



Universities UK
International

The scale of UK higher education transnational education 2023–24

Trend analysis and regional highlights
10th anniversary edition



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UK HE TNE in 2023–24

This 10th anniversary edition of UUKi's *Scale of TNE* report series provides a snapshot of where, at what level, and through what type of provision higher education (HE) transnational education (TNE) students studied during the 2023–24 academic year, with insights on the evolution of UK HE TNE through the past decade.

UK HE TNE is world-leading in scale and quality, and forms an integral part of many UK institutions' education strategies. UK HE TNE has seen significant growth in the past decade, a +70.0% increase from approximately 379,500 UK HE TNE students in 2014–15, to 645,335 UK HE TNE students in 2023–24 (excluding Oxford Brookes; [see a note on data](#)).

The proliferation of high-quality research and guidance over the past 10 years has supported UK HE TNE providers to prioritise strategic, secure, equitable and sustainable TNE collaborations. This has been bolstered by insights from sector bodies, including UUKi, British Council, Jisc and the Quality Assurance Agency (QAA), with UK HE TNE forming a key pillar of the UK Government's International Education Strategy.



653,570
students



173
UK providers



231
countries and
territories

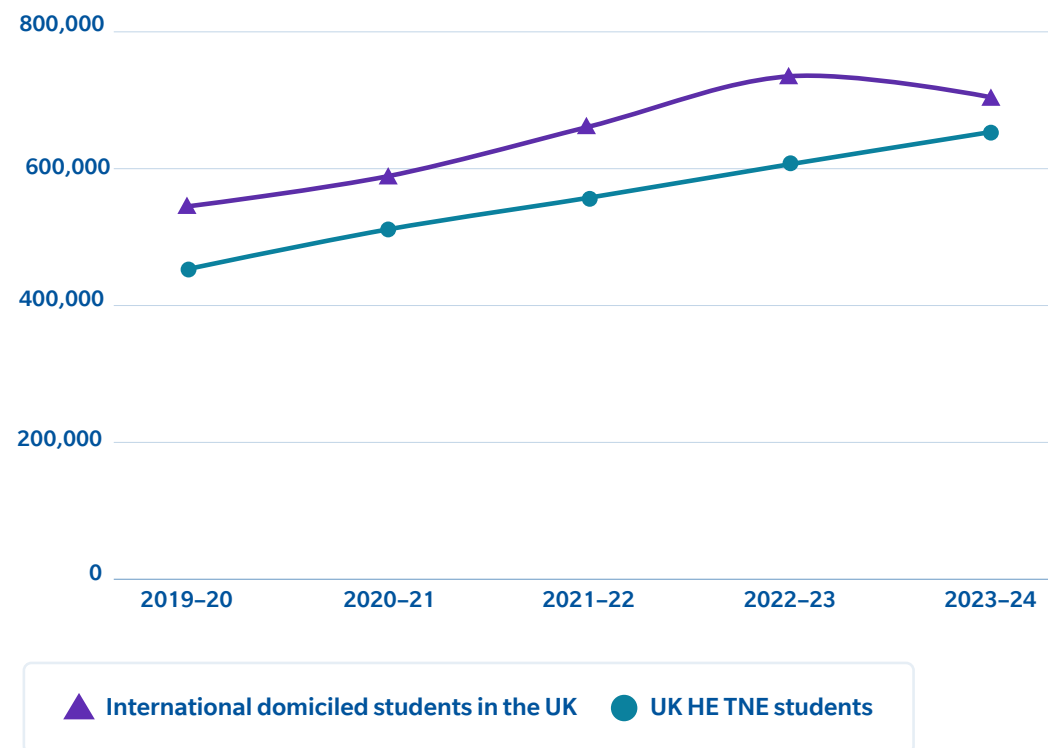
The continued growth of UK HE TNE

The number of UK HE TNE students (653,570) now compares closely to the number of onshore international students recruited to the UK (704,405). From 2022–23 to 2023–24, the UK saw a –4.2% drop in international student recruitment, but a +7.8% growth in UK HE TNE students. If the same growth/reduction rates were to continue for another academic year, the number of UK HE TNE students would overtake onshore international student recruitment to the UK in 2024–25.

Demand for higher education and TNE is rising rapidly: numbers of higher education students globally have more than doubled from the c. 100 million enrolled at the 2000 millennium (*UNESCO UIS database*). If participation in UK higher education were to increase at the average rate for the last 10 years, then there would be demand for around 358,000 additional places in England alone by 2035 (*HEPI report*).

Whilst some students globally will be internationally mobile, most will need access to education in their home country or region – globally, of the overall **264+ million higher education students**, only **6.9 million** are internationally mobile, approximately 2.6%. Innovative models of TNE pose an opportunity for the international community to meet the demand for education globally.

FIGURE 1 • TNE VS ONSHORE INTERNATIONAL STUDENTS



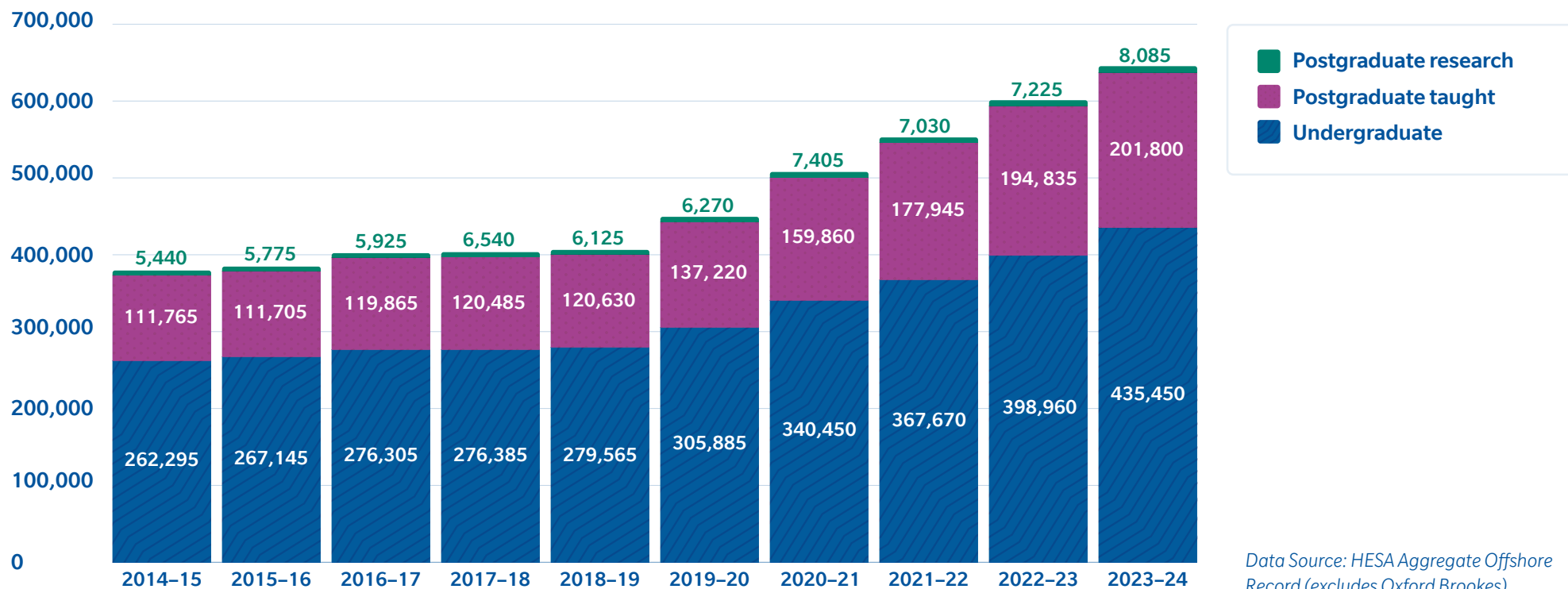
Several countries, including India, Saudi Arabia, Egypt and Greece, have recently developed laws and education regulations to welcome TNE, to address national strategic priorities for internationalisation, to fill skills gaps, increase capacity building and widen access to education.

Over five years, from 2019–20 to 2023–24, there has been an average annual growth rate of +9.6% in the total number of UK HE TNE students. If the same growth rate of +9.6% per year were to continue, the milestone of over 1 million UK HE TNE students could be met as early as three years from now in the 2028–29 academic year.

How has UK HE TNE provision changed in 10 years?

Over 10 years, from 2014–15 to 2023–24, the growth of UK HE TNE students has been +66.0% for undergraduate students, +80.6% for postgraduate taught (PGT) students, and +48.6% for postgraduate research (PGR) students (all excluding Oxford Brookes).

FIGURE 2 • 10-YEAR UK HE TNE HEADCOUNT: POSTGRADUATE AND UNDERGRADUATE



UK providers deliver TNE to a significantly higher number of undergraduate students than postgraduate students. In 2023–24, across all providers, there were 442,550 undergraduate UK HE TNE students – more than double the total 211,015 postgraduate taught and research UK TNE students combined.

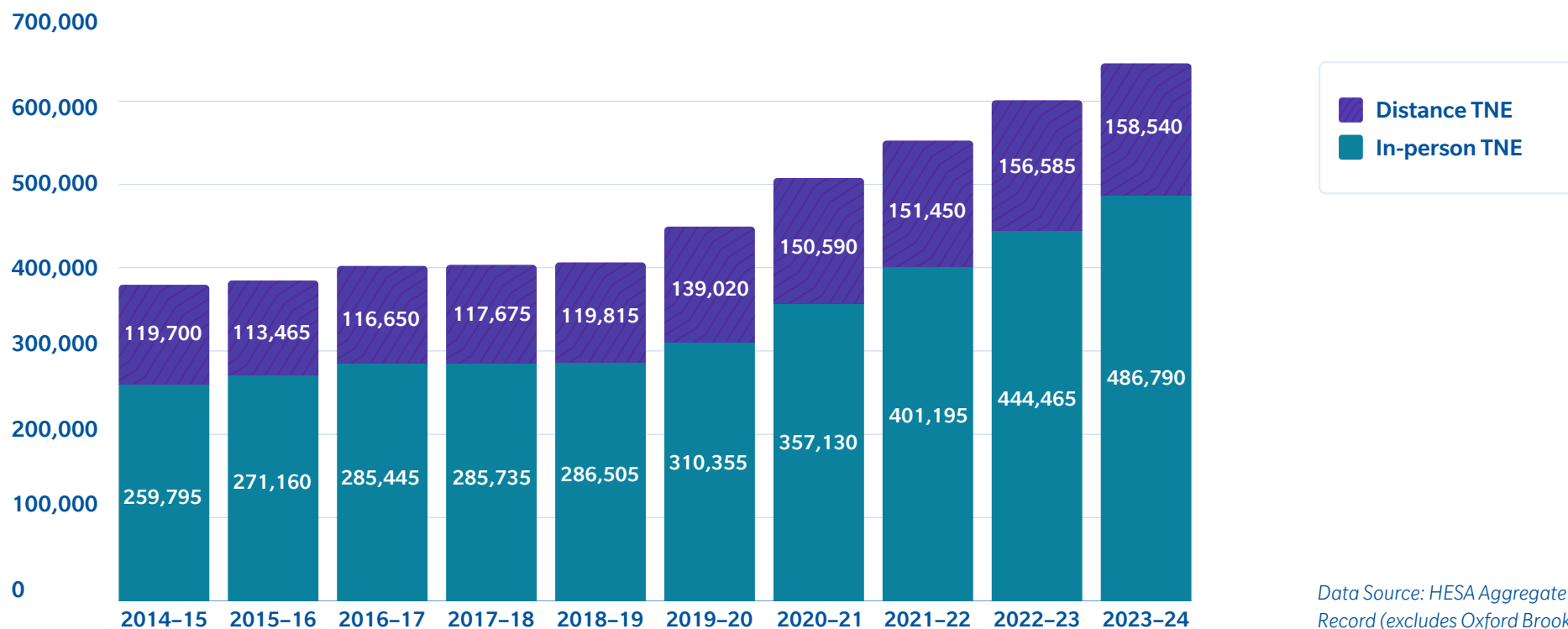
At postgraduate level, the number of PGT TNE students significantly outweighs PGR TNE students. In 2023–24, across all providers, there were 202,930 PGT TNE students (a +47.8% increase over the past five years), compared to 8,085 PGR TNE students (a +28.9% increase over the past five years).

How has UK HE TNE provision changed in 10 years?

Globally, there are more TNE students studying in-person than via distance learning. In 2023–24, 176 countries and territories hosted in-person TNE, while 231 hosted TNE via distance learning. Across all providers, there were 491,765 in-person TNE students compared with 161,805 distance TNE students.

In 10 years, from 2014–15 to 2023–24, in-person UK HE TNE has grown by +87.4%, while distance UK HE TNE has grown +32.5% (excluding Oxford Brookes).

FIGURE 3 • 10-YEAR UK HE TNE HEADCOUNT: IN-PERSON AND DISTANCE



Through what types of provision are UK HE TNE students studying?

In 2023–24, almost half of UK HE TNE students (279,565 or 42.8%) were studying via collaborative provision, a +10.8% increase from the previous year. Around a quarter (24.8%) were studying via distance, flexible or distributed learning, while another quarter (25.9%) were registered at an overseas partner organisation. The remaining UK HE TNE students (6.6%) were studying at an overseas campus.

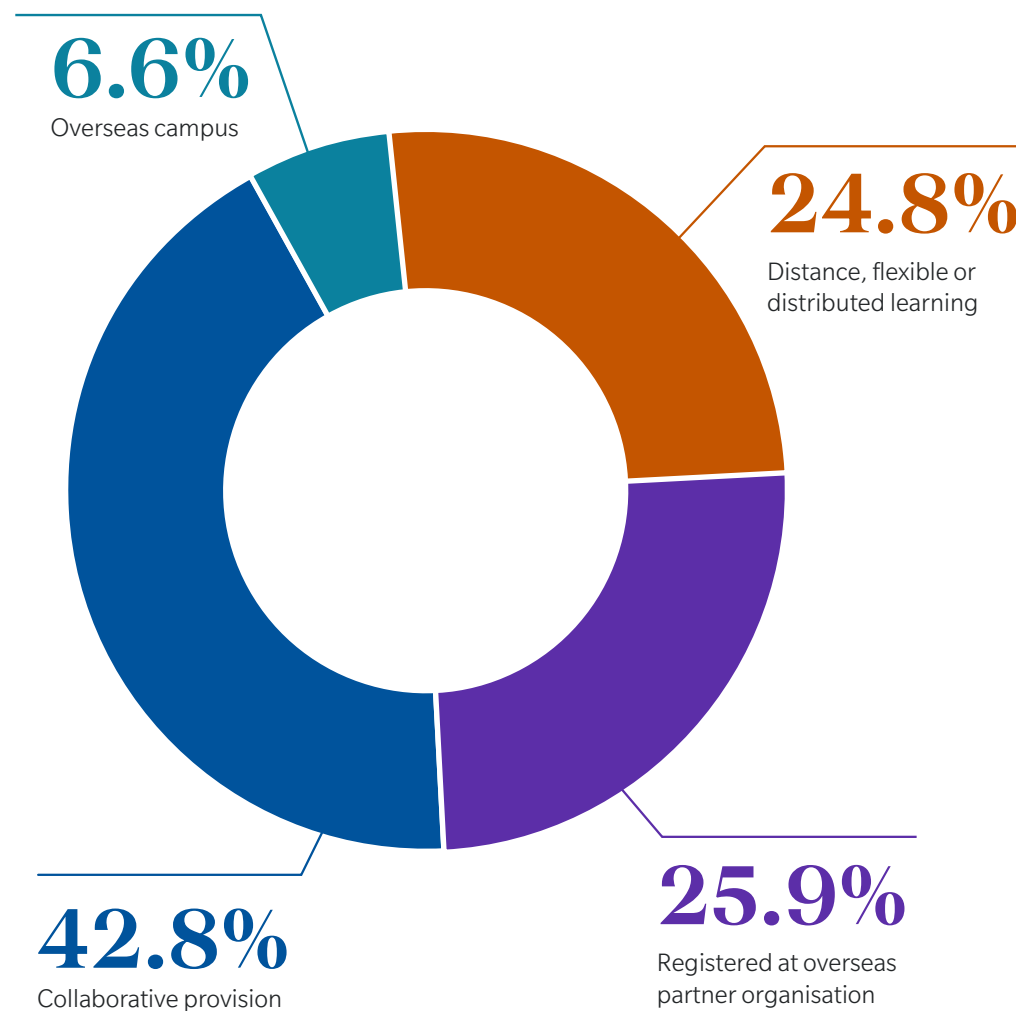
Which types of TNE have grown the most?

Over the past five years, since 2019–20, the most significant growth has been in the number of UK HE TNE students registered at an overseas partner organisation (+72.5% increase), and those studying via collaborative provision (+58.0% increase).

Which types of TNE have the highest number of providers operating them?

In 2023–24, 142 UK higher education providers were delivering TNE via distance learning; 100 via collaborative TNE provision; 44 had students registered at overseas partner organisations; and 26 delivered TNE at an overseas campus.

FIGURE 4 • PROPORTION OF UK HE TNE STUDENTS BY TYPE OF PROVISION, 2023-24



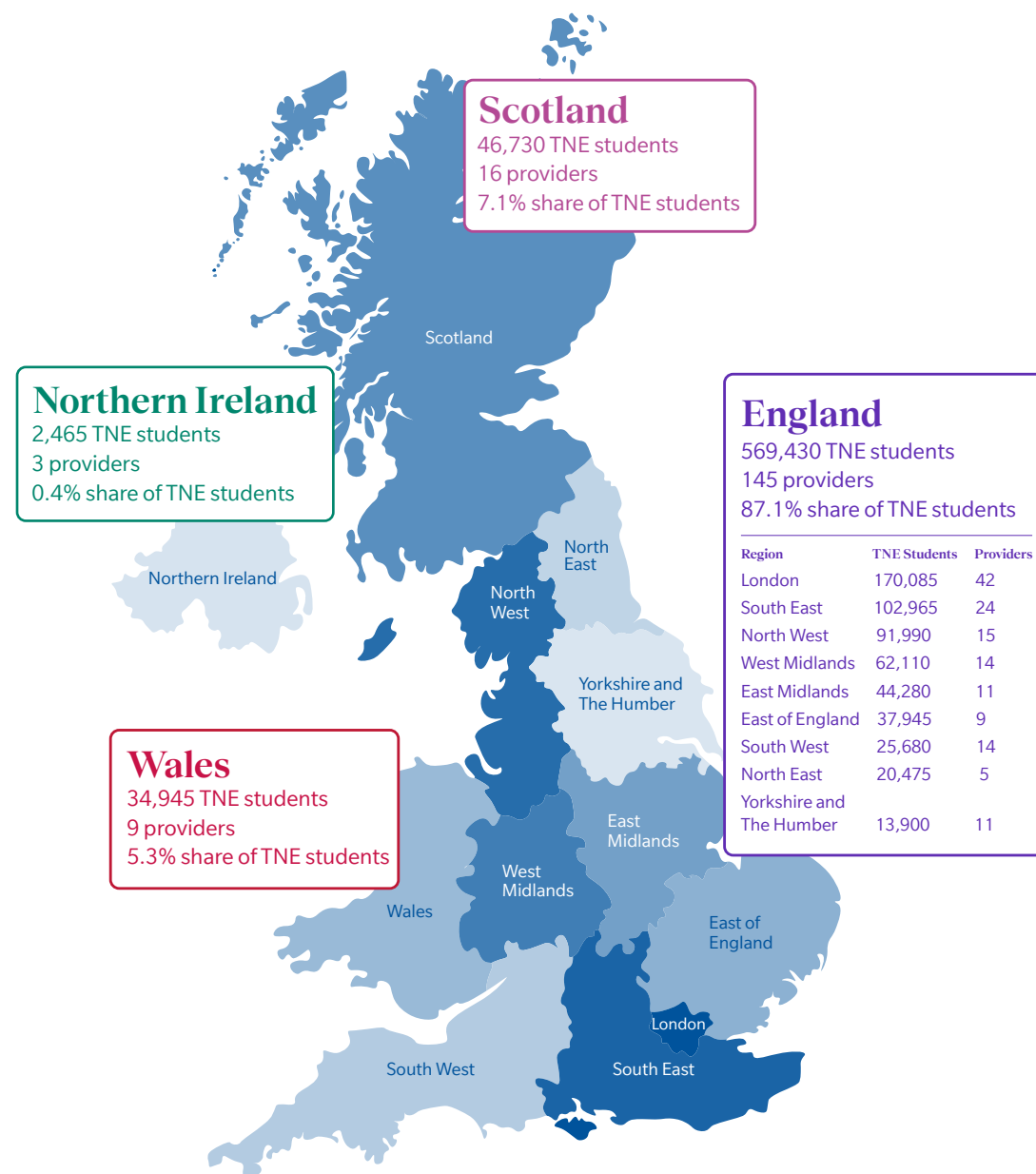
Which regions of the UK deliver the most TNE?

England has the highest number of HE TNE providers in the UK, at 145 TNE providers, while Scotland has 16 TNE providers, Wales 9 TNE providers and Northern Ireland 3 TNE providers. Correspondingly, most UK HE TNE students are studying with providers located in England (569,430), followed by Scotland (46,730), Wales (34,945) and Northern Ireland (2,465).

Of the devolved nations, Wales has seen the most significant five-year growth in the number of UK HE TNE students since 2019–20, with an additional 6,150 TNE students, compared to Scotland's increase of 2,640 TNE students, and Northern Ireland's increase of 1,030 students. England followed by Wales have the highest average TNE students per institution – an average of c. 3,930 TNE students per provider in England and c. 3,885 TNE students per provider in Wales.

Regionally, the highest proportion of UK HE TNE students are studying with providers located in London (42 providers) and the South East of England (24 providers). However, since 2019–20, the regions of the UK with the highest growth in the number of UK TNE students have been the North West (+84.4% increase) and the South West (+80.6% increase), followed by the South East (+78.2% increase) and the East of England (+68.9% increase). This is higher than the five-year TNE student growth rate of London (+36.6% increase).

FIGURE 5 • TNE PROVISION BY UK NATION AND REGION, 2023–24



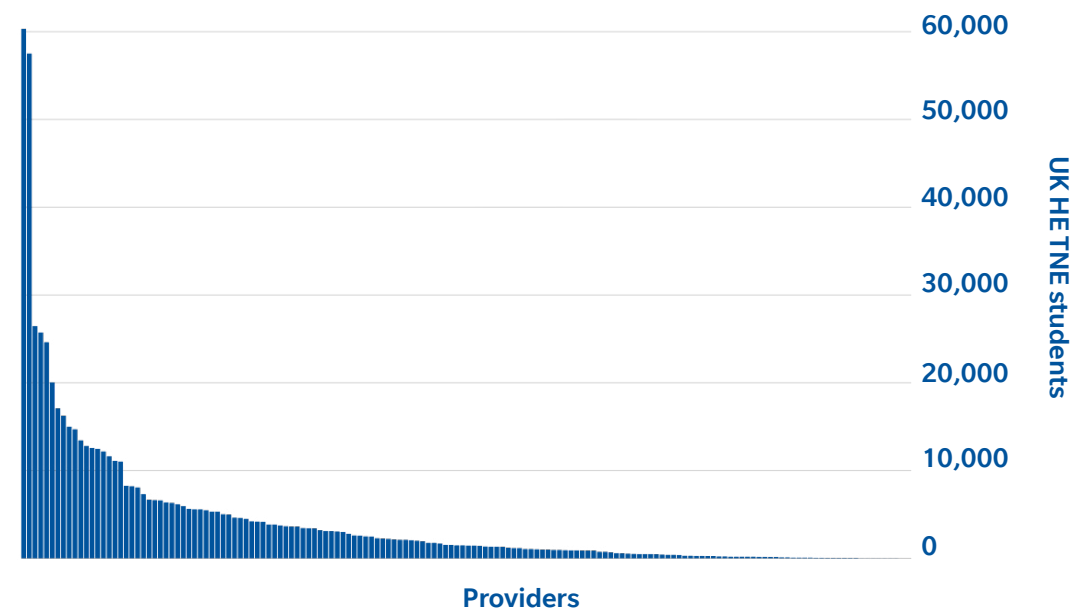
Who provides UK HE TNE?

UK providers continue to deliver TNE at a scale that suits their strategic priorities and resources. In 2023–24, 173 UK HE TNE providers delivered TNE, with a national average of c. 3,780 TNE students per provider. 79.2% of UK HE TNE providers had under 5,000 TNE students; 36 UK HE TNE providers had over 5,000 TNE students; and 18 UK HE TNE providers had over 10,000 TNE students.

Nine UK HE TNE providers have developed TNE portfolios with over 15,000 TNE students: The Open University; University of London; Coventry University; University of Liverpool; Liverpool John Moores University; Cardiff Metropolitan University; University of East London; University of Nottingham; and University of Greenwich.

The largest two providers of UK HE TNE by a substantial margin remain The Open University and the University of London due to their unique delivery models.

FIGURE 6 • UK HE TNE STUDENT NUMBERS PER PROVIDER, 2023–24



UK HE TNE
providers with over
15,000
TNE students

The Open University
University of London
Coventry University
University of Liverpool
Liverpool John Moores University
Cardiff Metropolitan University
University of East London
University of Nottingham
University of Greenwich

What does UK HE TNE growth look like at the provider level in 2023-24?

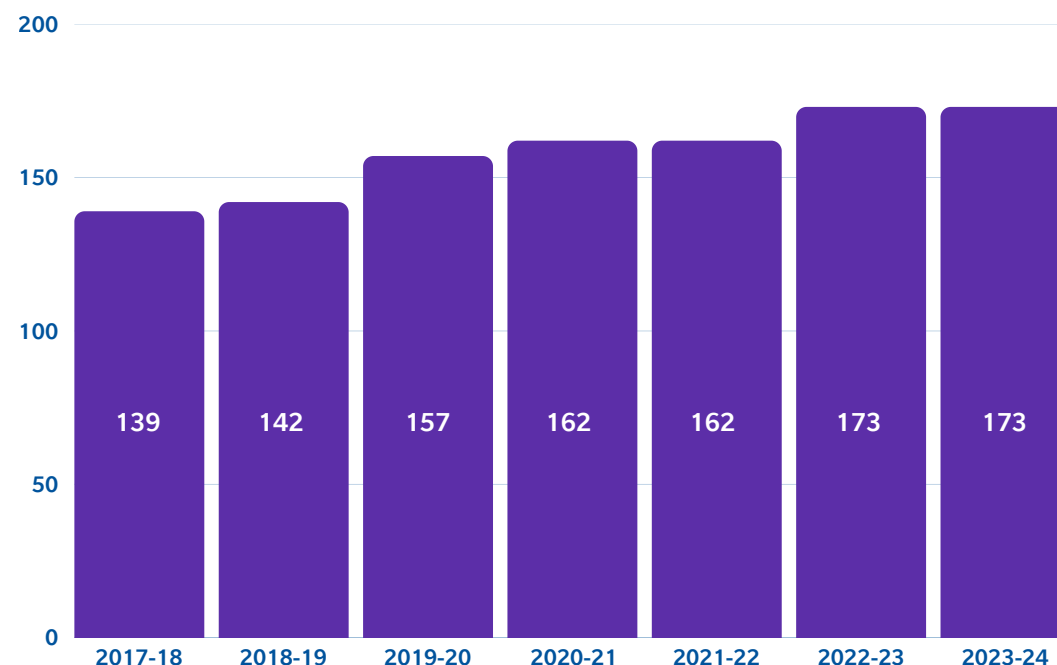
106 UK HE TNE providers increased their TNE numbers. 17 UK providers increased their TNE numbers by more than 1,000 students. 106 UK TNE providers increased their TNE numbers from the previous year.

In five years, 84 UK providers have increased their TNE student numbers by more than 25%.

The average growth rate among UK HE TNE providers in one year is +36.6% and over five years is +108.1%. For UK providers with over 1,000 students, the average growth rate in one year is +10.0% and over five years is +128.3%.

Nine UK HE TNE providers saw a growth of over +2,000 TNE students: The Open University; Coventry University; De Montfort University; University for the Creative Arts; University of the West of England, Bristol; Oxford Brookes University; Liverpool John Moores University; University of East London; and University of Liverpool.

FIGURE 7 • NUMBER OF UK HE TNE PROVIDERS, 2017-18 TO 2023-24



In five years 84 UK providers
have seen more than a
25% increase
in TNE student numbers

Where are UK HE TNE students located?

Asia continues to hold just over half of the market share of UK HE TNE students, at 51.1% in 2023–24. The other half of the UK's TNE students are mainly hosted by Europe (18.4%), the Middle East (14.3%) and Africa (10.6%), while a few UK HE TNE students are hosted by North America (4.6%), South America (0.6%) and Australasia (0.4%).

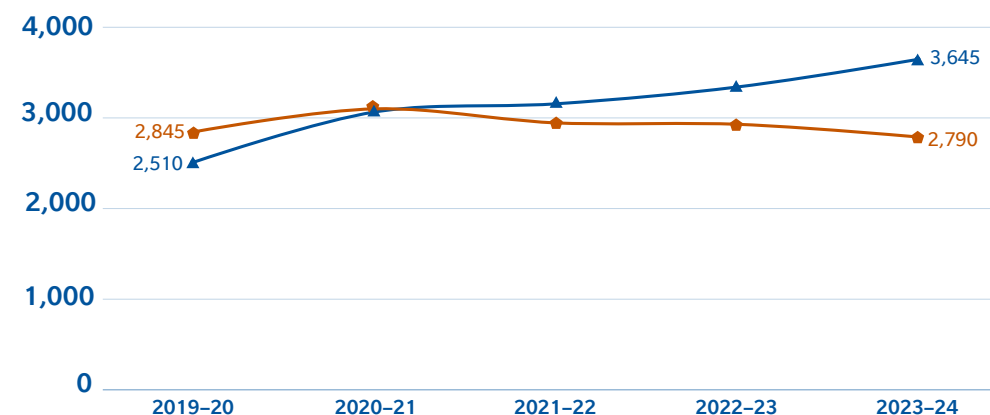
In five years, Asia has seen the fastest growth in absolute terms, with an additional 106,415 UK HE TNE students (representing a +46.7% increase), while the Middle East has seen the fastest growth in percentage terms, a +57.7% increase (an additional 34,140 UK HE TNE students).

Since 2019–20, there has been relative consistency in world regions hosting similar proportions of the total market share of UK HE TNE students, with a slight rise in Asia (+0.9% increase) and the Middle East (+1.2% increase), with a slight drop in Europe (-1.3% decrease).

FIGURE 8 • NUMBER OF UK TNE STUDENTS BY WORLD REGION, 2019–20 TO 2023–24

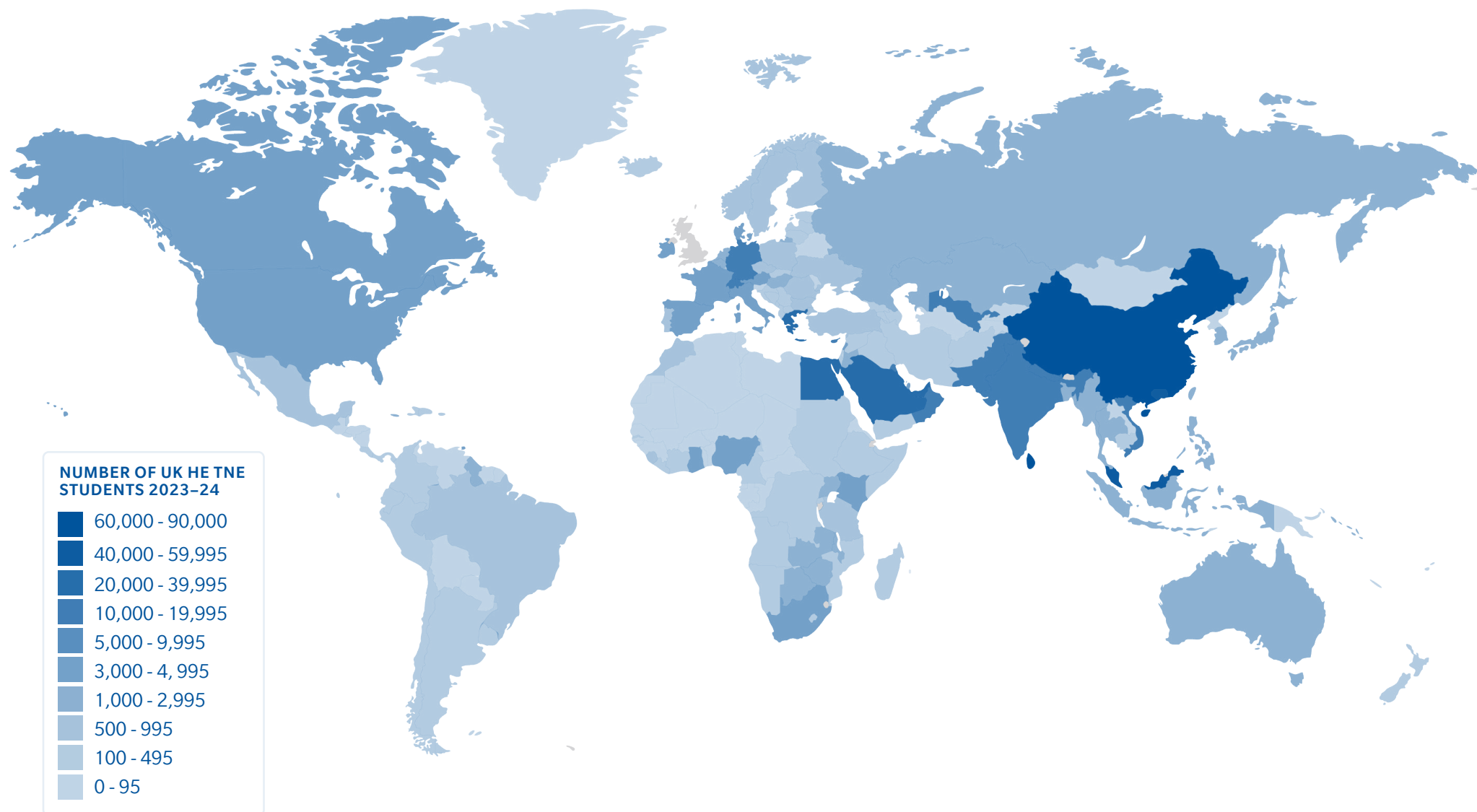


A CLOSER LOOK AT AUSTRALASIA AND SOUTH AMERICA



Where are UK HE TNE students located?

FIGURE 9 • WORLD MAP OF UK TNE PROVISION, 2023-24



Data source: HESA Aggregate Offshore Record

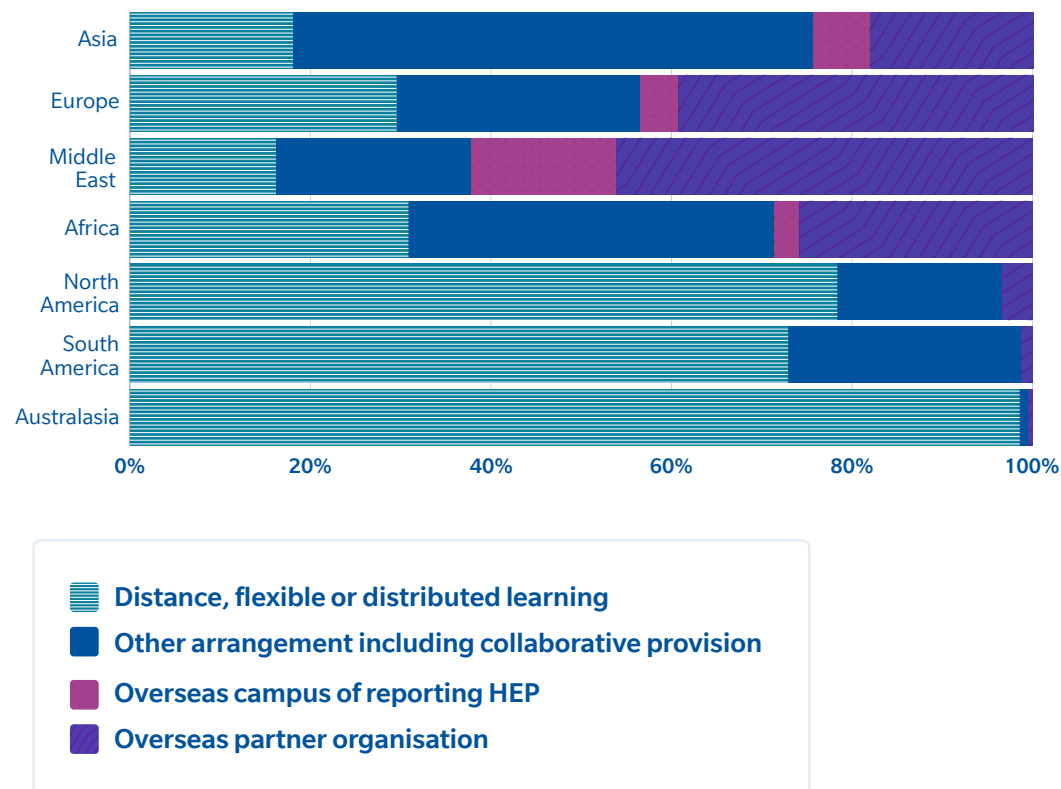
What types of UK TNE provision exist across world regions?

In 2023–24, the most prominent type of UK HE TNE in Asia and Africa was collaborative provision, whereas in Europe and the Middle East, there were more UK HE TNE students registered at overseas partner organisations than studying via the other types of TNE. In North America, South America and Australasia, the majority of UK HE TNE students studied via distance, flexible or distributed learning.

In 2023–24, what countries and territories had the largest number of UK HE TNE students per type of provision?

- Most UK HE TNE students studying at an overseas campus were studying in the United Arab Emirates (UAE) (13,590), China (11,565) and Malaysia (8,520).
- The majority of TNE students registered at an overseas partner organisation were studying in China (28,005) and Saudi Arabia (18,825), followed by Greece (12,745), Malaysia (11,575), Egypt (10,740) and Kuwait (10,685).
- Of those studying through collaborative provision, a majority were in Sri Lanka (53,305) and China (41,720), with significant quantities in Egypt (19,735), Malaysia (18,025), Singapore (17,380) and Greece (16,495).
- For distance, flexible or distributed learning, the top host country was Pakistan (13,480) – the only country with over 10,000 distance UK HE TNE students – followed by the US (9,035), Singapore (8,785) and China (8,135).

FIGURE 10 • PROPORTION OF UK HE TNE STUDENTS BY REGION OF STUDY AND TYPE OF PROVISION, 2023-24



At what level are UK HE TNE students studying across world regions?

Globally, there are significantly higher proportions of undergraduate UK HE TNE students in Asia (76.6%) and the Middle East (75.3%), in contrast to higher proportions of postgraduate UK HE TNE students in Australasia (68.2%), North America (60.6%) and South America (58.4%). A more even split exists in Africa (57.0% undergraduate; 43.0% postgraduate) and Europe (52.1% undergraduate; 47.9% postgraduate).

What are the top 10 host countries/territories for UK HE TNE students within world regions 2023–24?

FIGURE 11 • TOP 10 UK HE TNE HOST COUNTRIES PER WORLD REGION, 2023–24

North America

United States (9,540)
Trinidad and Tobago (6,935)
Canada (6,665)
Jamaica (1,450)
Mexico (820)
The Bahamas (785)
St Lucia (655)
Barbados (475)
Cayman Islands (470)
Belize (370)

South America

Guyana (1,405)
Brazil (760)
Peru (440)
Colombia (310)
Chile (185)
Uruguay (150)
Argentina (135)
Ecuador (115)
Bolivia (50)
Venezuela (30)

Africa

Egypt (32,040)
Nigeria (6,695)
South Africa (6,165)
Kenya (3,600)
Mauritius (3,350)
Ghana (3,235)
Botswana (2,110)
Uganda (2,050)
Zimbabwe (1,515)
Malawi (1,090)

Europe

Greece (30,515)
Germany (16,635)
Cyprus (European Union) (11,800)
Switzerland (10,745)
Ireland (7,450)
Spain (5,695)
Austria (4,410)
Denmark (3,805)
France (3,520)
Italy (3,025)

Asia

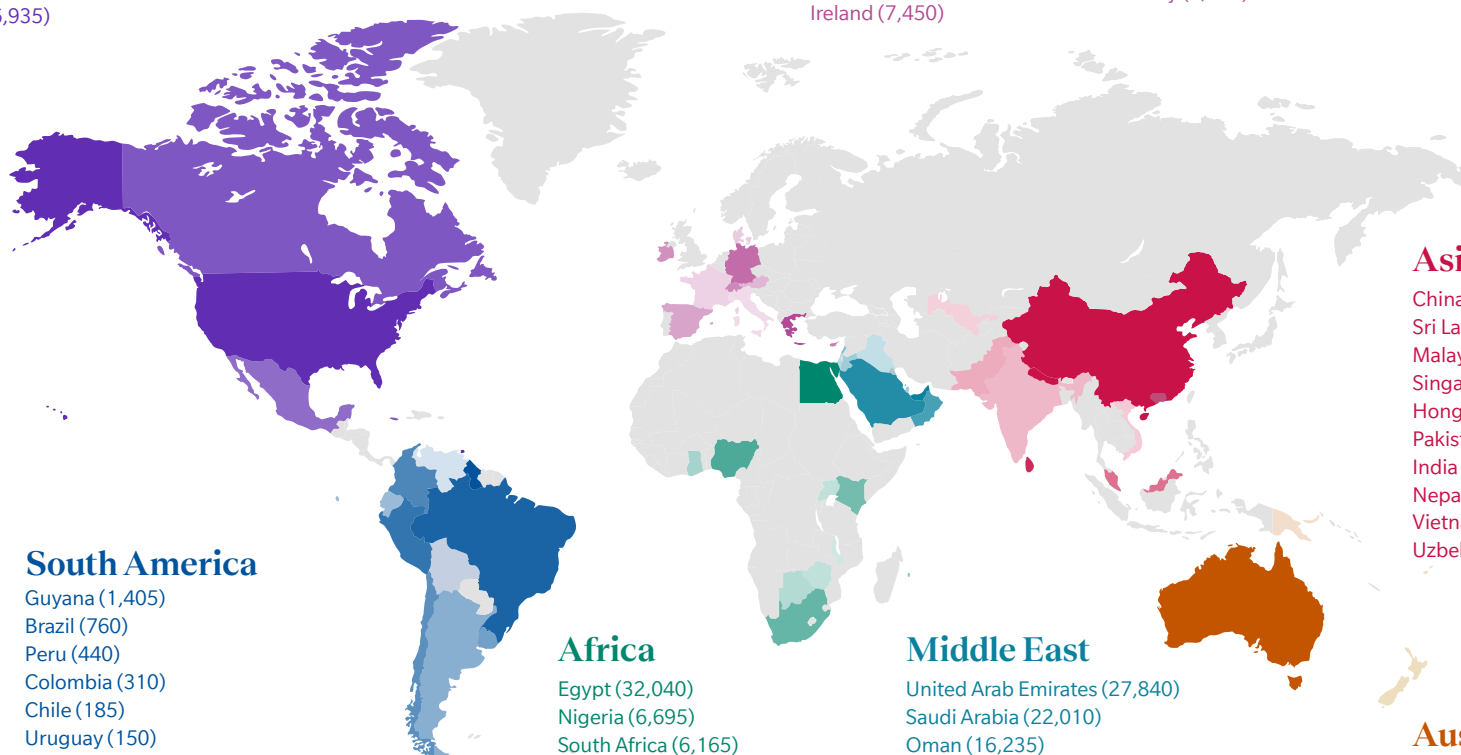
China (89,425)
Sri Lanka (62,935)
Malaysia (43,155)
Singapore (31,735)
Hong Kong (SAR China) (20,515)
Pakistan (16,035)
India (15,160)
Nepal (15,005)
Vietnam (12,620)
Uzbekistan (10,450)

Middle East

United Arab Emirates (27,840)
Saudi Arabia (22,010)
Oman (16,235)
Kuwait (11,305)
Bahrain (4,695)
Lebanon (3,770)
Qatar (3,640)
Jordan (2,650)
Israel (345)
Iraq (345)

Australasia

Australia (2,150)
New Zealand (455)
Papua New Guinea (65)
Fiji (60)



Top 10 host countries/ territories for UK HE TNE students 2023–24

In 2023–24, the top host country/territory for UK HE TNE was China, followed by Sri Lanka and Malaysia. The strongest five-year growth has been from Saudi Arabia (+142.2%), Sri Lanka (+104.2%) and the UAE (+88.1%).

The top 10 UK HE TNE host countries/territories for 2023–24 change if the data is categorised by those who host in-person TNE and those who host distance learning.

Three countries not included in the overall top 10 host countries/territories of UK HE TNE are in the top 10 for in-person TNE: Saudi Arabia, Oman and Nepal.

Four countries not included in the overall top 10 host countries/territories of UK HE TNE are in the top 10 for distance TNE: Pakistan, US, Canada and South Africa.

In 2022–23, Egypt ranked 5th place, Saudi Arabia 9th place, and India 10th place. In 2023–24, Egypt rose to 4th place above Singapore at 5th place; Saudi Arabia rose to 8th place over Hong Kong in 9th place, and Germany claimed 10th place, overtaking India that was in 10th place.

TABLE 1 • GLOBAL TOP 10 UK TNE HOST COUNTRIES/TERRITORIES, 2023–24

Global rank 2023–24	Country/territory of provision	Number of students 2023–24	Growth rate from 2022–23 (one year)	Growth rate from 2019–20 (five years)
1	 China	89,425	▲ +8.5%	▲ +79.6%
2	 Sri Lanka	62,935	▲ +12.8%	▲ +104.2%
3	 Malaysia	43,155	▼ -1.0%	▼ -12.6%
4	 Egypt	32,040	▲ +13.0%	▲ +63.5%
5	 Singapore	31,735	▲ +1.6%	▲ +13.8%
6	 Greece	30,515	▲ +12.2%	▲ +52.9%
7	 United Arab Emirates	27,840	▲ +24.1%	▲ +88.1%
8	 Saudi Arabia	22,010	▲ +9.2%	▲ +142.2%
9	 Hong Kong (SAR)	20,515	▼ -2.1%	▼ -8.4%
10	 Germany	16,635	▲ +16.6%	▲ +80%

Top 10 distance UK HE TNE

Pakistan (13,480)
United States (9,035)
Singapore (8,785)
China (8,135)
United Arab Emirates (6,710)
Hong Kong (SAR of China) (6,685)
Canada (6,570)
Malaysia (5,030)
Germany (4,835)
South Africa (4,705)

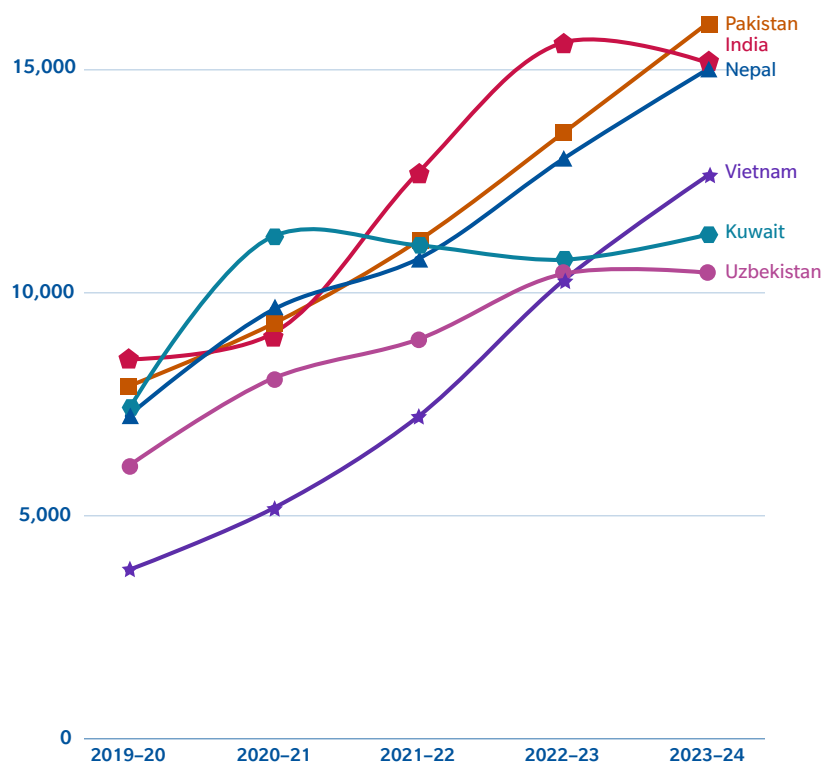
Top 10 in-person UK HE TNE

China (81,290)
Sri Lanka (59,990)
Malaysia (38,125)
Egypt (30,475)
Greece (29,300)
Singapore (22,945)
United Arab Emirates (21,130)
Saudi Arabia (19,160)
Oman (15,420)
Nepal (14,410)

Where is UK HE TNE rising?

Beyond the top 10 there are many more countries seeing strong growth in UK HE TNE provision. Some have grown from a very low baseline, while others are making a step change to become regional education hubs.

FIGURE 12 • COUNTRIES WITH RAPID GROWTH IN UK HE TNE STUDENT NUMBERS, 2019–20 TO 2023–24



In 2023–24:

Pakistan

- **16,035** UK HE TNE students.
- **+103.0%** UK HE TNE student increase in five years.
- Most common type of TNE: distance, flexible or distributed learning.
- Global rank 2023–24: **#12**

Nepal

- **15,005** UK HE TNE students.
- **+107.5%** UK HE TNE student increase in five years.
- Most common type of TNE: collaborative provision.
- Global rank 2023–24: **#14**

Kuwait

- **11,305** UK HE TNE students.
- **+53.4%** UK HE TNE student increase in five years.
- Most common type of TNE: students registered at overseas partner organisation.
- Global rank 2023–24: **#17**

India

- **15,160** UK HE TNE students
- **+78.1%** UK HE TNE student increase in five years.
- Most common type of TNE: collaborative provision.
- Global rank 2023–24: **#13**

Vietnam

- **12,620** UK HE TNE students.
- **+233.9%** UK HE TNE student increase in five years.
- Most common type of TNE: collaborative provision.
- Global rank 2023–24: **#15**

Uzbekistan

- **10,450** UK HE TNE students.
- **+71.1%** UK HE TNE student increase in five years.
- Most common type of TNE: collaborative provision.
- Global rank 2023–24: **#19**

A note on data

Data about TNE is collected annually by the Higher Education Statistics Agency via the Aggregate Offshore Record. AOR data has been collected since 2007–08 from UK higher education providers who subscribe to HESA.

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

Historically, Oxford Brookes University students accounted for over 40% of all UK HE TNE student numbers, due to a partnership with the Association of Chartered Certified Accountants (ACCA). However, in 2019–20 Oxford Brookes University changed its reporting practices, resulting in a 256,450 reduction in the total number of students reported to HESA for the Aggregate Offshore Record (AOR) between 2018–19 and 2019–20. The longitudinal analysis in this report excludes Oxford Brookes University where appropriate, to reflect sector-wide trends more accurately over time.

All analysis in this report excludes further education provision, and provision where the location of study is marked as England, Wales, Scotland, Northern Ireland, or Jersey.

HESA Aggregate Offshore Record 2023-24 © Jisc 2025

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Data access

The data behind all charts and tables in this report is available in a downloadable file: **download the full dataset.**

Each tab corresponds to a figure or table in the report and is labelled accordingly.

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