

Introduction

'Transnational education' is the delivery of degrees in a country other than where

Table 1: Types of provision

Type of provision			Example of provision
Students registered at the reporting provider	Studying overseas for UK HEP award for overseas awarding provider.	Overseas campus.	Overseas campus or joint campus.
	Distance, flexible and distributed learning for a UK HEP award where the location of the student is not to be overseas.	Distance, flexible and distributed learning.	Programmes delivered online.

Type of provision

FIGURE 5

studying through collaborative provision, compared with 39.1% overall in the UK. 37.7% were studying through distance, flexible and distributed learning with 29.0% overall in the UK. 18.0% were based at overseas campuses compared with 7.0% overall in the UK and 8.6% were registered at an overseas partner.

Figure 5: Scottish HE TNE students by type of provision, 2019-20

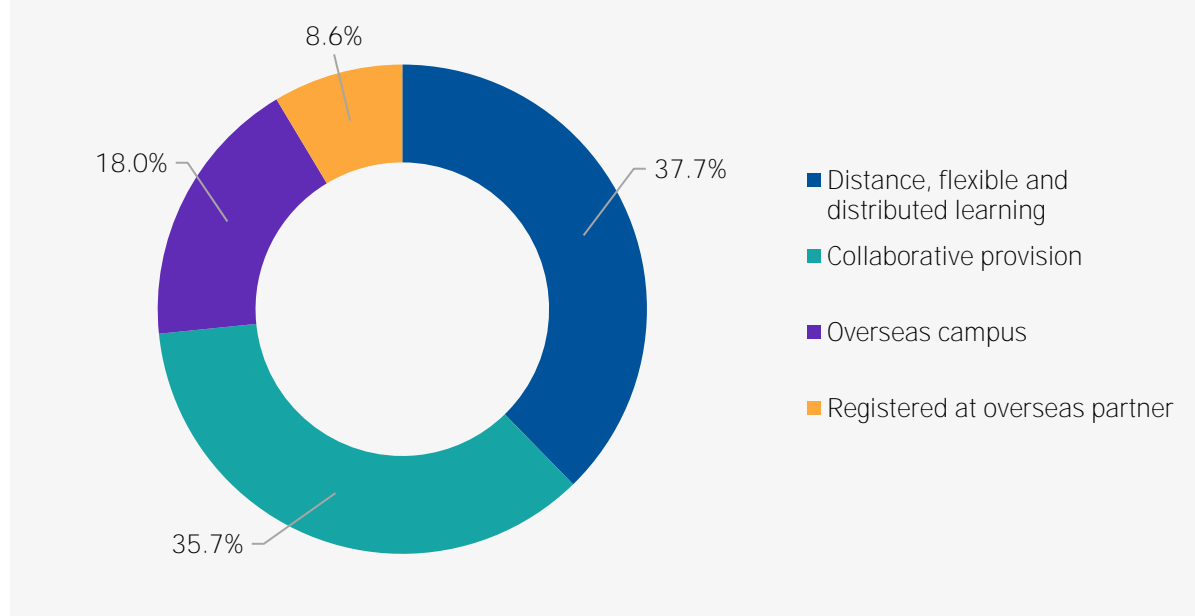


TABLE 2 shows that the fastest growing type of TNE provision in Scotland between 2015-16 and 2019-20 was distance, flexible and distributed learning with a 41.9% increase. This growth in provision was a slower increase for UK based providers with a 22.4% increase. Flexible and distributed learning accounted for the fastest growth in Scotland with an increase of 13.1% compared to 16.0% in the UK as a whole. Commercial provision also saw strong growth in Scotland in the period (9.0%) compared to 9.0% in the UK as a whole. There has however, been a decline in Scotland's TNE student population of 48.1% compared with a smaller decrease (-3.2%) in the UK as a whole.

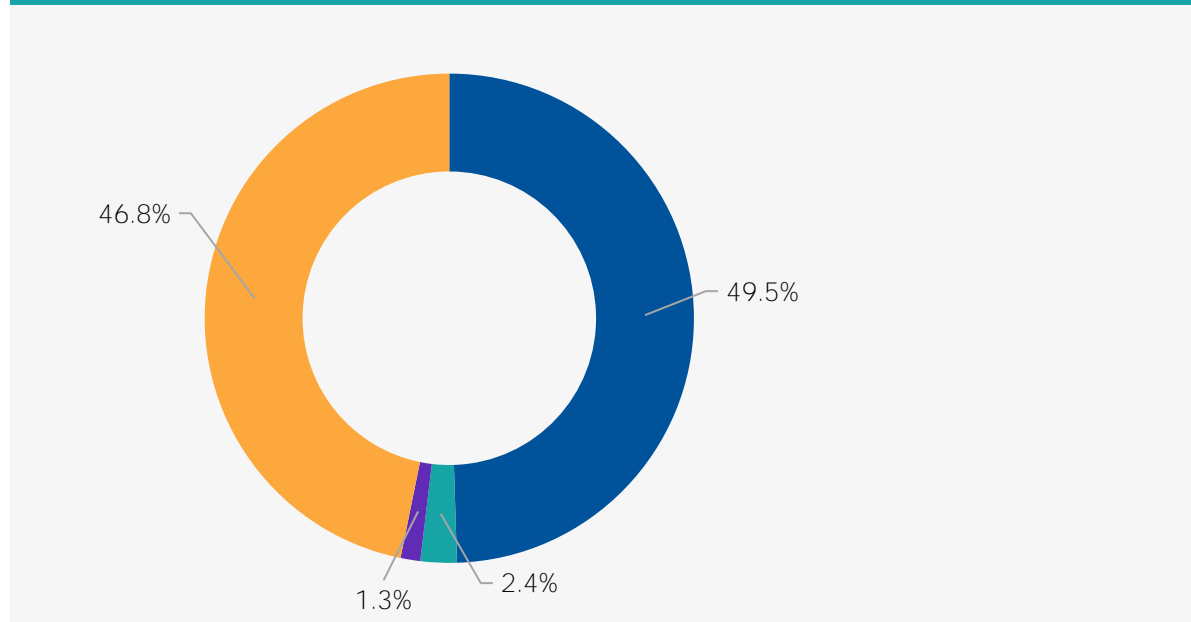
Table 2: Scottish HE TNE students by type of provision, 2015-16 to 2019-20.

Type of provision	Additional information	Change since 2015-16	Change since 2018-19

Level of provision

FIGURE 6 shows that in 2019-20 Scottish providers reported that 51.9% of TNEs (46.8% of students) were at undergraduate level (49.5% of students) and 48.1% at postgraduate level (46.8% of students) (1.3% postgraduate research). The majority of provision is at undergraduate level (49.5%) and 46.8% of students are at undergraduate level (46.8%).

Figure 6:



Host regions

TABLE 4 shows that Asia continued to host the largest contingent of TNE students reported by Scottish providers in 2019–20, followed by the Middle East, the European Union, Africa, North America, EU Europe, Australasia and South America...

Table 4:

Region	%	Students
Asia	37.1%	16,375
Middle East	22.2%	

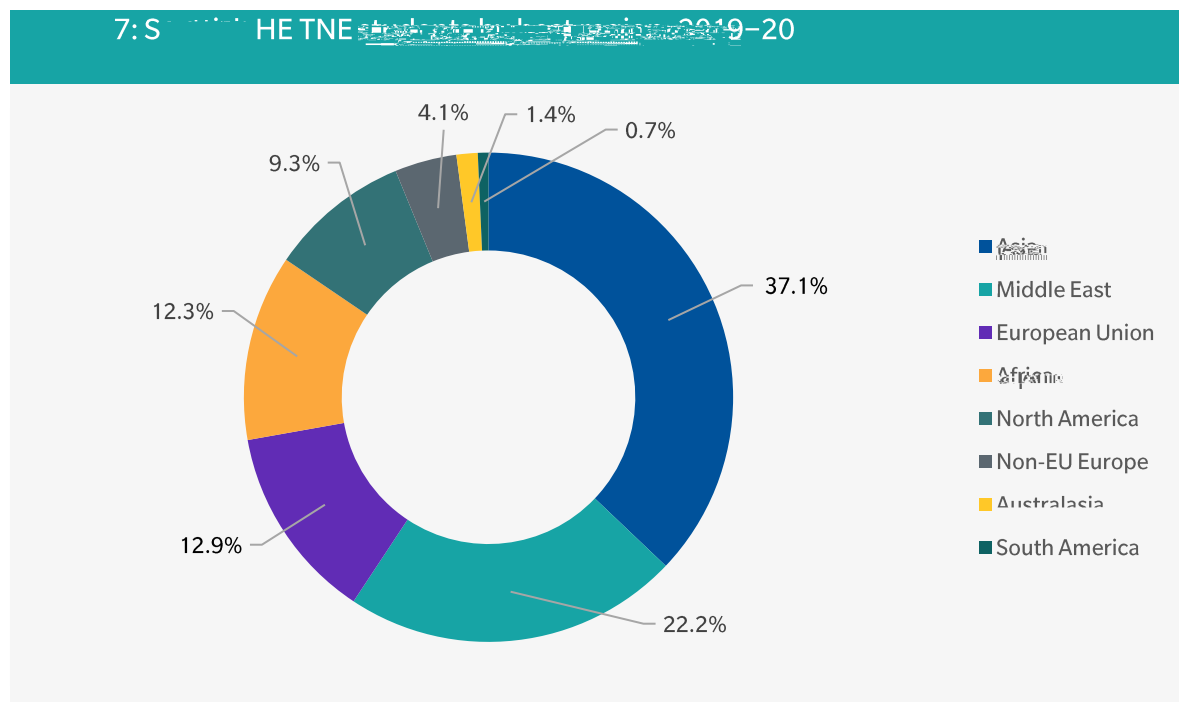
FIGURE 7 shows a breakdown of TNE students reported by Scottish providers by region in 2019-20.

proportion of students in the Middle East (22.2% in Scotland vs 13.1% in the UK), Africa

the UK), non-EU Europe (4.1% in Scotland vs 0.2% in the UK) and Asia (37.1%

Scotland vs 0.6% in the UK) and South America (0.7% in Scotland vs 0.6% in the UK)

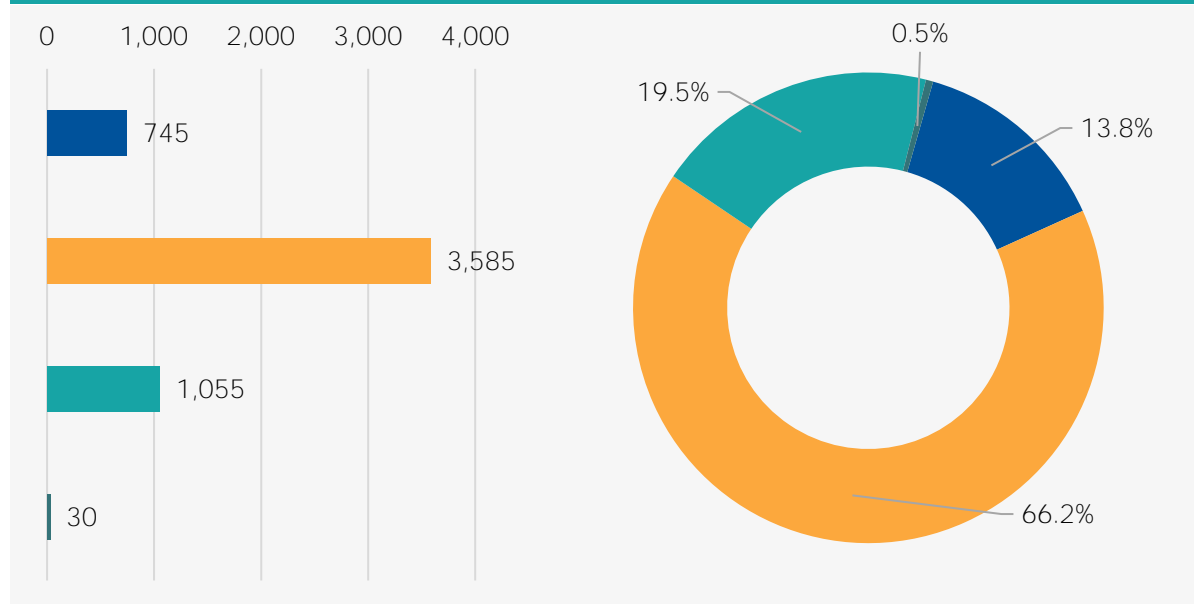
and a lower proportion in Asia (37.1% in Scotland vs 50.2% in the UK), and the



Africa

FIGURE 8 shows that the majority of TNE students reported by Scottish providers in Africa are provided via distance, flexible and distributed learning (66.2%) in follow with the registered at overseas partner organisation (19.5%), collaborative provision (13.8%) and at an overseas campus (0.5%).

Figure 8 Scottish HE TNE students in Africa by type of provision, 2019-20



Collaborative provision (745, 13.8%)

Distance, flexible and distributed learning (3,585, 66.2%)

Registered at overseas partner organisation (1,055, 19.5%)

At an overseas campus (30, 0.5%)

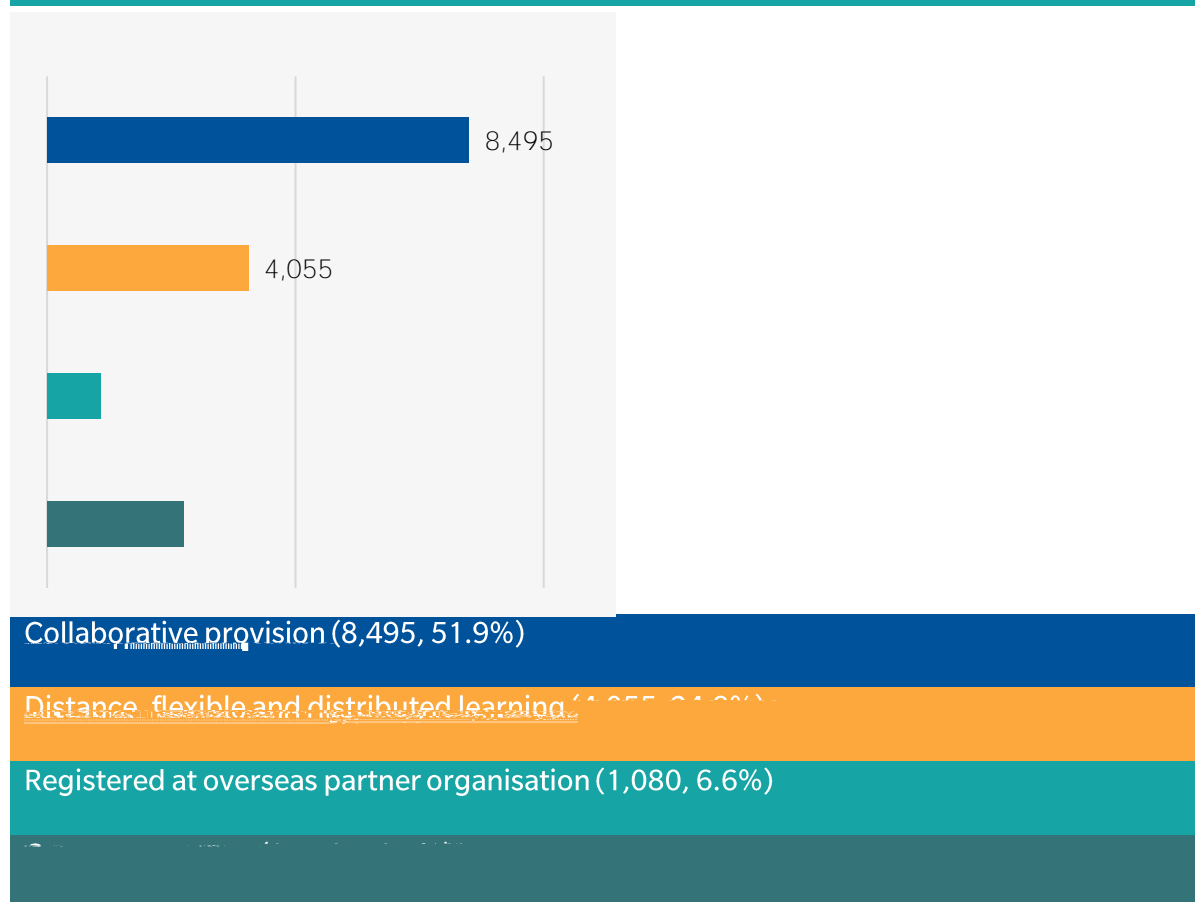




Asia

FIGURE 12 shows that a majority of TNE students reported by Scottish providers in Asia were studying through collaborative provision (51.9%), followed by distance, flexible and distributed learning (31.8%), registered at overseas partner organisations (6.6%), and registered students (7.7%).

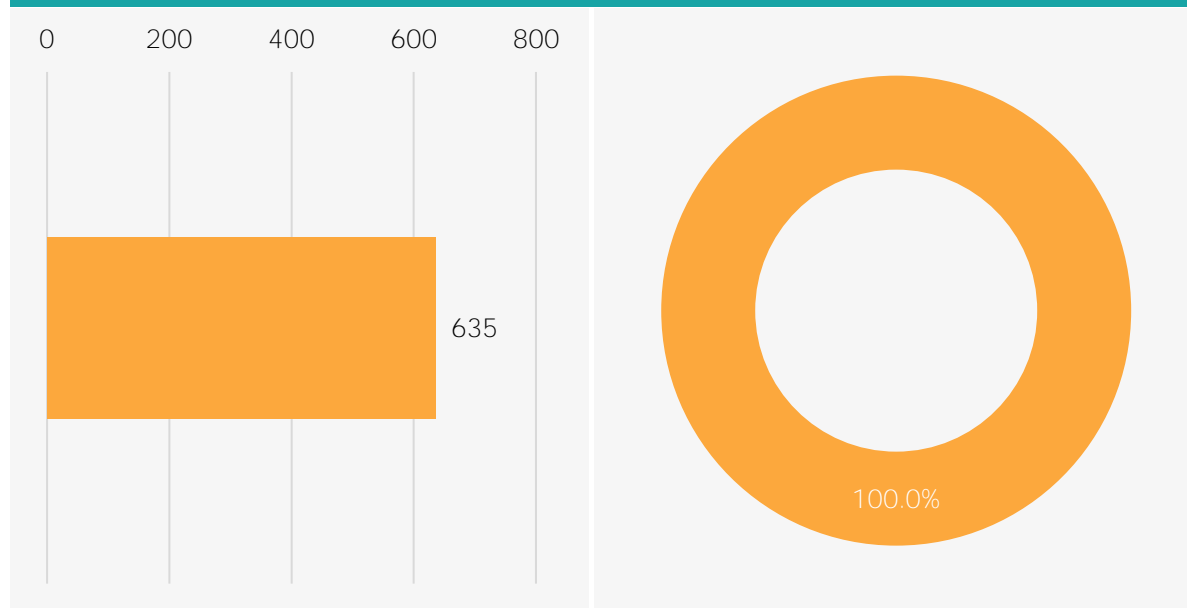
Figure 12: Scottish HE TNE students in Asia by type of provision, 2019-20



Australasia

Figure 16 shows that all TNE in Australasia is distance, flexible and distributed learning.

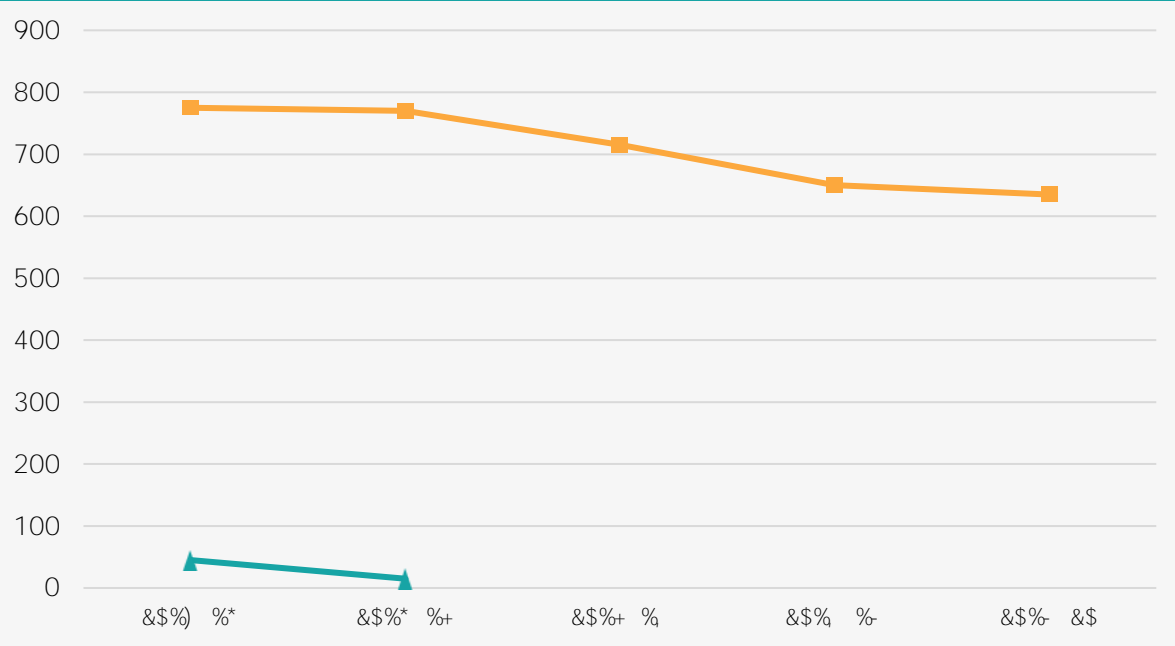
Figure 16: Scale of HE TNE in Australasia 2019-20. All HE TNE in Australasia is distance, flexible and distributed learning.



Distance, flexible and distributed learning

FIGURE 17 shows that the number of students studying through distance, flexible and distributed provision in Australasia decreased each year from 2015-16 and 2018-20. Overseas partner-organisations registered at an organisation was zero in 2019-20; the last year any students were recorded as studying this way was in 2016-17.

Figure 17: Scottish HE TNE student in Australasia by type of provision, 2015-16 to 2019-20



Registered at overseas partner organisation ▲

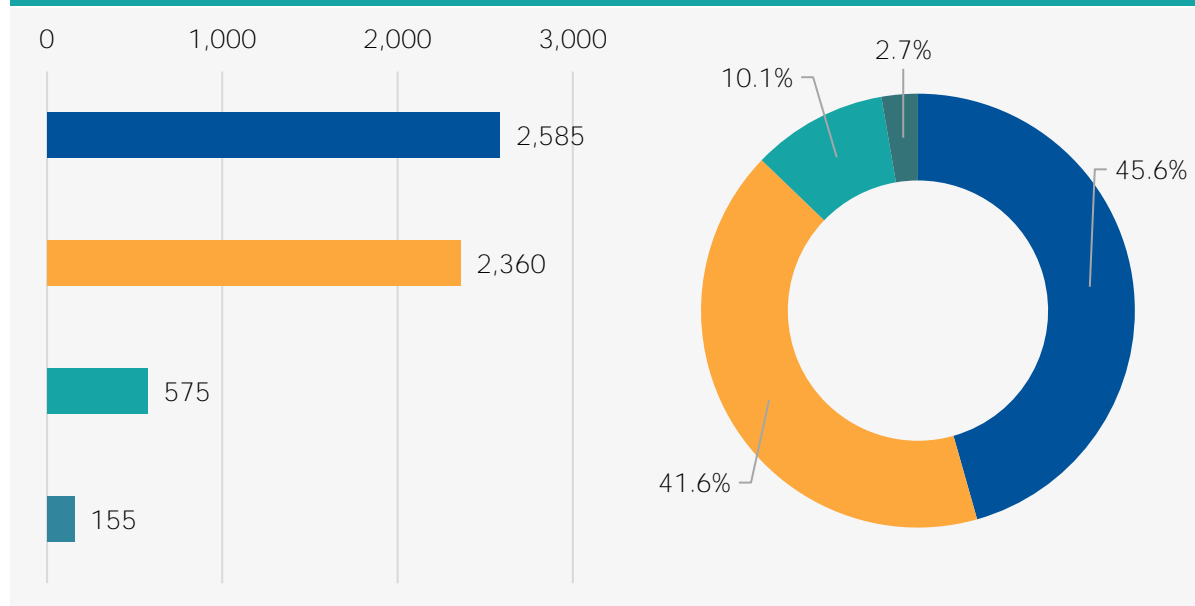


European Union

FIGURE 20 shows that a majority of TNE students reported by Scottish providers in the

distance, flexible and "blended" provision (41.6%) followed by collaborative provision (45.6%)

Figure 20: Scottish HE TNE students in the EU by type of provision, 2019–20



Collaborative provision (2,585, 45.6%)

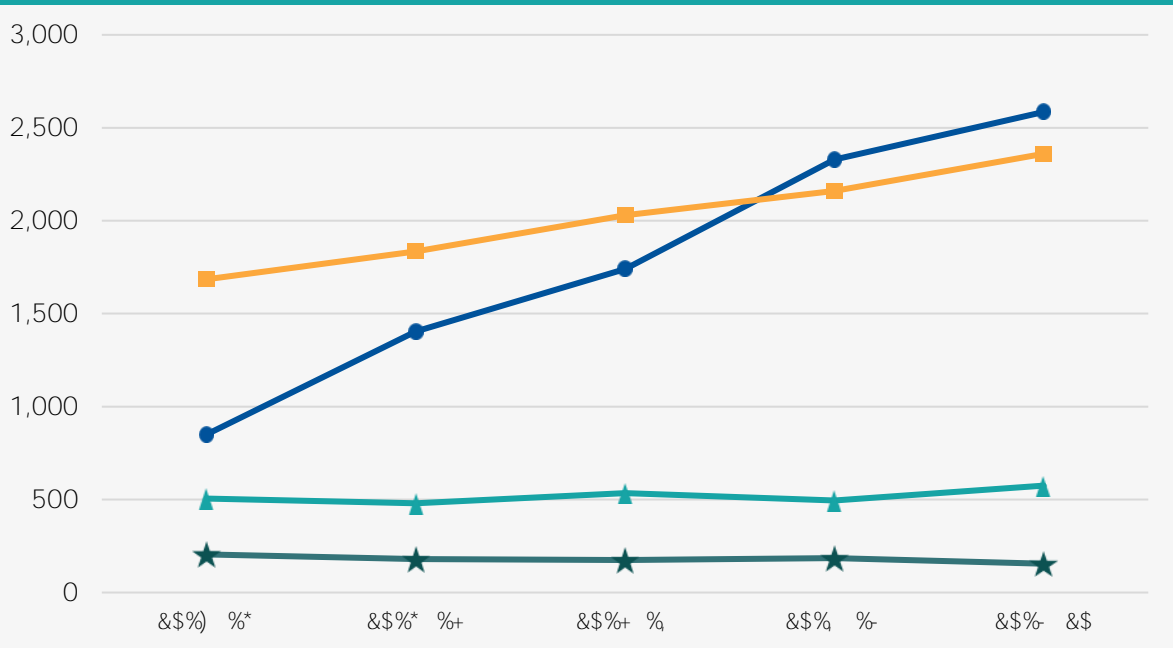
Distance, flexible and "blended" provision (2,360, 41.6%)

Registered at overseas partner organisation (575, 10.1%)

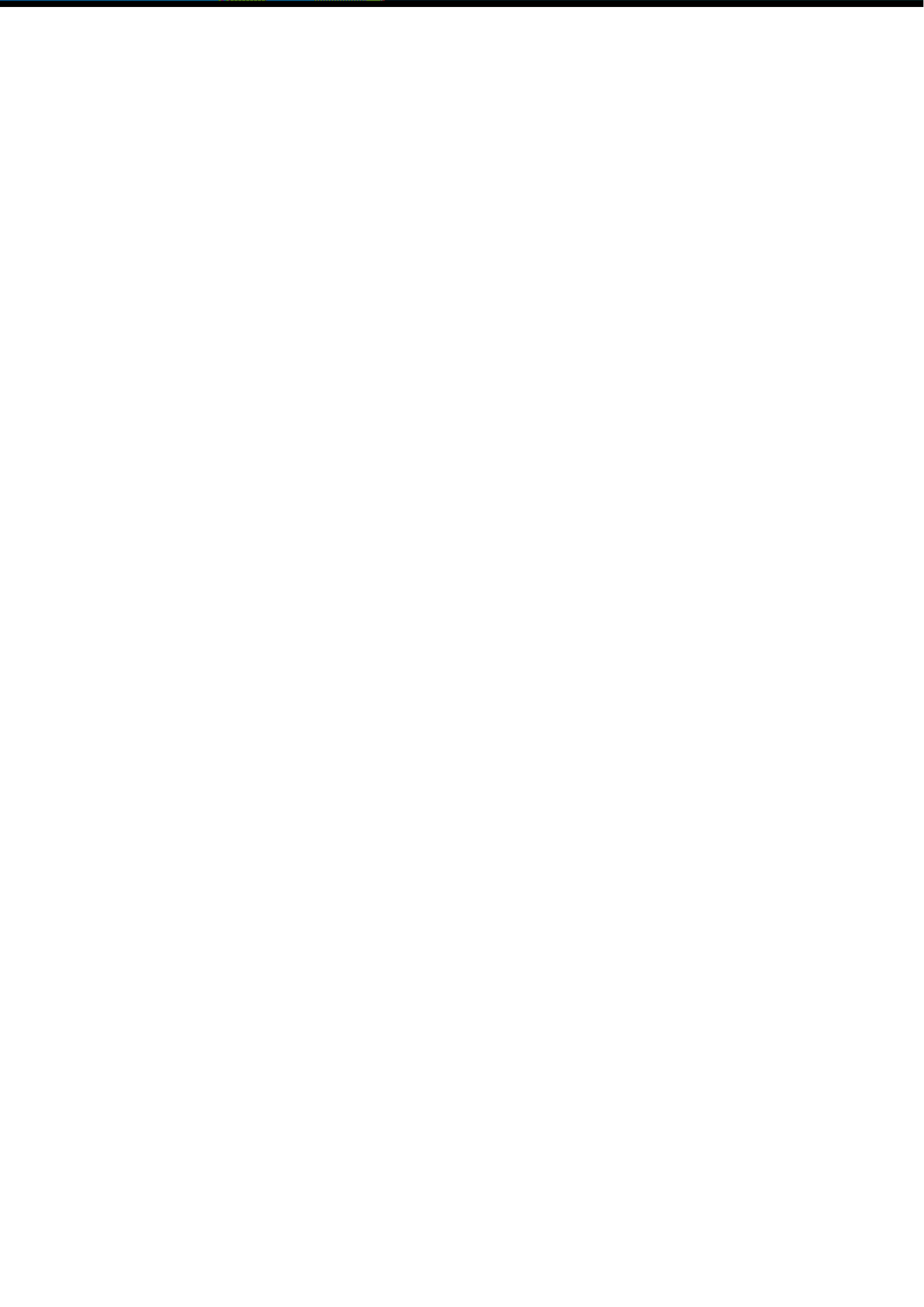
Other (155, 2.7%)

shows that between 2015-16 and 2019-20, there was an increase in all TNE modes of study except success campus reported by Scottish providers in the European Union. The increase was particularly marked in collaborative provision.

Figure 21: Scottish HE TNE students in the EU by type of provision, 2015-16 to 2019-20







Middle East

FIGURE 28 shows that the majority of HE TNE students in the Middle East were registered at overseas partner organisations (50.6%), followed by collaborative provision (30.6%), distance, flexible and distributed learning (18.6%) and those registered at overseas partner organisations (0.2%).

Figure 28 HE TNE students in the Middle East by type of provision, 2019–20

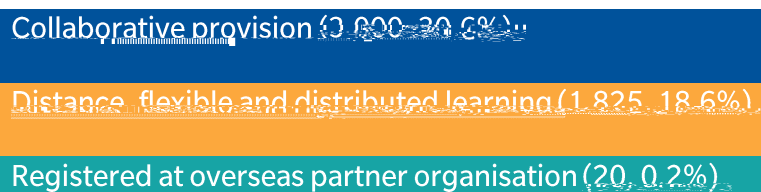
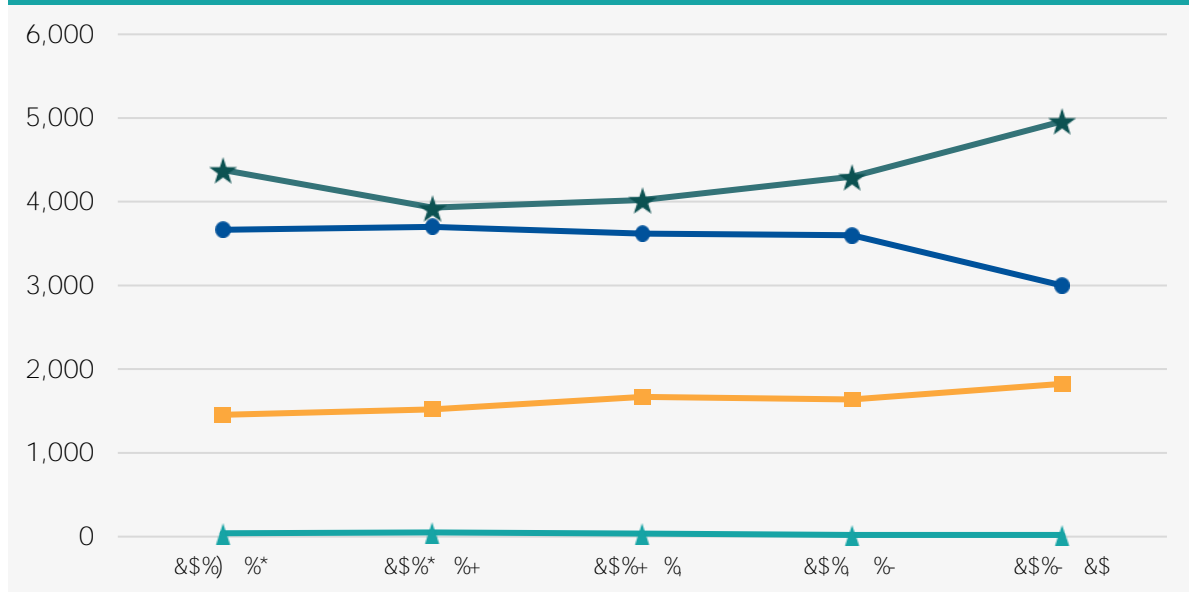


FIGURE 29 shows that between 2015-16 and 2019-20, there was a decrease in students for introduction services, cross-institutional and collaborative provision provided by Scottish providers in the Middle East. The number of students at an overseas campus increased slightly after reaching a low in 2016-17, while distance learning

Figure 29: Scale of HE TNE students in the Middle East, by mode of provision, 2015-16 to 2019-20



Collaborative provision ●

Registered at overseas partner organisation ▲

Distance learning ○

Introduction services ★

FIGURE 30 shows that 58.4% of TNE students reported by Scottish providers in 2019-20 were at postgraduate level. **FIGURE 31** shows that between 2015-16 and 2019-20 there was an increase at postgraduate level with a slight decrease at undergraduate level.

Figure 30: Scottish HE TNE students in the Middle East by level of study, 2019-20

Figure 31:

North America

FIGURE 32 shows that a majority of TNE students reported by Scottish providers in North America are studying in distance, flexible and distributed learning (83.0%), followed by registered at an overseas partner organisation (17.0%).

Figure 32: Scottish HE TNE students in North America by type of provision 2019-20

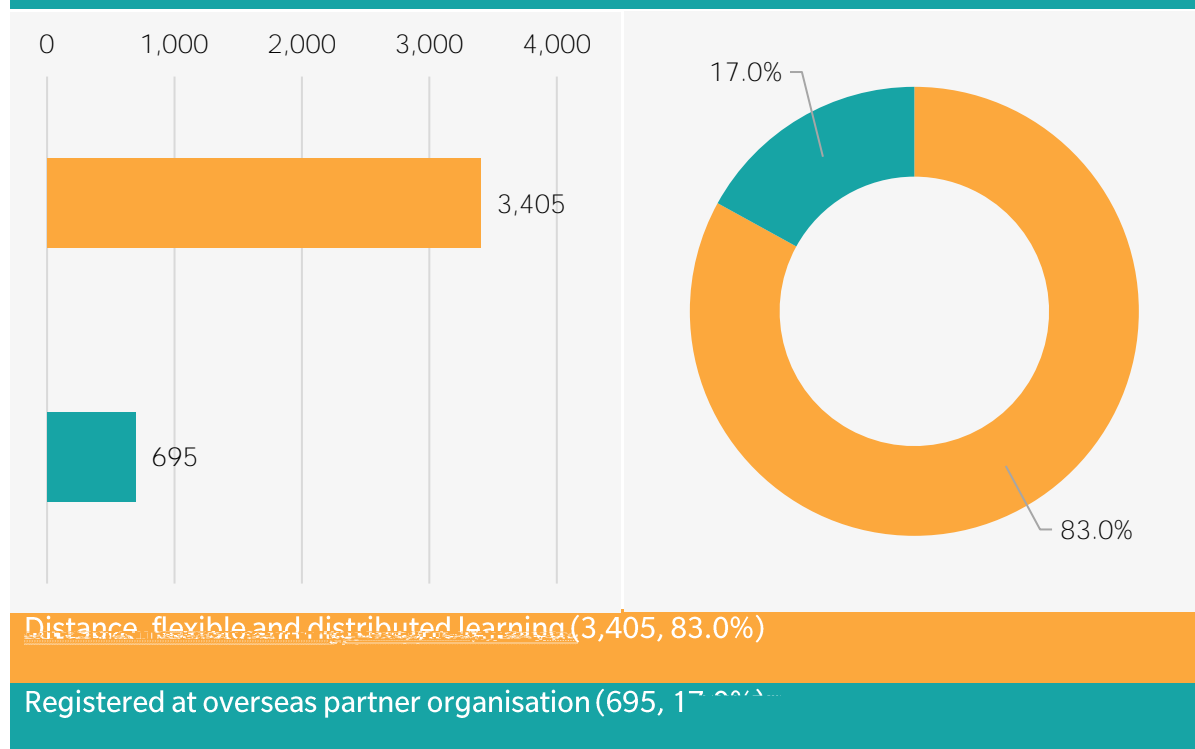
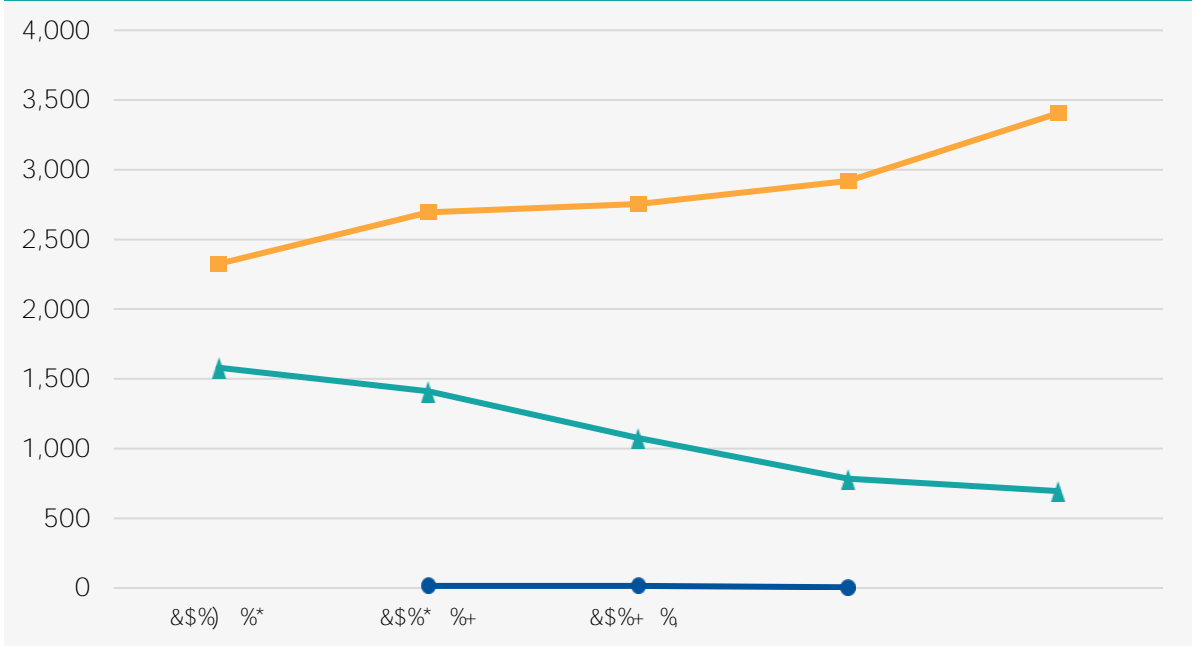


FIGURE 33 HE TNE students in North A 2019-20. The chart shows the number of HE TNE students in North A 2019-20, broken down by registration status and provision type. The Y-axis represents the number of students, ranging from 0 to 4,000. The X-axis represents the academic year, with data points for 2016-17, 2017-18, 2018-19, and 2019-20. The legend indicates three categories: Registered at overseas partner organisation (orange line with square markers), Collaborative provision (teal line with triangle markers), and a third category (blue line with circle markers) which remains at zero.

Figure 33: Scottish HE TNE students in North A 2019-20



Registered at overseas partner organisation

Collaborative provision

FIGURE 34 shows that 10.8% of TNE students in Scotland in 2019-20 in North America were studying at postgraduate level and 89.2% were

FIGURE 35 shows that between 2015-16 and 2019-20 there was a decrease in graduate and undergraduate level.

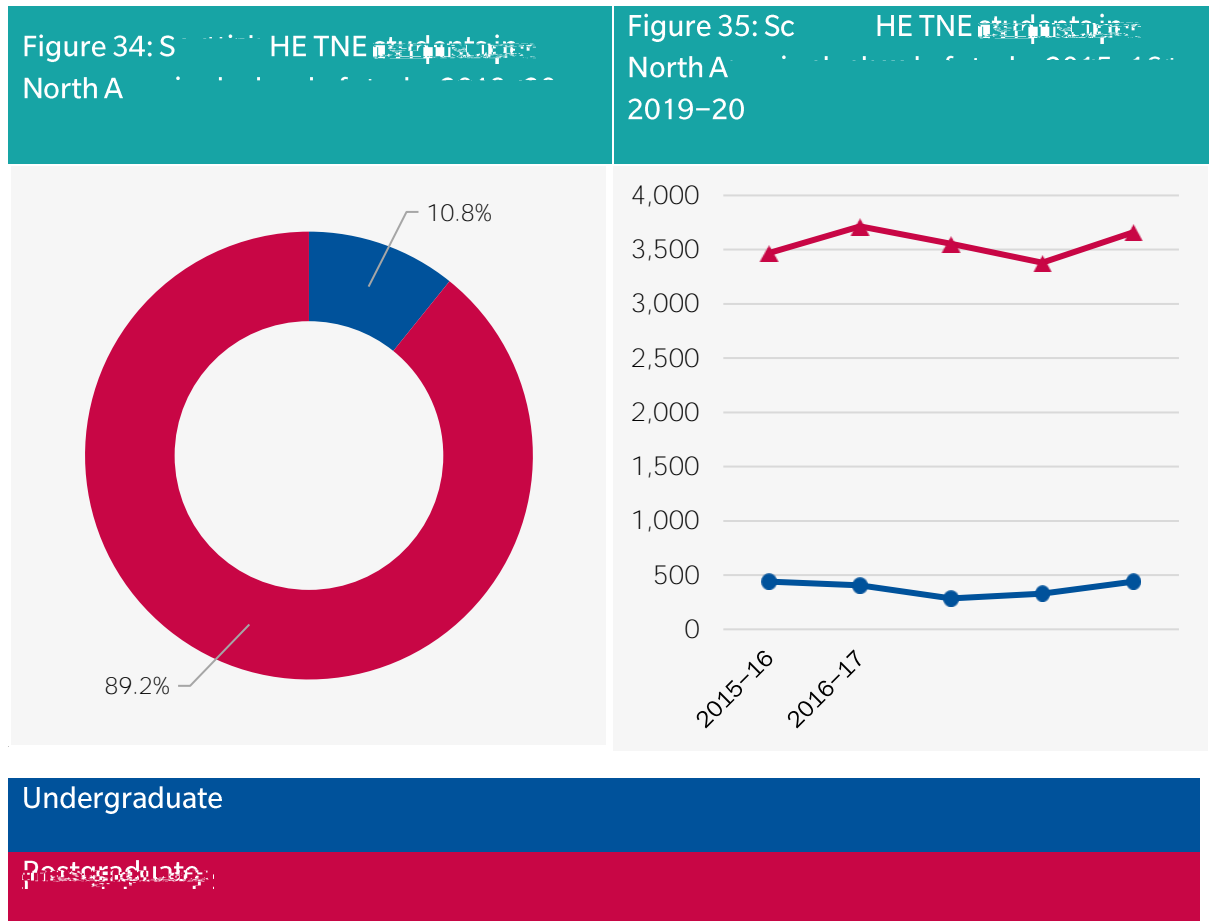




FIGURE 38 *Figure 38 shows that in 2019-20, 5.0% of HE TNE students in Scotland were from South America, with 5.0% of HE TNE students from South America at undergraduate level, compared to 5.0% at undergraduate level. **FIGURE 39** shows that between 2015-16 and 2019-20, there was a steady increase in HE TNE students from South America at undergraduate level.*

Figure 38 HE TNE students from South America by level of study, 2019-20.

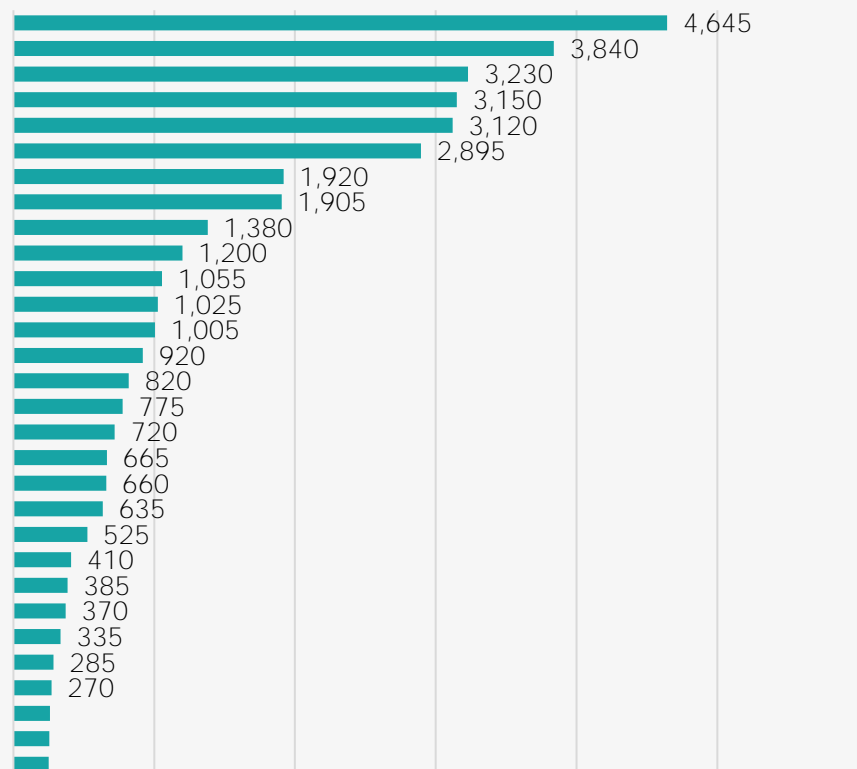
Figure

Host countries and territories

Notes: UK total excludes Oxford Brookes University.

more than ever before. **FIGURE 40** shows the number of HE TNE students enrolled in Scottish providers by country in 2019-20. The top seven countries and territories host India, South Africa, United States, Canada, Trinidad and Tobago, Mauritius, Qatar, Nigeria, Ireland and Uganda have a higher relative position in Scotland than in the UK overall. Saudi Arabia, China, United States, United Kingdom, United Arab Emirates, and the United States have a lower relative position.

Figure 40: Top 30 countries and territories hosting Scottish HE TNE students, 2019-20



Scottish providers reported TNE students in 51 countries and territories in Africa in 2019–20, up from 46 the previous year. **TABLE 5** shows the five African countries with the

Host country or territory	Students	%
South Africa	1,055	19.5%
Nigeria	830	15.1%

Scottish providers hosted 525 TNE students from Australasia in 2019-20, the same number as the previous year. **TABLE 7** shows the five Australasian countries and territories hosting the most TNE students from Scottish providers in 2019-20.

Table 7: Top five host countries and territories of Scottish HE TNE students in Australasia, 2018-19

Host country or territory	Students	%
Australia	525	82.40%
New Zealand	90	17.20%
Tonga	5	0.95%
	5	0.95%
Fiji	5	0.95%

Scottish providers hosted 525 TNE students from Australasia in 2019-20, the same number as the previous year. **TABLE 8** shows the five European Union countries and territories hosting the most TNE students from Scottish providers in 2019-20.

Table 8: Top five host countries and territories of Scottish HE TNE students in the EU, 2018-19

Host country or territory	Students	%
Greece	3,230	57.0%
Ireland	665	11.7%

Scottish providers reported TNE students in 16 countries and territories in the non-EU Europe in 2019-20, up from 16 the previous year. **TABLE 9** shows the five non-EU European countries and territories hosting the most TNE students from Scottish providers in 2019-20.

Host country or territory	Students	%
Switzerland	1,200	66.1%
Norway	250	13.9%
Ukraine	105	5.7%
Russia	105	5.7%
Azerbaijan	65	3.6%

Scottish providers reported TNE students in 14 countries and territories in the Middle East in 2019-20, the same number as the previous year. **TABLE 10** shows the top five Middle Eastern countries and territories hosting the most TNE students from Scottish providers in 2019-

Host country or territory	Students	%
United Arab Emirates	4,645	47.4%
Oman	3,150	
Qatar	1,005	10.3%
Saudi Arabia	385	3.9%
Bahrain	250	2.5%

Conclusions

Scottish providers account for 9.8% of international students studying in the UK. By comparison, Scottish providers account for 4.7% of international students studying in the UK. Between 2015–16 and 2019–20, TNE student numbers grew 15.1% at Scottish providers (15.1% overall) compared to the UK as a whole (16.7%). Scottish providers are more likely to offer research-intensive provision. In 2019–20 (64.7%) compared to the UK as a whole (53.2%).

Different types of provision are more favoured by Scottish providers than their UK counterparts. In 2019–20, Scottish providers reported double the proportion of students on overseas campuses (18.0%) compared to the proportion (6.9%) for the UK as a whole. This mode of provision continues to grow for Scottish providers with an increase of 9.2% from 2018–19 to 2019–20. Distance, flexible and distributed learning also made up a greater proportion of the Scottish TNE student population in 2019–20 than for the UK as a whole: 36.7% were studying through this mode from Scottish providers, compared to 31.2% overall in the UK.

Scottish providers are more likely to offer research-intensive provision among Scottish providers (51.9%) compared to the UK as a whole (40.2%).

Scottish TNE provision can be found in most corners of the globe. Again, providers are more likely to offer research-intensive provision in the UK as a whole (50.3%). In 2019–20, although this was smaller than the proportion for the UK as a whole (50.3%). On the other hand, the percentage of TNE students in the Middle East (22.2%), North America (9.3%), non-EU Europe (4.1%), Australasia (1.4%) and South America (0.7%) was lower among Scottish providers than in the UK as a whole.

It should be noted that the data analysed in this report predates the impact of the Covid-19 pandemic, and its impact on TNE student numbers remains to be seen. The

potentially lead to growing interest among providers in TNE as internationalisation strategies, and the widespread shift to online learning may lead to wider regulatory recognition and increased uptake of this mode of delivery among students.

students access a Scottish higher education globally through distance or blended learning.

More than 50% of Scottish TNE provision in the 2019-20 period was in the UK (50.6%) and it's growing in Asia (16.7%). The definition of what constitutes an

investment-based TNE is not categorised as such in HESA collections. Campuses are investment-heavy operations that require a long-term commitment with local communities, something highly sought after by overseas authorities in particular in the Middle East and Africa. This is not the case in Arabia.

diversified than that of the UK as a whole. The leading territory hosts just 10.5% of Scottish TNE provision and no providers in any category is above 40%. However, Scottish providers should continue to diversify their TNE to include hybrid modes of TNE, including in the European Union and less traditional locations such as South America or French-speaking Africa. This will help the Scottish TNE sector offset risks such as a resurgence of the

competition from international students.

In sum, this edition of the Scale of UK Higher Education Transnational Education Scottish Providers shows a healthy picture of Scottish TNE. In 2019-20 there were more students accessing a Scottish higher education in more territories and more providers. With continuing support from the UK and devolved administration as outlined in the Scottish International Education Strategy and the announcement of a Scottish International Education Strategy, we hope the sector will continue growing and increasing the life chances of students globally.

higher education institutions (HEIs) globally and helps them flourish internationally. To do this we promote UK HEIs abroad, provide trusted, reliable information for need about them and create new opportunities through our unique ability to act at sector level. We draw on UK university expertise to influence policies in the UK or elsewhere and facilitate mutually beneficial collaboration between UK HEIs



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