



Universities UK
International

The scale of UK higher education transnational education 2020-21

Trend analysis and regional highlights

In partnership with



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Universities UK International

Universities UK International (UUKi) represents UK higher education institutions (HEIs) globally and helps them flourish internationally. To do this we actively promote UK HEIs abroad, provide trusted information for and about them, and create new opportunities through our unique ability to act at sector level. We draw on UK university expertise to influence policy in the UK and overseas, delivering information, advice and guidance to facilitate mutually beneficial collaboration between UK HEIs and a broad range of international partners.

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Executive summary

As demand for higher education (HE) is increasing around the world, transnational education (TNE) is growing rapidly. The latest data shows there was growth in UK TNE globally during the Covid-19 pandemic. In 2020–21, 510,835 students were studying for awards from 162 UK providers in 228 countries and territories through TNE – a 12.7% increase from the previous year.

While the government has recognised the importance of TNE for the higher education sector and the UK economy in the International Education Strategy, the challenge to develop secure, sustainable and scalable TNE persists.

The sixth edition of UUKi's report on *The scale of UK higher education transnational education* is published in partnership with the British Council. It provides a snapshot analysis of where, at what level, and through what type of provision TNE students studied during the 2020–21 academic year, and longitudinal trends in TNE from 2016–17. This edition includes highlights from the British Council for selected countries as context for the data. Finally, the report provides recommendations on how to support the development of TNE in the future.

Overview

In 2020–21,

- **162** higher education providers (HEPs) reported **510,835** students studying through TNE – a **12.7%** increase from 2019–20.¹
- The top **15** providers accounted for over **50%** of all students, while the top two providers accounted for **18.7%** of all students.
- **39.1%** of UK HE TNE students were studying through collaborative provision; **30.0%** were studying through distance, flexible or distributed learning; **22.6%** were studying while registered at an overseas partner organisation; and **7.0%** studied at overseas campuses. Students registered at an overseas partner organisation saw the largest proportional increase (**+17.6%**) from 2019–20.
- **67.2%** of students were studying at undergraduate level.
- The European Union hosted the largest number of providers (**147**), followed by Asia (**146**) and Africa (**126**).

In 2020–21,

510,835

students were studying UK TNE programmes

UK HE TNE students increased by

57,445

(+12.7%)

from 2019–20

1. This number is based on providers who returned data to the HESA AOR and opted into Heidi Plus. For the coverage of the HESA AOR, see HESA Aggregate Offshore record 2020/21 – Coverage of the record.

Insights by region

In 2020–21,

- UK TNE was reported in **228** countries and territories.
- Asia hosted **49.5%** of students, followed by the European Union (**15.8%**), the Middle East (**13.8%**), Africa (**11.1%**), North America (**5.3%**), non-EU Europe (**3.4%**), Australasia (**0.6%**), and South America (**0.6%**).
- China was the top host country for UK TNE (**61,495** students; **12.0%** of the total), followed by Malaysia (**48,460; 9.5%**), Sri Lanka (**37,175; 7.3%**), Singapore (**27,875; 5.5%**) and Egypt (**23,805; 4.7%**).
- Student numbers in the EU increased by **24,825 (+44.7%)** between 2016–17 and 2020–21.
- Students registered at an overseas partner organisation were the most prevalent in the Middle East (**47.9%** of the regional total), while distance, flexible or distributed learning was the main type of provision in Australasia (**99.0%**), North America (**81.1%**), and South America (**80.8%**). There was also substantial overseas campus provision in the Middle East (**13.6%**).

Looking ahead

Higher Education Statistics Agency (HESA) data from 2020–21 suggests that the Covid-19 pandemic led to an increase in UK TNE as countries were looking to enhance the quality of their domestic higher education systems, students were less willing or unable to travel abroad for their studies and UK universities sought to actively respond to the new operating environment.

UK TNE grew during the pandemic across all regions. There are now TNE students in most countries and territories globally and numbers have increased across all regions at an overall higher growth rate than ever before.

Whether these developments are sustainable in the long term remains to be seen as unexpected political or economic events can sharply reverse trends. To support the development of scalable, sustainable and secure TNE in the future it is important for the government and the sector to work closely together and to:

Collect better data on TNE students' characteristics, experiences and outcomes. HESA's relaunch of its review of the Aggregate Offshore record (AOR) is therefore very welcome and UUKi's group on monitoring and evaluation tools in TNE will work closely with HESA on this review to ensure the use of metrics in TNE is proportionate and fit for purpose.

Promote the quality of UK HE TNE overseas. UK higher education has an outstanding reputation, but the UK's quality assurance system is complex. Targeted information to clarify responsibilities and processes is necessary to strengthen overseas stakeholders' trust in UK TNE qualifications and positively affect demand.

Continue to remove barriers to TNE to diversify provision. China was the only top host country showing growth at a double-digit rate, and only a few new countries entered the list of top 20 host countries and territories. Free Trade Agreements, for example, can contribute to an environment of enhanced collaboration through side agreements on the recognition of qualifications or staff and student mobility.

Continue to mitigate risks in TNE. Key issues in international partnerships include safeguarding universities' values, the duty of care for students and staff, and the security of sensitive information, data and cyber networks. Universities UK has published guidelines for universities on **Managing risk in internationalisation**: security-related issues, and the dialogue on how to mitigate risks related to TNE partnerships must be continued.

Use TNE to support development. Research has demonstrated the positive impact TNE can have on the partner country, institution and overseas students, as well as its crucial role in tackling global challenges, such as climate change, displacement or gender equality. Government support to enable institutions to create mutually beneficial partnerships will be essential to making TNE partnerships sustainable.

Jump straight to the conclusion 

1. Introduction

As demand for higher education (HE) is increasing around the world, transnational education (TNE) is growing rapidly.

The delivery of degrees outside of the country where the awarding institution is based through, for example, online, flexible or distributed learning, franchise provision, overseas campuses or fly-in faculty has become increasingly attractive. TNE can help enhance the quality of higher education in the host country, it can support capacity-building of teaching staff and researchers, address local labour market needs and have a positive impact on local economies.²

The demand for TNE increased during the pandemic as countries shifted to online and distance learning or were looking to enhance the quality of domestic higher education through international collaboration, and students may have been less able to travel abroad for their studies.³ This is reflected in the latest data showing that UK HE TNE grew across all world regions. In 2020–21, 162 UK higher education providers reported 510,835 students learning through transnational education in 228 countries and territories worldwide. This is a 12.7% increase compared to the previous academic year.

Over the decade, TNE has not only become an important strand of universities' international activities, but crucially, it also supports the UK economy. In 2019, the income generated from UK TNE activity was estimated to be £2.2 billion, an increase of 104.4% since 2010.⁴ The importance of TNE has been recognised by the UK

“ In 2019, the income generated from UK TNE activity was estimated to be £2.2 billion, an increase of 104.4% in current prices since 2010.”

Government, and is a key feature of the International Education Strategy which aims to increase education exports to £35 billion per year by 2030. To do so, the UK Government, the British Council and the sector work to address market barriers to grow UK education exports and ensure education will be promoted in future free trade agreements (FTAs). Additionally, India, Indonesia, Nigeria, Saudi Arabia and Vietnam have been identified as priority countries for the International Education Champion, as these countries demonstrate strong potential to open up new opportunities for international higher education activities.

The scale of UK higher education transnational education 2020–21 is the sixth in a series of reports produced by UUKi that analyse trends in UK HE TNE provision by provider, location, type and level, using the latest data available. This edition was produced in partnership with the British Council and provides trend analysis and qualitative regional insights on policy and economic developments in selected countries to provide a context for the data. The report offers insights into the scale and scope of UK HE TNE across the globe, sheds light on new opportunities, and ultimately supports the development of sustainable, scalable and secure TNE partnerships.

The report uses the Higher Education Statistics Agency (HESA) Aggregate Offshore Record (AOR) data covering students on UK TNE programmes between 2016–17 and 2020–21. It is divided into three sections. The **first section** analyses sector-wide figures by student numbers, type of provision, level of study and the new headcount category. The **second section** focuses on providers, highlighting diversification trends and location of provider, and providers by host region. The **third section** includes quantitative regional and country insights alongside qualitative country highlights for context. **Finally**, the report concludes with recommendations on how the sector and government can work together to support the development of UK HE TNE in the future.

2. British Council, 2021. *Local impact of transnational education: a pilot study in selected European countries*.

3. Gulf Business, 2021. *Why transnational education is key for the post-Covid world*.

4. GOV.UK, 2021. *UK revenue from education related exports and transnational education activity, Calendar Year 2019*.

5. GOV.UK, 2021. *International Education Strategy: 2021 update*.

A note on definitions

Higher education TNE is the delivery of degrees in a country or territory other than that where the awarding provider is based. It can include, but is not limited to, overseas 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 or territory outside of the UK. This includes all students active at any point in the reporting period, including students who became dormant part way through the year, and those withdrawing from courses. In this report, we use the word ‘students’ to represent these UK HE TNE learners, unless otherwise stated.

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. 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’.⁶

Following HESA’s definitions, this report uses the term ‘higher education providers’ to refer to the UK universities and institutions covered by the AOR. HESA collects data which relates to five categories or types of TNE provision and providers are responsible for returning data against these. The categories are broad, and universities may not always categorise 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, but not included in the table.

In accordance with HESA’s Standard Rounding Methodology⁷:

- 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**

In 2019–20, Oxford Brookes University changed its reporting practice to reflect the point at which students engage directly with their component of the BSc (Hons) Degree in Applied Accounting, taught in partnership with the Association of Chartered Certified Accountants (ACCA). The longitudinal analysis in this report excludes Oxford Brookes University where appropriate, to reflect sector-wide trends more accurately over time.

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.

6. HESA, 2022. *Aggregate Offshore record 2021/22 – Coverage of the record*.

7. HESA, 2022. *General Performance Indicators suppressions*.

Table 1: Types of TNE provision

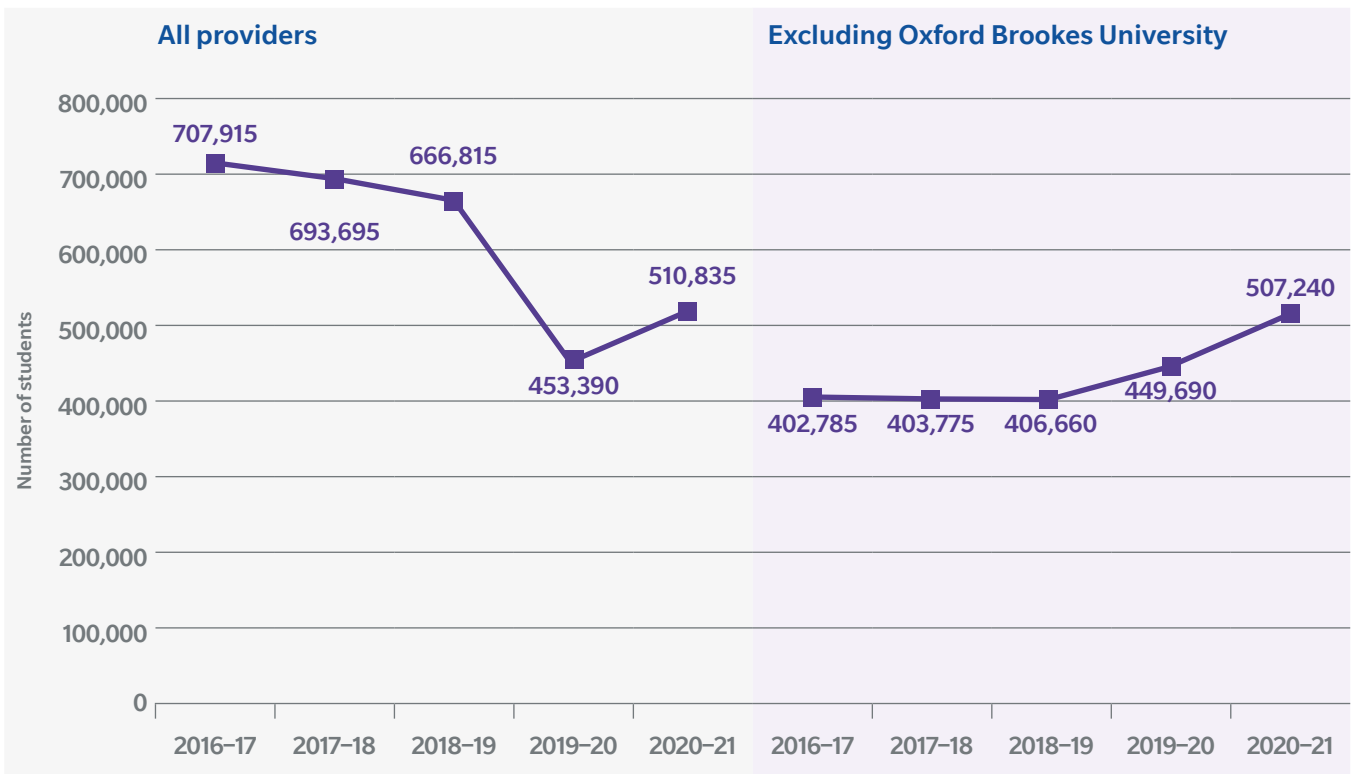
Type of provision terminology in AOR		Terminology in this report	Example of provision
Students registered at the reporting provider	Studying overseas for UK HEP award at overseas campus of reporting provider	Overseas campus	Overseas standalone or joint campus
	Distance, flexible or distributed learning 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

2. Overview

In 2020–21, 162 UK higher education providers reported 510,835 students learning through TNE in 228 countries and territories worldwide.

In **Figure 1**, HESA AOR data shows an increase of 57,445 students (+12.7%) compared to 2019–20. The drop of over 200,000 students from 2018–19 to 2020–21 was because Oxford Brookes University changed its reporting. When Oxford Brookes University is excluded, the data shows that UK TNE numbers have in fact been increasing in the last five years, and especially since 2018–19.

Figure 1: UK HE TNE student numbers, 2016–17 to 2020–21



Type of provision

The Covid-19 pandemic does not seem to have had a significant impact on the split of types of UK TNE provision; in 2020–21, there were minimal changes to this data. **Figure 2** shows that 39.1% of UK TNE students were studying through collaborative provision (no change compared to 2019–20); 30.0% were studying through distance, flexible or distributed learning (down from 31.2%); 22.6% were studying while registered at an overseas partner organisation (up from 21.7%); and 7.0% studied at overseas campuses (up from 6.9%).

Figure 2: Proportion of UK HE TNE students by type of provision, 2020–21 (all providers)

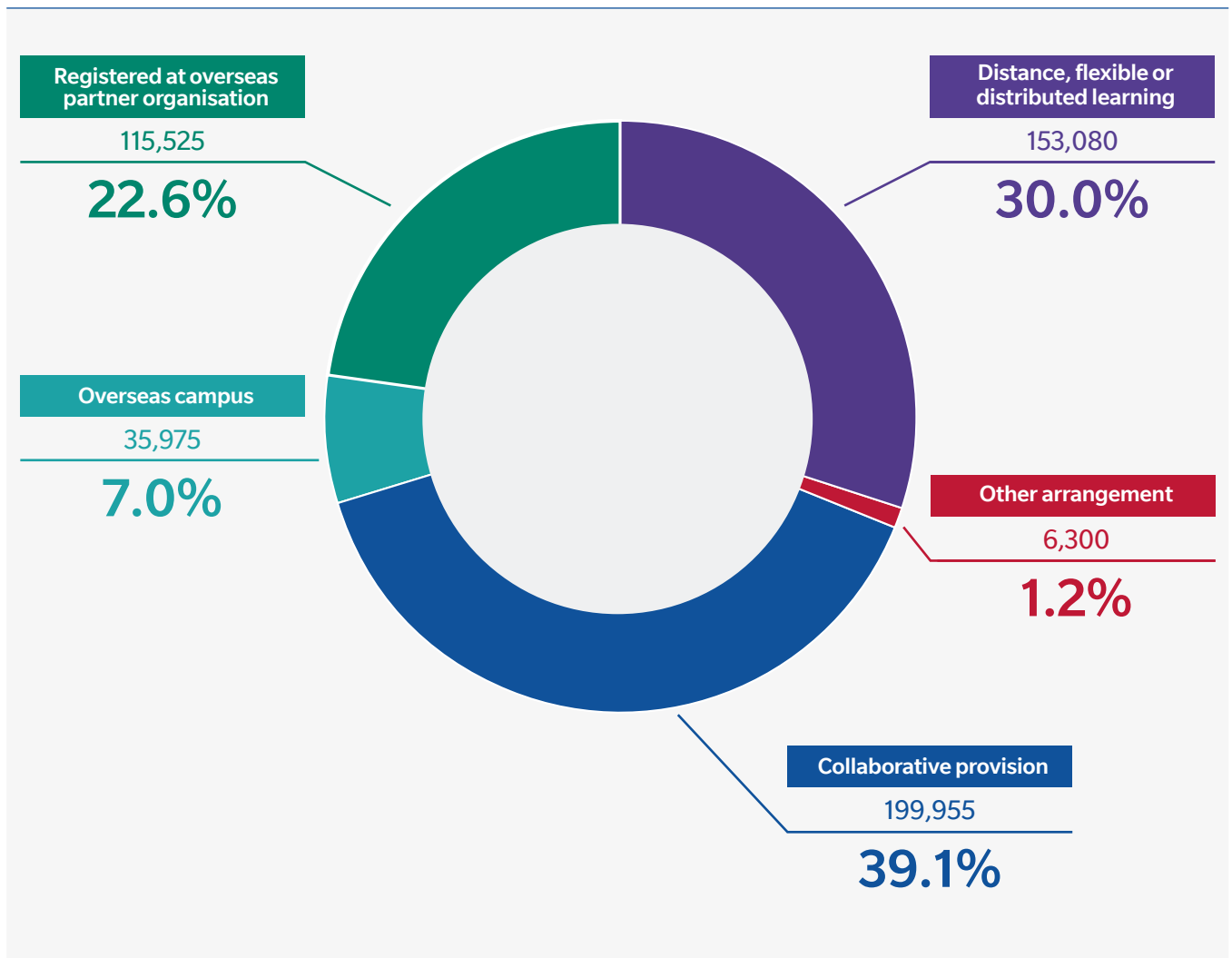
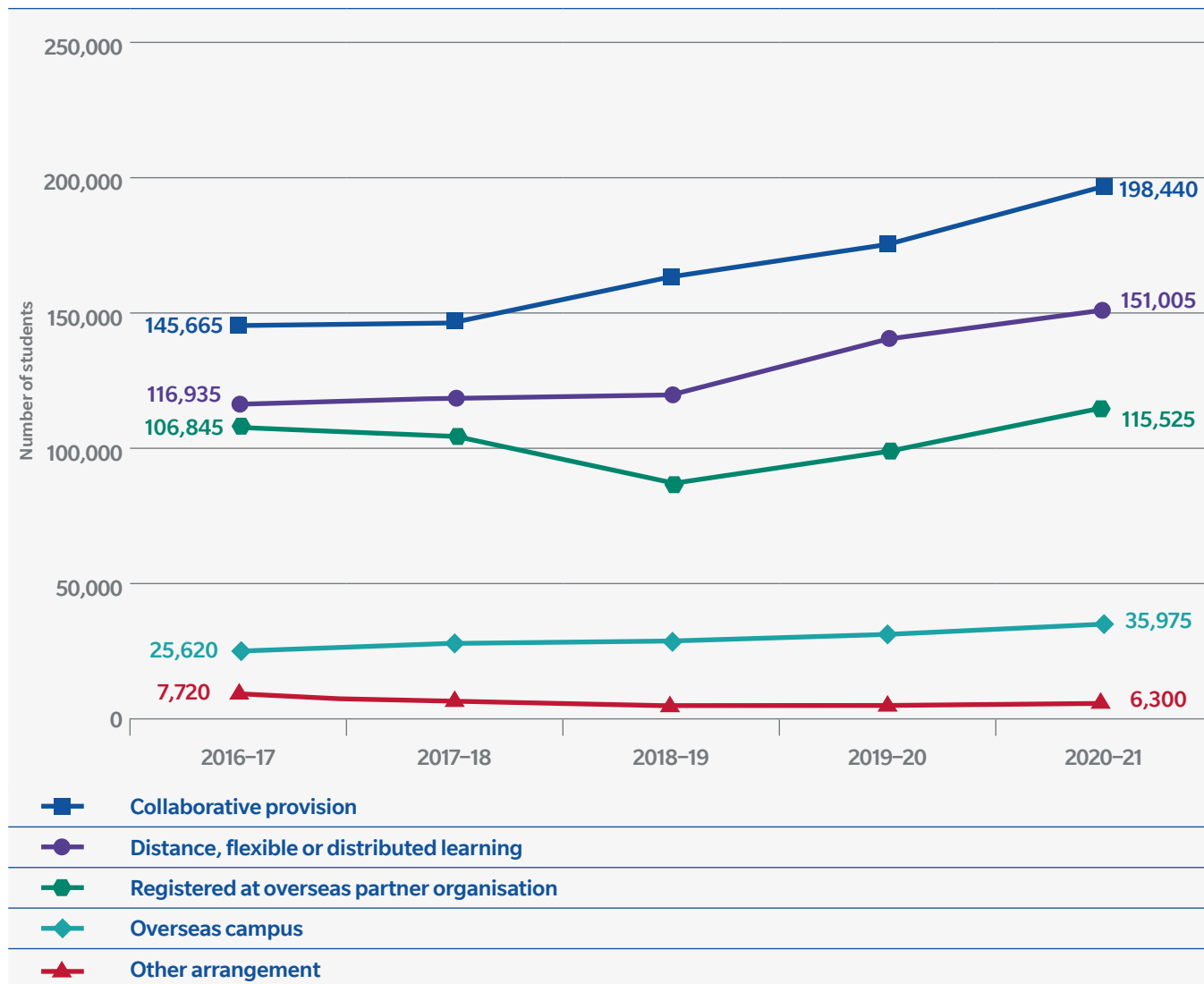


Figure 3 shows that between 2016–17 and 2020–21, collaborative provision saw the largest increase in numbers, with 52,775 (+36.2%) more students. This was followed by distance, flexible or distributed learning, with 34,070 (+29.1%) more students. There was also an increase of 8,680 (+8.1%) in students registered at an overseas partner organisation. Students registered at overseas campuses increased by 10,355 (+40.4%). Those studying via other arrangements decreased by 1,420 (–18.4%) over the same period, despite an increase of 1,140 (+22.1%) in the previous year.

Figure 3: UK HE TNE student numbers by type of provision 2016–17 to 2020–21 (excluding Oxford Brookes University)



UK University Overseas Campus Network

The UK University Overseas Campus Network (UKUOCN) was formed in 2021 to provide a forum for UK universities with overseas campuses to discuss issues of common interest.

The UKUOCN is co-convened by Newcastle University and the University of Nottingham and, at the time of writing, has 18 members. Its Champion is Newcastle University's Vice-Chancellor and President Professor, Chris Day. The UKUOCN institutions host 28 campuses and joint ventures in 13 countries across Europe, Asia and Africa. The first one, University of London Institute Paris, was established in 1894 in France, with an average of one overseas campus opening per year from 1998 to 2021.

Most of these campuses are different types of partnership ventures, although a growing number (currently 11) are wholly owned enterprises of the UK institution. The scope of these endeavours varies, with the majority focusing on taught provision for undergraduate students, and offering opportunities to complete study in the UK.

Collectively, UKUOCN campuses host around 67,000 students studying across 600 programmes. While 87% of students are local, these campuses recruit from beyond their host country borders: 10% of students come from third countries, and a further 3% from the UK. With an alumni population of almost 60,000, the total UKUOCN student and graduate population exceeds 125,000.

Some 3,500 academics, supported by over 3,200 professional service staff, are employed on UKUOCN campuses. Around half (52%) of the academics are from the host countries.

Level of study

Figure 4 shows that in 2020–21, as previous years, most UK TNE students were studying for first degrees (63.8%), with an additional 3.4% in other undergraduate programmes, while 31.4% were studying postgraduate taught programmes. Students on postgraduate research programmes made up the smallest group (1.5%).

Figure 4: Proportion of UK HE TNE students by level of study, 2020–21 (all providers)

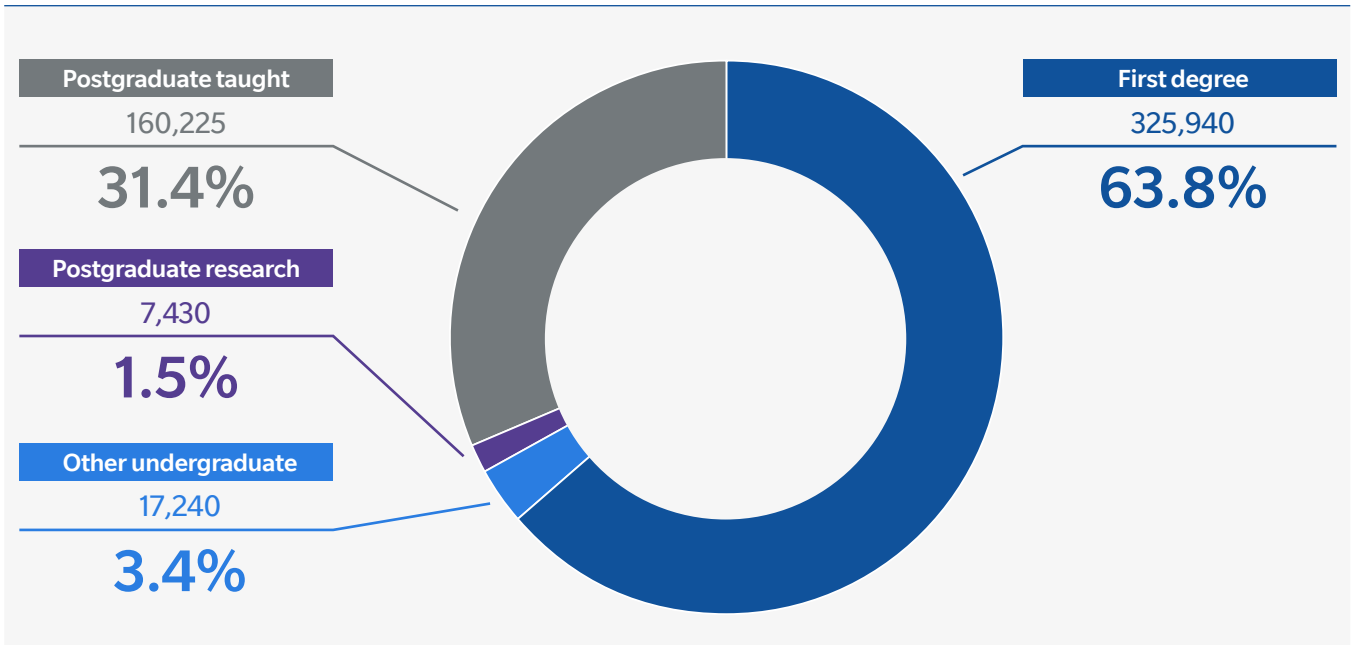
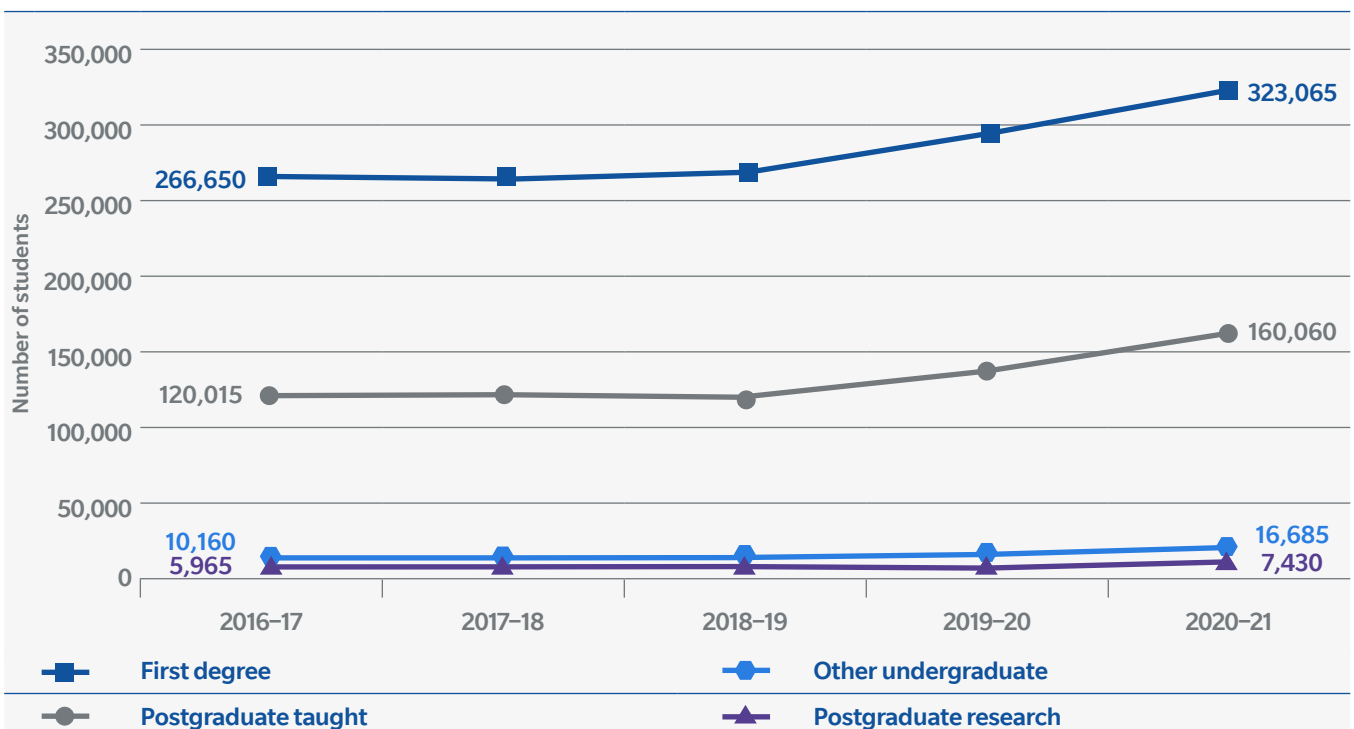


Figure 5 shows an increase of 56,415 (+21.2%) in first degree programmes between 2016–17 and 2020–21. Numbers on other undergraduate programmes increased by 6,525 (+64.2%). The number of postgraduate taught students increased by 40,045 (+33.4%), while postgraduate research student numbers increased by 1,465 (+24.6%).

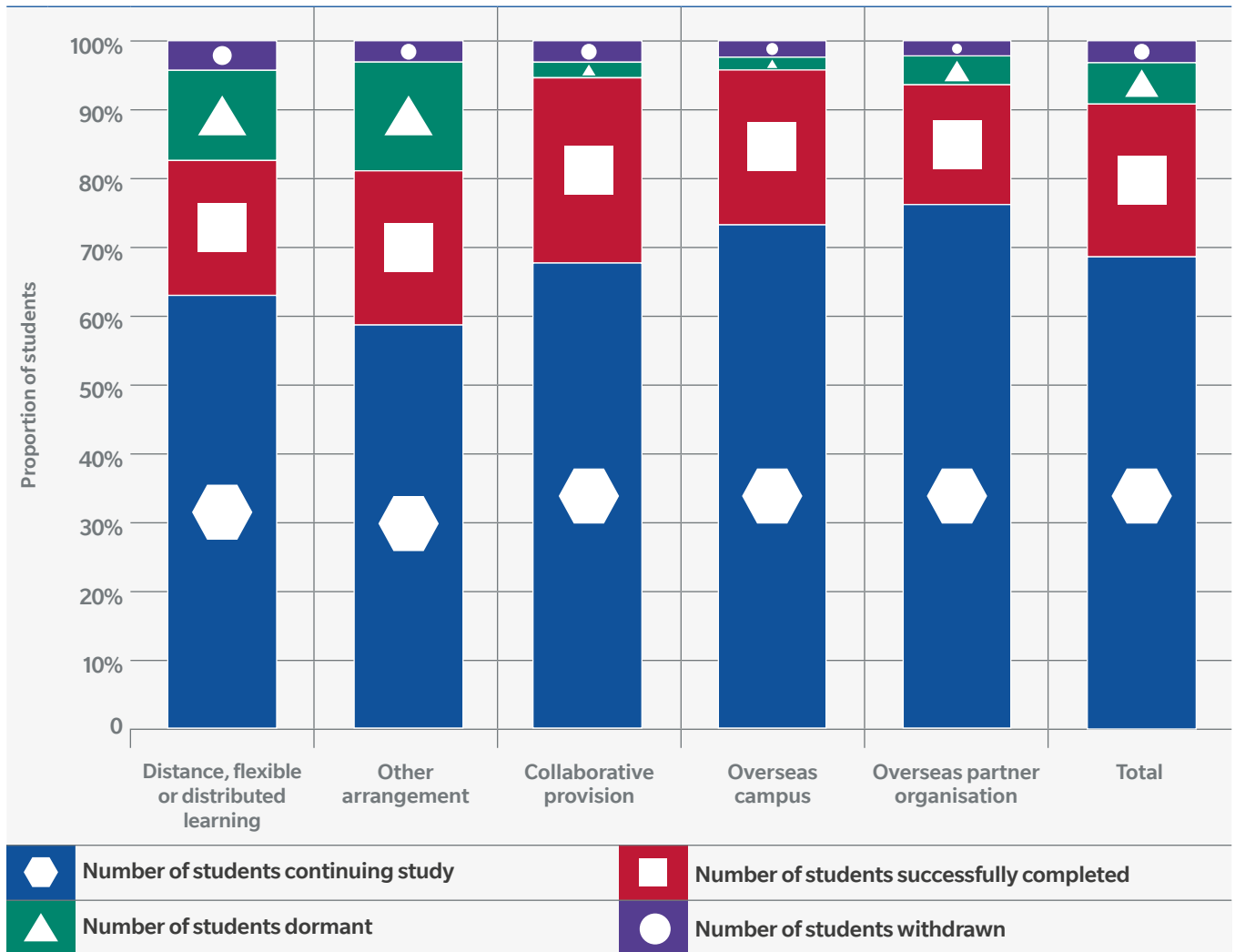
Figure 5: Number of UK HE TNE students by level of study, 2016–17 to 2020–21 (excluding Oxford Brookes University)



Headcount categories

Figure 6 shows student numbers in the four headcount categories under which all providers in England and Wales reported students in 2020–21. Students continuing to study formed the largest category (68.7%), followed by those who successfully completed their degree (22.2%), those who were dormant (6.0%) and those who withdrew (3.2%).

Figure 6: Proportion of UK HE TNE students by headcount categories and type of provision, 2020–21 (all providers in England and Wales)



3. Providers

Diversification

Figure 7 shows that 24 more providers reported UK TNE in 2020–21 than in 2016–17. Six new providers were added in the last reporting year, making this the largest number of providers ever recorded.

Figure 7: Number of UK HE TNE providers, 2016–17 to 2020–21

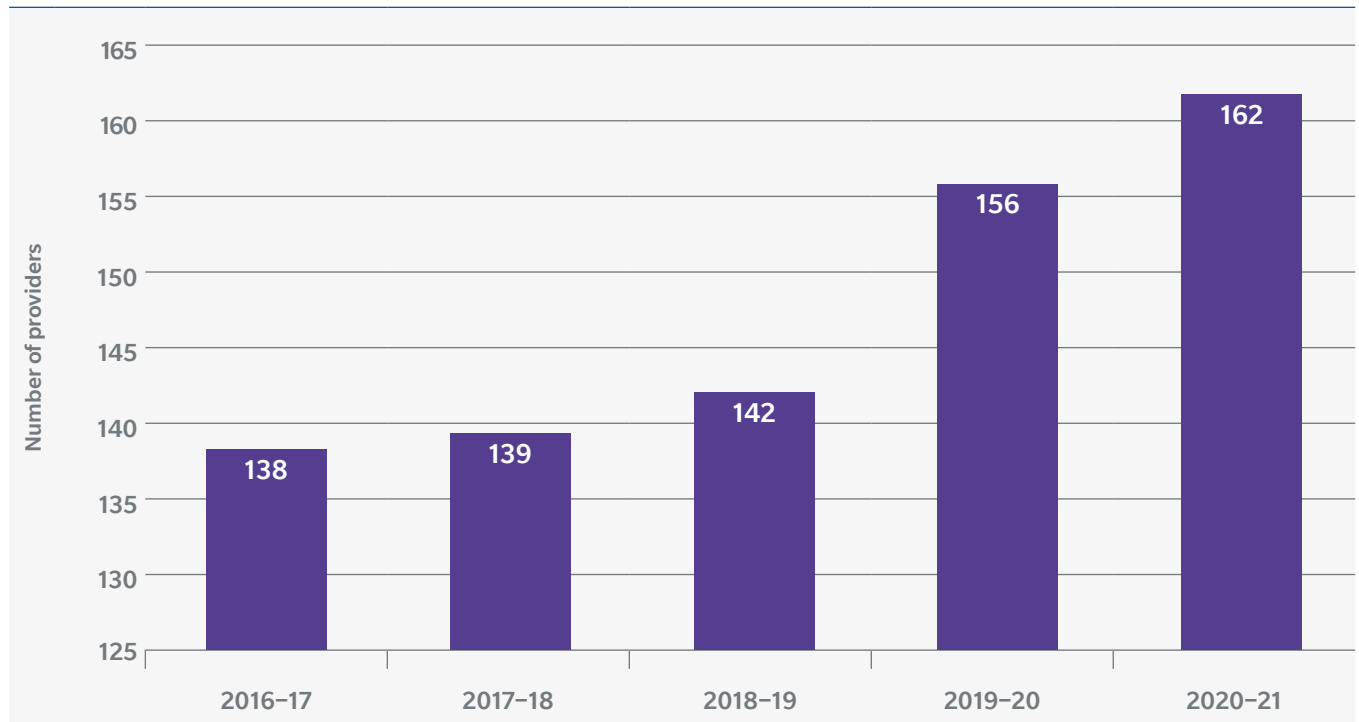
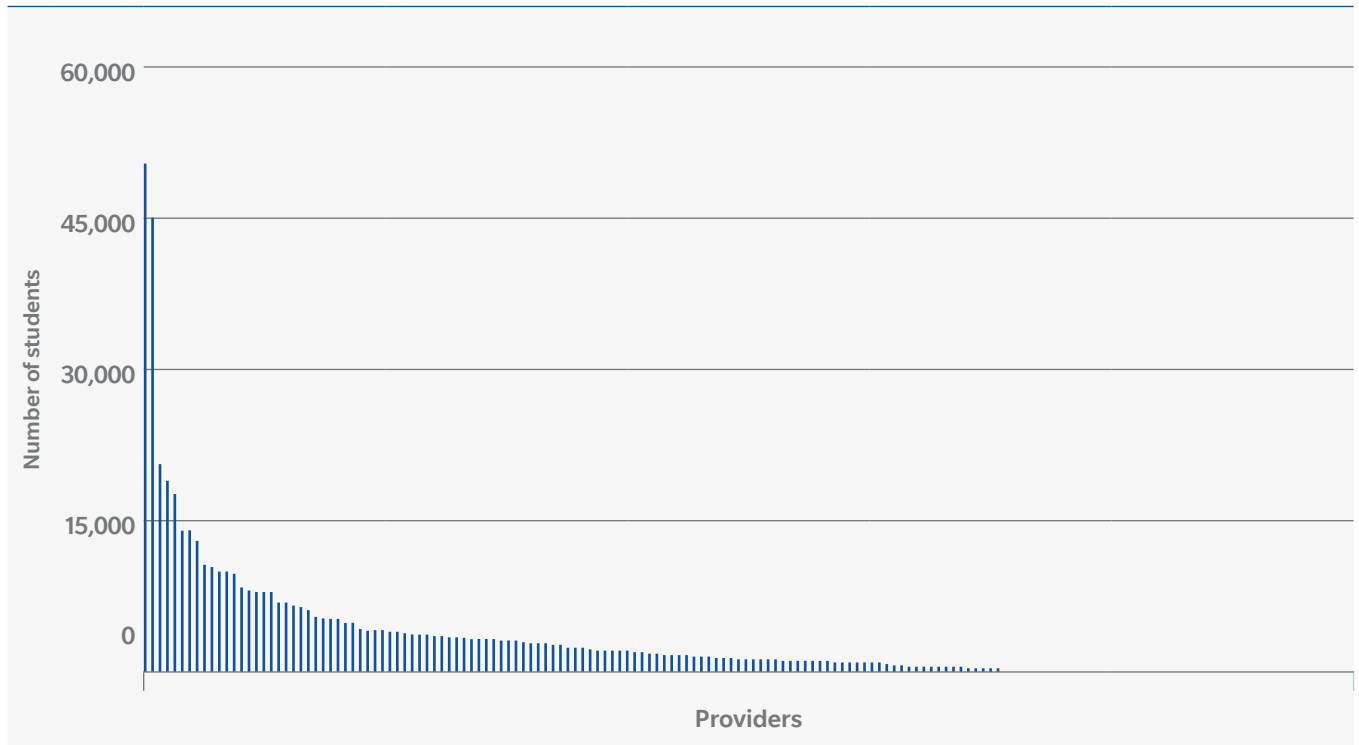


Figure 8 shows the distribution of student numbers between providers. Ten providers reported over 10,000 students in 2020–21 and a further 17 reported between 5,000 and 10,000 students. Student numbers in providers reporting more than 5,000 students increased by 15.7% between 2019–20 and 2020–21, while numbers in those with fewer than 5,000 UK TNE students increased by 7.2%.

- **50.8%** of all UK TNE provision was reported by **15** providers.
- **136** providers accounted for less than **1%** of UK TNE provision each.
- **90** providers reported more than **1,000** TNE students in 2020–21, up from **82** in 2019–20.

Figure 8: UK HE TNE student numbers, 2020–21 (all providers)



Location of provider

Table 2 shows that most students were reported by providers located in England (84.4%). This was followed by Scotland (9.0%), Wales (6.2%) and Northern Ireland (0.3%).

- 116 out of 167 providers and 17 out of 62 alternative providers in England reported TNE students. Excluding Oxford Brookes University, provision increased by 91,230 students (27.1%) between 2016–17 and 2020–21.
- 3 out of 4 providers in Northern Ireland reported TNE students. Provision increased by 230 students (16.2%) between 2016–17 and 2020–21.
- 17 out of 18 providers in Scotland reported TNE students. Provision increased by 9,750 students (24.3%) between 2016–17 and 2020–21.
- 9 out of 9 providers in Wales reported TNE students. Provision increased by 7,245 students (29.5%) between 2016–17 and 2020–21.

Table 2: UK HE TNE students by country of provider, 2020–21 (all providers)

Provider country	England	Northern Ireland	Scotland	Wales
Number of providers reporting TNE students	133	3	17	9
Total number of TNE students	431,395	1,650	45,955	31,835
Proportion of UK's TNE student numbers	84.4%	0.3%	9.0%	6.2%

Providers by host region

Table 3 shows that the number of UK TNE providers has grown across all regions between 2016–17 and 2020–21. In 2020–21, the European Union hosted the largest number of UK TNE providers (147), closely followed by Asia (146) and Africa (126).

Table 3: UK HE TNE providers by host country or territory (all providers)

Region	2016–17	2017–18	2018–19	2019–20	2020–21
Africa	105	105	108	125	126
Asia	127	128	129	141	146
Australasia	80	83	84	96	106
European Union	119	119	123	138	147
Middle East	103	108	112	125	125
North America	104	108	107	119	125
Other Europe	101	103	106	115	117
South America	69	74	79	89	96

4. Regions

In 2020–21, UK HE TNE was delivered in 228 countries and territories around the world, with 49.5% of students studying in Asia, followed by the EU (15.8%), the Middle East (13.8%) and Africa (11.1%).

Highlights

- Asia hosted **252,845** students, **49.5%** of the total.
- Student numbers increased the most in Asia (**+25,520** students), followed by the Middle East (**+11,200**), between 2019–20 and 2020–21.
- Student numbers increased across all world regions between 2019–20 and 2020–21, with the largest proportional increases taking place in South America (**+21.9%**), the Middle East (**+18.9%**) and Africa (**+16.7%**). Of the top 20 host countries and territories, **16** saw increases in student numbers.
- The top type of provision varies by region: distance, flexible or distributed learning was the prevalent mode of delivery in Australasia, North America, and South America; collaborative provision was dominant in Asia and Africa; and studying with an overseas provider was most common in the Middle East.

UK TNE was delivered in

228

countries and territories

Asia hosted

49.5%

of TNE students

South America saw a

21.9%

increase in TNE students

UK HE TNE numbers by region

Figure 9 shows the change in student numbers in each world region between 2016–17 and 2020–21 (note that this excludes Oxford Brookes University). Student numbers increased in all world regions over the last five years. Asia has consistently hosted the largest number of students, with this number increasing by 27.7% between 2016–17 and 2020–21. The European Union hosted the second largest number of students, increasing by 44.7% over the same period.

Figure 9: UK HE TNE student numbers by region of provision, 2016–17 to 2020–21 (excluding Oxford Brookes University)

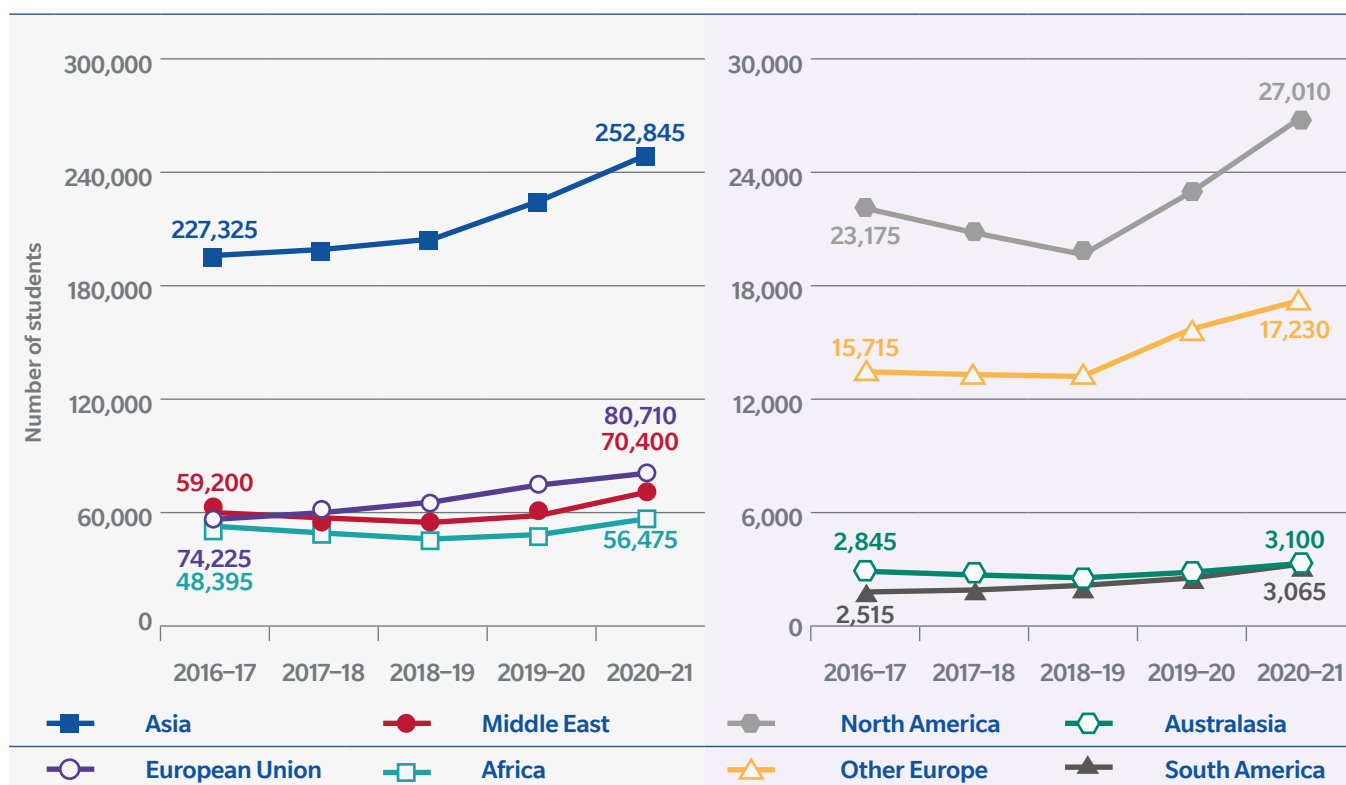


Table 4 shows an increase in student numbers across all world regions between 2019–20 and 2020–21. Africa, the Middle East, and North America increased their share of the total, while Asia, the EU and non-EU Europe's share decreased. Australasia and South America's share remained the same.

Table 4: Proportion of UK HE TNE students by region of provision, 2019–20 to 2020–21

Region	2019–20		2020–21	
	Student numbers	% Total	Student numbers	% Total
Africa	48,395	10.7%	56,475	11.1%
Asia	227,325	50.1%	252,845	49.5%
Australasia	2,845	0.6%	3,100	0.6%
EU	74,225	16.4%	80,710	15.8%
Middle East	59,200	13.1%	70,400	13.8%
North America	23,175	5.1%	27,010	5.3%
Other Europe	15,715	3.5%	17,230	3.4%
South America	2,515	0.6%	3,065	0.6%

Note: Percentages exclude UK territories.

Table 5 shows the top 20 host countries and territories by student numbers in 2020–21, the percentage change from the previous year and the proportion of the global total in each. The top eight countries and territories account for 50.8% of the total number of students. The largest variations took place in Saudi Arabia (+64.5%), Kuwait (+45.6%), Nepal (+33.0%) and Uzbekistan (+32.2%). There were decreases in Cyprus (EU) (–12.1%), Oman (–11.8%) and Malaysia (–1.9%).

Table 5: Top 20 host countries and territories for UK HE TNE students, 2020–21 (all providers)

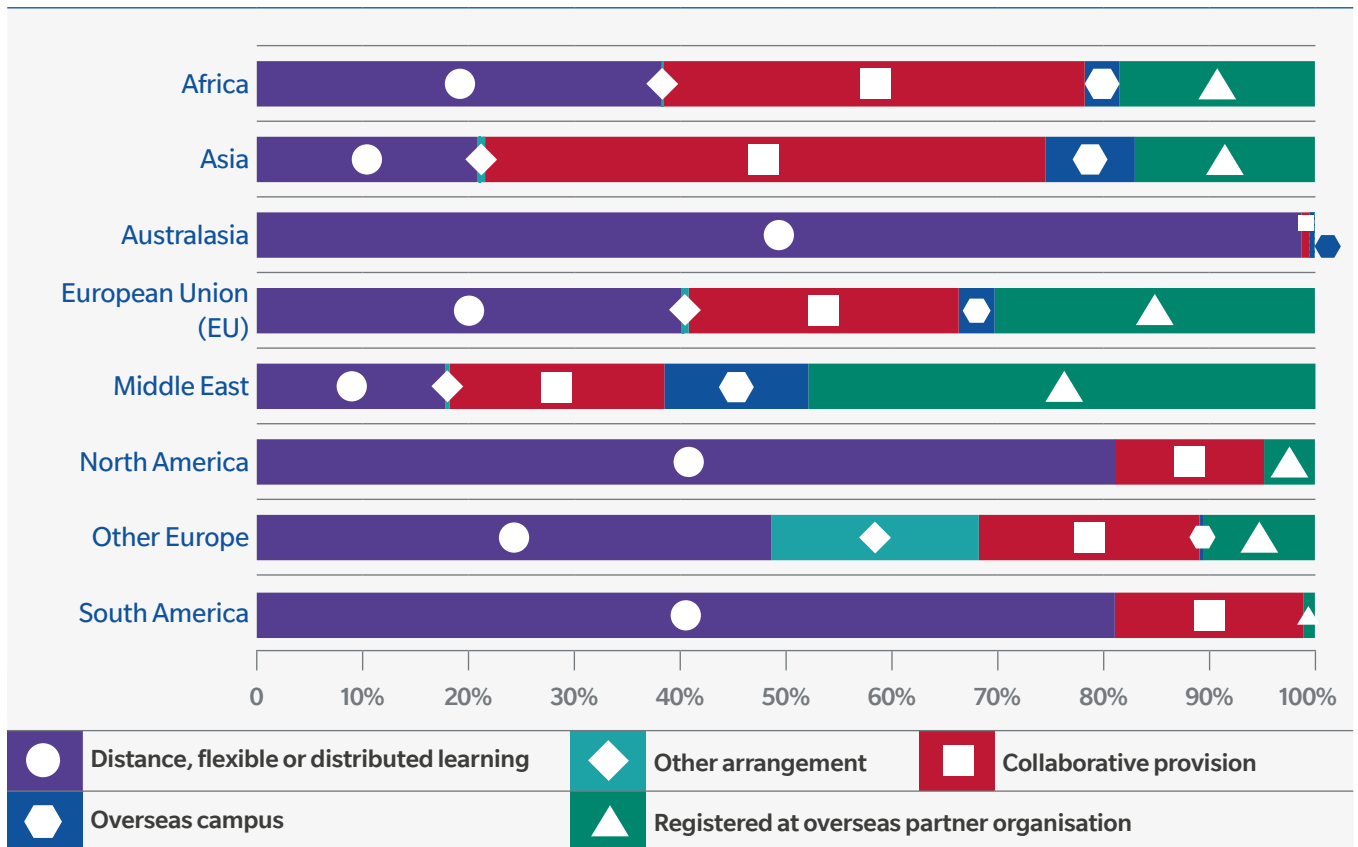
Rank	Host country/territory	Student numbers	Growth rate %	% of total students
1	 China	61,495	23.5% ↑	12.0%
2	 Malaysia	48,460	–1.9% ↓	9.5%
3	 Sri Lanka	37,175	20.6% ↑	7.3%
4	 Singapore	27,875	0.0%	5.5%
5	 Egypt	23,805	21.5% ↑	4.7%
6	 Hong Kong (SAR) ⁸	22,480	0.4% ↑	4.4%
7	 Greece	21,530	9.2% ↑	4.2%
8	 United Arab Emirates	16,570	12.0% ↑	3.2%
9	 Oman	15,625	–11.8% ↓	3.1%
10	 Saudi Arabia	14,945	64.5% ↑	2.9%
11	 Germany	11,535	24.7% ↑	2.3%
12	 Kuwait	10,720	45.6% ↑	2.1%
13	 Cyprus (EU)	9,970	–12.1% ↓	2.0%
14	 Nepal	9,620	33.0% ↑	1.9%
15	 Pakistan	9,305	17.9% ↑	1.8%
16	 India	9,090	6.8% ↑	1.8%
17	 United States	8,855	20.7% ↑	1.7%
18	 Switzerland	8,775	8.9% ↑	1.7%
19	 Uzbekistan	8,080	32.2% ↑	1.6%
20	 Ireland	6,820	14.9% ↑	1.3%

8. Special Administrative Region of China

Type of provision by region

Figure 10 shows the distribution of students by type of TNE provision and region of study in 2020–21. Distance, flexible or distributed learning was the main type of provision in Australasia (99.0%), North America (81.1%), South America (80.8%) and the EU (40.1%). It also made up a significant proportion of provision in Africa (38.2%) and Asia (20.1%). Collaborative provision was important across the board, but especially in Asia (53.2%) and Africa (39.8%). Students registered at an overseas partner organisation were prevalent in the Middle East (47.9%) and they also made up a big proportion in the EU (30.2%). There was substantial overseas campus provision in the Middle East (13.6%).

Figure 10: Proportion of UK HE TNE students by region of study and type of provision, 2020–21 (all providers)



Level of study across regions

Figure 11 shows the distribution of students by level of provision in each world region in 2020–21. First degrees were the main form of provision in Asia (74.2%), the Middle East (72.9%) and Africa (54.2%). Postgraduate taught degrees were the most popular choice in Australasia (70.0%), North America (59.0%) and South America (56.9%). Postgraduate research was more significant in North America (4.5%) and other undergraduate degrees were more significant in Australasia (8.7%) than in other regions, although both categories represent a relatively small proportion of students.

Figure 11: Proportion of UK HE TNE students by region and level of study, 2020–21 (all providers)

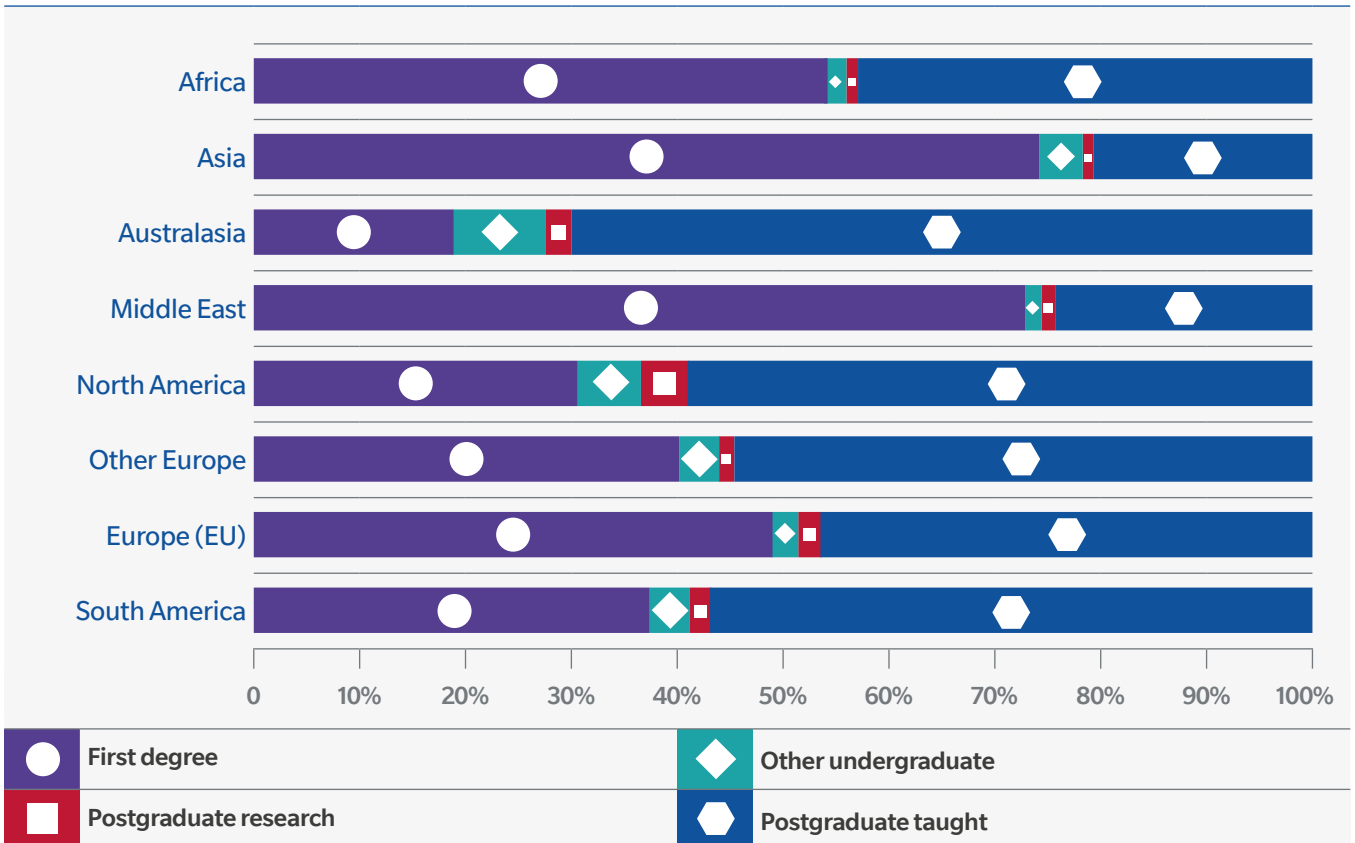


Table 6 shows the top host countries and territories by level of provision in 2020–21 and the percentage of provision at each level in each country/territory. Of the top 20 hosts for undergraduate students, only in Ireland (44.4%), the UAE (48.2%) and India (48.7%) did undergraduate students account for less than half of the TNE student population. On the other hand, in 8 of the top 20 hosts for postgraduate students, postgraduate students accounted for less than half of the TNE student population. Nine countries and territories feature in the top 20 for both undergraduate and postgraduate provision.

Sri Lanka hosted the largest number of postgraduate students, despite postgraduate provision only accounting for 34.5% of its total TNE student population. Postgraduate students made up the largest proportion of provision in Nigeria (87.5%), Austria (84.1%) and Cyprus (EU) (81.7%). Undergraduate students made up the largest proportion of provision in Kuwait (96.1%), Uzbekistan (94.9%) and Nepal (92.6%).

Table 6: Top 20 host countries and territories for UK HE TNE students by level of study, 2020–21

Rank	Undergraduate			Postgraduate		
	Host country/territory	Number of students	% Undergraduate	Host country/territory	Number of students	% Postgraduate
1	 China	52,645	85.6%	 Sri Lanka	12,835	34.5%
2	 Malaysia	40,395	83.4%	 China	8,850	14.4%
3	 Sri Lanka	24,340	65.5%	 UAE	8,570	51.7%
4	 Egypt	21,810	91.6%	 Cyprus (EU)	8,150	81.7%
5	 Singapore	21,740	78.0%	 Malaysia	8,065	16.6%
6	 Hong Kong (SAR)	16,415	73.0%	 Switzerland	6,150	70.1%
7	 Greece	16,100	74.8%	 Singapore	6,135	22.0%
8	 Oman	13,500	86.4%	 Hong Kong (SAR)	6,065	27.0%
9	 Saudi Arabia	12,890	86.2%	 United States	6,005	67.8%
10	 Kuwait	10,300	96.1%	 Greece	5,430	25.2%
11	 Nepal	8,905	92.6%	 Germany	5,190	45.0%
12	 Pakistan	8,260	88.8%	 Nigeria	5,110	87.5%
13	 UAE	7,995	48.2%	 India	4,660	51.3%
14	 Uzbekistan	7,665	94.9%	 Canada	4,320	71.1%
15	 Germany	6,345	55.0%	 South Africa	3,795	69.6%
16	 India	4,430	48.7%	 Ireland	3,785	55.5%
17	 Vietnam	4,295	83.2%	 Trinidad & Tobago	3,100	52.4%
18	 Spain	4,165	81.3%	 Austria	2,825	84.1%
19	 Bahrain	3,120	84.1%	 Ghana	2,540	64.5%
20	 Ireland	3,030	44.4%	 Oman	2,120	13.6%

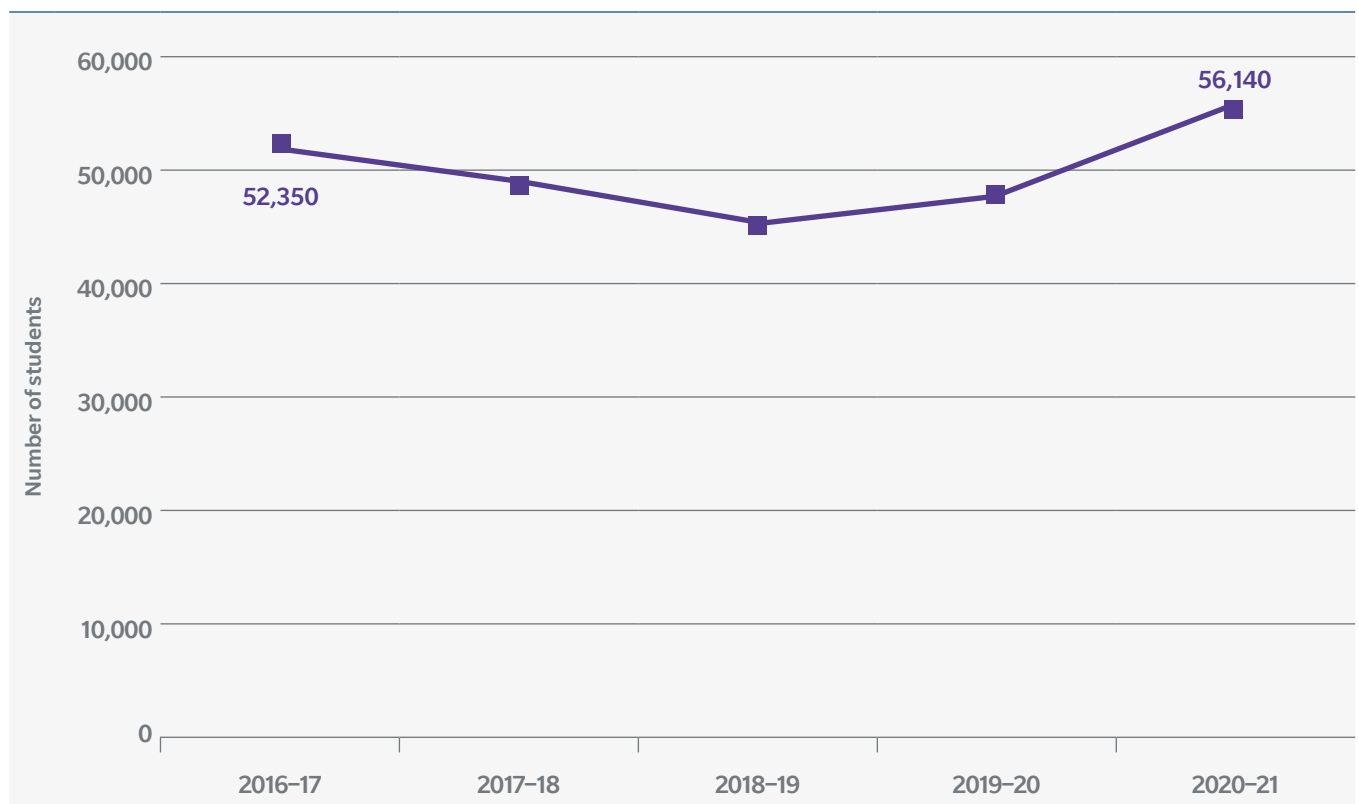
5. Insight by region

Africa

Trend analysis

As shown in **Figure 12**, after a drop in 2018–19, student numbers in Africa recovered in the last two years and grew by 17.3% between 2019–20 and 2020–21.











Figure 12: Number of UK HE TNE students in Africa, 2016–17 to 2020–21 (excluding Oxford Brookes University)



Top host countries

Table 7 shows the 10 top host countries in Africa in 2020–21. Egypt hosted the most students: 23,805 (42.2% of the total). The greatest proportional increase took place in Nigeria (+31.7%). Only Zambia showed a proportional decrease (–6.2%) from 2019–20 to 2020–21.

Table 7: Top 10 host countries in Africa for UK HE TNE students, 2020–21 and % change from 2019–20 (all providers)

Host country/territory	Number of students	% of students	Percentage change 2019–20 to 2020–21
 Egypt	23,805	42.2%	21.5% ↑
 Nigeria	5,840	10.3%	31.7% ↑
 South Africa	5,455	9.7%	10.2% ↑
 Ghana	3,935	7.0%	0.6% ↑
 Mauritius	3,380	6.0%	11.9% ↑
 Kenya	2,490	4.4%	23.0% ↑
 Botswana	1,965	3.5%	18.0% ↑
 Uganda	1,475	2.6%	25.5% ↑
 Zimbabwe	1,090	1.9%	14.1% ↑
 Zambia	1,065	1.9%	–6.2% ↓

Egypt hosted the most students

23,805

Egypt hosted

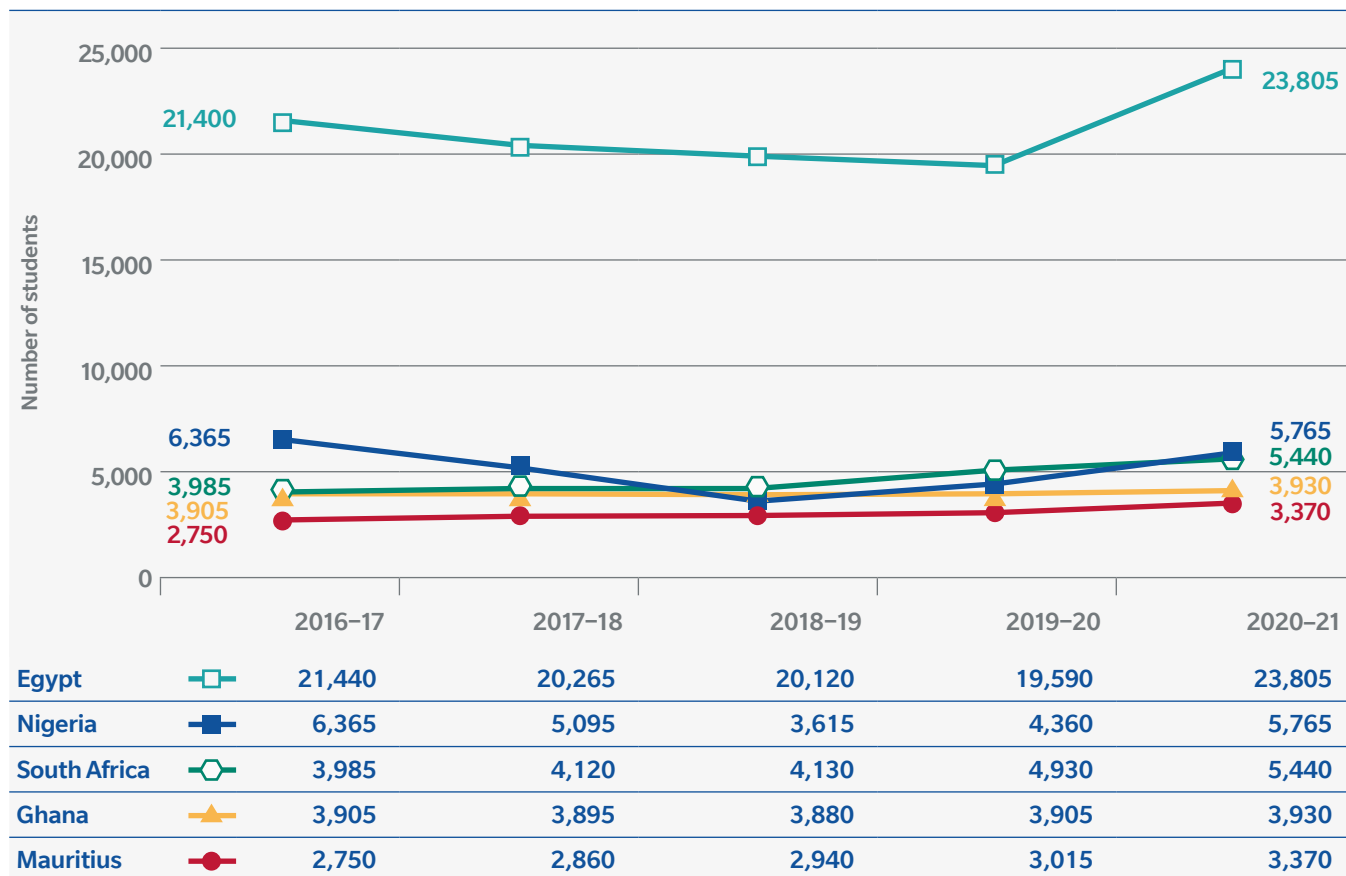
42.2%
of the total

Nigeria had the biggest increase

+31.7%

Figure 13 shows the development of student numbers in the top five host countries (excluding students from Oxford Brookes University), which altogether accounted for 75.1% of all UK HE TNE students in Africa in 2020–21. Student numbers increased by 4,215 (+21.5%) in Egypt from 2019–20 to 2020–21, while numbers in Nigeria increased by 1,405 (+32.2%), in South Africa by 510 (+10.3%), in Ghana by 25 (+0.6%) and in Mauritius by 355 (+11.8%).














Figure 13: Top 5 host countries in Africa for UK HE TNE students, 2016–17 to 2020–21 (by rank in 2020–21) (excluding Oxford Brookes University)



Type of provision

Table 8 shows how many students were studying through each type of TNE provision, how many countries in Africa hosted each type of provision, and which countries were at the top for each type of provision. Collaborative provision was delivered in 31 of 56 countries where students were reported, with the largest number of them located in Egypt. Distance, flexible or distributed learning was delivered in all 56 countries where TNE students were reported in Africa, with the largest number of them based in South Africa. Students registered at overseas partner organisations were reported in 38 countries; Egypt hosted the largest number of students. Students studying at an overseas campus were reported in ten countries, most of them in Mauritius. Other arrangements were reported in only one country – Zimbabwe.





















Table 8: UK HE TNE students in Africa by type of provision, 2020–21 (all providers)

Type of provision	Number of students	Number of countries/ territories represented out of 56 (%)	Top countries/ territories
Collaborative provision	22,465	31 (55.4%)	Egypt 
			Botswana 
			Mauritius 
Distance, flexible or distributed learning	21,550	56 (100.0%)	South Africa 
			Nigeria 
			Kenya 
Registered at overseas partner organisation	10,575	38 (67.9%)	Egypt 
			Ghana 
			Nigeria 
Overseas campus	1,860	10 (17.9%)	Mauritius 
			Ghana 
			Malawi 
Other arrangement	30	1 (1.8%)	Zimbabwe 

Level of study

Table 9 shows the distribution of undergraduate and postgraduate TNE study across African countries. Egypt alone accounted for 68.6% of undergraduate students in Africa. Mauritius had the second most undergraduate students but accounted for only 6.9% of the total. At postgraduate level, students were slightly more evenly spread with Nigeria accounting for 20.7%, South Africa for 15.4% and Ghana for 10.3%.

Table 9: Top 10 host countries in Africa for UK HE TNE students by level of study, 2020–21 (all providers)

Rank	Undergraduate (UG)			Postgraduate (PG)		
	Country/territory	Number of students	Percentage of UG in Africa	Country/territory	Number of students	Percentage of PG in Africa
1	 Egypt	21,810	68.6%	 Nigeria	5,110	20.7%
2	 Mauritius	2,200	6.9%	 South Africa	3,795	15.4%
3	 South Africa	1,660	5.2%	 Ghana	2,540	10.3%
4	 Ghana	1,395	4.4%	 Egypt	1,995	8.1%
5	 Botswana	885	2.8%	 Kenya	1,950	7.9%
6	 Nigeria	735	2.3%	 Uganda	1,375	5.6%
7	 Kenya	535	1.7%	 Mauritius	1,180	4.8%
8	 Morocco	370	1.2%	 Botswana	1,080	4.4%
9	 Zimbabwe	350	1.1%	 Zimbabwe	735	3.0%
10	 Zambia	345	1.1%	 Zambia	720	2.9%

Country highlights

Egypt

With a 21.5% increase in UK TNE numbers from 2019–20 to 2020–21, Egypt is now ranked as the fifth top host country globally. Based on government policy positions and the increasing number of partnership requests from Egyptian universities, with many UK universities visiting Egypt to explore opportunities, we can expect numbers to continue to grow in the mid-to-long term.

There are several drivers for the demand for UK TNE in Egypt. With a population of 106 million, Egypt is the 14th most populous country in the world, and with a forecasted rise to 160 million by 2050, it is set to climb even higher. Egypt has a young population, with 45% of inhabitants being under the age of 19. Participation in higher education is almost 40% (around 3 million students) with a near even split between females and males. The government considers higher education as the key to social and economic development and has set a target of attaining a 45% participation rate by 2030.

To meet this target, the government has been building capacity for almost 30 years by regularly increasing the size and number of existing traditional state universities and encouraging the creation of private universities. In the last decade, the internationalisation of universities to enhance quality and to expand capacity became a focus. The first step to internationalisation was introducing teaching collaborations, especially with UK partners. This has resulted in many dual degree programmes, primarily at undergraduate level. In 2019, the government built on this and passed a law to enable foreign universities to establish campuses in Egypt. As the government aims to restore Egypt's former glory as a regional hub for higher education, it is planning to introduce further de-regulatory legislation.

“ Participation in higher education is almost 40% with a near even split between females and males.”

There are several different TNE models in operation in Egypt, with the dominant one being dual degree programmes. However, private companies are increasingly setting up consortia to host programmes from several foreign universities. The government is also seeking strategic partnerships for 15 new-style state universities it is establishing.

The UK is not the only target country. Germany, France, Italy, Canada, China and Russia have also increased their collaboration with Egypt, but the most significant development recently has been increased engagement with the US. Arizona State University, in collaboration with local partner institutions, has moved quickly and decisively to make Egypt its base for both Africa and the Middle East. US institutions are interested in professional qualifications and micro-credits as well as regular degrees.

Country highlights

South Africa

The notable increase in the number of UK TNE students in South Africa (+10.2% from 2019–20 to 2020–21) can be attributed to the demand for international qualifications as a way for graduates to gain a competitive advantage in the employment market.

In 2021, the overall unemployment rate for 15–24-year-olds was at a record high, at 66.5%. The graduate unemployment rate for those aged 15–24 was 40.3% and 15.5% among those aged 25–34 years.⁹

Against this backdrop, graduate employability has become a key factor in the South African tertiary education landscape.

There is an opportunity for TNE activities to provide qualifications that are sought by employers or raise chances of employment after graduation. Applied TNE programmes that focus on skills acquisition and address labour market needs stand a better chance of success in the current environment.

The key to continued TNE growth in South Africa is to contextualise TNE programmes and to empower graduates to contribute to the local economy.

“ Notable increase in the number of UK TNE students in South Africa +10.2% from 2019–20.”

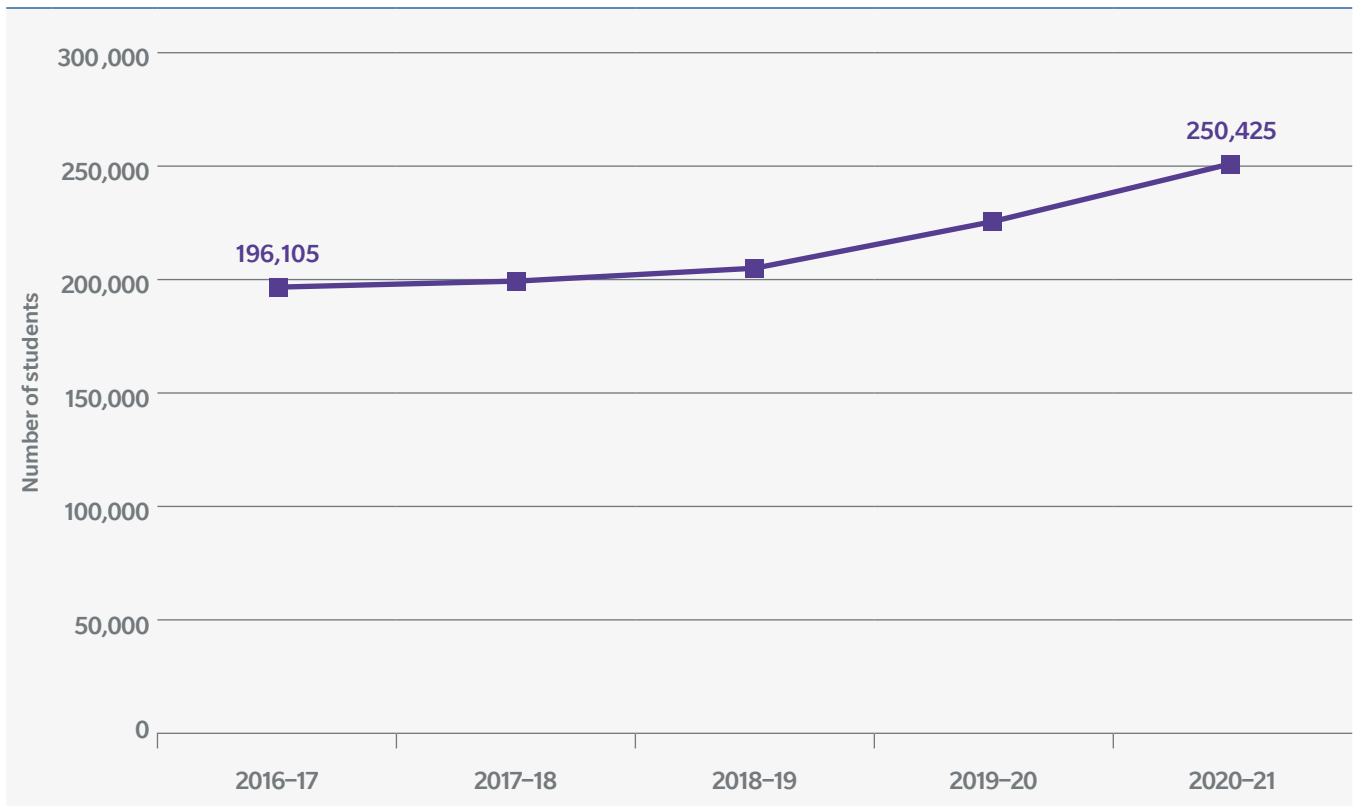
Insight by region

Asia

Trend analysis

As shown in **Figure 14**, student numbers in Asia have increased year-on-year since 2014–15. They increased by 25,455 (+11.3%) between 2019–20 and 2020–21.











Figure 14: Number of UK HE TNE students in Asia, 2016–17 to 2020–21 (excluding Oxford Brookes University)



Top host countries and territories

Table 10 shows the 10 Asian countries and territories hosting the most students in 2020–21. China was ranked the top host country with 61,495 (24.3% of the total). The greatest proportional increase took place in Vietnam (+36.6%). Only numbers in Malaysia decreased (–1.9%) and there was no change in numbers in Singapore.

Table 10: Top 10 host countries and territories in Asia for UK HE TNE students, 2020–21 (all providers)

Host country/territory	Number of students	% of students	Percentage change 2019–20 to 2020–21
 China	61,495	24.3%	23.5% ↑
 Malaysia	48,460	19.2%	–1.9% ↓
 Sri Lanka	37,175	14.7%	20.6% ↑
 Singapore	27,875	11.0%	0.0%
 Hong Kong (SAR)	22,480	8.9%	0.4% ↑
 Nepal	9,620	3.8%	33.0% ↑
 Pakistan	9,305	3.7%	17.9% ↑
 India	9,090	3.6%	6.8% ↑
 Uzbekistan	8,080	3.2%	32.2% ↑
 Vietnam	5,165	2.0%	36.6% ↑

China hosted the most students

61,495

China hosted

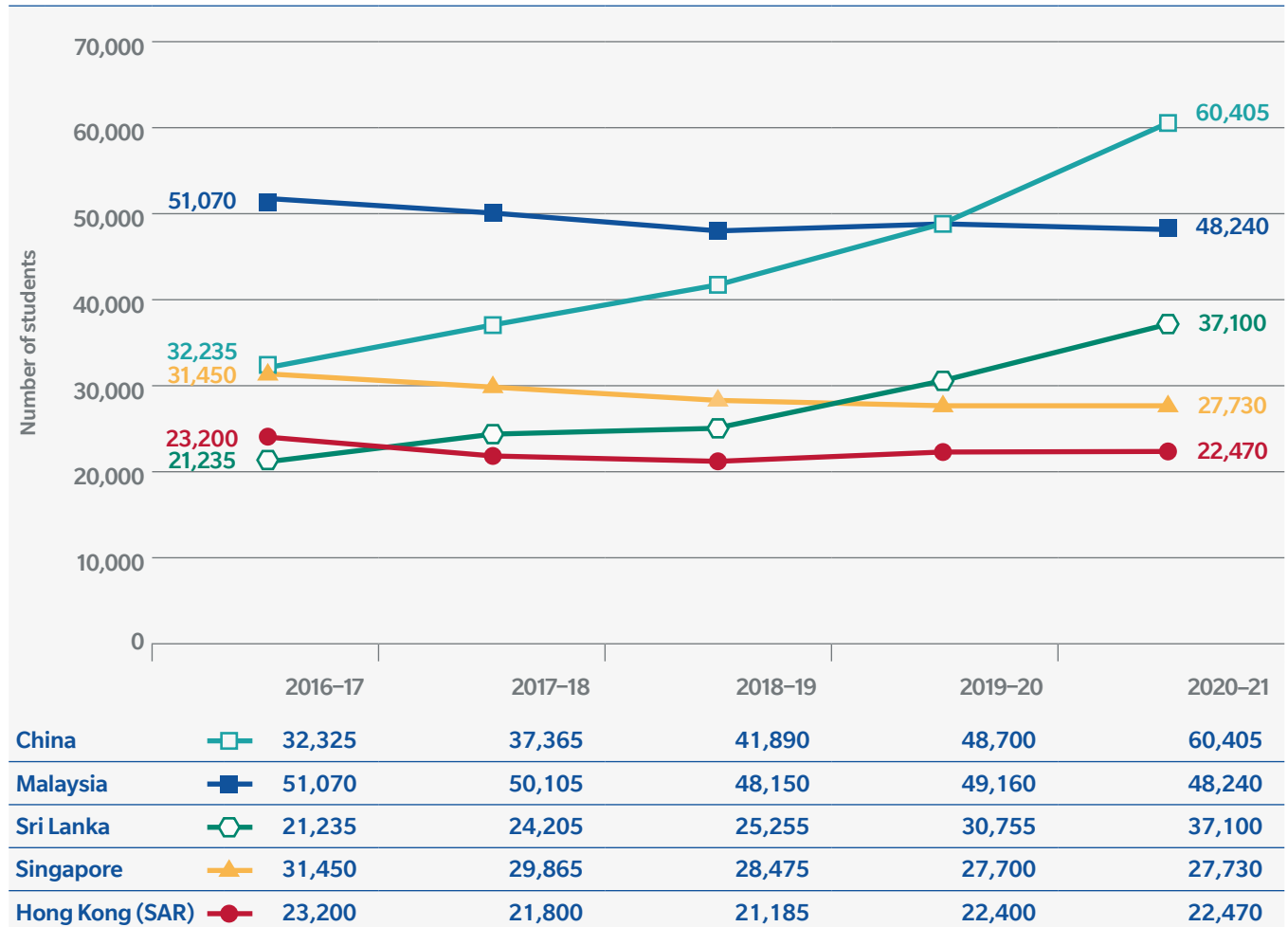
24.3%
of the total

Vietnam had the biggest increase

+36.6%

Figure 15 shows the development of student numbers in the top five Asian host countries and territories, which together accounted for 78.2% of all TNE students in Asia in 2020–21. Between 2016–17 and 2020–21, student numbers increased in China by 28,080 (+86.9%), and in Sri Lanka by 15,865 (+74.7%). Numbers decreased in Malaysia by 2,830 (–5.5%), in Singapore by 3,720 (–11.8%) and in Hong Kong by 730 (–3.1%).
















Figure 15: Top 5 host countries and territories in Asia for UK HE TNE students, 2016–17 to 2020–21 (by rank in 2020–21) (excluding Oxford Brookes University)



Type of provision

Table 11 shows the number of students studying through each type of TNE provision, how many countries and territories in Asia hosted each type of provision, and what the top countries and territories were for each type of provision. Collaborative provision was delivered in 28 of 32 countries and territories where students were reported, with the largest number of them located in Sri Lanka. Distance, flexible or distributed learning was delivered in all 32 countries and territories, with the largest number of students located in Pakistan. Students registered at overseas partner organisations were reported in 22 countries and territories, with most of them located in China. Students studying at an overseas campus were reported in 14 countries and territories, most of them in China. Other arrangements were reported in all countries and territories, primarily in Uzbekistan.





















Table 11: UK HE TNE students in Asia by type of provision, 2020–21 (all providers)

Type of provision	Number of students	Number of countries/territories represented out of 32 (%)	Top countries/territories
Collaborative provision	134,555	28 (87.5%)	Sri Lanka 
			China 
			Malaysia 
Distance, flexible or distributed learning	50,775	32 (100%)	Pakistan 
			Singapore 
			Hong Kong (SAR) 
Registered at overseas partner organisation	43,675	22 (68.8%)	China 
			Malaysia 
			Hong Kong (SAR) 
Overseas campus	21,760	14 (43.8%)	China 
			Malaysia 
			Sri Lanka 
Other arrangement	2,085	32 (100%)	Uzbekistan 
			Malaysia 
			Singapore 

Level of study

Table 12 shows the distribution between undergraduate and postgraduate TNE study across Asian countries and territories. At undergraduate level, China accounted for 26.6% of all students, Malaysia for 20.4% and Sri Lanka for 12.3%. At postgraduate level, Sri Lanka hosted most students (23.4%), followed by China (16.1%) and Malaysia (14.7%).

Table 12: Top 10 host countries and territories in Asia for UK HE TNE students by level of study, 2020–21 (all providers)

Rank	Undergraduate (UG)			Postgraduate (PG)		
	Country/territory	Number of students	Percentage of UG in Asia	Country/territory	Number of students	Percentage of PG in Asia
1	 China	52,645	26.6%	 Sri Lanka	12,835	23.4%
2	 Malaysia	40,395	20.4%	 China	8,850	16.1%
3	 Sri Lanka	24,340	12.3%	 Malaysia	8,065	14.7%
4	 Singapore	21,740	11.0%	 Singapore	6,135	11.2%
5	 Hong Kong (SAR)	16,415	8.3%	 Hong Kong (SAR)	6,065	11.0%
6	 Nepal	8,905	4.5%	 India	4,660	8.5%
7	 Pakistan	8,260	4.2%	 Japan	1,050	1.9%
8	 Uzbekistan	7,665	3.9%	 Pakistan	1,045	1.9%
9	 India	4,430	2.2%	 Vietnam	870	1.6%
10	 Vietnam	4,295	2.2%	 Thailand	785	1.4%

Country highlights

China

With over 61,000 students in 2020–21, China was the top host country for UK TNE. Over 240 joint UK–China degree partnerships were in operation in 2022.

UK–China cooperative partnerships account for around one-fifth of all Chinese–overseas joint programmes and institutions at undergraduate level and above. There are 41 UK–China joint institutes, including 39 institutes without legal entity status and two joint campuses with their own independent legal entity status.

The 2020–21 academic year saw a particularly strong increase in TNE, which was due in part to the pandemic, with travel difficulties and lockdowns making receiving an in-person UK education while staying closer to home more attractive.

Another reason for the sharp increase in 2020–21 was that Chinese authorities temporarily raised the recruitment quotas for some joint programmes and institutes, allowing them to enrol students who had originally planned to study abroad but were unable to travel due to the pandemic.

“ There are 41 UK–China joint institutes.”

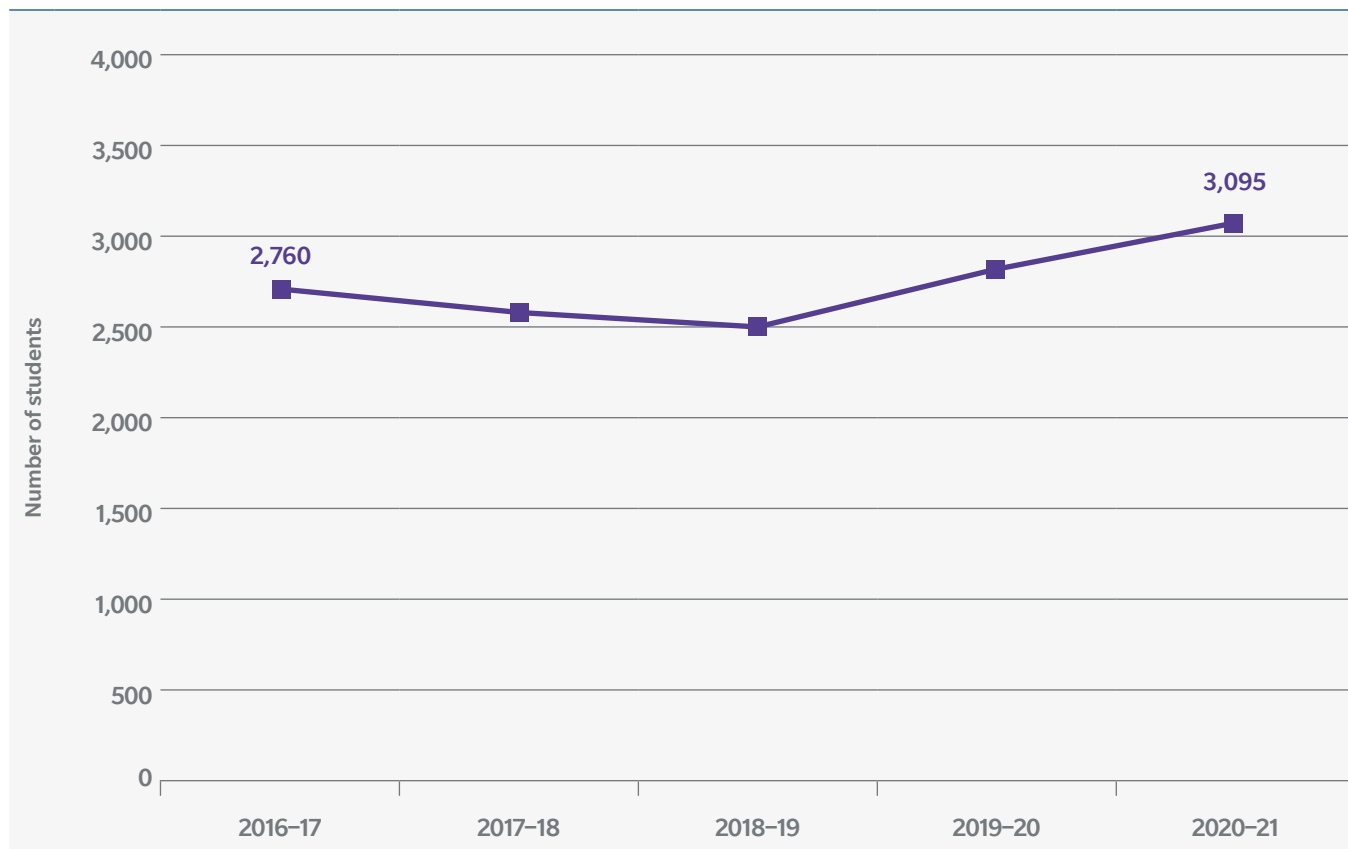
Insight by region

Australasia

Trend analysis

As shown in **Figure 16**, student numbers in Australasia were in decline until 2018–19 but recovered after that. Between 2018–19 and 2020–21, student numbers increased by 610 (+24.5%).











Figure 16: Number of UK HE TNE students in Australasia, 2016–17 to 2020–21 (excluding Oxford Brookes University)



Top host countries and territories

Table 13 shows the 10 countries and territories in Australasia hosting the most students in 2020–21. Australia was ranked first with 2,440 students (78.7% of the total), which was a 7.5% increase compared to the previous academic year. New Zealand hosted 515 students, a 14.4% increase compared to 2019–20. Numbers in all other host countries and territories were below 100 students.

Table 13: Top 10 host countries and territories in Australasia for UK HE TNE students, 2020–21 (all providers)

Host country/territory	Number of students	% of students	Percentage change 2019–20 to 2020–21
 Australia	2,440	78.7%	7.5% ↑
 New Zealand	515	16.6%	14.4% ↑
 Papua New Guinea	55	1.8%	22.2% ↑
 Fiji	50	1.6%	25.0% ↑
 Vanuatu	10	0.3%	100.0% ↑
 Solomon Islands	5	0.2%	-50.0% ↓
 Tonga	5	0.2%	0.0%
 Samoa	5	0.2%	0.0%
 Guam	5	0.2%	0.0%
 US Samoa	5	0.2%	...

Australia hosted the most students

2,440

Australia hosted

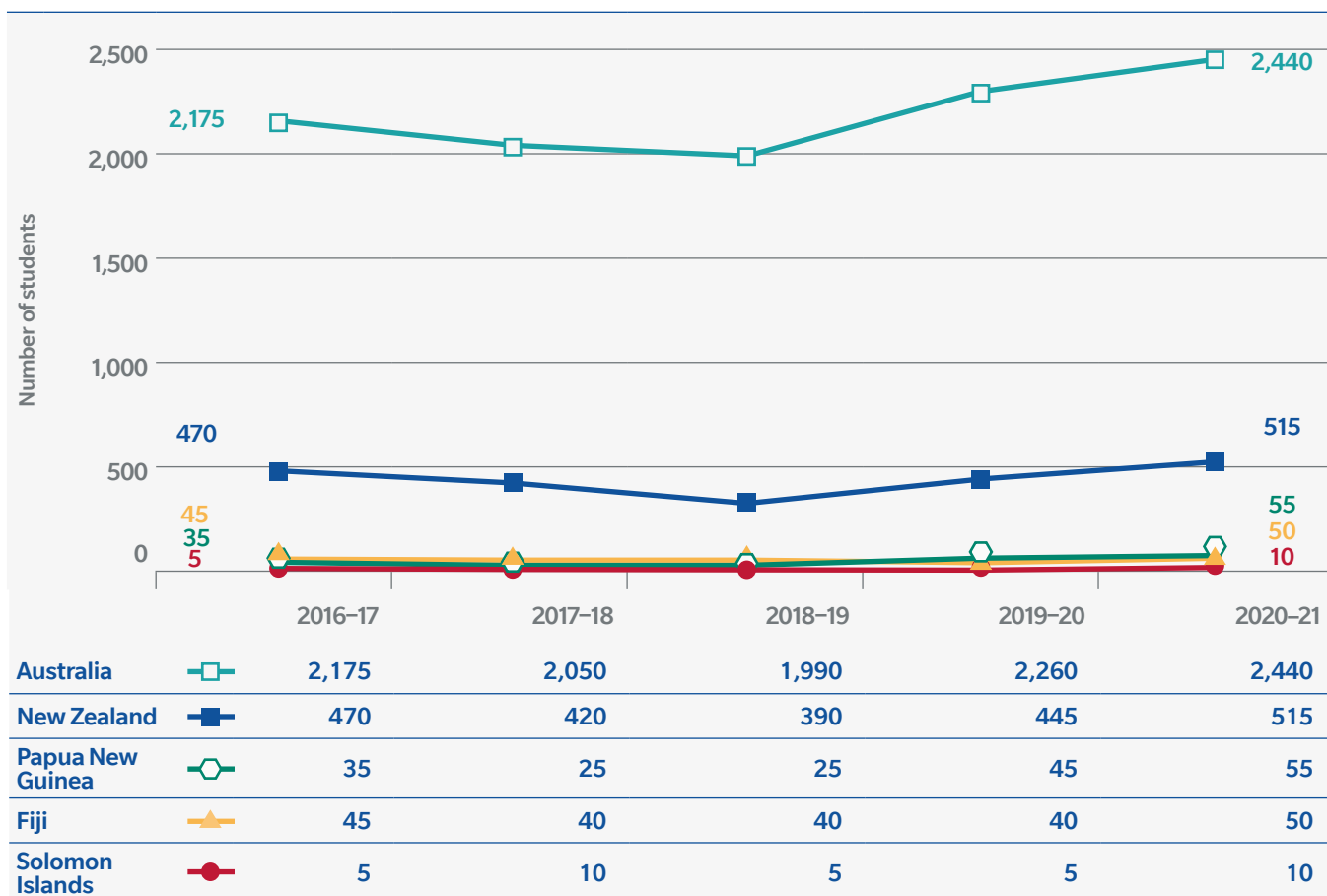
78.7%
of the total

Vanuatu had the biggest increase

+100.0%

Figure 17 shows the trends in student numbers in the top five host countries and territories, which together accounted for 99.2% of all TNE students in Australasia in 2020–21. Between 2016–17 and 2020–21, student numbers increased in all five countries.










Figure 17: Top 5 host countries and territories in Australasia for UK HE TNE students, 2016–17 to 2020–21 (by rank in 2020–21) (excluding Oxford Brookes University)



Type of provision

Table 14 shows how many students were studying through each type of TNE provision, how many countries and territories in Australasia hosted each type of provision, and what the top countries and territories were for each type of provision. Collaborative provision was reported in four out of 17 countries and territories, with the largest number of students located in Australia. Distance, flexible or distributed learning was the top type of provision, delivered in all 17 countries and territories where TNE students were reported in Australasia, with most of them studying in Australia. Students registered at overseas partner organisations were reported in five countries and territories, most of them in Papua New Guinea.





















Table 14: UK HE TNE students in Australasia by type of provision, 2020–21 (all providers)

Type of provision	Number of students	Number of countries/ territories represented out of 17 (%)	Top countries/ territories
Collaborative provision	20	4 (23.5%)	Australia 
			Papua New Guinea 
			Fiji 
Distance, flexible or distributed learning	3,065	17 (100.0%)	Australia 
			New Zealand 
			Fiji 
Registered at overseas partner organisation	10	5 (29.4%)	Papua New Guinea 
			Australia 
			Solomon Islands 
Overseas campus	0	0 (0.0%)	..
Other arrangement	0	0 (0.0%)	..

Level of study

Table 15 shows the distribution between undergraduate and postgraduate TNE study across Australasian countries and territories, predominantly Australia and New Zealand. At undergraduate level, Australia accounted for 79.4% of all students, followed by New Zealand at 17.5%. At postgraduate level, the distribution of students across Australia and New Zealand was similar.

Table 15: Top 10 host countries and territories in Australasia for UK HE TNE students by level of study, 2020–21 (all providers)

Rank	Undergraduate (UG)			Rank	Postgraduate (PG)		
	Country/territory	Number of students	Percentage of UG in Australasia		Country/territory	Number of students	Percentage of PG in Australasia
1	 Australia	680	79.4%	1	 Australia	1,760	78.4%
2	 New Zealand	150	17.5%	2	 New Zealand	365	16.3%
3	 Papua New Guinea	10	1.2%	3	 Papua New Guinea	40	1.8%
4	 Fiji	5	0.6%	4	 Fiji	40	1.8%
5	 Vanuatu	0	0.0%	5	 Solomon Islands	5	0.2%
5	 Tonga	0	0.0%	6	 US Samoa	5	0.2%
5	 Tuvalu	0	0.0%	7	 Vanuatu	5	0.2%
5	 Solomon Islands	0	0.0%	8	 Samoa	5	0.2%
5	 Niue	0	0.0%	9	 Tonga	5	0.2%
5	 Kiribati	0	0.0%	10	 New Caledonia	5	0.2%

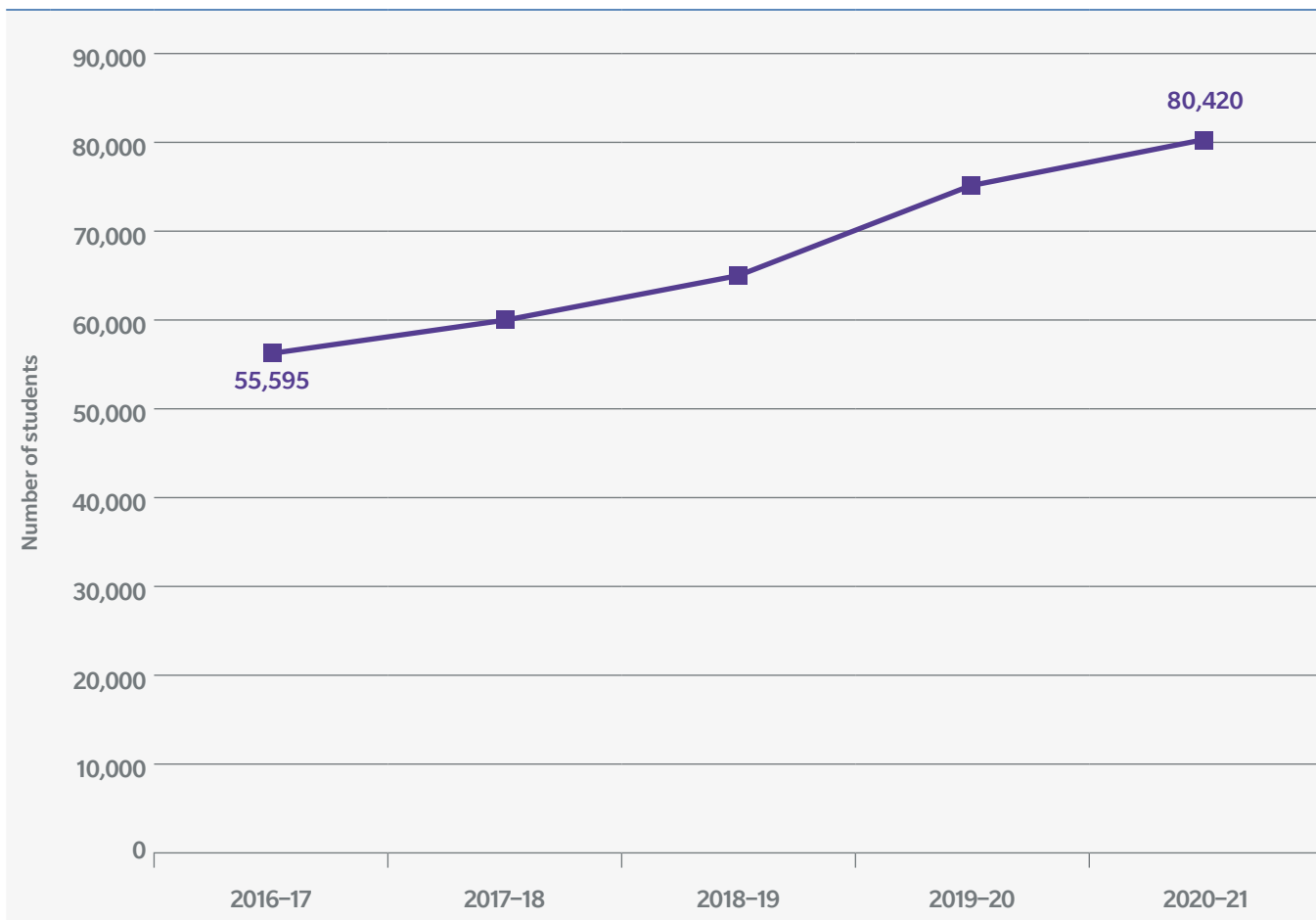
Insight by region

European Union

Trend analysis

As shown in **Figure 18**, student numbers in the EU increased by 24,825 (+44.7%) between 2016–17 and 2020–21.











Figure 18: Number of UK HE TNE students in the EU, 2016–17 to 2020–21 (excluding Oxford Brookes University)



Top host countries and territories

Table 16 shows the 10 EU countries hosting the most students in 2020–21. Greece hosted the most students, with 21,530 (26.7% of the total), followed by Germany, with 11,535 (14.3% of the total). Germany was also the country with the greatest proportional increase (+24.7%) from 2019–20 to 2020–21. Cyprus (EU) was the only country in the top 10 where student numbers decreased (–12.1%).

Table 16: Top 10 host countries in the EU for UK HE TNE students, 2020–21 (all providers)

Host country/territory	Number of students	% of students	Percentage change 2019–20 to 2020–21
 Greece	21,530	26.7%	9.2% ↑
 Germany	11,535	14.3%	24.7% ↑
 Cyprus (EU)	9,970	12.4%	–12.1% ↓
 Ireland	6,820	8.5%	14.9% ↑
 Spain	5,125	6.3%	11.7% ↑
 Austria	3,360	4.2%	5.5% ↑
 France	3,265	4.0%	5.7% ↑
 Italy	2,710	3.4%	14.3% ↑
 Malta	2,490	3.1%	24.2% ↑
 Netherlands	2,450	3.0%	10.6% ↑

Greece hosted the most students

21,530

Greece hosted

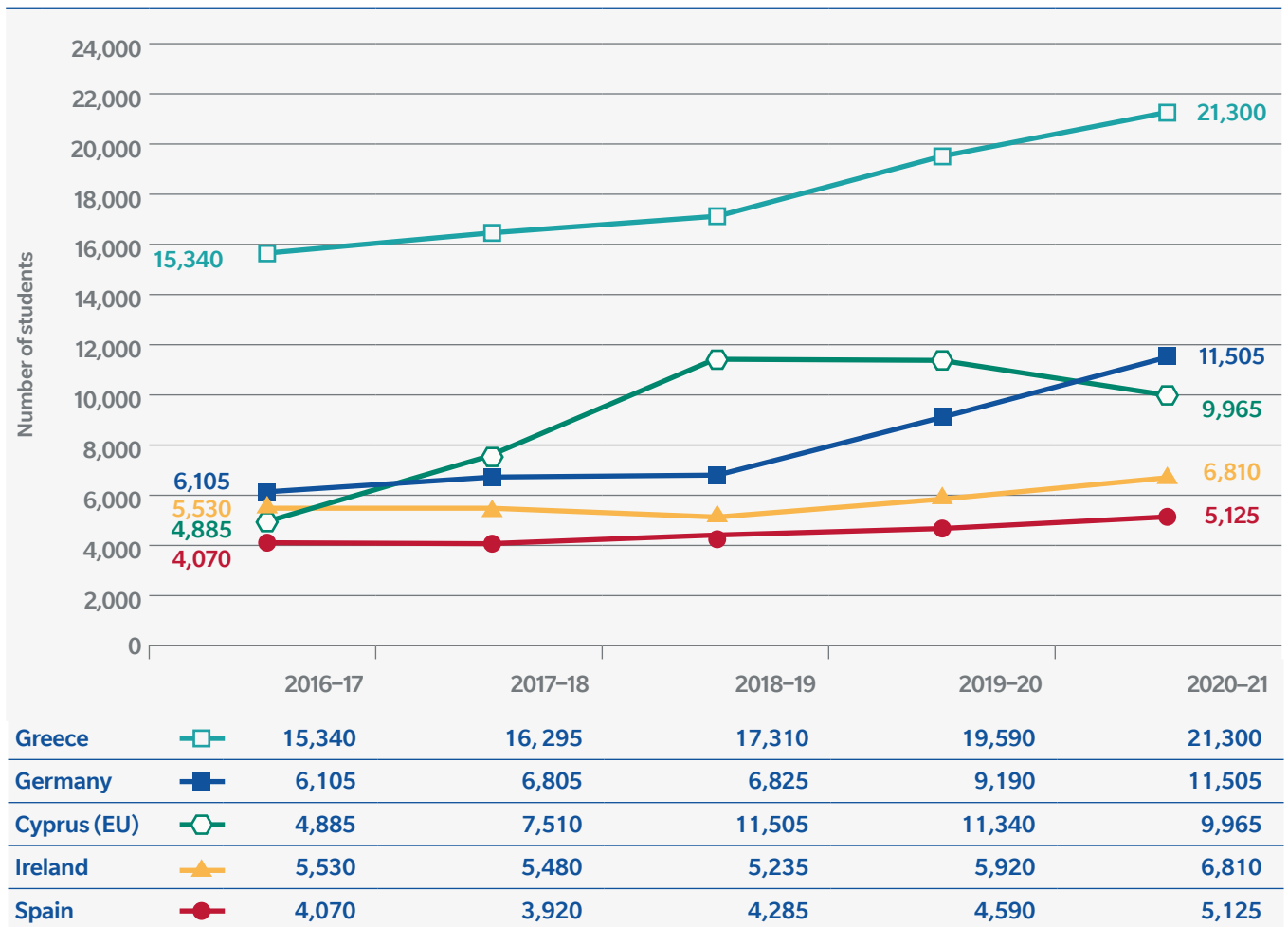
26.7%
of the total

Germany had the biggest increase

+24.7%

Figure 19 shows the development of student numbers in the top five host countries, which together accounted for 68.0% of all TNE students in the EU in 2020–21.
















Figure 19: Top 5 host countries in the EU for UK HE TNE students, 2016–17 to 2020–21 (by rank in 2020–21) (excluding Oxford Brookes University)



Type of provision

Table 17 shows how many students were studying through each type of TNE provision, how many countries in the EU hosted each type of provision, and what the top countries were for each type of provision. Collaborative provision was delivered in 24 out of 33 countries where students were reported, with the largest number of them in Greece. Distance, flexible or distributed learning was delivered in all 33 countries where TNE students were reported in the EU, with Cyprus (EU) being the top host country. Students registered at overseas partner organisations were reported in 23 countries – the largest number of them in Greece. Students studying at an overseas campus were reported in seven countries, most of them in Germany. Other arrangements were reported in three countries, predominantly in Ireland.





















Table 17: UK HE TNE students in the EU by type of provision, 2020–21 (all providers)

Type of provision	Number of students	Number of countries/ territories represented out of 33 (%)	Top countries/ territories
Collaborative provision	20,605	24 (72.7%)	Greece 
			Germany 
			Spain 
Distance, flexible or distributed learning	32,370	33 (100.0%)	Cyprus (EU) 
			Ireland 
			Germany 
Registered at overseas partner organisation	24,380	23 (69.7%)	Greece 
			Austria 
			Germany 
Overseas campus	2,755	7 (21.2%)	Germany 
			Malta 
			Belgium 
Other arrangement	600	3 (9.1%)	Ireland 
			Greece 
			Poland 

Level of study

Table 18 shows the distribution between undergraduate and postgraduate UK TNE study across EU countries. Greece hosted the most undergraduate students (38.7%), followed by Germany (15.3%) and Spain (10.0%). At postgraduate level, Cyprus (EU) accounted for 20.8% of all students, Greece for 13.9% and Germany for 13.3%.

Table 18: Top 10 host countries in the EU for UK HE TNE students by level of study, 2020–21 (all providers)

Rank	Undergraduate (UG)			Postgraduate (PG)		
	Country/territory	Number of students	Percentage of UG in the EU	Country/territory	Number of students	Percentage of PG in the EU
1	 Greece	16,100	38.7%	 Cyprus (EU)	8,150	20.8%
2	 Germany	6,345	15.3%	 Greece	5,430	13.9%
3	 Spain	4,165	10.0%	 Germany	5,190	13.3%
4	 Ireland	3,030	7.3%	 Ireland	3,785	9.7%
5	 Cyprus (EU)	1,820	4.4%	 Austria	2,825	7.2%
6	 France	1,675	4.0%	 Malta	1,670	4.3%
7	 Italy	1,385	3.3%	 France	1,590	4.1%
8	 Hungary	1,195	2.9%	 Netherlands	1,570	4.0%
9	 Netherlands	880	2.1%	 Italy	1,325	3.4%
10	 Malta	820	2.0%	 Belgium	1,305	3.3%

Country highlights

Greece

With 21,530 students, Greece is the top host country for UK TNE students in the EU and seventh globally. Student numbers increased by 9.2% in 2020–21 compared to the previous academic year.

UK TNE programmes have been offered in Greece since the early 1990s by local partners who operate as private colleges. The majority of UK TNE provision in Greece happens through franchise and validation arrangements. More than 90% of UK TNE students are of Greek nationality, with a small number of students coming mainly from Balkan countries.

The national education strategy encourages the internationalisation of the Greek higher education sector and recent reforms have given Greek universities powers and incentive to pursue collaborations with foreign universities. Specifically, these include the freedom to develop undergraduate and postgraduate programmes in English; specific funds and financial incentives for universities to meet and exceed their internationalisation targets; and interventions to support universities to attract international students.

“ More than 90% of UK TNE students in Greece are of Greek nationality.”

Although the regulatory framework for the professional recognition of UK TNE offered by colleges has developed and improved over the years, Brexit has created new difficulties for some professions. As the UK and Greek governments share a desire to maintain and reinforce the strong educational connections between the two countries, coordinated joint efforts aim to remove these barriers. For instance, the British Embassy and the British Council Greece have established two strategic bilateral partnerships¹⁰ with the Greek Ministry of Education which have generated great interest and engagement from the Greek and UK HE sector and are perceived as key pillars of the bilateral cooperation in education.

The year-on-year increase in student numbers demonstrates the appreciation of UK education and the strong positioning of UK TNE in Greece. Recent increases further suggest that students unable to afford studies in the UK are looking to alternative, more cost-effective UK education options such as UK TNE. There is a strong potential of growth of partnerships with Greek universities, as evidence suggests from the bilateral programme in progress.

Cyprus (EU)

UK education remains high on the agenda in Cyprus and it seems that TNE collaborations between UK and Cypriot institutions could be the way forward post-Brexit and considering Covid-19's impact.

It is evident that recently there has been increased interest from both local and UK institutions to establish TNE partnerships. TNE is considered an important pillar for maintaining relations in the area of education, for building credibility and safeguarding the prestige of a UK education in the local market, and for expanding UK alumni networks. In the absence of such collaborations, interest in UK education is predicted to gradually fade out as a result of the increased competition from other emerging study destinations in the EU and from the increased competition between local institutions.

State universities are now introducing courses delivered in the English language, in order to promote themselves as an attractive study option for both local graduates from private (English–medium) schools and international students. This is also aligned with the government's ambition to develop Cyprus into an international education hub. Via TNE agreements, UK institutions gain access to both local and international students who choose Cyprus as a study destination.

There is a friendly regulatory framework for TNE collaborations in terms of accreditation and currently most of the franchise courses on offer are provided by UK universities.

Country highlights

Spain

Spain was ranked fifth top host country in the EU for UK TNE in 2020–21, reflecting an increase of 11.7% in student numbers compared to the previous academic year.

This growth is partly due to top-up degrees offered by private universities and colleges. Since 2015, there has been unprecedented demand for these programmes, as regulation facilitated access from mid-level vocational education and training. Most importantly, these programmes are well connected with businesses, thus providing students with better employment opportunities compared to Spanish-only undergraduate degrees from a university. Top-ups in collaboration with UK institutions present a unique opportunity due to the high demand for English language skills. These programmes offered by private institutions have a competitive edge because they allow students to continue their education at Spanish higher education institutions or through TNE agreements.

Another source of growth is the increasing interest from international private universities, colleges and private universities in partnering with UK providers to attract international students. Many international students travel to Spain to obtain a UK qualification and dedicated centres have been set up to target students from specific countries, such as Pakistan or India.

**“ An increase of 11.7%
in student numbers
compared to the previous
academic year.”**

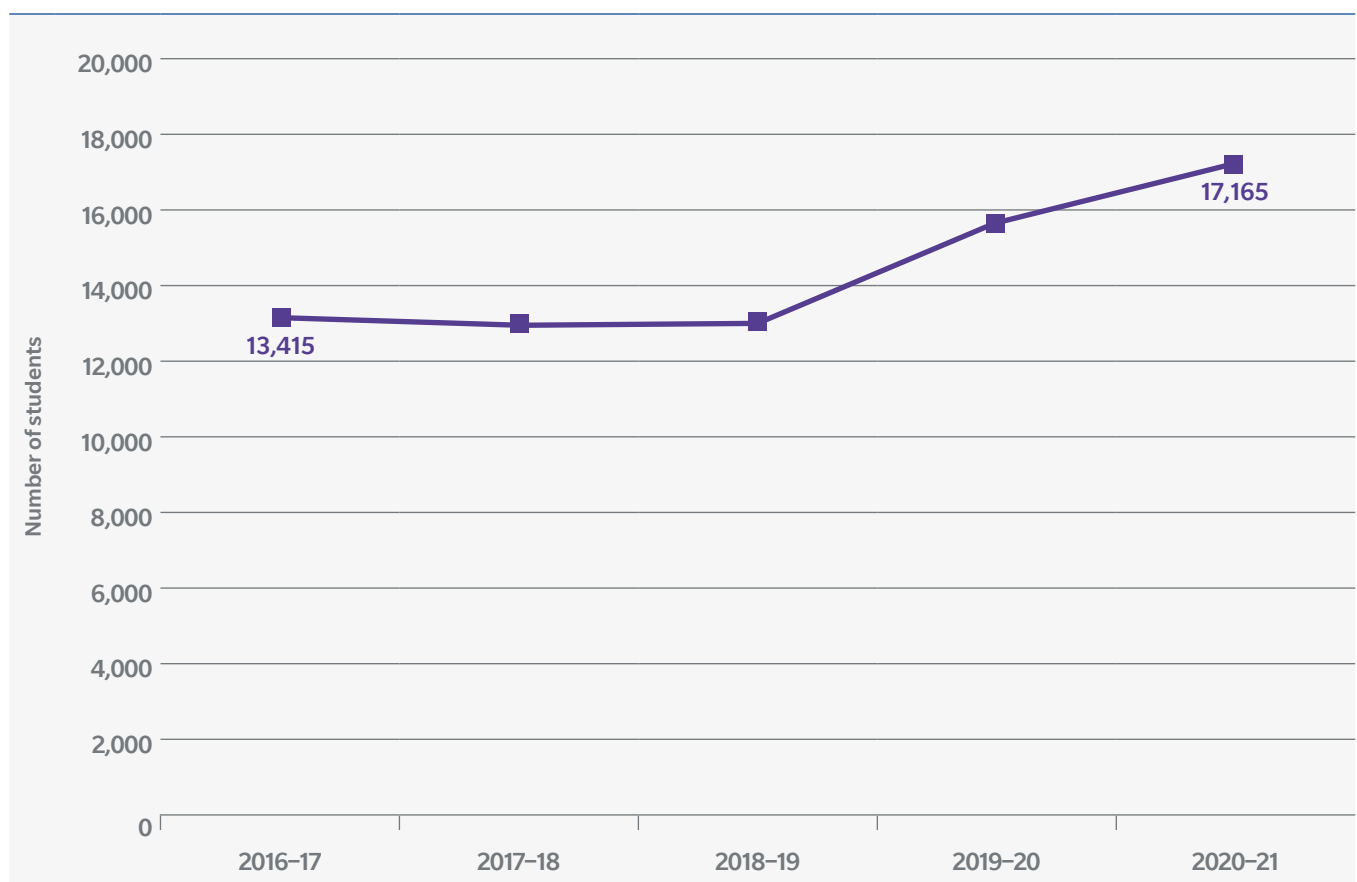
Insight by region

Europe (non-EU)

Trend analysis

As shown in [Figure 20](#), student numbers in non-EU Europe decreased slightly between 2016–17 and 2018–19 but increased by 3,980 (+30.2%) between 2018–19 and 2020–21.











Figure 20: Number of UK HE TNE students in Europe (non-EU), 2016–17 to 2020–21 (excluding Oxford Brookes University)



Top host countries and territories

Table 19 shows the top 10 non-EU European countries and territories hosting the most students in 2020–21. Switzerland was the country hosting the most students, with 8,775 (50.9% of the total), followed by Russia, with 3,195 (18.5% of the total).¹¹ The greatest proportional increase took place in Norway (+23.5%), while the only proportional decrease took place in Azerbaijan (–1.7%).

Table 19: UK HE TNE students in Europe (non-EU) by type of provision (all providers)

Host country/territory	Number of students	% of students	Percentage change 2019–20 to 2020–21
 Switzerland	8,775	50.9%	8.9% ↑
 Russia	3,195	18.5%	3.9% ↑
 Norway	945	5.5%	23.5% ↑
 Channel Islands	780	4.5%	18.2% ↑
 Isle of Man	665	3.9%	20.9% ↑
 Turkey	640	3.7%	17.4% ↑
 Ukraine	395	2.3%	19.7% ↑
 Serbia	360	2.1%	7.5% ↑
 Bosnia and Herzegovina	295	1.7%	5.4% ↑
 Azerbaijan	290	1.7%	–1.7% ↓

Switzerland hosted the most students

8,775

Switzerland hosted

50.9%
of the total

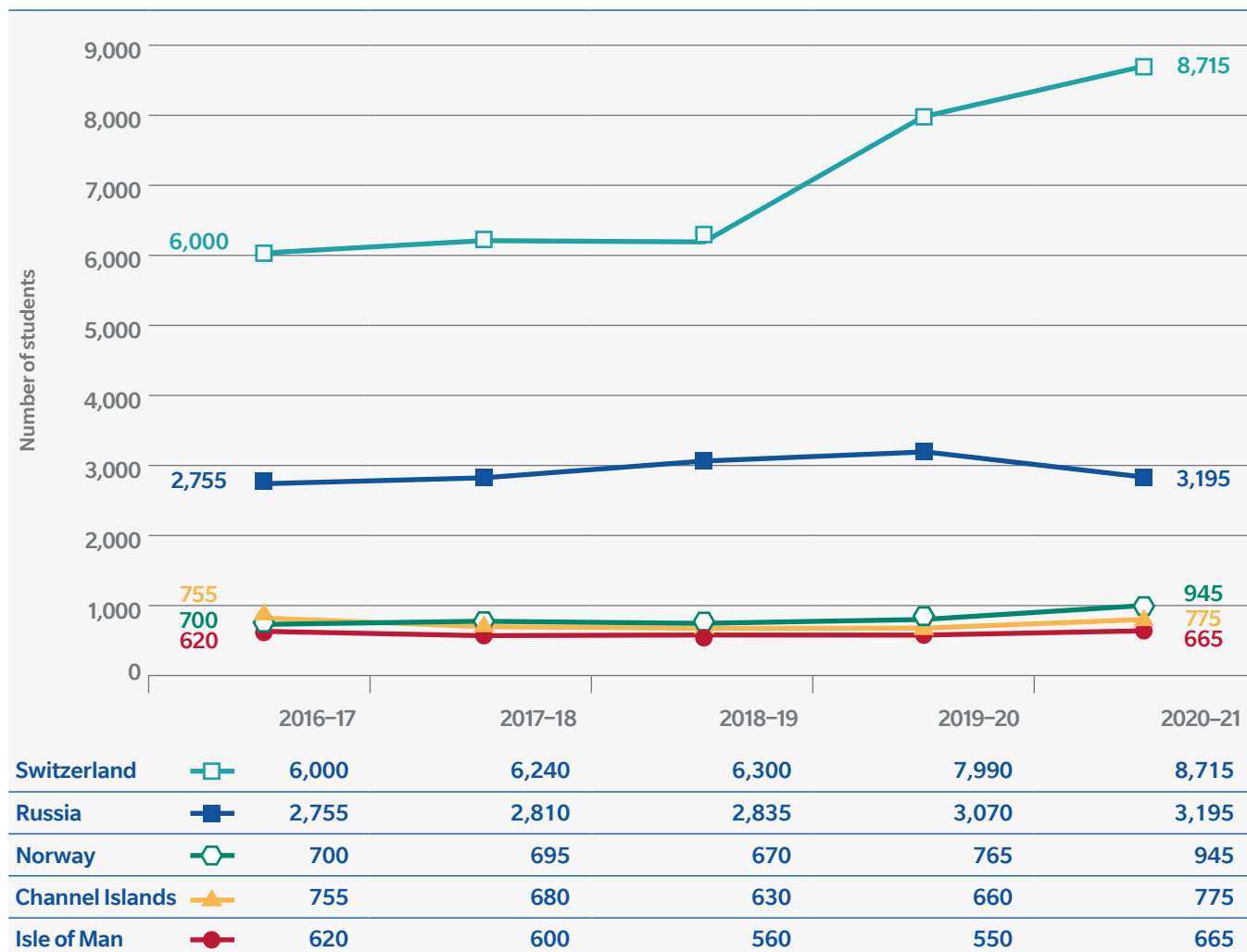
Norway had the biggest increase

+23.5%

11. Note that this data set predates Russia's invasion of Ukraine in February 2022 which led many universities to suspend formal relationships with Russian partners.

Figure 21 shows the development of student numbers in the top five host countries and territories, which together accounted for 83.7% of all TNE students in non-EU Europe in 2020–21. Between 2016–17 and 2020–21, numbers in all those five countries and territories increased. Numbers increased by 2,715 (+45.3%) in Switzerland and by 440 (+16.0%) in Russia. Numbers in all other countries and territories were low – under 1000 students.













Figure 21: Top 5 host countries and territories in Europe (non-EU) for UK HE TNE students, 2016–17 to 2020–21 (by rank in 2020–21) (excluding Oxford Brookes University)



Type of provision

Table 20 shows how many students were studying through each type of TNE provision, how many countries or territories in non-EU Europe hosted each type of provision, and what the top countries or territories were for each type of provision. Collaborative provision was delivered in 14 out of 26 countries and territories; distance, flexible or distributed learning was delivered in all 26 countries and territories; and students registered at overseas partners were reported in 14 countries and territories. Switzerland hosted the largest number of students for all three types of provision. Switzerland was also the country where the largest number of students were reported to study at an overseas campus and the only one to host students studying via other arrangements.





















Table 20: UK HE TNE students in Europe (non-EU) by type of provision, 2020–21 (all providers)

Type of provision	Number of students	Number of countries/territories represented out of 26 (%)	Top countries
Collaborative provision	3,640	14 (53.8%)	Switzerland 
			Russia 
			Isle of Man 
Distance, flexible or distributed learning	8,380	26 (100.0%)	Switzerland 
			Russia 
			Norway 
Registered at overseas partner organisation	1,835	14 (53.8%)	Switzerland 
			Norway 
			Bosnia and Herzegovina 
Overseas campus	3,335	2 (7.7%)	Switzerland 
			Channel Islands 
Other arrangement	40	1 (3.8%)	Switzerland 

Level of study

Table 21 shows the distribution between undergraduate and postgraduate TNE study across non-EU European countries and territories. Switzerland accounted for 34.9% of all undergraduate students, followed closely by Russia, which accounted for 33.9% of all students. At postgraduate level, distribution was rather uneven, with Switzerland leading with 63.7%, followed by Norway with 7.4%.

Table 21: Top 10 host countries and territories in Europe (non-EU) for UK HE TNE students by level of study, 2020–21 (all providers)

Rank	Undergraduate (UG)			Postgraduate (PG)		
	Country/territory	Number of students	Percentage of UG in Europe (non-EU)	Country/territory	Number of students	Percentage of PG in Europe (non-EU)
1	 Switzerland	2,625	34.9%	 Switzerland	6,150	63.7%
2	 Russia	2,545	33.9%	 Norway	715	7.4%
3	 Channel Islands	515	6.9%	 Russia	655	6.8%
4	 Isle of Man	485	6.5%	 Turkey	355	3.7%
5	 Turkey	285	3.8%	 Ukraine	290	3.0%
6	 Serbia	240	3.2%	 Channel Islands	260	2.7%
7	 Norway	230	3.1%	 Azerbaijan	240	2.5%
8	 Bosnia and Herzegovina	185	2.5%	 Isle of Man	180	1.9%
9	 Gibraltar	125	1.7%	 Serbia	120	1.2%
10	 Ukraine	105	1.4%	 Bosnia and Herzegovina	110	1.1%

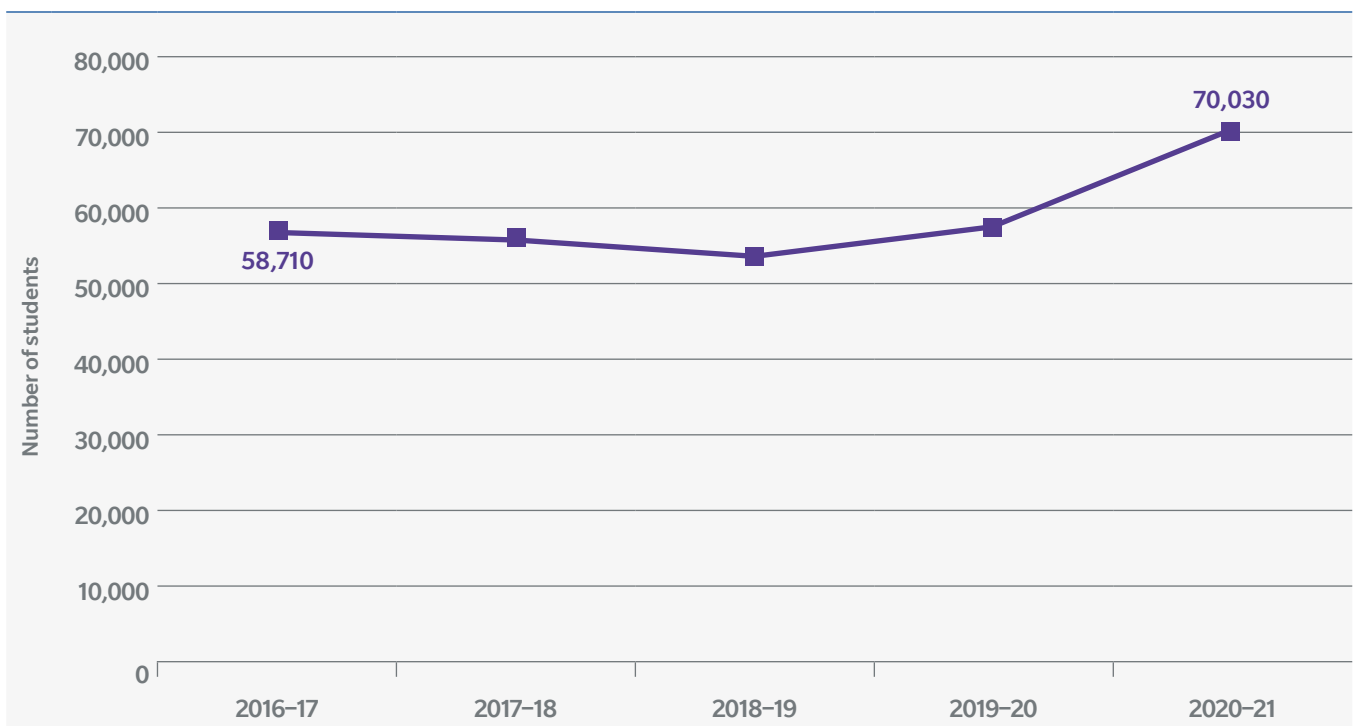
Insight by region

Middle East

Trend analysis

As shown in **Figure 22**, student numbers in the Middle East dropped between 2016–17 and 2018–19, but then increased by 16,185 (+30.1%) between 2018–19 and 2020–21











Figure 22: Number of UK HE TNE students in the Middle East, 2016–17 to 2020–21 (excluding Oxford Brookes University)



Top host countries and territories

Table 22 shows the 10 Middle Eastern countries hosting the most students in 2020–21. For the first time, the UAE hosted the most students, with 16,570 (23.5% of the total), followed by Oman, with 15,625 (22.2% of the total). The greatest proportional increase took place in Saudi Arabia (+64.5%), while the only proportional decrease took place in Oman (–11.8%).

Table 22: Top 10 host countries in the Middle East for UK HE TNE students, 2020–21 (all providers)

Host country/territory	Number of students	% of students	Percentage change 2019–20 to 2020–21
 UAE	16,570	23.5%	12.0% ↑
 Oman	15,625	22.2%	–11.8% ↓
 Saudi Arabia	14,945	21.2%	64.5% ↑
 Kuwait	10,720	15.2%	45.6% ↑
 Bahrain	3,710	5.3%	25.5% ↑
 Qatar	3,265	4.6%	20.9% ↑
 Lebanon	2,360	3.4%	28.6% ↑
 Jordan	2,290	3.3%	13.9% ↑
 Israel	270	0.4%	28.6% ↑
 Iraq	270	0.4%	31.7% ↑

UAE hosted the most students

16,570

UAE hosted

23.5%

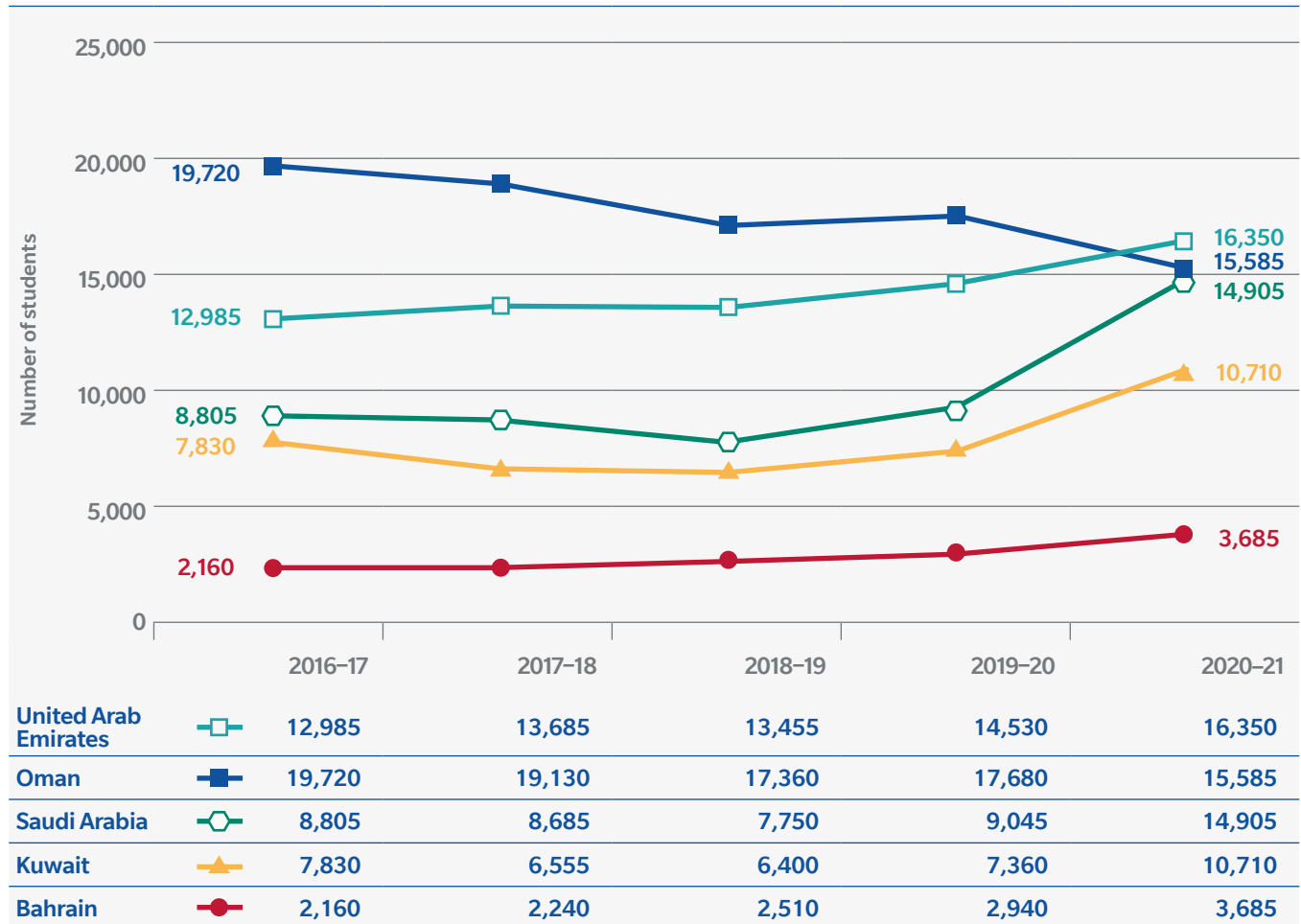
of the total

Saudi Arabia had the biggest increase

+64.5%

Figure 23 shows the development of student numbers in the top five host countries, which together accounted for 87.4% of all UK TNE students in the Middle East in 2020–21. Between 2016–17 and 2020–21, student numbers in Oman decreased by 4,135 (–21.0%), while numbers in the UAE increased by 3,365 (+25.9%), in Saudi Arabia by 6,100 (+69.3%), in Kuwait by 2,880 (+36.8%) and in Bahrain by 1,525 (+70.6%).
















Figure 23: Top 5 host countries in the Middle East for UK HE TNE students, 2016–17 to 2020–21 (by rank in 2020–21) (excluding Oxford Brookes University)



Type of provision

Table 23 shows how many students were studying through each type of TNE provision, how many countries in the Middle East hosted each type of provision, and what the top countries were for each type of provision. Collaborative provision was delivered in 13 out of 14 countries, with the largest number of students based in Oman. Distance, flexible or distributed learning was delivered in all 14 countries; the top host was the UAE. Students registered at an overseas partner organisation were reported in nine countries, with most of them based in Saudi Arabia. Six countries reported students studying on an overseas campus, the largest number of them in the UAE. Three countries reported students studying via other arrangements, with most students based in Bahrain.





















Table 23: UK HE TNE students in the Middle East by type of provision (all providers)

Type of provision	Number of students	Number of countries/ territories represented out of 14 (%)	Top countries/ territories
Collaborative provision	14,315	13 (92.9%)	Oman 
			UAE 
			Qatar 
Distance, flexible or distributed learning	12,550	14 (100.0%)	UAE 
			Saudi Arabia 
			Qatar 
Registered at overseas partner organisation	33,725	9 (64.3%)	Saudi Arabia 
			Kuwait 
			Oman 
Overseas campus	9,560	6 (42.9%)	UAE 
			Qatar 
			Jordan 
Other arrangement	250	3 (21.4%)	Bahrain 
			Oman 
			Kuwait 

Level of study

Table 24 shows the distribution between undergraduate and postgraduate TNE study across Middle Eastern countries. At undergraduate level, Oman accounted for 25.8% of all students and Saudi Arabia for 24.6%. At postgraduate level, the UAE accounted for most students (47.6%), followed by Oman (11.8%).

Table 24: Top 10 host countries in the Middle East for UK HE TNE students by level of study, 2020–21 (all providers)

Rank	Undergraduate (UG)			Postgraduate (PG)		
	Country/territory	Number of students	Percentage of UG in the Middle East	Country/territory	Number of students	Percentage of PG in the Middle East
1	 Oman	13,500	25.8%	 UAE	8,570	47.6%
2	 Saudi Arabia	12,890	24.6%	 Oman	2,120	11.8%
3	 Kuwait	10,300	19.7%	 Saudi Arabia	2,060	11.4%
4	 UAE	7,995	15.3%	 Qatar	1,830	10.2%
5	 Bahrain	3,120	6.0%	 Jordan	1,005	5.6%
6	 Lebanon	1,640	3.1%	 Lebanon	720	4.0%
7	 Qatar	1,430	2.7%	 Bahrain	590	3.3%
8	 Jordan	1,280	2.4%	 Kuwait	420	2.3%
9	 Israel	125	0.2%	 Iraq	250	1.4%
10	 Occupied Palestinian Territories	30	0.1%	 Israel	145	0.8%

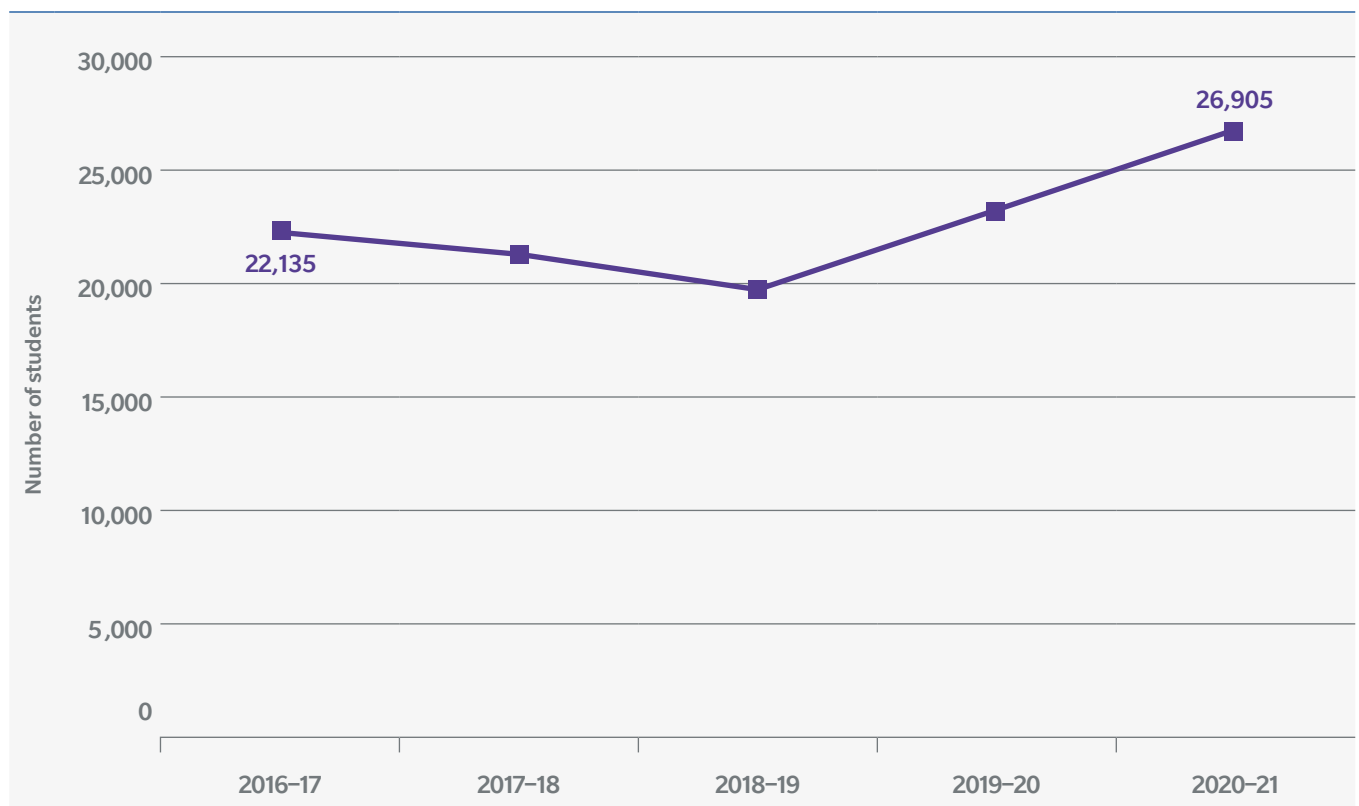
Insight by region

North America

Trend analysis

As shown in **Figure 24**, student numbers in North America decreased between 2016–17 and 2018–19 but increased by 7,140 (+36.1%) between 2018–19 and 2020–21.











Figure 24: Number of UK HE TNE students in North America, 2016–17 to 2020–21 (excluding Oxford Brookes University)



Top host countries and territories

Table 25 shows the 10 North American countries hosting the most students in 2020–21. The US was the top country, hosting 8,855 students (32.8% of the total), followed by Canada, with 6,080 students (22.5% of the total). The greatest proportional increase took place in Belize (+44.7%), while the only proportional decrease took place in Barbados (–0.9%).

Table 25: Top 10 host countries and territories in North America for UK HE TNE students, 2020–21 (all providers)

Host country/territory	Number of students	% of students	Percentage change 2019–20 to 2020–21
 United States	8,855	32.8%	20.7% ↑
 Canada	6,080	22.5%	16.0% ↑
 Trinidad and Tobago	5,920	21.9%	10.9% ↑
 Jamaica	1,265	4.7%	17.1% ↑
 Mexico	945	3.5%	42.1% ↑
 The Bahamas	605	2.2%	8.0% ↑
 Barbados	535	2.0%	–0.9% ↓
 St Lucia	490	1.8%	18.1% ↑
 Cayman Islands	380	1.4%	11.8% ↑
 Belize	275	1.0%	44.7% ↑

The United States hosted
the most students

8,855

The US hosted

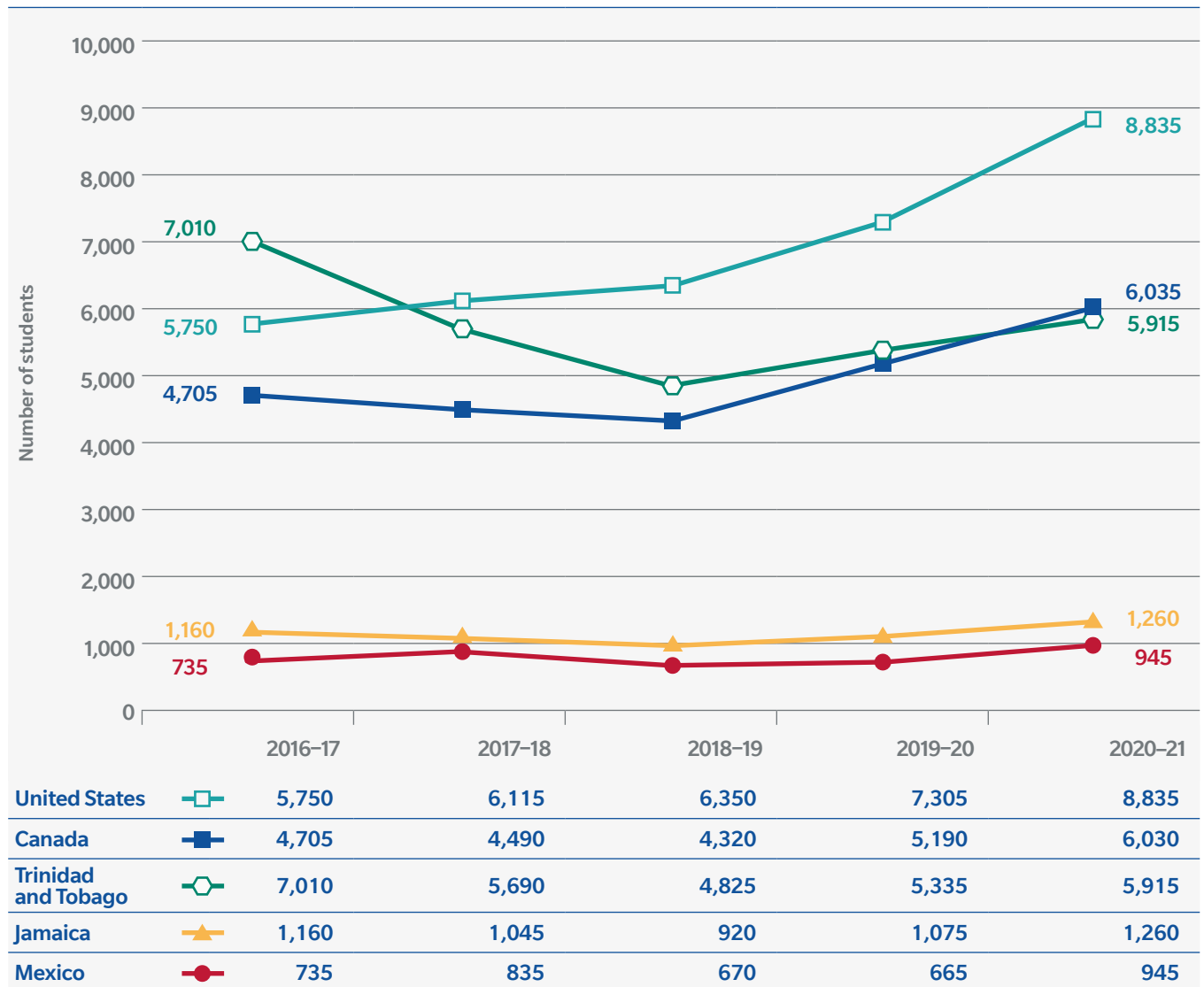
32.8%
of the total

Belize had the
biggest increase

+44.7%

Figure 25 shows the development of student numbers in the top five host countries and territories, which together accounted for 85.4% of all UK TNE students in North America in 2020–21. In 2016–17, Trinidad and Tobago was the top host country, but numbers have decreased by 1,095 (–15.6%) since and it has dropped to third place. Numbers in the US increased by 3,085 (+53.7%) and by 1,325 (+28.2%) in Canada; they are now ranked first and second.











Figure 25: Top 5 host countries and territories in North America for UK HE TNE students, 2016–17 to 2020–21 (by rank in 2020–21) (excluding Oxford Brookes University)



Type of provision

Table 26 shows how many students were studying through each type of TNE provision, how many countries and territories in North America hosted each type of provision, and what the top countries and territories were for each type of provision. Collaborative provision was delivered in 27 out of 37 countries, with the largest number of students based in Trinidad and Tobago. Distance, flexible or distributed learning was reported in all 37 countries and territories, with the largest number of students in the US. Students registered at an overseas partner organisation were reported in 21 countries; the top host was Trinidad and Tobago for this type of provision. Students studying via other arrangement were reported only in the US.





















Table 26: UK HE TNE students in North America by type of provision, 2020–21 (all providers)

Type of provision	Number of students	Number of countries/territories represented out of 37 (%)	Top countries/territories
Collaborative provision	3,795	27 (73.0%)	Trinidad and Tobago 
			United States 
			Jamaica 
Distance, flexible or distributed learning	21,915	37 (100.0%)	United States 
			Canada 
			Trinidad and Tobago 
Registered at overseas partner organisation	1,295	21 (56.8%)	Trinidad and Tobago 
			Mexico 
			Jamaica 
Overseas campus	0	0 (0.0%)	..
Other arrangement	5	1 (2.7%)	United States 

Level of study

Table 27 shows the distribution between undergraduate and postgraduate TNE study across North America. At undergraduate level, the US accounted for 28.9% and Trinidad and Tobago for 28.6% of all students. The US also accounted for the most students at postgraduate level (35.0%), followed by Canada (25.2%).

Table 27: Top 10 host countries and territories in North America for UK HE TNE students by level of study, 2020–21 (all providers)

Rank	Undergraduate (UG)			Postgraduate (PG)		
	Country or territory	Number of students	Percentage of UG in North America	Country or territory	Number of students	Percentage of PG in North America
1	 United States	2,850	28.9%	 United States	6,005	35.0%
2	 Trinidad and Tobago	2,820	28.6%	 Canada	4,320	25.2%
3	 Canada	1,760	17.8%	 Trinidad and Tobago	3,100	18.1%
4	 Mexico	555	5.6%	 Jamaica	885	5.2%
5	 Jamaica	375	3.8%	 Barbados	440	2.6%
6	 St Lucia	240	2.4%	 Mexico	390	2.3%
7	 The Bahamas	220	2.2%	 The Bahamas	380	2.2%
8	 Cayman Islands	155	1.6%	 St Lucia	245	1.4%
9	 Belize	140	1.4%	 Cayman Islands	220	1.3%
10	 Barbados	95	1.0%	 Grenada	155	0.9%

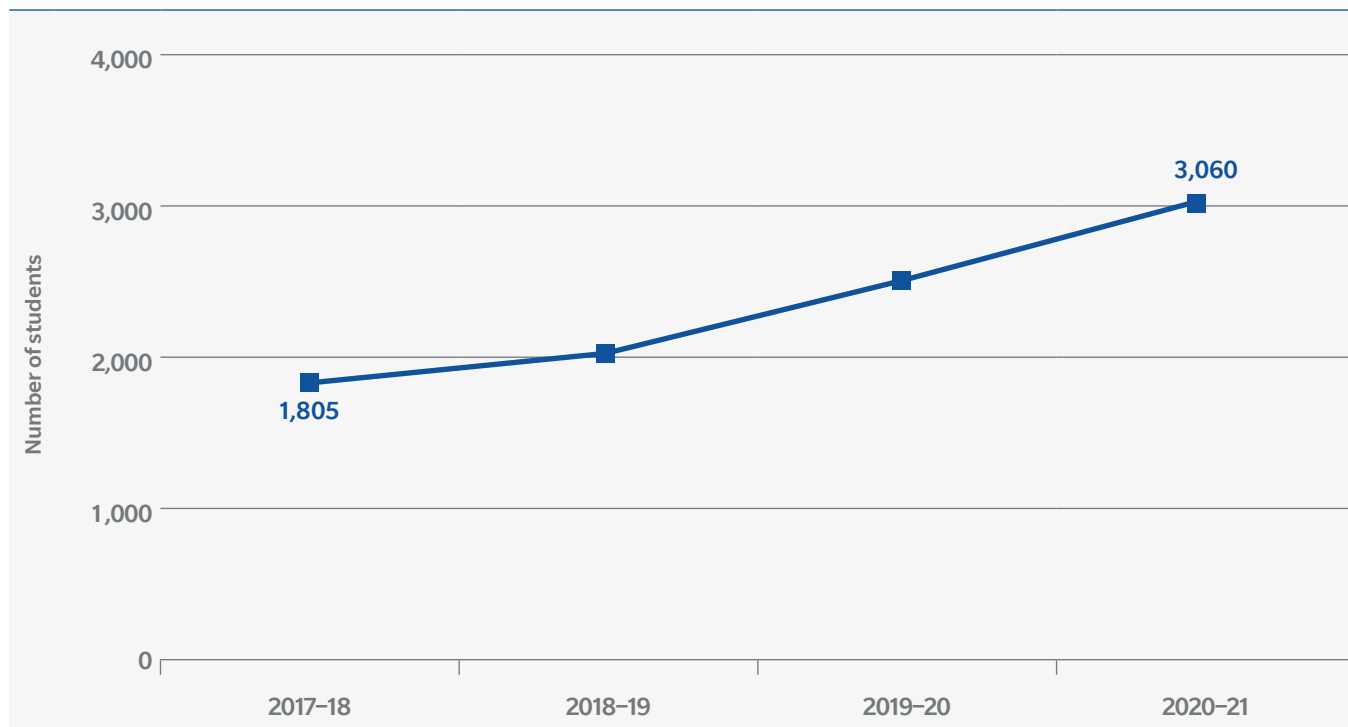
Insight by region

South America

Trend analysis

As shown in **Figure 26**, student numbers in South America increased by 1,255 (+69.5%) between 2016–17 and 2020–21.











Figure 26: Number of UK HE TNE students in South America, 2016–17 to 2020–21 (excluding Oxford Brookes University)



Top host countries and territories

Table 28 shows the 10 South American countries hosting the most students in 2020–21. Guyana hosted the most students, with 970 (31.6% of the total), followed by Brazil, with 740 (24.1% of the total). The greatest proportional increase took place in Suriname (+40.0%), while the smallest proportional increase took place in Argentina (+7.4%).

Table 28: Top 10 host countries in South America for UK HE TNE students, 2020–21 (all providers)

Host country/territory	Number of students	% of students	Percentage change 2019–20 to 2020–21
 Guyana	970	31.6%	28.5% ↑
 Brazil	740	24.1%	17.5% ↑
 Peru	395	12.9%	17.9% ↑
 Colombia	275	9.0%	22.2% ↑
 Chile	160	5.2%	28.0% ↑
 Argentina	145	4.7%	7.4% ↑
 Uruguay	130	4.2%	8.3% ↑
 Ecuador	110	3.6%	29.4% ↑
 Bolivia	45	1.5%	28.6% ↑
 Suriname	35	1.1%	40.0% ↑

Guyana hosted the most students

970

Guyana hosted

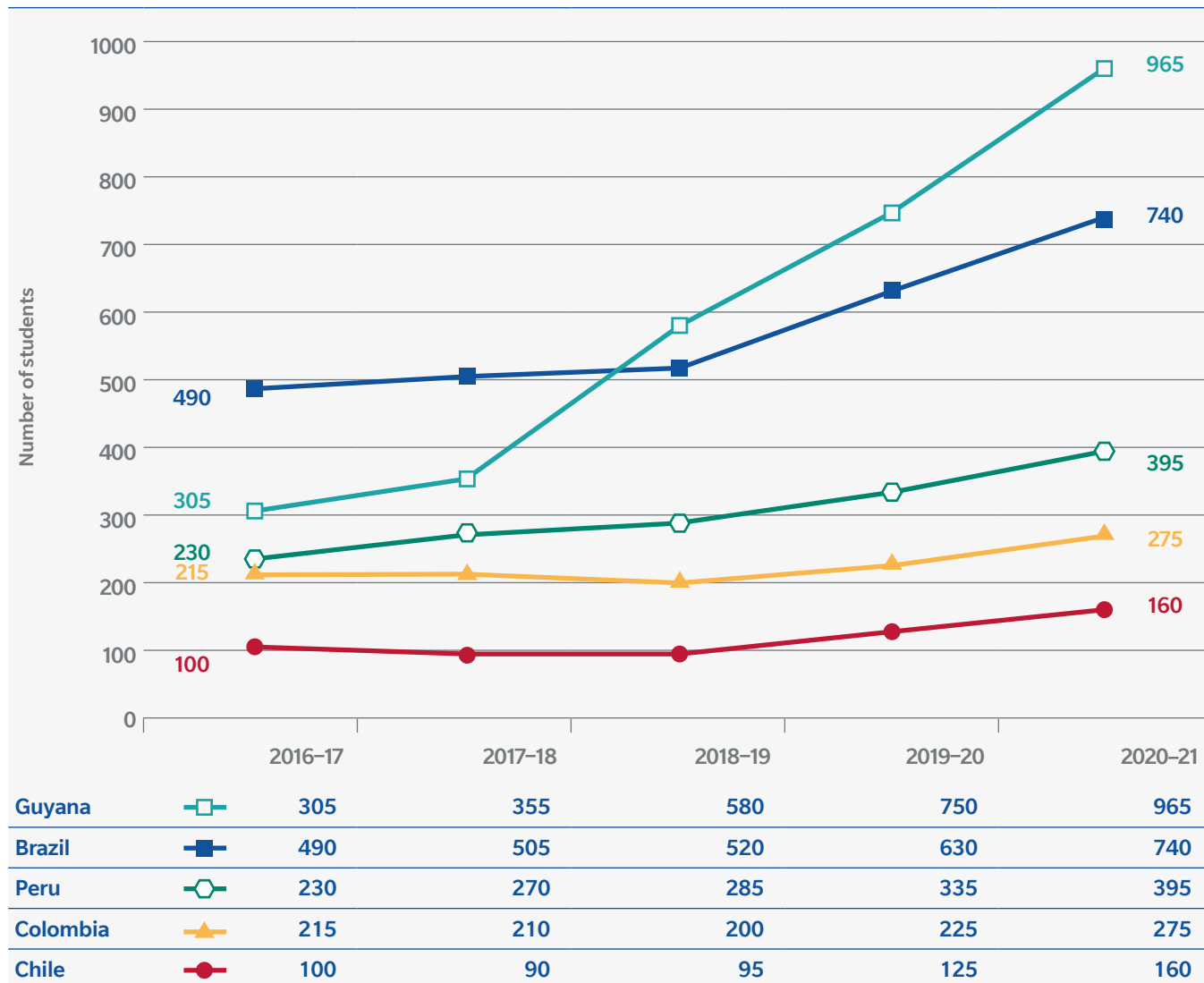
31.6%
of the total

Suriname had the biggest increase

+40.0%

Figure 27 shows the development of student numbers in the top five host countries, which together accounted for 82.7% of all UK TNE students in South America in 2020–21. Between 2016–17 and 2020–21, student numbers in all five countries increased. Numbers increased by 660 (+216.4%) in Guyana, and by 250 (+51.0%) in Brazil.









Figure 27: Top 5 host countries in South America for UK HE TNE students, 2016–17 to 2020–21 (by rank in 2020–21) (excluding Oxford Brookes University)



Type of provision

Table 29 shows how many students were studying through each type of TNE provision, how many countries in South America hosted each type of provision, and what the top countries were for each type of provision. Collaborative provision was delivered in 8 of 13 countries where students were reported; distance, flexible or distributed learning was delivered in all 13 countries where TNE students were reported in South America, and students registered at an overseas partner organisation were reported in two countries; Guyana hosted the largest number of students within each of these types of provision.





















Table 29: UK HE TNE students in South America by type of provision, 2020–21 (all providers)

Type of provision	Number of students	Number of countries/territories represented out of 13 (%)	Top countries/territories
Collaborative provision	55	8 (61.5%)	Guyana 
			Brazil 
			Peru 
Distance, flexible or distributed learning	2,475	13 (100.0%)	Guyana 
			Brazil 
			Peru 
Registered at overseas partner organisation	35	2 (15.4%)	Guyana 
			Colombia 
Overseas campus	0	0 (0.0%)	..
Other arrangement	0	0 (0.0%)	..

Level of study

Table 30 shows the distribution between undergraduate and postgraduate TNE study across South American countries. At undergraduate level, Brazil, Guyana and Peru accounted for 72.6% of all students. At postgraduate level, Guyana, Brazil and Colombia accounted for 72.0% of all students.

Table 30: Top 10 host countries in South America for UK HE TNE students by level of study, 2020–21 (all providers)

Rank	Undergraduate (UG)			Rank	Postgraduate (PG)		
	Country/territory	Number of students	Percentage of UG in South America		Country/territory	Number of students	Percentage of PG in South America
1	 Brazil	330	26.2%	1	 Guyana	670	37.1%
2	 Guyana	300	23.8%	2	 Brazil	405	22.4%
3	 Peru	285	22.6%	3	 Colombia	225	12.5%
4	 Uruguay	95	7.5%	4	 Peru	110	6.1%
5	 Argentina	55	4.4%	5	 Chile	105	5.8%
5	 Chile	55	4.4%	6	 Argentina	85	4.7%
6	 Colombia	50	4.0%	7	 Ecuador	75	4.2%
7	 Ecuador	35	2.8%	8	 Uruguay	35	1.9%
8	 Bolivia	30	2.4%	9	 Suriname	30	1.7%
9	 Venezuela	10	0.8%	10	 Venezuela	15	0.8%

Country highlights

Brazil

In Brazil, interest in TNE has been increasing as the devaluation of Brazilian currency and the Covid-19 pandemic have severely impacted Brazilian students' ability and willingness to move abroad. While numbers were still low in 2020–21 (740), they increased by 17.5% compared to the previous academic year.

Many Brazilian higher education institutions include in their internationalisation strategies plans for TNE partnerships, such as dual degrees. This process was initiated by the internationalisation at home programme CAPES PRInt¹² which required universities to present a cohesive internationalisation strategy, including priority countries and proposed university partners, to be eligible for funding.

“ An increase of 17.5% in student numbers compared to the previous academic year.”

Peru

The number of UK TNE students in Peru is low (395 in 2020–21) but grew by 17.9% from 2019–20 to 2020–21.

Since the University Law was passed in 2014, the higher education system in Peru has gone through a series of policy reforms. One of the key reforms was to mainstream quality assurance practices. The licensing process which enforced the application of a quality model by all universities resulted in the closure of nearly 30% of private universities for non-compliance. The quality model also prioritised the institutionalisation of a strategic approach to research development in higher education institutions, which has driven change and improvement in universities' performance.

A second milestone to the reform of quality management is the recently approved model for the accreditation of institutions. It has a strong focus on internationalisation, across quality model dimensions and standards, shifting from an academic mobility-based approach to a more holistic internationalisation approach where TNE strategies may gain ground in the coming years.

“ An increase of 17.9% in student numbers compared to the previous academic year.”

12. EU Commission, 2017. CAPES/PRInt.

6. Conclusion

Transnational education can help increase diversity and cultural exchange between staff and students. It helps to make quality education more accessible, addresses labour market needs and may help to tackle global challenges like climate change. Its growth across all regions throughout the pandemic reflects the important role it plays for UK universities and their partners.

Demand for TNE is likely to continue to grow worldwide; however this general trend may mask local variations as political and economic factors impact on scale and scope of partnership opportunities. The UK government and the sector need to continue to proactively work together to support the development of sustainable, scalable and secure TNE in the future – recognising the likelihood of unpredictable changes in the operating environment.

In 2020–21, more universities than ever before reported students in TNE programmes. There are now TNE students in most countries and territories globally and numbers have increased across all regions at an overall higher growth rate than ever before. Just over 90% of TNE students of English and Welsh providers were continuing their studies or had successfully completed their degree. The Covid-19 pandemic seems to have stimulated growth of UK TNE as countries were looking to enhance the quality of their domestic higher education systems and students were less willing or unable to travel abroad for their studies. However, it remains to be seen whether this trend continues in the future.

The country highlights in this report provide context for the TNE data. They demonstrate that TNE collaborations do not emerge in a vacuum but are dependent on policy and regulatory changes, as well as economic and geopolitical developments. Many countries, such as Brazil and Greece, are actively incentivising their institutions to develop TNE partnerships. At the same time, political developments can make TNE provision more difficult or even untenable – as the cases of Myanmar and Russia demonstrate.

“ Just over 90% of TNE students of English and Welsh providers were continuing their studies or had successfully completed their degree.”

Institutions must therefore be ready for unexpected changes in the operating environment of particular countries through a sophisticated international function and require strong support from government, the British Council and UUKi to continue to develop scalable, sustainable and secure TNE in the future.

To build on the UK’s leading position as a global provider of TNE, universities, sector bodies and the UK government should:

1. Collect better data on TNE students’ characteristics, experiences and outcomes.

The HESA AOR represents one of the world’s most comprehensive datasets of students located in a country other than that where the reporting provider is located, but more detailed information on students studying via UK TNE – for example, their characteristics, outcomes and experiences – would significantly enhance the ability of universities to develop scalable, sustainable and secure TNE. HESA’s relaunch of its review of the AOR is therefore very welcome and UUKi’s group on monitoring and evaluation tools in TNE will work closely with HESA on this review to ensure the use of metrics in TNE is proportionate and fit for purpose.

2. Promote the quality of UK HE TNE overseas.

UK higher education has an outstanding reputation; however, matters of quality assurance at home significantly affect the perception of UK HE TNE abroad. In the context of increasing regulatory divergence in the four UK nations, overseas stakeholders may not fully understand the UK’s quality assurance system and requirements. Targeted information to clarify responsibilities and processes and demonstrating the high quality of UK HE TNE is necessary to strengthen overseas stakeholders’ trust in UK TNE qualifications and positively affect demand.

3. Continue to remove barriers to TNE to diversify provision.

While student numbers grew across all regions, China was the only top host country showing growth at a double-digit rate, and only a few new countries entered the list of top 20 host countries and territories. Identifying and reducing barriers to TNE in priority countries will be crucial to diversifying UK TNE provision and ensuring a sustainable spread of partnerships. The government aims to negotiate free trade agreements (FTAs) with the majority of the UK's trade partners by the end of 2022. While FTAs by themselves do not solve all barriers, they can contribute to an environment of enhanced collaboration through side agreements on the recognition of qualifications or staff and student mobility.

4. Continue to mitigate risks in TNE.

UK TNE operates under different regulatory and policy frameworks and is inevitably affected by geopolitical developments and local shifts in power. Key issues for institutions include safeguarding their values in the context of local requirements and laws; the duty of care to their students and staff; and the security of sensitive information, data and cyber networks. UUK has published guidelines for universities on *Managing risk in internationalisation: security-related issues*,¹³ and the dialogue on how to mitigate risks related to TNE partnerships must be continued.

5. Use TNE to support development.

Overseas partners are increasingly interested in building capacity and enhancing the quality of their higher education systems, while international organisations use TNE to support displaced people in accessing higher education.¹⁴ Research has demonstrated the positive impact TNE can have on the partner country, institution and overseas students, as well as its crucial role in tackling global challenges, such as climate change, displacement or gender equality.¹⁵ Government support to enable institutions to create mutually beneficial partnerships will be essential to making TNE partnerships sustainable.

Additional resources

This report should be read jointly with other resources, such as the British Council's *Local impact of transnational education: A pilot study in selected European countries*, or *Shape of Global Higher Education*. Sector bodies such as the *Quality Assurance Agency for Higher Education (QAA)* and *Jisc* also have useful resources that supplement the findings of the report.

13. Universities UK, 2020. *Managing risks in Internationalisation: Security related issues*.

14. UNHCR, 2022. *Connected Higher Education*.

15. British Council, 2021. *Local impact of transnational education: a pilot study in selected European countries*.



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