-18, 42.9% of students in the Middle East studied through collaborative provision. This was followed by distance, flexible or distributed learning (20.7%); studying at an overseas campus (19.8%); registered at an overseas partner organisation (16.1%); and via other arrangements (0.5%). The Middle East hosts the largest proportion of students studying at an overseas campus of all world regions.

Table 28 shows how many students studied through each type of UK TNE provision, how many countries hosted each provision, and what the top countries were for each type. Oman hosts the largest student numbers in collaborative provision and registered at an overseas partner organisation while the UAE leads in distance, flexible or distributed learning and in students registered at an overseas campus. The number of countries hosting students registered at an overseas partner organisation has fallen from 14 (100% of countries in the region) in 2016-17 to 7 (50%) in 2017-18.

TABLE 28: UK TNE STUDENTS IN THE MIDDLE EAST BY TYPE OF PROVISION, 2017-18





















RANK	TYPE OF PROVISION	NUMBER OF STUDENTS	NUMBER OF COUNTRIES REPRESENTED OUT OF 14 (%)	TOP COUNTRIES (% OF PROVISION TYPE)
1	Collaborative provision	16,250	13 (93%)	 Oman (83.0%)  United Arab Emirates (10.3%)  Qatar (2.0%)
2	Distance, flexible or distributed learning	7,830	14 (100%)	 United Arab Emirates (39.4%)  Saudi Arabia (20.9%)  Qatar (12.5%)
3	Overseas campus	7,485	5 (36%)	 United Arab Emirates (93.0%)  Qatar (3.1%)  Bahrain (2.2%)
4	Registered at overseas partner organisation	6,105	7 (50%)	 Oman (67.4%)  United Arab Emirates (22.7%)  Saudi Arabia (4.2%)
5	Other arrangement	205	1 (7%)	 Bahrain (100%)

LEVEL OF STUDY

The proportion of undergraduate TNE provision in the Middle East in 2017–18 increased by 1% compared to 2016–17, reaching 61%. The Middle East hosts more students at postgraduate level (39%) than the average for UK TNE (35%).

Table 29 shows that distribution between undergraduate and postgraduate TNE study varied across the Middle East. The UAE hosts the largest number of postgraduate students and second largest of undergraduate students, after Oman. Qatar, Saudi Arabia and Bahrain complete the top five in both undergraduate and postgraduate student numbers.

TABLE 29: TOP 10 HOST COUNTRIES IN THE MIDDLE EAST FOR UK TNE STUDENTS BY LEVEL OF STUDY, 2017-18

RANK	UNDERGRADUATES			POSTGRADUATE		
	COUNTRY	NUMBER OF STUDENTS	% OF UG IN THE MIDDLE EAST	COUNTRY	NUMBER OF STUDENTS	% OF PG IN THE MIDDLE EAST
1	 Oman	15,595	67.7%	 United Arab Emirates	7,140	48.1%
2	 United Arab Emirates	5,970	25.9%	 Oman	2,600	17.5%
3	 Qatar	455	2.0%	 Saudi Arabia	1,770	11.9%
4	 Saudi Arabia	395	1.7%	 Qatar	1,200	8.1%
5	 Bahrain	275	1.2%	 Bahrain	495	3.3%
6	 Jordan	180	0.8%	 Kuwait	445	3.0%
7	 Lebanon	75	0.3%	 Jordan	380	2.6%
8	 Kuwait	45	0.2%	 Lebanon	365	2.5%
9	 Israel	20	0.1%	 Iraq	120	0.8%
10	 Iran	15	0.1%	 Israel	90	0.6%

Case study

UNIVERSITY OF ABERDEEN – QATAR

Operated in close partnership with the Al-Faleh Group for Educational and Academic Services (AFG), the University of Aberdeen's Qatar Campus opened in 2017 and has expanded initial provision from undergraduate business degrees only to postgraduate MBA and MSc international business degrees. Postgraduate qualifications in education and law will be added soon. There were over 350 full-time undergraduate and 80 full and part-time postgraduates in 2018/19, a mixture of Qatari nationals and expatriate learners. The campus is staffed by a mixture of locally based AFG employees (whose selection is approved by Aberdeen), and Aberdeen-based 'flying faculty'.

A 60,000 sqm plot has been secured for further expansion and a purpose-built campus with a capacity of around 3,000 in the first instance will open in September 2022. The strengths of the university, along with market research and the Qatari Government's National Vision for 2030, will inform the range of programmes offered and will significantly extend the present scope of learning and research opportunities.

Potentially impacting the achievement of multiple sustainable development goals (SDGs), the campus is a unique exemplar of TNE in Qatar, bringing the provision of a world-leading, established university to the region and allowing students access to high quality European-style education without leaving the country. As well as contributing to intercultural understanding, it plays a clear role in meeting Qatari economic development priorities through upskilling the workforce.

NORTH AMERICA

Unless stated otherwise, the regional trend analysis excludes the three main programme providers of distance, flexible and blended TNE.

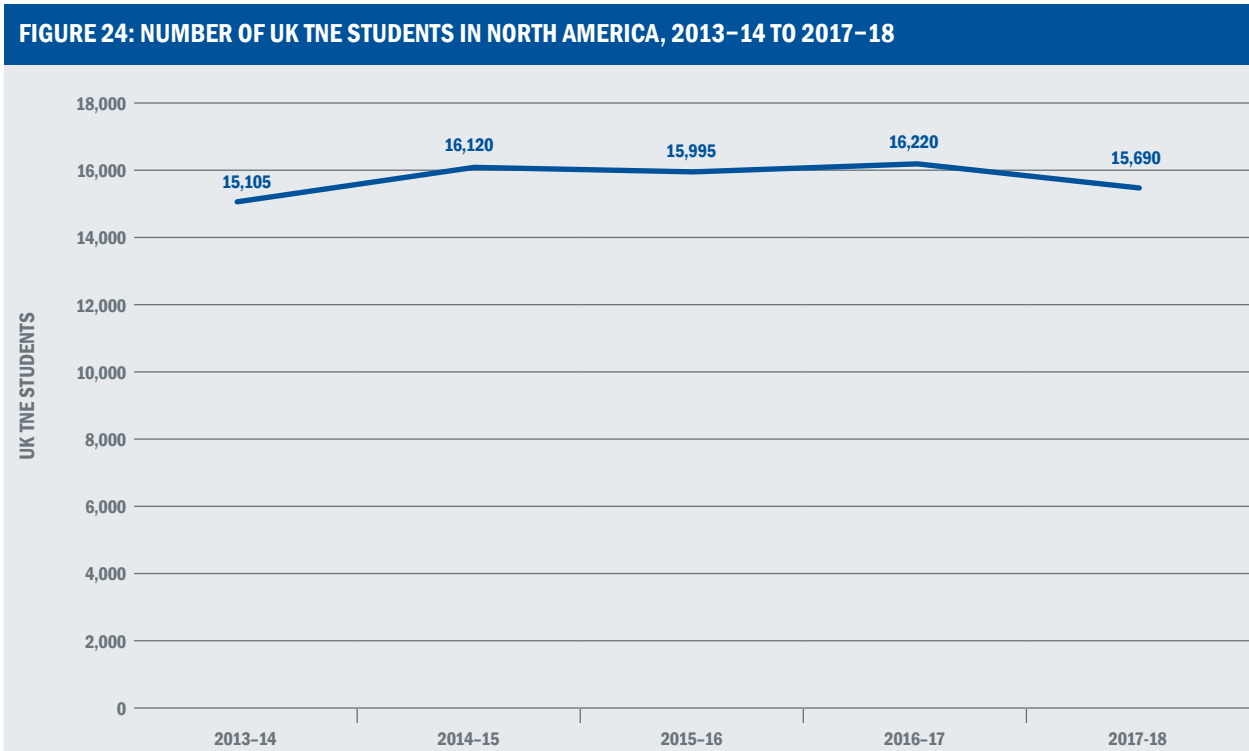


AT A GLANCE: UK HE TNE IN NORTH AMERICA IN 2017–18

- North America hosted the fifth highest number of TNE students by region (**4.7%**).
- The number of students decreased by **3.3%** between 2016–17 and 2017–18.
- TNE was delivered in **35** countries.
- The United States became the country with the largest number of TNE students, above Trinidad and Tobago and Canada.
- Mexico and the Bahamas increased their relative position in the top 10 countries with the most students in the region.
- **66.1%** of students studied through distance, flexible or distributed learning. This was followed by collaborative provision (**22.7%**); registered at an overseas partner organisation (**11.1%**); and study at an overseas campus (**0.1%**).
- **77.3%** of students were studying at postgraduate level.

TREND ANALYSIS

Figure 24 shows that North America hosted 15,690 students in 2017-18. Between 2013-14 and 2017-18 the number of students increased by 3.9%, with a decrease of 3.3% between 2016-17 and 2017-18.



UK TNE was delivered in

35

North American countries and territories in 2017-18.

North America hosted

4.7%

of UK TNE students in 2017-18.

HOST COUNTRIES

Table 30 shows the 10 countries in North America that hosted the most students in 2017–18. 76.2% of provision is concentrated in three countries (the United States, Trinidad and Tobago and Canada). The United States surpassed Trinidad and Tobago as the country with the largest number of students in 2017–18 and Mexico also experienced significant growth (13.6%)

TABLE 27: TOP 10 HOST COUNTRIES IN NORTH AMERICA FOR UK TNE STUDENTS, 2017–18











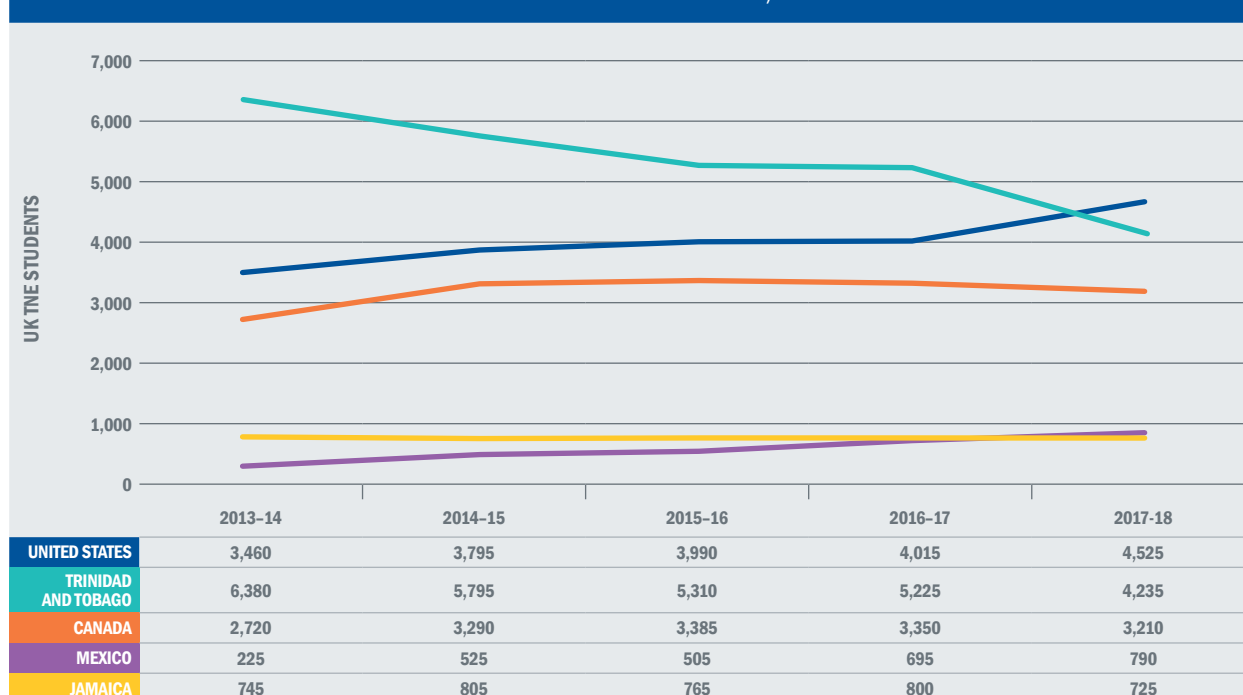
RANK	HOST COUNTRIES	NUMBER OF STUDENTS	PERCENTAGE OF STUDENTS
1	 United States	4,525	28.8%
2	 Trinidad and Tobago	4,235	27.0%
3	 Canada	3,210	20.4%
4	 Mexico	790	5.0%
5	 Jamaica	725	4.6%
6	 Barbados	505	3.2%
7	 The Bahamas	270	1.7%
8	 Cayman Islands	265	1.7%
9	 St Lucia	235	1.5%
10	 Antigua and Barbuda	135	0.9%

Figure 25 shows the progression in student numbers from 2013–14 to 2017–18 in the top five host countries, which cumulatively account for nearly 86% of all students. There have been significant increases in student numbers in the United States (31%) and Mexico (340%) and a steep decline in Trinidad and Tobago (-33%).

FIGURE 25: TOP FIVE COUNTRIES FOR TNE STUDENTS IN NORTH AMERICA, 2017–18 AND CHANGES SINCE 2013–14













TYPE OF PROVISION

In 2017–18, 66.1% of students in North America studied through distance, flexible or distributed learning, an increase of 4.4% compared to 2016–17. This was followed by collaborative provision (22.7%); registered at an overseas partner organisation (11.1%); and at an overseas campus (0.1%).

Table 31 shows how many students were studying through each type of TNE provision, how many countries hosted each provision, and what the top countries were for each type. Trinidad and Tobago had the most students in collaborative provision and registered at an overseas partner organisation, while most students studying through distance, flexible or distributed learning were located in the United States and Canada.

TABLE 31: UK TNE STUDENTS IN NORTH AMERICA BY TYPE OF PROVISION, 2017–18





















RANK	TYPE OF PROVISION	NUMBER OF STUDENTS	NUMBER OF COUNTRIES REPRESENTED OUT OF 35 (%)	TOP COUNTRIES (% OF PROVISION TYPE)
1	Distance, flexible or distributed learning	10,365	35 (100%)	 United States (36.1%)  Canada (26.8%)  Trinidad and Tobago (10.9%)
2	Collaborative provision	3,565	25 (71%)	 Trinidad and Tobago (59.2%)  United States (21.5%)  Canada (11.8%)
3	Registered at overseas partner organisation	1,745	7 (20%)	 Trinidad and Tobago (57.0%)  Mexico (30.5%)  Jamaica (11.5%)
4	Overseas campus	10	1 (3%)	 United States (67.4%)

LEVEL OF STUDY

The vast majority of students in North America study at postgraduate level (77.3%), a proportion which has increased by 1.2% between 2016–17 and 2017–18. The distribution between undergraduate and postgraduate UK TNE study varies across North American countries, as shown in **Table 32**

- Trinidad and Tobago had 48% of the undergraduate market share with 1,705 undergraduate students, a decrease from 56.2% in 2016–17 when they hosted 2,180 undergraduate students.
- The United States and Mexico increased their share of undergraduate students by 3.3% to 700 students and by 4.8% to 495 students respectively.
- The United States also increased its market share at postgraduate level from 27.4% with 3,380 students in 2016–17 to 31.5% with 3,820 students in 2017–18, while Trinidad and Tobago's market share decreased to 20.8% with 2,530 students from 24.7% with 3,045 students during the same period.

TABLE 32: TOP 10 HOST COUNTRIES IN NORTH AMERICA FOR UK TNE STUDENTS BY LEVEL OF STUDY, 2017-18

RANK	UNDERGRADUATES			POSTGRADUATE		
	COUNTRY	NUMBER OF STUDENTS	% OF UG IN NORTH AMERICA	COUNTRY	NUMBER OF STUDENTS	% OF PG IN NORTH AMERICA
1	 Trinidad and Tobago	1,705	48.0%	 United States	3,820	31.5%
2	 United States	700	19.7%	 Canada	3,005	24.8%
3	 Mexico	495	14.0%	 Trinidad and Tobago	2,530	20.8%
4	 Canada	200	5.7%	 Jamaica	665	5.5%
5	 Cayman Islands	90	2.5%	 Barbados	450	3.7%
6	 Jamaica	60	1.7%	 Mexico	295	2.4%
7	 The Bahamas	60	1.7%	 The Bahamas	210	1.7%
8	 Barbados	55	1.6%	 St Lucia	185	1.5%
9	 St Lucia	50	1.4%	 Cayman Islands	175	1.4%
10	 St Vincent and the Grenadines	20	0.6%	 Antigua and Barbuda	115	1.0%

Case study

UNIVERSITY OF EDINBURGH – USA & CANADA

The University of Edinburgh welcomed its first online Masters students in 2005 and now has around 3,800 students and more than 5,000 graduates. The university's portfolio of online graduate-level programmes, now one of the largest in the UK, is designed with working professionals in mind. The flexibility of the degree programme timetable enables students to take between two and six years to complete a Masters, ideal for those who wish to advance their studies part time.

The University of Edinburgh's online provision in North America has doubled over the last four years as a result of new programmes in the humanities, social sciences and medical and veterinary sciences. Along with course choice and design, student recruitment is also driven by the university's long heritage dating back to 1583, its reputation for excellence, and lower tuition fees compared to online degrees from local providers in North America.

One North American student explains why he chose the University of Edinburgh: 'Firstly, it's one of the top universities in the world, particularly for the humanities.... I was attracted by the flexibility of the study, the rigour of the coursework and the friendliness of the faculty and staff.'

Through its highly participative learning environment that supports its global community of students with access to a comprehensive suite of services to support their studies, the University of Edinburgh is positioning itself as a world leader in digital education.

SOUTH AMERICA

Unless stated otherwise, the regional trend analysis excludes the three main programme providers of distance, flexible and blended TNE.



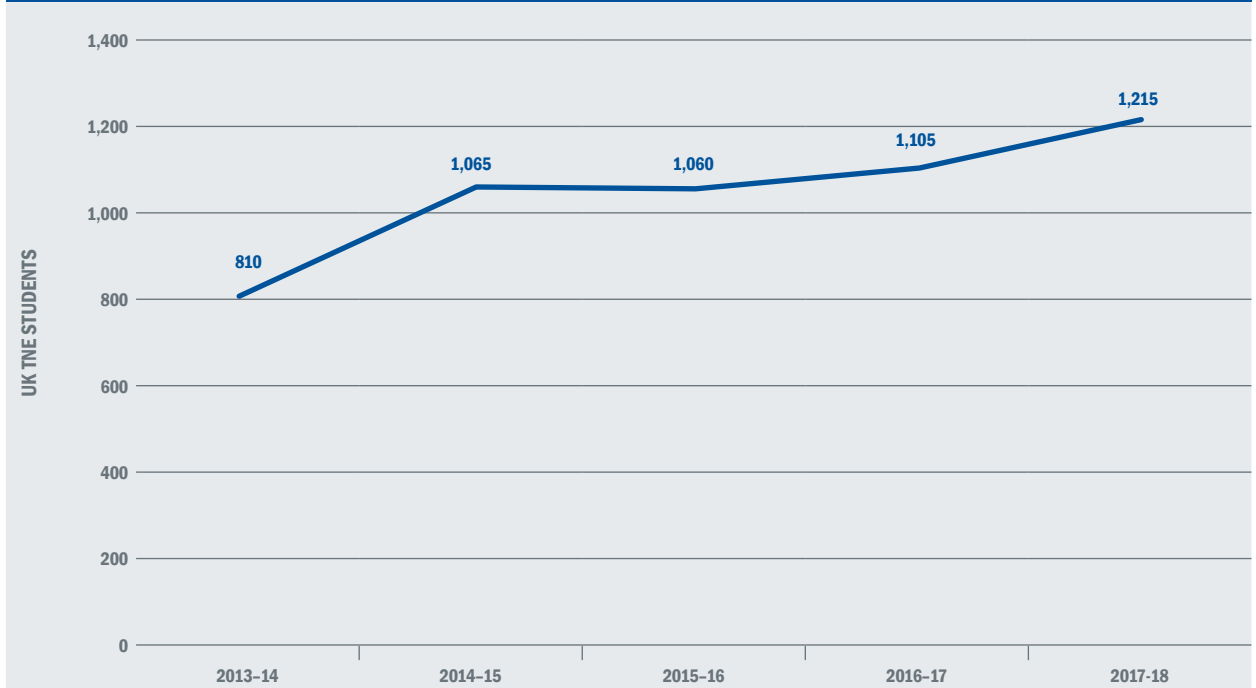
AT A GLANCE: UK HE TNE IN SOUTH AMERICA IN 2017-18

- South America hosted the lowest number of students of all regions (**1,215**).
- Student numbers grew by **49.9%** between 2013-14 and 2017-18, albeit from a low basis.
- TNE was delivered in **13** countries.
- The **10** countries with the most TNE students were identical to those in 2016-17.
- Guyana (**206%**) and Peru (**185%**) experienced the largest growth between 2013-14 and 2017-18.
- **89.9%** of students studied through distance, flexible or distributed learning, **6.8%** less than in 2016-17, followed by **13.6%** through collaborative provision, up from **7.7%** in 2016-17.
- **87.8%** of students were studying at postgraduate level.

TREND ANALYSIS

As shown in **Figure 26**, overall student numbers in South America increased by nearly 50% between 2013-14 and 2017-18. The pace of growth increased in 2017-18 as compared to 2016-17, with an increase of 9.7% against 4.0% one year before.

FIGURE 26: NUMBER OF UK TNE STUDENTS IN SOUTH AMERICA, 2013-14 TO 2017-18



UK TNE was delivered in

13

South American countries and territories in 2017-18.

South America hosted

0.4%

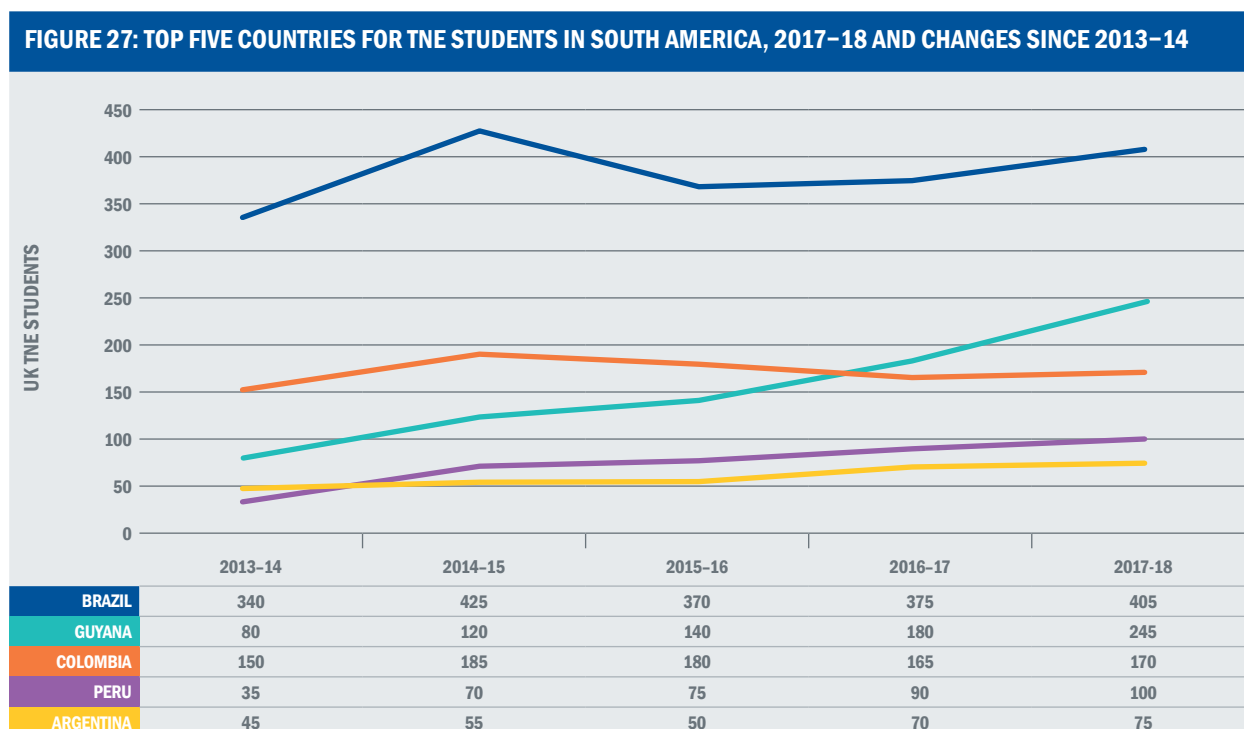
of UK TNE students in 2017-18.

HOST COUNTRIES

Table 33 shows the 10 countries in South America hosting the most students in 2017-18. All relative positions stayed the same compared to 2016-17 and six countries increased their student numbers, albeit from a low basis.

TABLE 33: TOP 10 HOST COUNTRIES IN SOUTH AMERICA FOR UK TNE STUDENTS, 2017-18			
RANK	HOST COUNTRIES	NUMBER OF STUDENTS	PERCENTAGE OF STUDENTS
1	 Brazil	405	33.6%
2	 Guyana	245	20.3%
3	 Colombia	170	13.9%
4	 Peru	100	8.4%
5	 Argentina	75	6.0%
6	 Chile	60	5.1%
7	 Ecuador	60	4.8%
8	 Uruguay	45	3.5%
9	 Venezuela	25	2.0%
10	 Bolivia	10	0.8%

Figure 27 shows the progression in student numbers from 2013-14 to 2017-18 in the top five host countries, which cumulatively account for over 82% of all students in South America. From a relatively low basis, the largest increases in student numbers took place in Guyana (206%) and Peru (185%).











TYPE OF PROVISION

In 2017–18, 83.1% of students in South America studied through distance, flexible or distributed learning, down from 89.9% in 2016–17. This was followed by collaborative provision (13.6%, up from 7.7%); and registered at an overseas partner organisation (3.3%).

Table 34 shows how many students were studying through each type of UK HE TNE provision, how many countries hosted each provision, and what the top countries were for each provision. Guyana has reached the first position in collaborative provision from being third in 2016–17.





















TABLE 34: UK TNE STUDENTS IN SOUTH AMERICA BY TYPE OF PROVISION, 2017–18

RANK	TYPE OF PROVISION	NUMBER OF STUDENTS	NUMBER OF COUNTRIES REPRESENTED OUT OF 13 (%)	TOP COUNTRIES (% OF PROVISION TYPE)
1	Distance, flexible or distributed learning	1,010	13 (100%)	 Brazil (32.4%)  Guyana (18.7%)  Colombia (15.7%)
2	Collaborative provision	165	9 (69%)	 Guyana (35.2%)  Peru (27.3%)  Brazil (26.1%)
3	Registered at overseas partner organisation	40	2 (15%)	 Brazil (92.5%)  Argentina (7.5%)

LEVEL OF STUDY

South America was the region hosting the largest proportion of postgraduate students in 2017–18 (87.8%), but the number of undergraduate UK HE TNE students as a percentage of the total almost doubled between 2016–17 and 2017–18, reaching 12.2%.

Table 35 shows the distribution between undergraduate and postgraduate UK HE TNE study across South American countries. Undergraduate students more than trebled in Brazil between 2016–17 and 2017–18 while Guyana increased its share of postgraduate student numbers from 16.8% to 22.6% in the same period.

TABLE 35: TOP 10 HOST COUNTRIES IN SOUTH AMERICA FOR UK TNE STUDENTS BY LEVEL OF STUDY, 2017–18						
RANK	UNDERGRADUATES			POSTGRADUATE		
	COUNTRY	NUMBER OF STUDENTS	% OF UG IN SOUTH AMERICA	COUNTRY	NUMBER OF STUDENTS	% OF PG IN SOUTH AMERICA
1	 Brazil	95	63.5%	 Brazil	315	29.4%
2	 Argentina	10	8.1%	 Guyana	240	22.6%
3	 Chile	10	7.4%	 Colombia	160	15.0%
4	 Colombia	10	6.1%	 Peru	95	9.1%
5	 Guyana	5	3.4%	 Argentina	60	5.7%
6	 Peru	5	3.4%	 Ecuador	55	5.1%
7	 Ecuador	5	2.7%	 Chile	50	4.8%
8	 Uruguay	5	2.7%	 Uruguay	40	3.7%
9	 Falkland Islands	–	1.4%	 Venezuela	25	2.2%
10	 Paraguay	–	0.7%	 Suriname	10	1.0%

5. CONCLUSION

Relative to its size, the UK has one of the largest and most diverse higher education transnational education systems in the world. Behind the headline figures lies a shifting educational landscape shaped by complex local and global drivers.

TNE, by its very nature, is affected by policy at both strategic and operational level. The data analysed in this report refers to a period when the UK had entered the process for leaving the European Union, the Office for Students was created to oversee the implementation of the higher education regulatory framework in England, and universities faced financial uncertainty from the commissioning of the Augar review. Demographic, political and economic factors have contributed to an environment that presents risks, but also significant opportunities for UK universities, as they have over time developed unparalleled expertise in transnational education.

In this context, the cross-government International Education Strategy⁶ launched in March 2019 identified TNE as ‘a key area of growth’ in UK education exports. The strategy acknowledges the role of TNE not only in economic terms, but also in facilitating the exchange of people, knowledge and ideas and in building soft power. This interest is mirrored in the devolved administrations, framed within their own distinctive policy approaches, as shown through the ‘Global Wales’ and ‘Connected Scotland’ initiatives. Government support comes as UK universities show an unwavering commitment to internationalisation and significant capacity for adaptation to domestic and global challenges.

TNE growth rates across types of provision and in host regions reflect this evolving picture. For the first time, the HESA AOR showed a decrease in total student numbers (-2%). Excluding the three main providers of distance, flexible and blended TNE, there was an increase of 2% but the year-on-year growth rate was below the average 5% registered in the three years preceding 2017–18. It is too early to conclude that stagnation points to TNE having reached a tipping point in its development, or that there is deliberate disinvestment in certain forms of TNE as a strategy of providers. Data collection also needs to evolve to capture forms of TNE that may escape the AOR, such as some forms of dual or joint delivery, given that providers do not always report students before they travel to the UK for the part of the programme taught onshore.

The number of providers reporting students on TNE courses continued to grow, but the share of students registered in institutions reporting large student numbers (more than 5,000) fell. This points at newer entrants to the TNE ecosystem and an increase in student numbers in providers with smaller provision. Nevertheless, there is still a substantial ‘long tail’ of providers with very small student numbers, and relative concentration of provision in a limited number of countries. In the future, knowledge sharing and mutualisation of resources could foster further diversification, helping providers reach new partner countries, and develop innovative modes of provision.

Student numbers increased in three of the five types of provision. The fastest growing category was in students studying at overseas campuses (10.7%) which off-set reductions in students studying for an award of the reporting provider registered at an overseas partner organisation and through other arrangements. This interesting trend suggests that overseas campuses, often the object of media scrutiny, attract increasing numbers of students as they become ingrained in the educational landscape of the territories where they operate. Distance learning also showed significant growth when the three main providers of distance, flexible and blended TNE are excluded (7.3%), which may point both to UK providers developing innovative modes of provision and host countries increasingly recognising distance or blended learning as a form of provision with the same standing as traditional campus-based learning.

6 <https://www.gov.uk/government/publications/international-education-strategy-global-potential-global-growth>

Student numbers at postgraduate level increased more rapidly than at undergraduate level. Postgraduate TNE represents 35.2% of all students when the three main providers of distance, flexible and blended TNE are excluded, and is particularly prevalent in some types of delivery such as distance learning (58.1%). As tertiary enrolment ratios increase in emerging economies and labour markets require specialised skills, it is likely that demand for advanced levels of education will continue to rise. If this coincides with more welcoming policies such as the recognition of distance learning or one-year Masters' degrees it could present a significant opportunity for UK universities.

At a regional level, perhaps the most striking feature has been the rapid growth in TNE student numbers in the EU since the referendum to leave the European Union (11.1% increase between 2016–17 and 2017–18 excluding the three main providers of distance, flexible and blended TNE). This contrasts markedly with other world regions, which experienced decreases or sluggish growth, and may point to UK providers implementing deliberate institutional strategies to protect their standing in the EU post-Brexit. An area that deserves further research is the interrelation between TNE and international research and mobility, and the role of TNE in securing access to regional programmes such as Erasmus and Horizon Europe.

At country level, the picture is ever more diverse. Including the three main providers of distance, flexible and blended TNE, China surpassed Malaysia as the largest country by TNE student numbers with 11% of the total, and Sri Lanka, Cyprus and South Africa have significantly increased their relative position, possibly reflecting welcoming policies that aim at addressing unmet demand for quality higher education or at creating regional education hubs. By contrast, student numbers in some leading host territories are stagnating or decreasing. Such is the case in Malaysia, Singapore, Hong Kong, Egypt, Oman and Nigeria. The decreases respond to complex reasons that fall out of the scope of this report, but the findings can provide a useful basis for further investigation into the demographic, political, economic and technological forces affecting TNE provision in these territories.

The analysis in this report helps us monitor trends in UK TNE provision around the world, based on the Aggregate Offshore Record. However, the report does not enable us to understand the effects on students of studying through UK TNE. What is the student experience like and how is it different from that of UK-based students? What is the impact of different modes of delivery on student outcomes? How does UK TNE contribute to the employability of graduates, and to their happiness and life satisfaction? How are all the above affected by contextual factors such as location or partner choice? Further work will be required to better understand who the TNE student is at a time when governments and regulators scrutinise ever more closely how education provision helps tackle global and domestic development goals.

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

Each one of the 693,695 students studying on UK TNE programmes in 2017–18 had a unique set of reasons for choosing British education. The reputation for quality of UK universities, but also their openness to offering innovative types of provision, and the emphasis on employability, critical thinking and life-long learning are likely to feature high on their list. Behind the numbers in this report lie the partnerships and expertise developed through years of carefully crafted internationalisation by university leaders, academics and practitioners in the UK and beyond. A renewed commitment by government and an ongoing sharing of knowledge and resources will ensure that UK HE TNE continues to transform the lives of students globally.

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

8. <https://www.gov.uk/government/statistics/uk-revenue-from-education-related-exports-and-tne-activity>



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