

Scale of UK higher education transnational education 2019-20: Scottish providers

Trend analysis of HESA data

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Executive summary

In 2019–20, Scottish universities were delivering transnational education (TNE) to more students than ever before and in more countries and territories than ever before.

This third edition of *The Scale of UK Higher Education Transnational Education: Scottish Providers* provides a snapshot analysis of where, at what level and through what type of provision Scottish TNE students studied during the 2019–20 academic year, and a longitudinal overview of trends in TNE from 2015–16.

Overview

Scotland's higher education (HE) TNE provision in 2019–20:

- 17 higher education providers reported students studying through TNE.
- 64.7% of Scottish providers reported more than 1,000 TNE students each.
- Scottish providers reported 44,140 students in TNE, which is 9.8% of the total reported by UK providers¹.
- Scottish TNE student numbers increased by 1,515 students (3.6%) from 2018–19.
- Scottish TNE was reported in 191 countries and territories, more than ever before.
- Asia continued to host the largest proportion of Scottish providers' TNE students (37.1%) in 2019–20, followed by the Middle East (22.2%), the European Union (12.9%), Africa (12.3%), North America (9.3%), non-EU Europe (4.1%), Australasia (1.4%) and South America (0.7%).
- Scottish providers reported that 51.9% of TNE students were studying at undergraduate level and 48.1% at postgraduate level.
- 37.7% of TNE students at Scottish providers were studying through distance, flexible and distributed learning, followed by 35.7% studying through collaborative provision, 18.0% registered at an overseas campus and 8.6% registered at an overseas partner organisation.

¹ UK total excludes Oxford Brookes University. For more information on why, please see our latest UK-wide [Scale of TNE report](#).

Introduction

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

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

Data about TNE is collected annually by the Higher Education Statistics Agency (HESA) via the Aggregate Offshore Record (AOR). AOR data has been collected since 2007–08 from UK higher education providers (HEPs) who subscribe to HESA. Universities provide data in their AOR return about "students that are studying wholly outside the UK who are either registered with the reporting provider or who are studying for an award of the reporting provider".

HESA collects data which relates to five categories or types of TNE provision and universities are responsible for returning data against these. The categories are broad, and universities may not always define their programmes by the same definitions used by HESA. [TABLE 1](#) shows these categories, how they are referred to in this briefing and an example for each. These examples are not exhaustive, and there are many other ways that TNE programmes operate which may be included in each category.

In accordance with HESA's Standard Rounding Methodology:

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

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

All data relates to Scottish providers that returned data to HESA.

Table 1: Types of provision

Type of provision		Report terminology	Example of provision
Students registered at the reporting provider	Studying overseas for UK HEP award at overseas campus of reporting provider.	Overseas campus.	Overseas standalone or joint campus.
	Distance, flexible and distributed learning for a UK HEP award where the location of the student is known to be overseas.	Distance, flexible and 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.

Reporting providers

Note: UK totals and percentage changes excludes Oxford Brookes University.

As shown in **FIGURE 1**, In 2019–20 Scottish providers reported 44,140 students in TNE, which is 9.8% of the total reported by UK providers. By way of comparison, Scottish providers hosted 10.7% of the international (non-UK) students in the UK In 2019–20.

Figure 1: Proportion of UK HE TNE students by country of provider, 2019-20

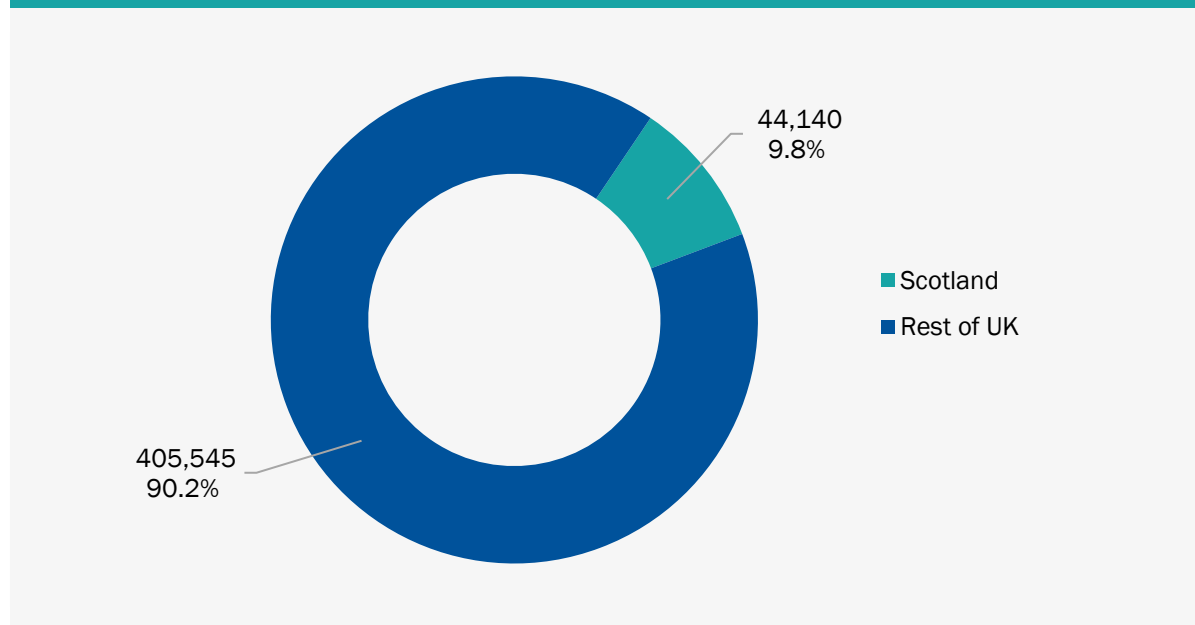


FIGURE 2 and FIGURE 3 show that between 2015–16 and 2019–20, TNE student numbers grew by 15.1% in Scotland, compared to 16.7% in the UK as a whole. From 2018–19 to 2019–20, growth was 3.6% in Scotland compared to 10.6% in the UK as a whole. This is partly due to the addition of 14 new providers in England to the Aggregate Offshore Record in 2019–20.

Figure 2: UK HE TNE students by country of provider 2015–16 to 2019–20

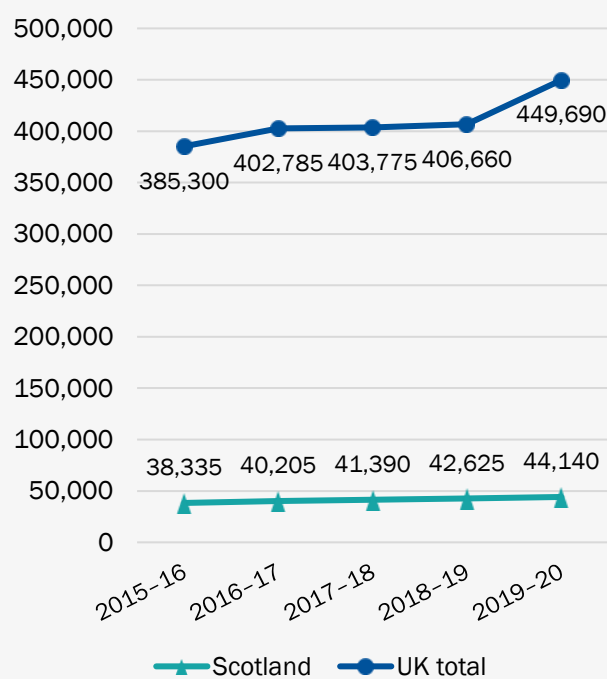
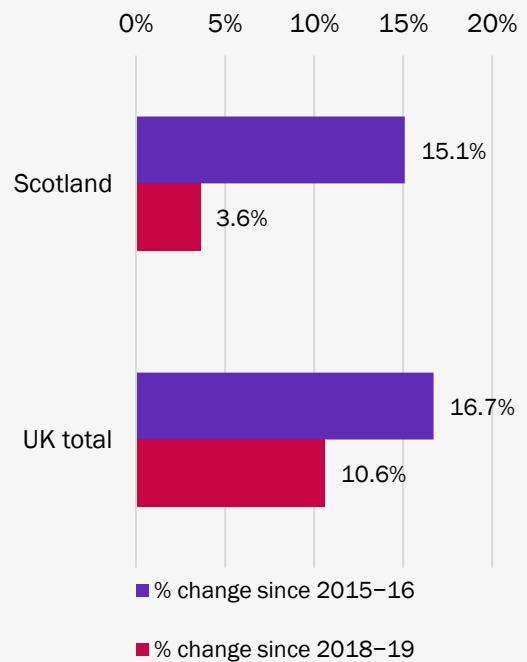
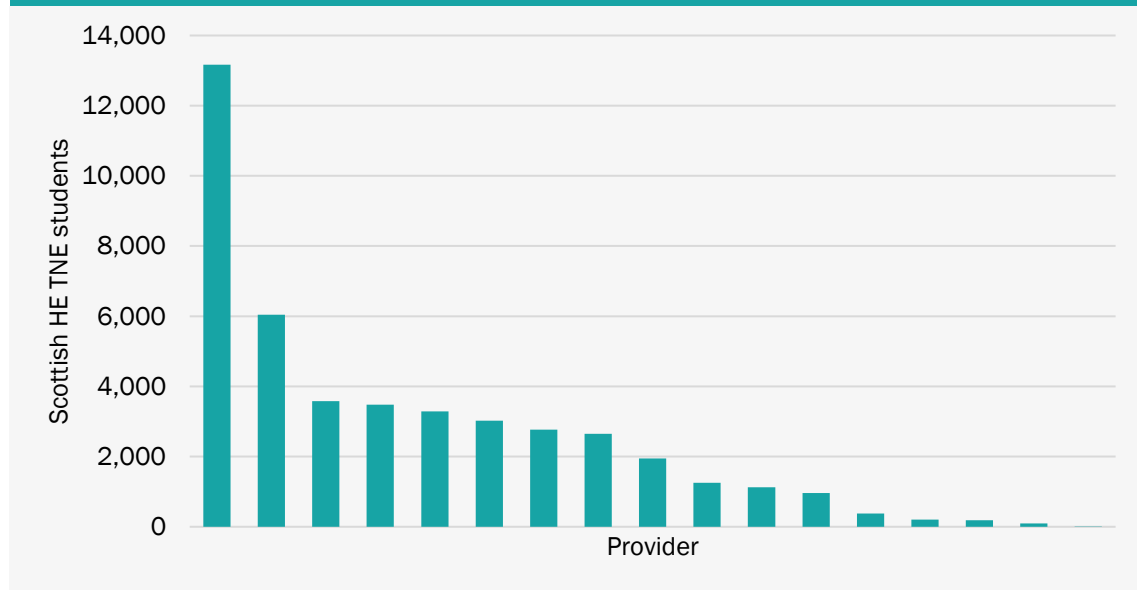


Figure 3: % change of UK HE TNE students by country of provider



In 2019–20, 11 out of 17 providers in Scotland reported more than 1,000 students in TNE, as shown in [FIGURE 4](#). This represents 64.7% of providers. 14 providers reported fewer than 4,000 students, which is 82.4%, compared with 78.9% in the UK as a whole. The median number of TNE students reported by Scottish institutions was 1,950 in 2019–20.

Figure 4: Scottish HE TNE students by reporting provider, 2019-20



Type of provision

FIGURE 5 shows that in 2019–20, 35.7% of TNE students at Scottish providers were studying through collaborative provision, compared with 39.1% overall in the UK; 37.7% were studying through distance, flexible and distributed learning, compared with 29.0% overall in the UK; 18.0% were registered at an overseas campus, compared with 7.0% overall in the UK and 8.6% were registered at an overseas partner organisation, compared with 21.8% overall in the UK.

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

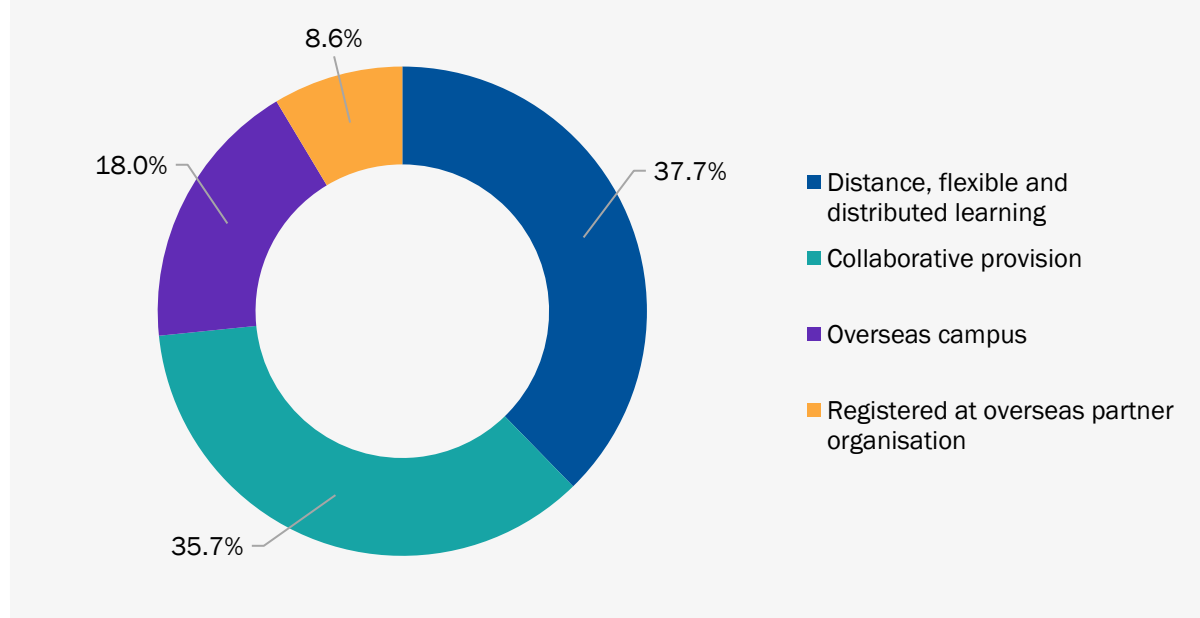


TABLE 2 shows that the fastest growing type of TNE provision in Scotland between 2015–16 and 2019–20 was distance, flexible and distributed learning with a 41.9% increase. This method of provision saw a slower increase for UK providers overall, with a 22.4% increase in the same time period. Between 2018–19 and 2019–20, distance, flexible and distributed learning was also the fastest growing category in Scotland, increasing by 13.1%, compared to 16.0% in the UK as a whole. Overseas campus provision also saw strong growth in Scotland in the previous year (9.2%), compared to 8.0% in the UK as a whole. There has been a marked decline in Scotland in TNE students registered at an overseas partner organisation (–48.1%) compared with a smaller decrease (–3.2%) in the UK as a whole from 2015–16 to 2019–20.

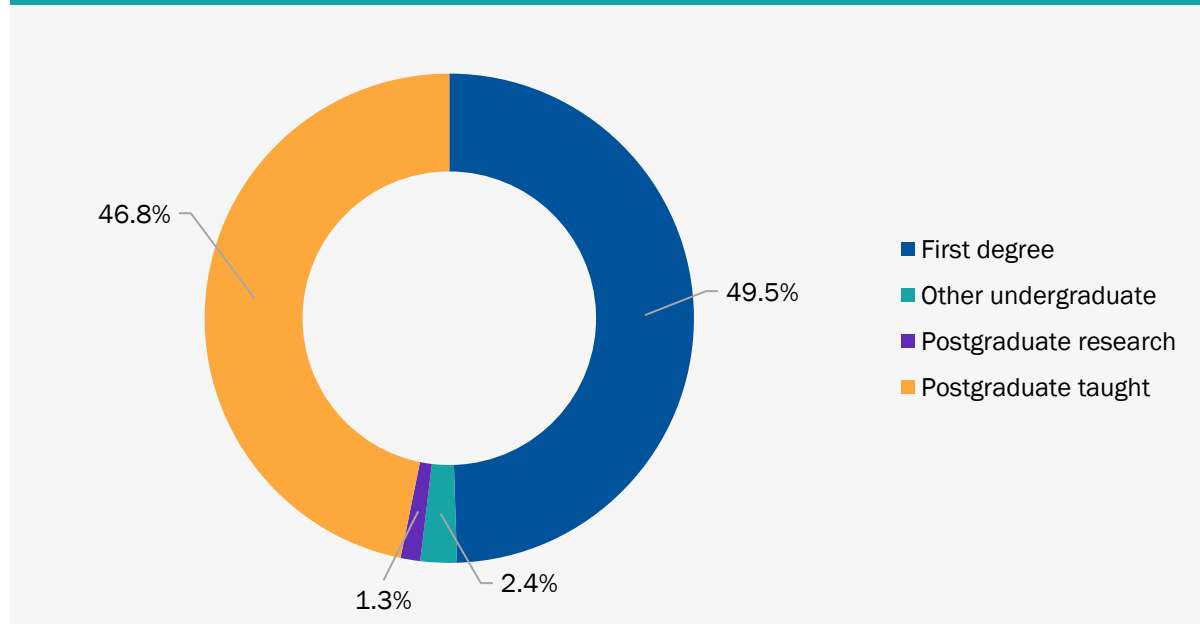
Table 2: Scottish HE TNE students by type of provision, 2015–16 to 2019–20

Type of provision	Academic year					Change since 2015–16	Change since 2018–19
	2015–16	2016–17	2017–18	2018–19	2019–20		
Distance, flexible and distributed learning	11,725	12,630	13,790	14,710	16,635	41.9%	13.1%
Collaborative provision	12,925	14,285	14,815	16,125	15,750	21.9%	-2.3%
Overseas campus	6,330	6,420	6,895	7,275	7,940	25.4%	9.2%
Registered at overseas partner organisation	7,355	6,865	5,885	4,515	3,815	-48.1%	-15.5%
Total	38,335	40,205	41,390	42,625	44,140	15.1%	3.6%

Level of provision

FIGURE 6 shows that in 2019–20, Scottish providers reported that 51.9% of TNE students were studying at undergraduate level (49.5% first degree and 2.4% other undergraduate) and 48.1% at postgraduate level (46.8% postgraduate taught and 1.3% postgraduate research). The proportion for the UK as a whole was 68.1% undergraduate and 31.9% postgraduate.

Figure 6: Scottish HE TNE students by level of study, 2019–20



As shown in [TABLE 3](#), In 2019–20, Scottish providers reported 22,920 TNE students at undergraduate level, an increase of 16.7% since 2015–16, and 21,220 TNE students at postgraduate level, an increase of 13.5% since 2015–16. In the UK as a whole the increases were 14.4% and 22.0% respectively.

Table 3: Scottish HE TNE students by level of study, 2015–16 to 2019–20

Level of study		Academic Year					Change since 2015-16	Change since 2018-19
		2015-16	2016-17	2017-18	2018-19	2019-20		
UG	First degree	19,190	20,290	21,360	22,730	21,860	13.9%	-3.8%
	Other UG	450	735	745	825	1,060	136.3%	28.9%
	Total	19,640	21,025	22,110	23,555	22,920	16.7%	-2.7%
PG	PG research	550	585	700	510	565	2.5%	10.4%
	PG taught	18,150	18,590	18,580	18,560	20,655	13.8%	11.3%
	Total	18,700	19,175	19,280	19,070	21,220	13.5%	11.3%
Total		38,165	38,335	40,205	41,390	42,625	11.7%	3.0%

Host regions

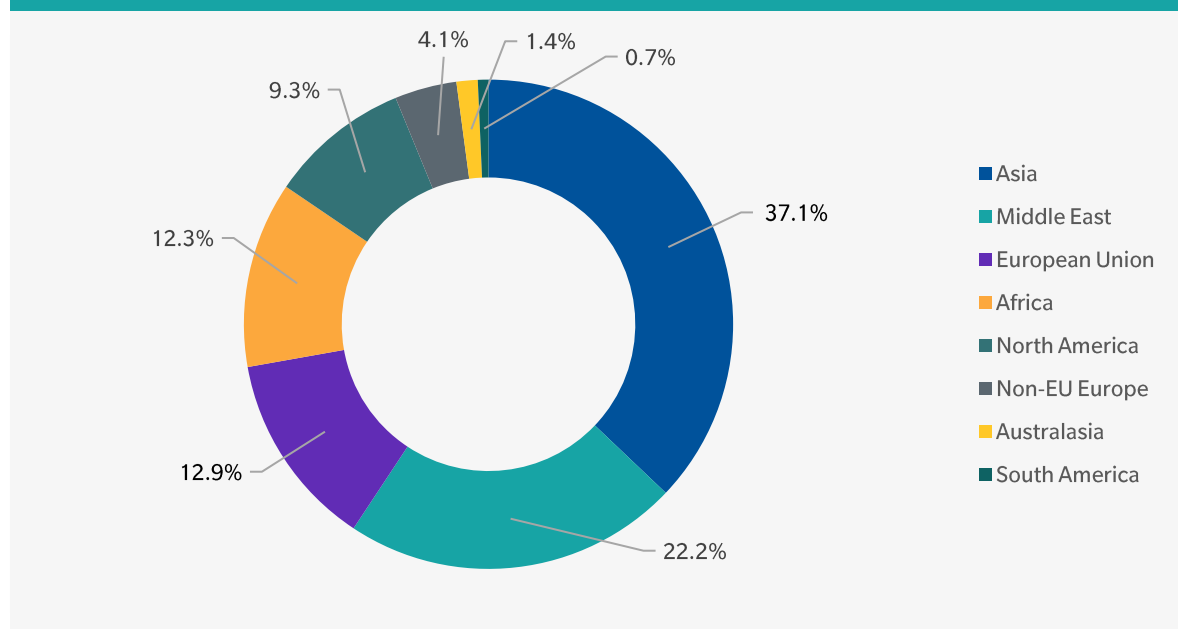
TABLE 4 shows that Asia continued to host the largest contingent of TNE students reported by Scottish providers in 2019–20, followed by the Middle East, the European Union, Africa, North America, non-EU Europe, Australasia and South America.

Table 4: Scottish HE TNE students by host region, 2019–20

Region	%	Students
Asia	37.1%	16,375
Middle East	22.2%	9,810
European Union	12.9%	5,675
Africa	12.3%	5,415
North America	9.3%	4,100
Europe (non-EU)	4.1%	1,815
Australasia	1.4%	635
South America	0.7%	310

FIGURE 7 shows a breakdown of TNE students reported by Scottish providers by region in 2019–20. Compared with the UK as a whole, in Scotland there was a higher proportion of students in the Middle East (22.2% in Scotland vs 13.1% in the UK), Africa (12.3% in Scotland vs 10.7% in the UK), North America (9.3% in Scotland vs 5.1% in the UK), non-EU Europe (4.1% in Scotland vs 3.2% in the UK), Australasia (1.4% in 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 European Union (12.9% in Scotland vs 16.6% in the UK).

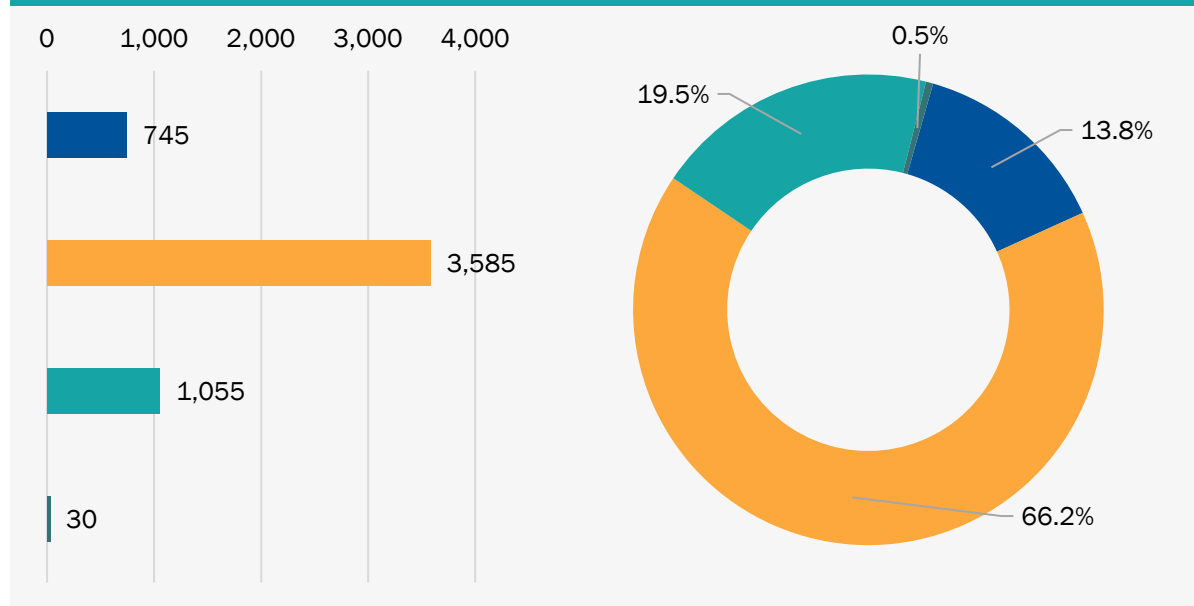
Figure 7: Scottish HE TNE students by host region, 2019–20



Africa

FIGURE 8 shows that a majority of TNE students reported by Scottish providers in Africa were studying through distance, flexible and distributed learning (66.2%), followed by those 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%)

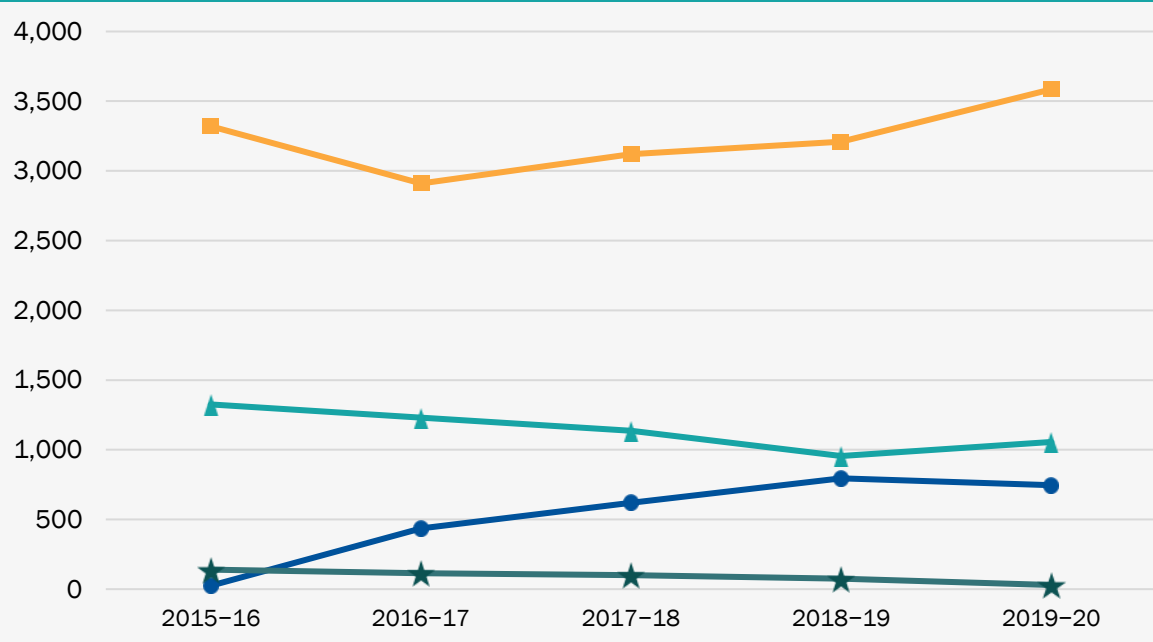
Distance, flexible and distributed learning (3,585, 66.2%)

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

Overseas campus (30, 0.5%)

FIGURE 9 shows that between 2015–16 and 2019–20, there was a decrease in TNE delivered via an overseas partner organisation. There was also a decrease in students registered at overseas campuses reported by Scottish providers in Africa and a small increase in distance, flexible and distributed learning and a large increase in collaborative provision.

Figure 9: Scottish HE TNE students in Africa by type of provision, 2015–16 to 2019–20



Collaborative provision ●

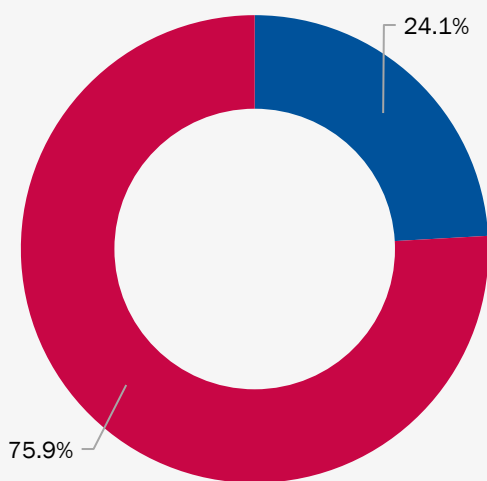
Distance, flexible and distributed learning ■

Registered at overseas partner organisation ▲

Overseas campus ★

FIGURE 10 shows that 75.9% of TNE students reported by Scottish providers in 2019–20 in Africa were studying at postgraduate level, as opposed to 24.1% at undergraduate level. FIGURE 11 shows that between 2015–16 and 2019–20, there was an increase at both levels of study, although postgraduate provision was decreasing up until 2018–19 before recovering sharply in 2019–20.

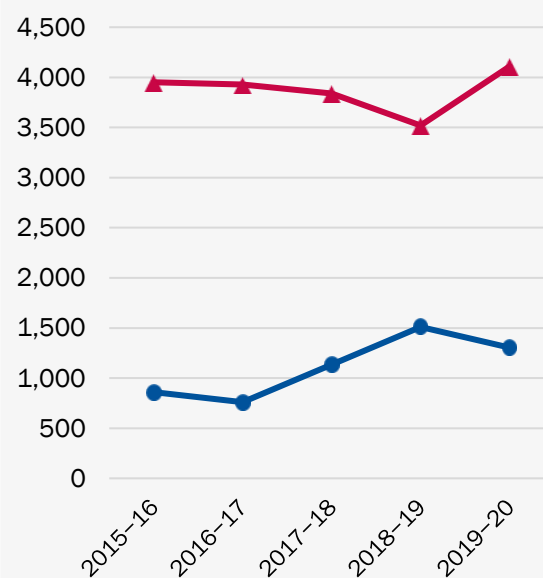
Figure 10: Scottish HE TNE students in Africa by level of study, 2019–20



Undergraduate ●

Postgraduate ▲

Figure 11: Scottish HE TNE students in Africa by level of study, 2015–16 to 2019–20



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 (24.8%), registered at an overseas campus (16.7%) and registered at overseas partner organisation (6.6%).

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

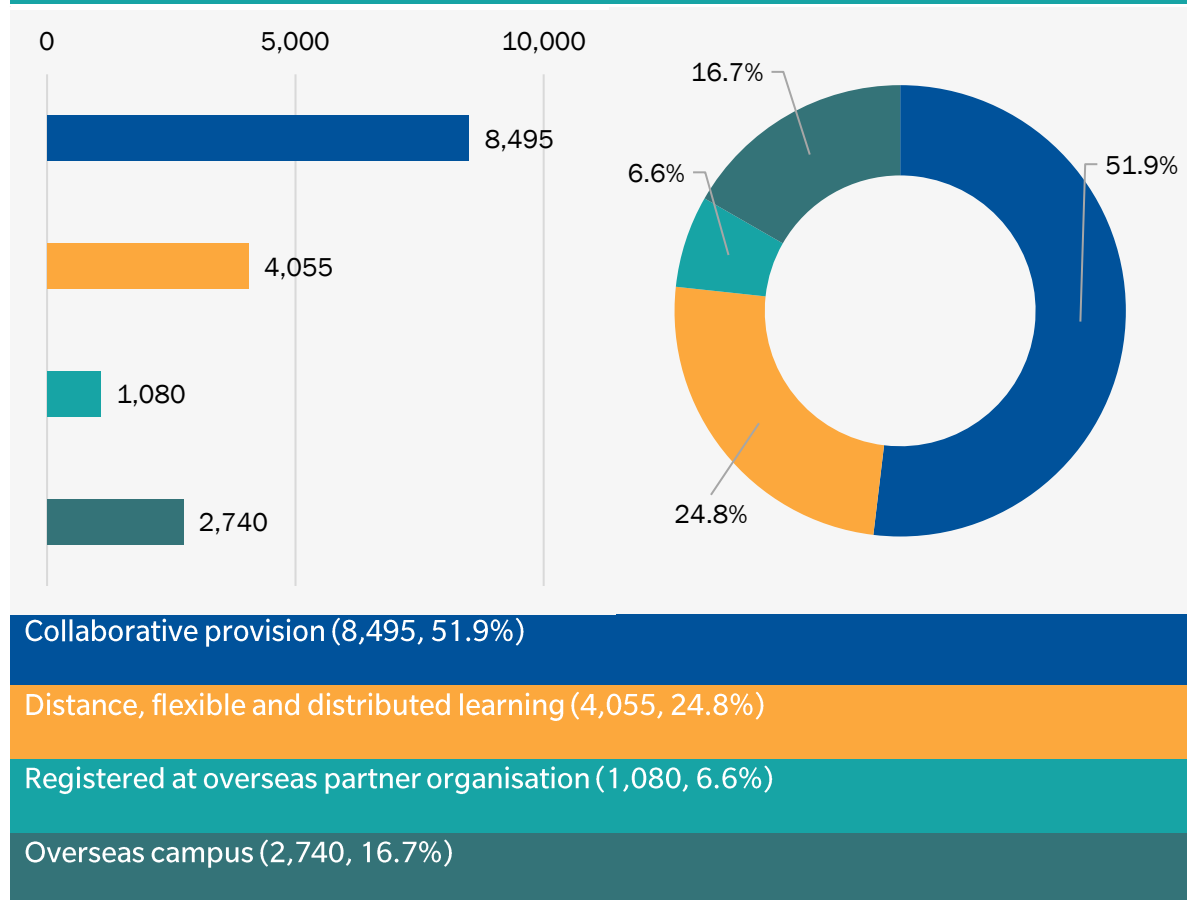
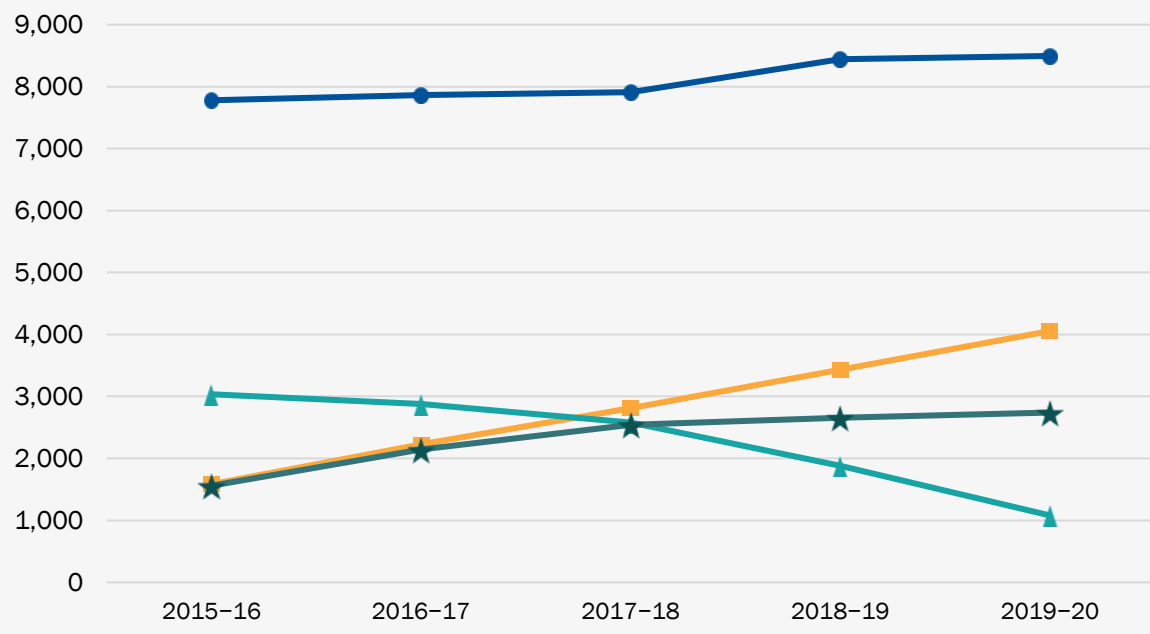


FIGURE 13 shows that between 2015–16 and 2019–20, there was an increase in student numbers in collaborative provision, distance learning, and overseas campus provision reported by Scottish providers in Asia, and a decrease in those registered at an overseas partner organisation.

Figure 13: Scottish HE TNE students in Asia by type of provision, 2015–16 to 2019–20



Collaborative provision ●

Distance, flexible and distributed learning ■

Registered at overseas partner organisation ▲

Overseas campus ★

FIGURE 14 shows that 71.7% of TNE students reported by Scottish providers in 2019–20 in Asia were studying at undergraduate level, against 28.3% were studying at postgraduate level. FIGURE 15 shows that between 2015–16 and 2019–20, there was an increase at both levels of study.

Figure 14: Scottish HE TNE students in Asia by level of study, 2019–20

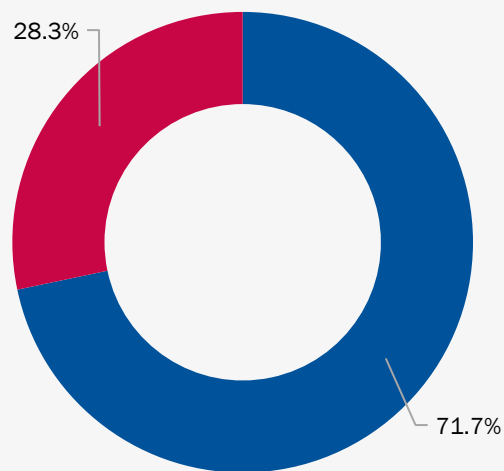
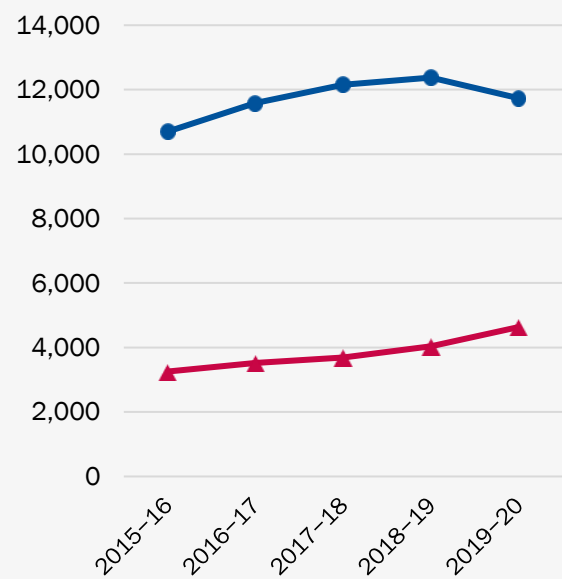


Figure 15: Scottish HE TNE students in Asia by level of study, 2015–16 to 2019–20



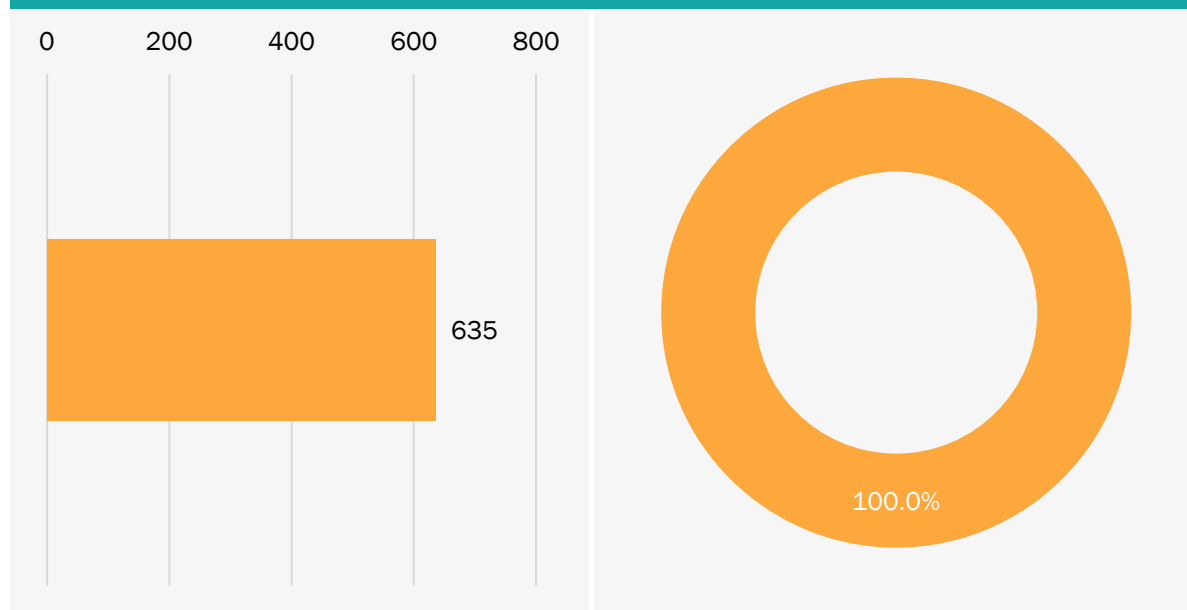
Undergraduate ●

Postgraduate ▲

Australasia

FIGURE 16 shows that all TNE students reported by Scottish providers in Australasia were studying through distance, flexible and distributed learning.

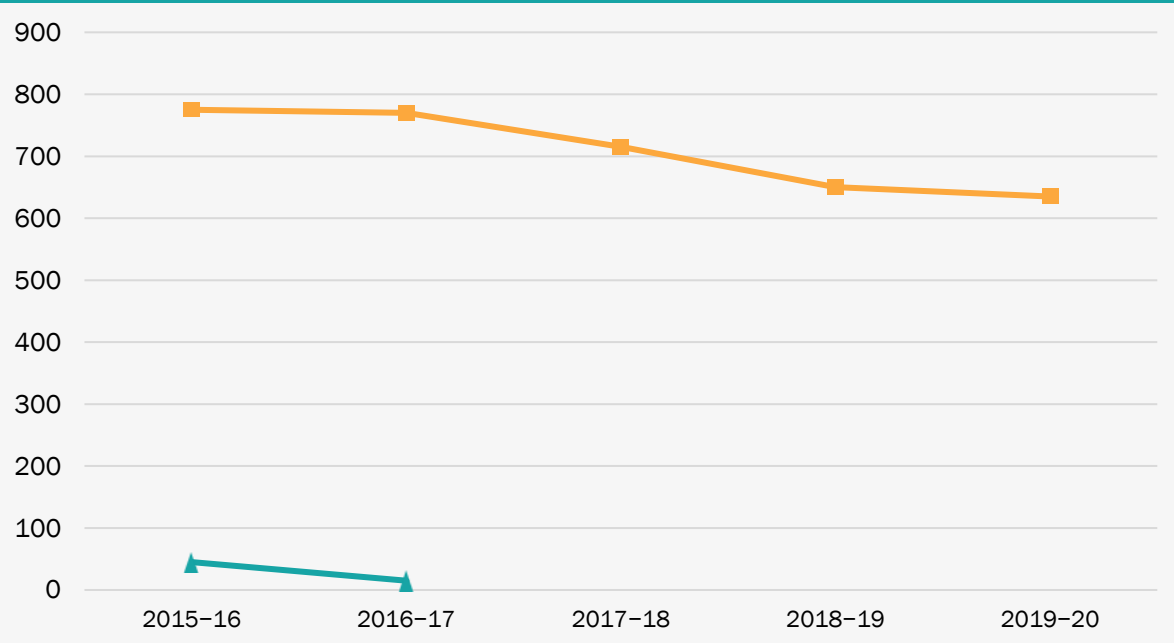
Figure 16: Scottish HE TNE students in Australasia by type of provision, 2019–20



Distance, flexible and distributed learning

FIGURE 17 shows that the number of students studying through distance, flexible and distributed learning in Australasia decreased each year from 2015–16 and 2019–20. The number of students registered at an overseas partner 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 students in Australasia by type of provision, 2015–16 to 2019–20



Distance, flexible and distributed learning ■

Registered at overseas partner organisation ▲

FIGURE 18 shows that 96.4% of TNE students reported by Scottish providers in 2019–20 in Australasia were studying at postgraduate level, and 3.6% were studying at undergraduate level. FIGURE 19 shows that there was a decrease in student numbers at both levels between 2015–16 and 2019–20.

Figure 18: Scottish HE TNE students in Australasia by level of study, 2019–20

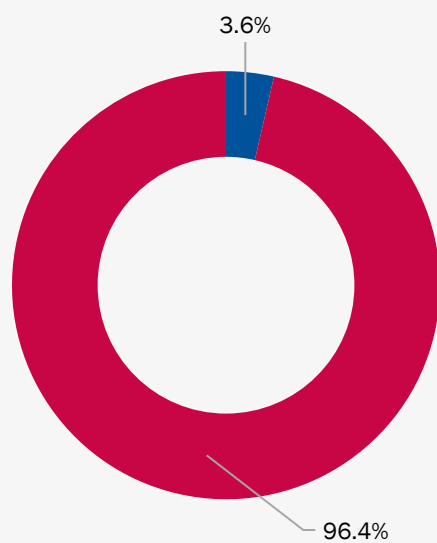
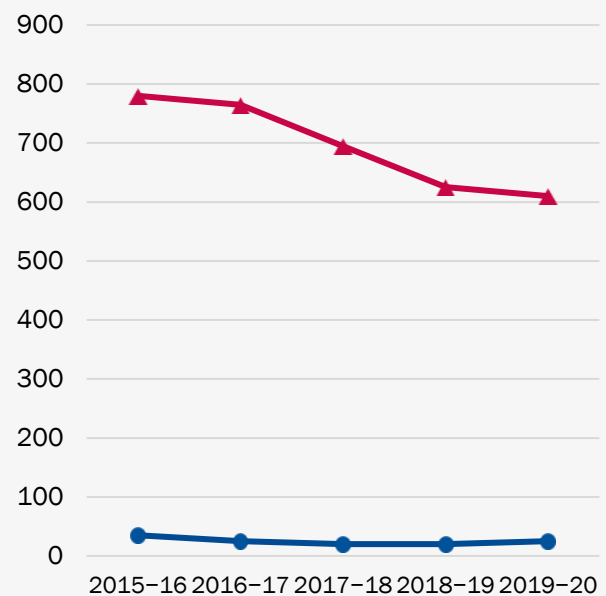


Figure 19: Scottish HE TNE students in Australasia by level of study, 2015–16 to 2019–20



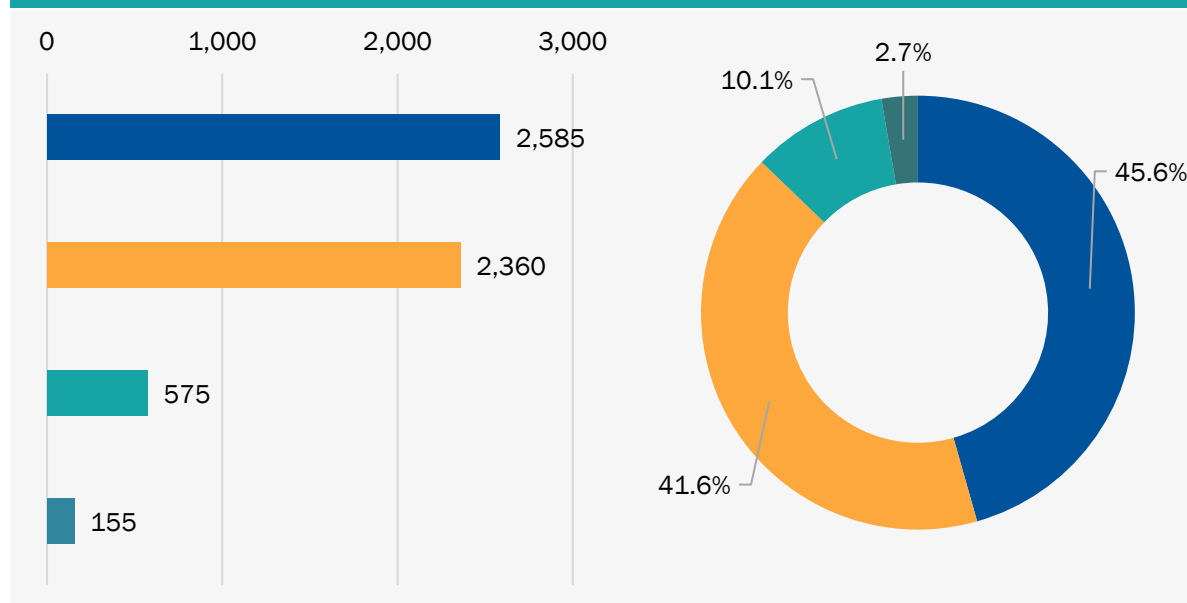
Undergraduate ●

Postgraduate ▲

European Union

FIGURE 20 shows that a majority of TNE students reported by Scottish providers in the European Union were studying through collaborative provision (45.6%), followed by distance, flexible and distributed learning (41.6%), registered at overseas partner organisation (10.1%) and at an overseas campus (2.7%).

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



Collaborative provision (2,585, 45.6%)

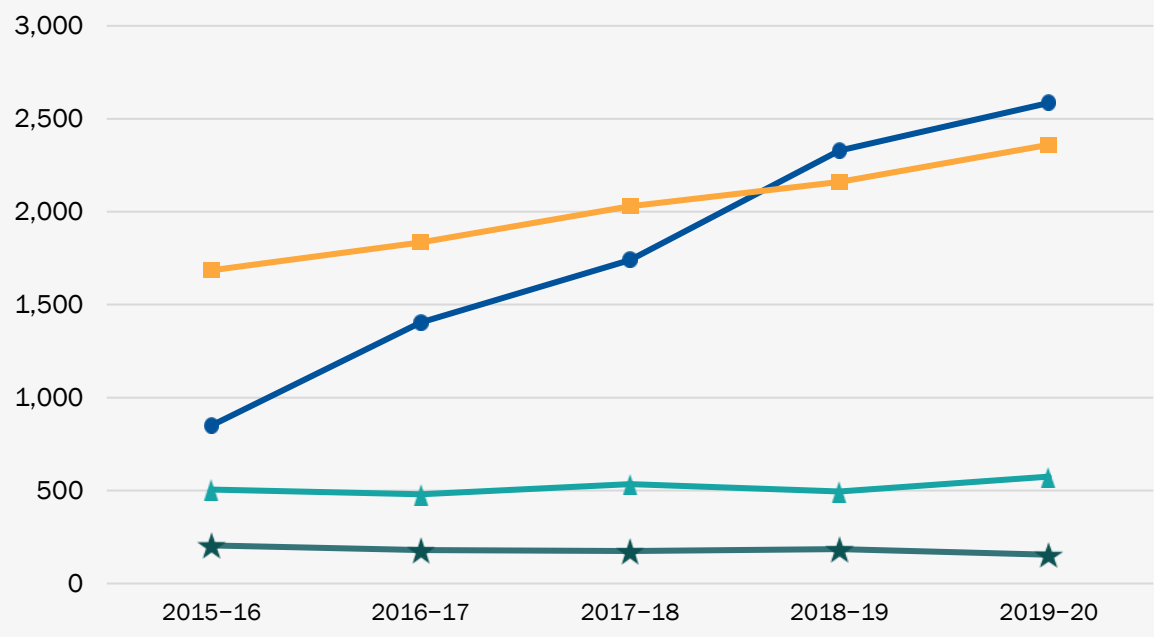
Distance, flexible and distributed learning (2,360, 41.6%)

Registered at overseas partner organisation (575, 10.1%)

Overseas campus (155, 2.7%)

FIGURE 21 shows that between 2015–16 and 2019–20, there was an increase in all TNE modes of study except overseas 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



Collaborative provision ●

Distance, flexible and distributed learning ■

Registered at overseas partner organisation ▲

Overseas campus ★

FIGURE 22 shows that 52.4% of TNE students reported by Scottish providers in 2019–20 in the European Union were studying at undergraduate level, against 47.6% at postgraduate level. FIGURE 23 shows that between 2015–16 and 2019–20, there was an increase at both levels of study, but the increase was substantially larger at undergraduate level.

Figure 22: Scottish HE TNE students in the EU by level of study, 2019–20

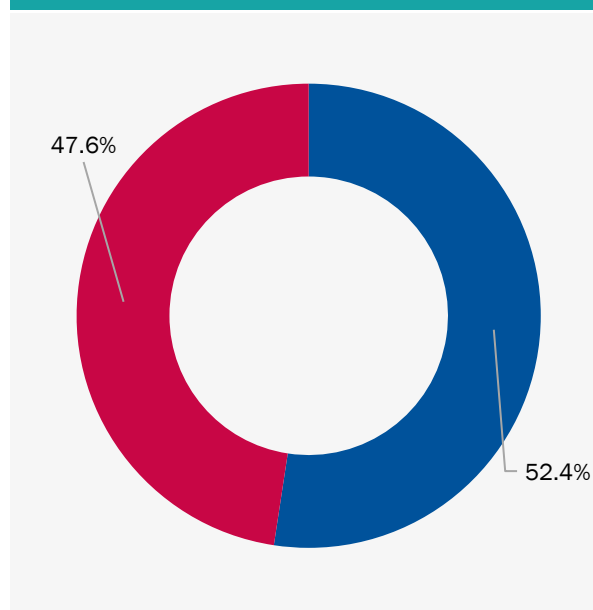
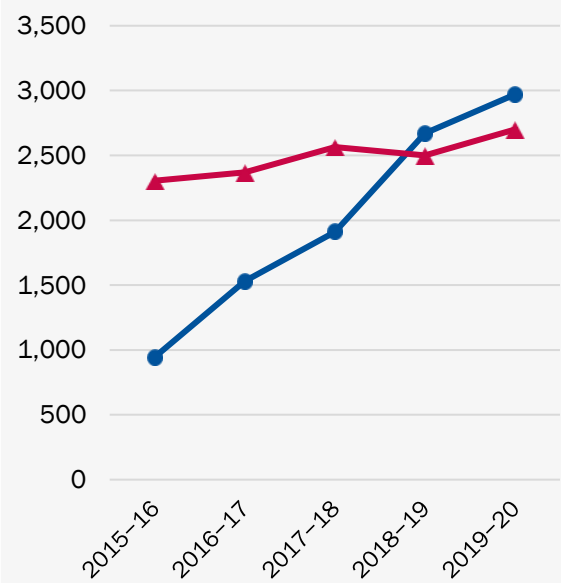


Figure 23: Scottish HE TNE students in the EU by level of study, 2015–16 to 2019–20



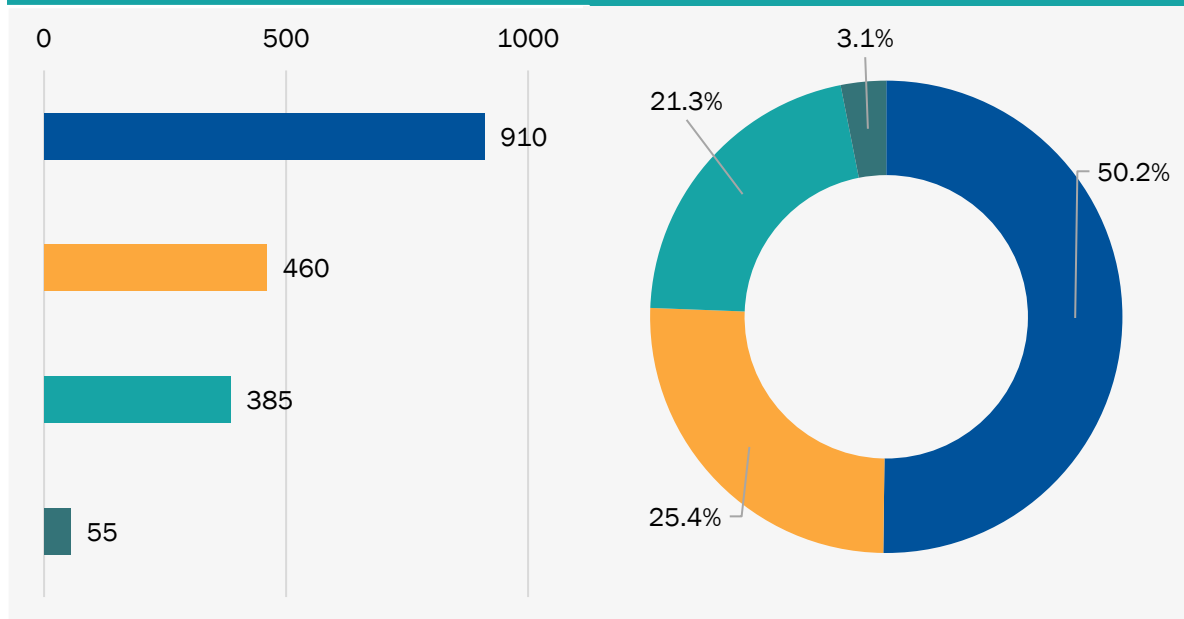
Undergraduate ●

Postgraduate ▲

Non-EU Europe

FIGURE 24 shows that in 2019–20, a majority of TNE students reported by Scottish providers in non-EU Europe were studying through collaborative provision (50.2%), followed by distance, flexible and distributed learning (25.4%), registered at overseas partner organisation (21.3%) and at an overseas campus (3.1%).

Figure 24: Scottish HE TNE students in non-EU Europe by type of provision, 2019–20



Collaborative provision (910, 50.2%)

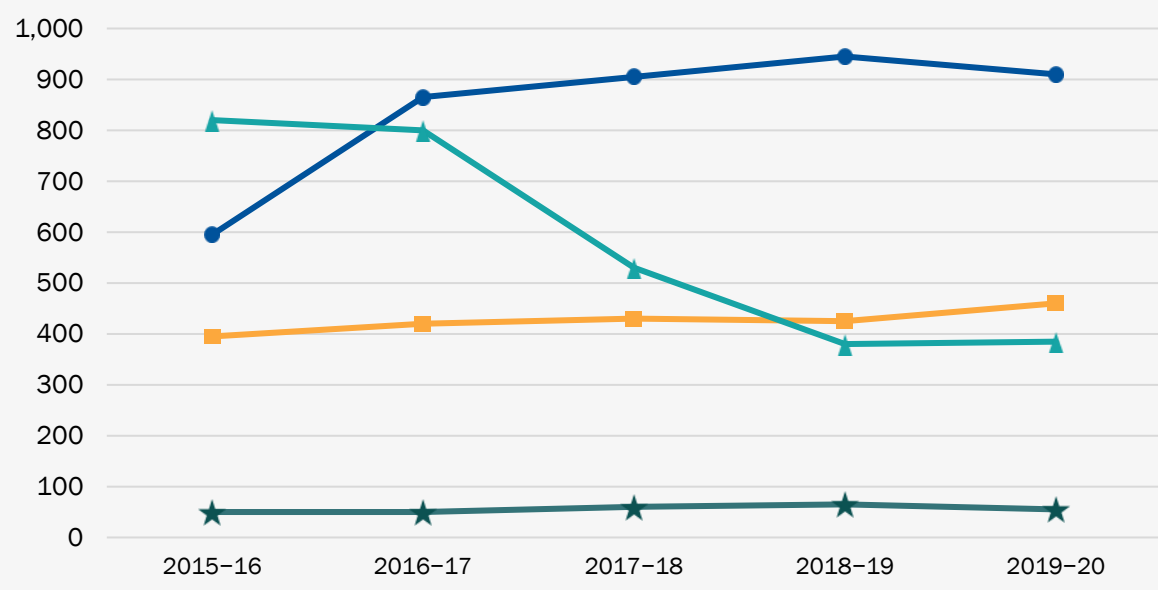
Distance, flexible and distributed learning (460, 25.4%)

Registered at overseas partner organisation (385, 21.3%)

Overseas campus (55, 3.1%)

FIGURE 25 shows that between 2015–16 and 2019–20, there was an increase in almost all TNE modes of study reported by Scottish providers in non-EU Europe. The exception to this was in the ‘registered at overseas partner’ category, which experienced a large decrease from 2016–17 to 2018–19.

Figure 25: Scottish HE TNE students in non-EU Europe by type of provision, 2015–16 to 2019–20



Collaborative provision ●

Distance, flexible and distributed learning ■

Registered at overseas partner organisation ▲

Overseas campus ★

FIGURE 26 shows that 61.7% of TNE students reported by Scottish providers in 2019–20 in non-EU Europe were studying at postgraduate level, against 38.3% at undergraduate level. FIGURE 27 shows that between 2015–16 and 2019–20, there was an increase at postgraduate level and a decrease at undergraduate level, although numbers decreased at both levels between 2016–17 and 2018–19.

Figure 26: Scottish HE TNE students in non-EU Europe by level of study, 2019–20

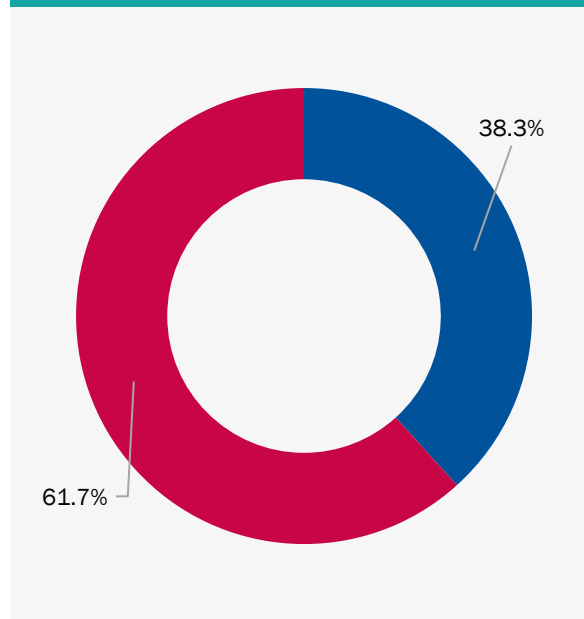
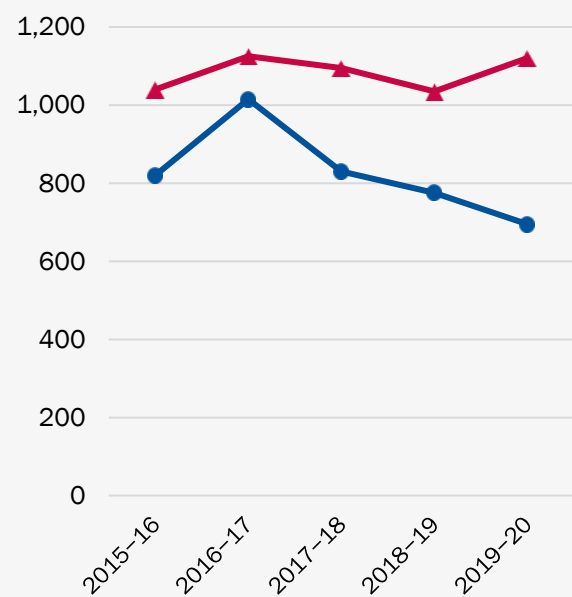


Figure 27: Scottish HE TNE students in non-EU Europe by level of study, 2015–16 to 2019–20



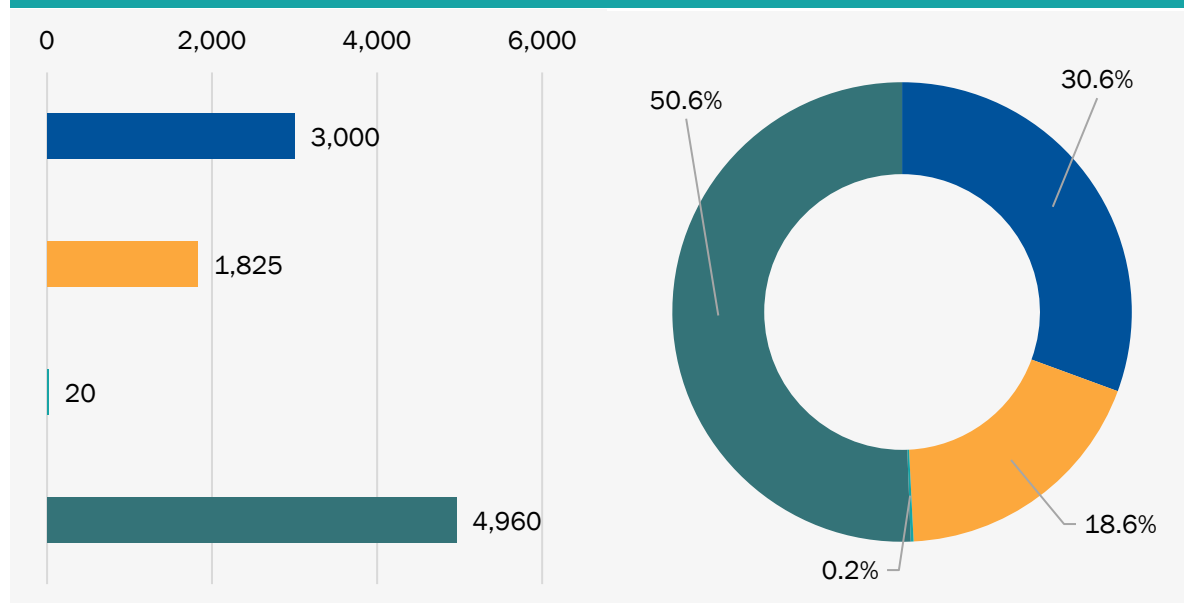
Undergraduate ●

Postgraduate ▲

Middle East

FIGURE 28 shows that the majority of TNE students reported by Scottish providers in the Middle East were studying at an overseas campus (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: Scottish HE TNE students in the Middle East by type of provision, 2019–20



Collaborative provision (3,000, 30.6%)

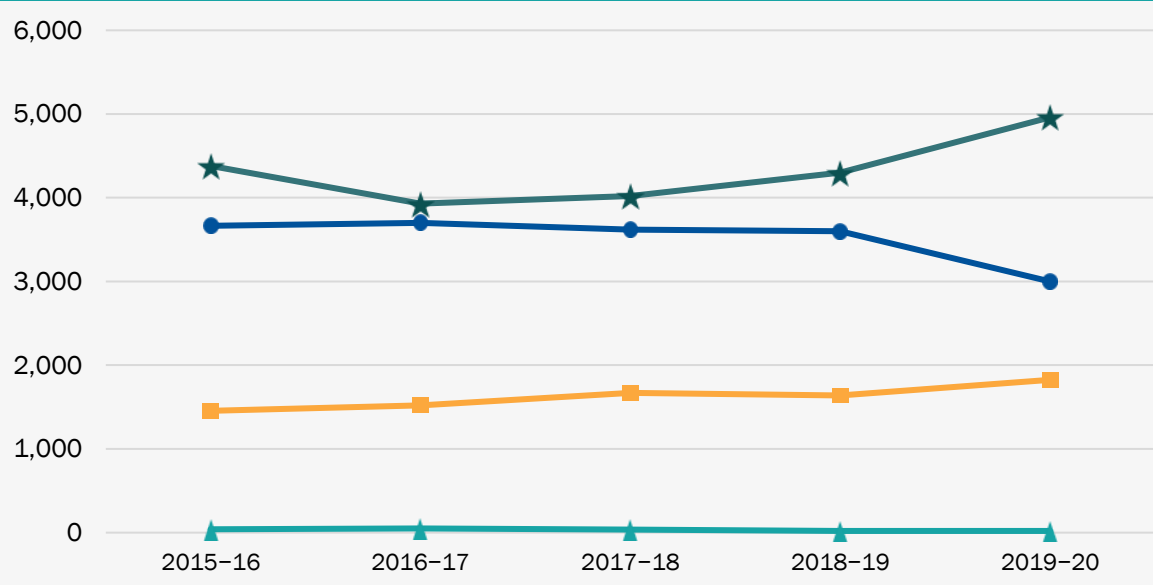
Distance, flexible and distributed learning (1,825, 18.6%)

Registered at overseas partner organisation (20, 0.2%)

Overseas campus (4,960, 50.6%)

FIGURE 29 shows that between 2015–16 and 2019–20, there was a decrease students registered at an overseas partner organisation and collaborative provision reported 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 also increased gradually despite a slight decrease in 2018–19.

Figure 29: Scottish HE TNE students in the Middle East by type of provision, 2015–16 to 2019–20



Collaborative provision ●

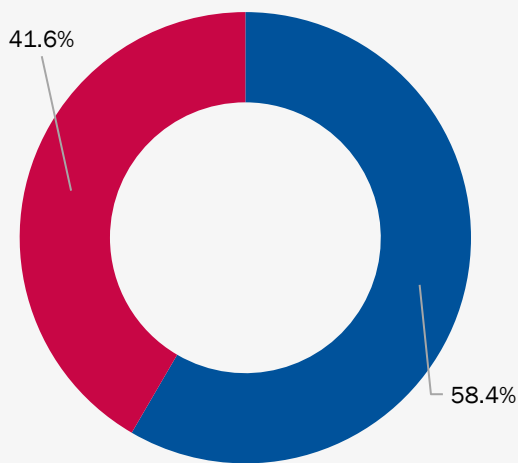
Distance, flexible and distributed learning ■

Registered at overseas partner organisation ▲

Overseas campus ★

FIGURE 30 shows that 58.4% of TNE students reported by Scottish providers in 2019–20 in the Middle East were studying at undergraduate level, against 41.6% 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.

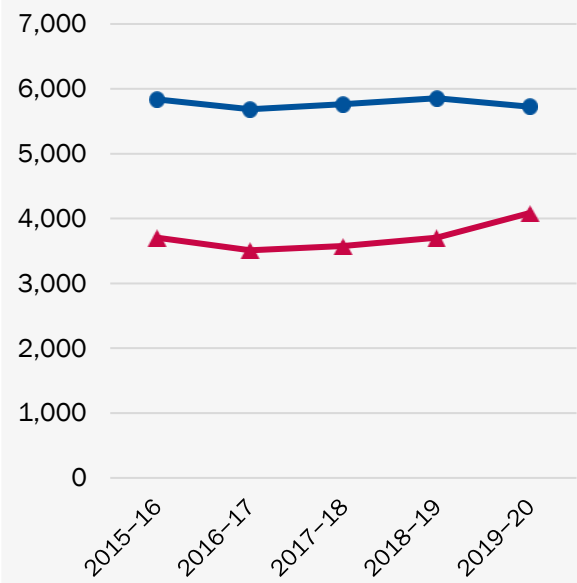
Figure 30: Scottish HE TNE students in the Middle East by level of study, 2019–20



Undergraduate ●

Postgraduate ▲

Figure 31: Scottish HE TNE students in the Middle East by level of study, 2015–16 to 2019–20



North America

FIGURE 32 shows that a majority of TNE students reported by Scottish providers in North America were studying through 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

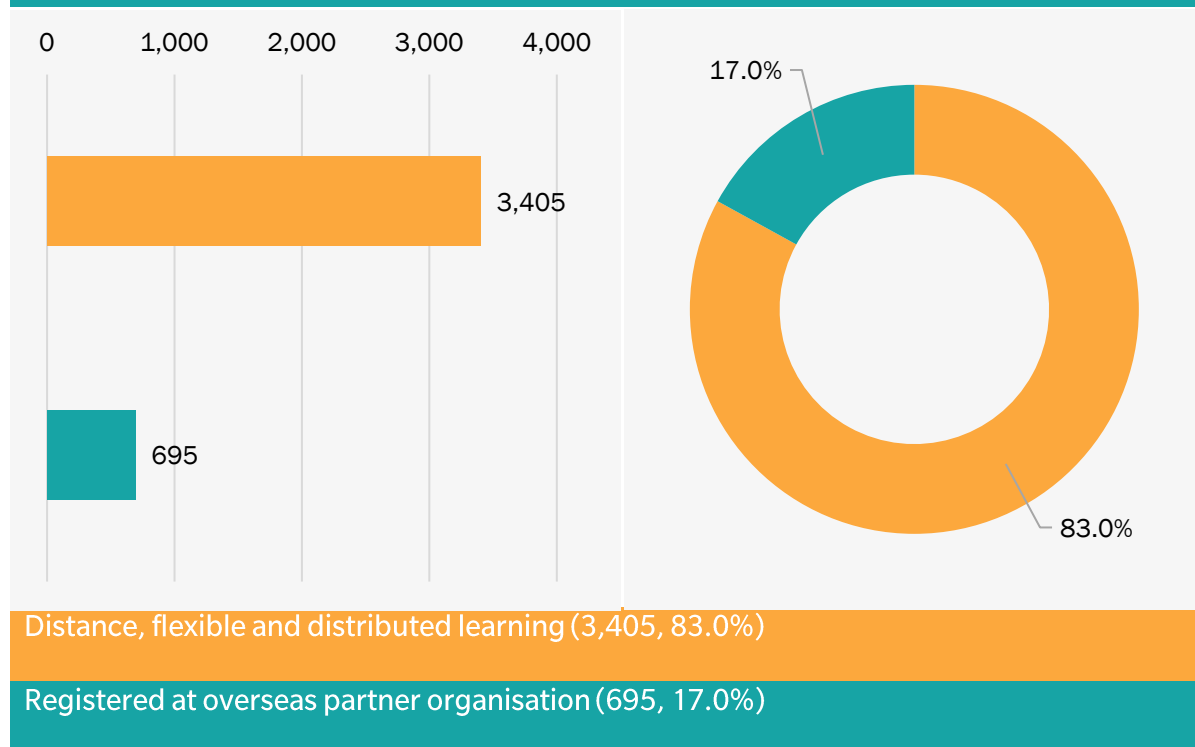
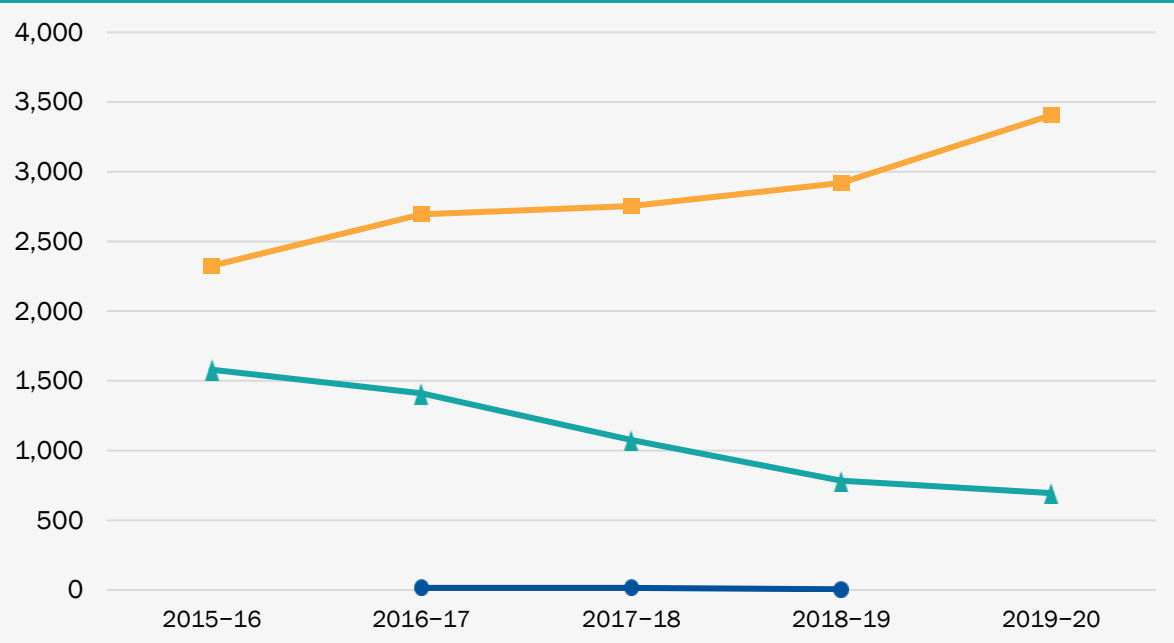


FIGURE 33 shows that between 2015–16 and 2019–20, there was an increase in students studying through distance, flexible and distributed learning and a decrease in students registered at an overseas partner organisation reported by Scottish providers in North America. Low student numbers in collaborative provision were reported between 2016-17 and 2018-19.

Figure 33: Scottish HE TNE students in North America by type of provision, 2015–16 to 2019–20



Distance, flexible and distributed learning ■

Registered at overseas partner organisation ▲

Collaborative provision ●

FIGURE 34 shows that 89.2% of TNE students reported by Scottish providers in 2019–20 in North America were studying at postgraduate level, and 10.8% were studying at undergraduate level. FIGURE 35 shows that between 2015–16 and 2019–20, there was an increase at postgraduate and undergraduate level.

Figure 34: Scottish HE TNE students in North America by level of study, 2019–20

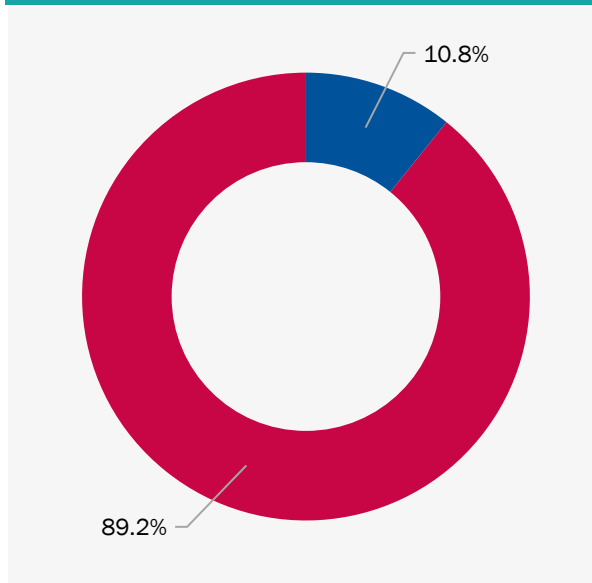
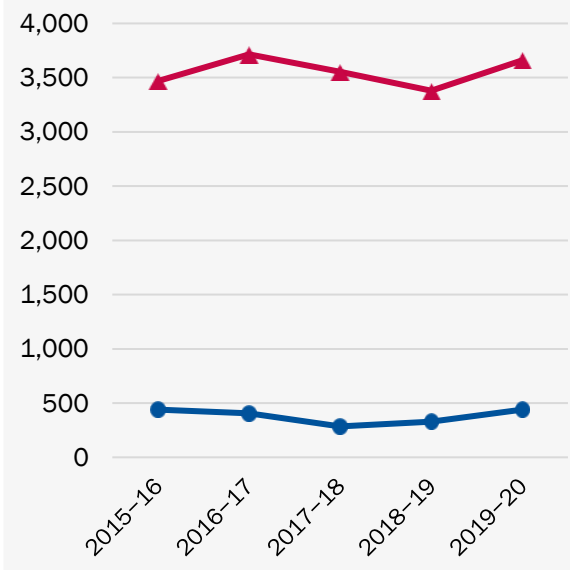


Figure 35: Scottish HE TNE students in North America by level of study, 2015–16 to 2019–20



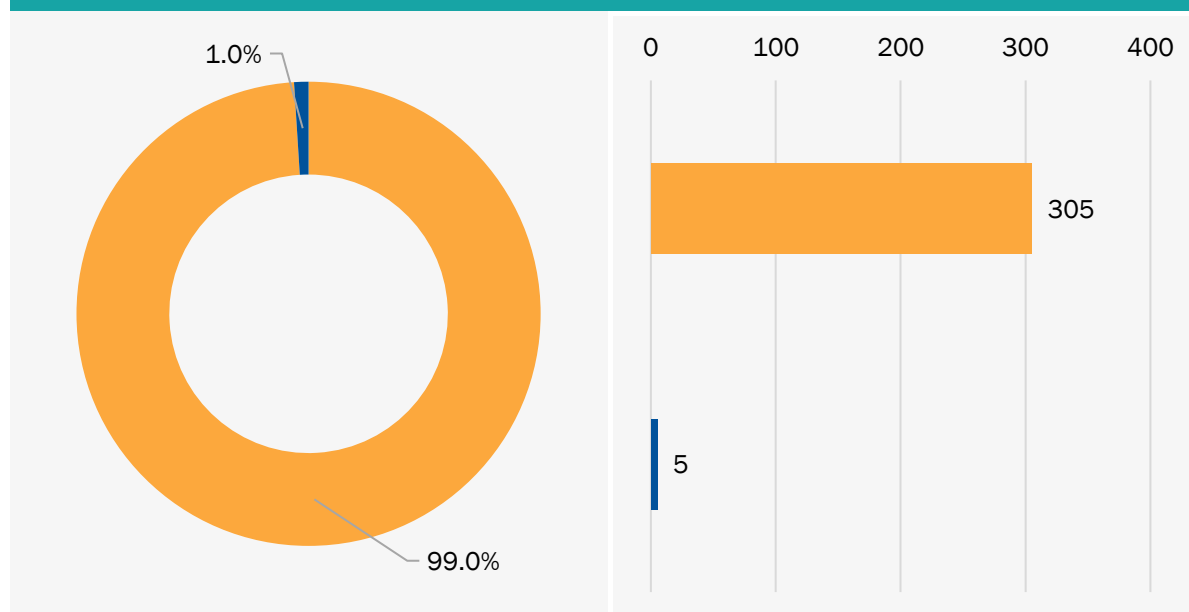
Undergraduate ●

Postgraduate ▲

South America

FIGURE 36 shows that a majority of TNE students reported by Scottish providers in South America were studying through distance, flexible and distributed learning (99.0%), followed by collaborative provision (1.0%).

Figure 36: Scottish HE TNE students in South America by type of provision, 2019–20

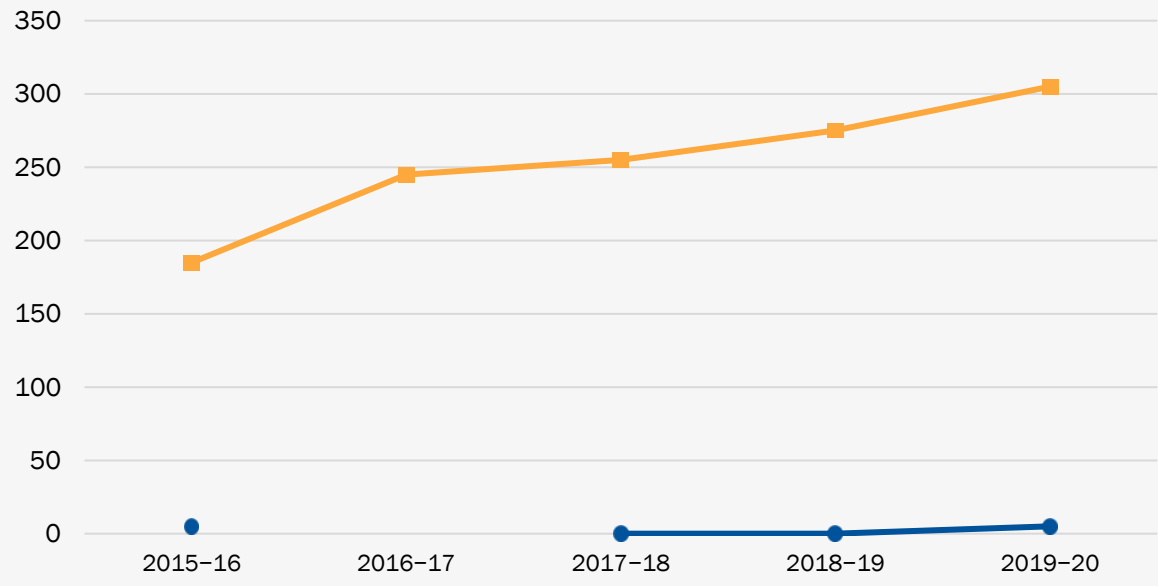


Distance, flexible and distributed learning (305, 99.0%)

Collaborative provision (5, 1.0%)

FIGURE 37 shows that between 2015–16 and 2019–20, there was an increase in those studying through distance, flexible and distributed learning. Numbers of students studying through collaborative provision have remained at very low or zero levels.

Figure 37: Scottish HE TNE students in South America by type of provision, 2015–16 to 2019–20



Distance, flexible and distributed learning ■

Collaborative provision ●

FIGURE 38 shows that 94.2% of TNE students reported by Scottish providers in 2019–20 in South America were studying at postgraduate level, as opposed to 5.8% at undergraduate level. FIGURE 39 shows that between 2015–16 and 2019–20, there was a steep increase at postgraduate level and a slight increase at undergraduate level.

Figure 38: Scottish HE TNE students in South America by level of study, 2019–20

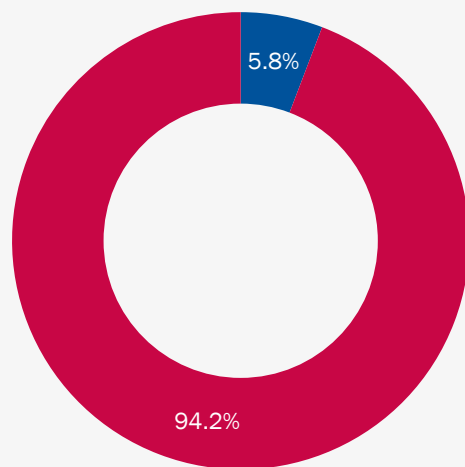
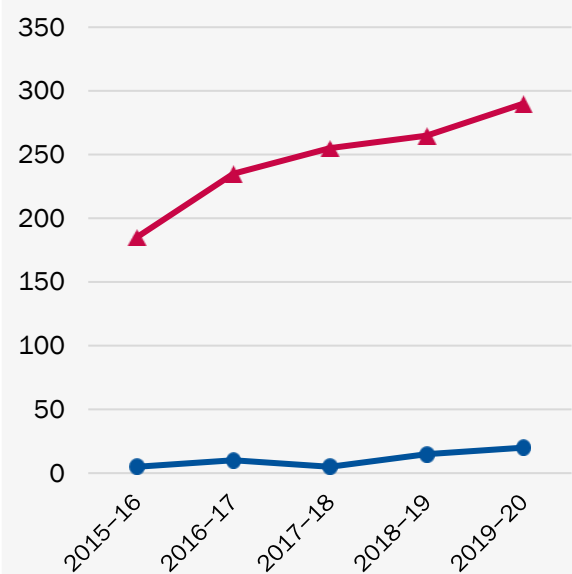


Figure 39: Scottish HE TNE students in south America by level of study, 2015–16 to 2019–20



Undergraduate ●

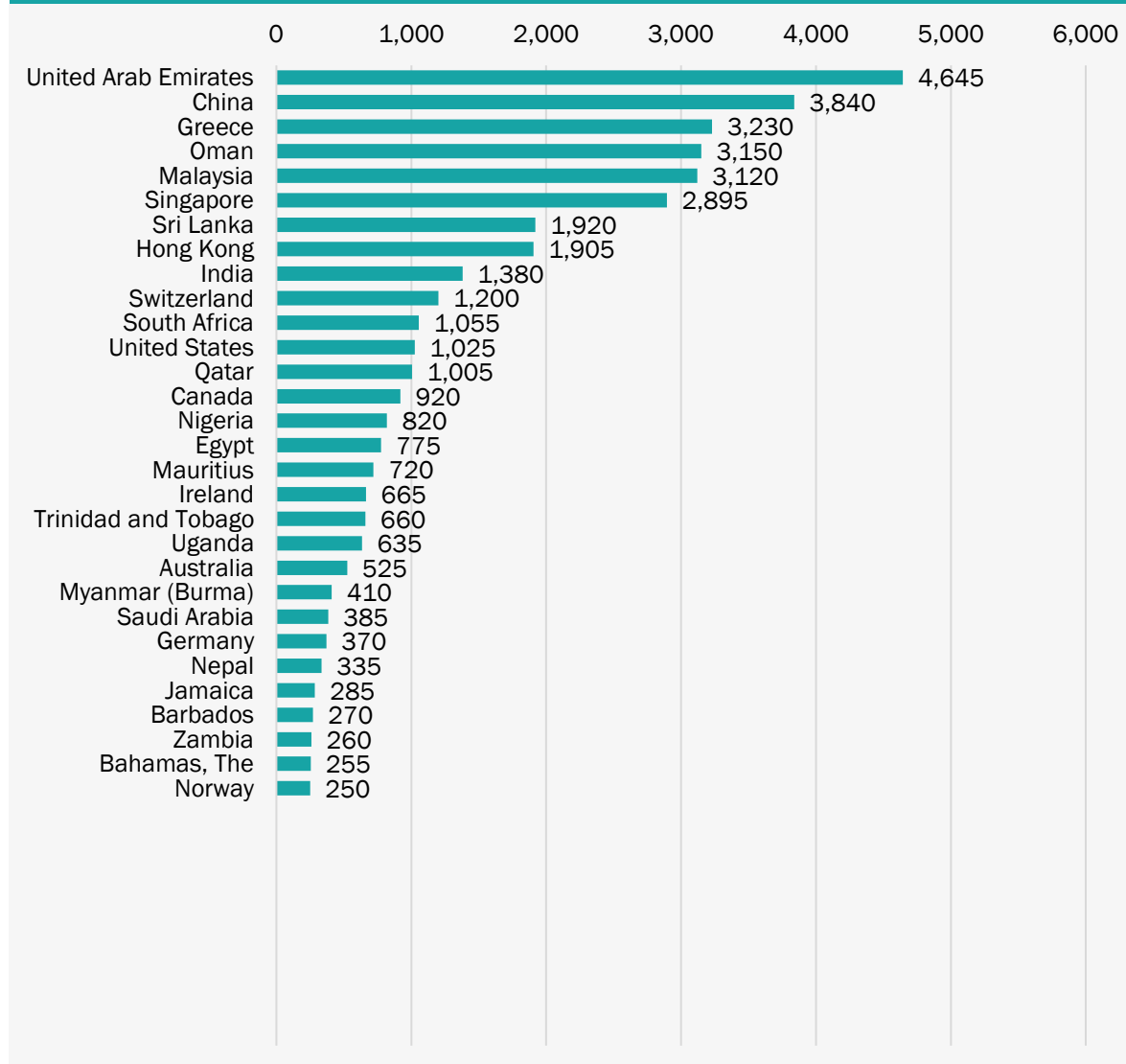
Postgraduate ▲

Host countries and territories

Notes: UK total excludes Oxford Brookes University.

Scottish providers delivered TNE in a total of 191 countries and territories in 2019–20, more than ever before. **FIGURE 40** shows a breakdown of TNE students reported by Scottish providers by country in 2019–20. The top seven countries and territories host over 50% of all students. United Arab Emirates (UAE), Oman, Greece, Switzerland, 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, while Malaysia, Hong Kong, Sri Lanka, Egypt, Singapore, Germany, and Saudi Arabia 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 and territories hosting the most TNE students from Scottish providers in 2019–20.

Table 5: Top five host countries and territories of Scottish HE TNE students in Africa, 2018–19		
Host country or territory	Students	%
South Africa	1,055	19.5%
Nigeria	820	15.1%
Egypt	775	14.3%
Mauritius	720	13.3%
Uganda	635	11.7%

Scottish providers reported TNE students in 28 countries and territories in Asia in 2019–20, down from 29 the previous year. **TABLE 6** shows the five **Asian** countries and territories hosting the most TNE students from Scottish providers in 2019–20.

Table 6: Top five host countries and territories of Scottish HE TNE students in Asia, 2018–19		
Host country or territory	Students	%
China	3,840	23.5%
Malaysia	3,120	19.1%
Singapore	2,895	17.7%
Sri Lanka	1,920	11.7%
Hong Kong	1,905	11.6%

Scottish providers reported TNE students in six countries and territories in 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	14.50%
Tonga	5	
Papua New Guinea	5	
Fiji	5	

Scottish providers reported TNE students in 28 countries and territories in the European Union 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%
Germany	370	6.5%
Malta	190	3.3%
Netherlands	160	2.8%

Scottish providers reported TNE students in 19 countries and territories in 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.

Table 9: Top five host countries and territories of Scottish HE TNE students in non-EU Europe, 2018–19

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 five **Middle Eastern** countries and territories hosting the most TNE students from Scottish providers in 2019–20.

Table 10: Top five host countries and territories of Scottish HE TNE students in the Middle East, 2018–19

Host country or territory	Students	%
United Arab Emirates	4,645	47.4%
Oman	3,150	32.1%
Qatar	1,005	10.3%
Saudi Arabia	385	3.9%
Bahrain	250	2.5%

Scottish providers reported TNE students in 31 countries and territories in North America in 2019–20, down from 32 the previous year. **TABLE 11** shows the five **North American** countries and territories hosting the most TNE students from Scottish providers

Table 11: Top five host countries and territories of Scottish HE TNE students in North America, 2018–19

Host country or territory	Students	%
United States	1,025	25.0%
Canada	920	22.4%
Trinidad and Tobago	660	16.1%
Jamaica	285	7.0%
Barbados	270	6.5%

Scottish providers reported TNE students in twelve countries and territories in South America in 2019–20, the same number as the previous year. **TABLE 12** shows the five **South American** countries and territories hosting the most TNE students from Scottish providers in 2019-20.

Table 12: Top two host countries and territories of Scottish HE TNE students in South America, 2018–19

Host country or territory	Students	%
Guyana	155	50.0%
Brazil	50	16.8%
Colombia	35	11.0%
Chile	15	
Peru	10	

Conclusions

Scottish providers account for 9.8% of the UK's total TNE student population. By comparison, Scottish providers account for 10.7% of international students studying in the UK. Between 2015–16 and 2019–20, TNE student numbers grew slightly slower at Scottish providers (15.1%) than in the UK as a whole (16.7%). Scottish providers are more likely to be engaged in large scale TNE, with a higher proportion of Scottish providers reporting more than 1,000 students in TNE 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 other UK counterparts. In 2019–20, Scottish providers reported more than double the proportion of students on overseas campuses (18.0%) compared to the proportion reported by all UK providers (6.9%), and 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.

Undergraduate provision is less prevalent among Scottish providers (51.9%) compared to the UK (68.3%).

Scottish TNE provision can be found in most corners of the globe. Asia continued to host the largest proportion of Scottish providers' TNE students (38.5%) 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 larger 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 effects of the pandemic are likely to be varied. Disruption to international travel may potentially lead to growing interest among UK providers in TNE as a key pillar of 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.

Looking at the future, there are several inferences that could be drawn from the data:

- Distance, flexible and distributed learning is an increasingly popular choice for Scottish providers. It's the largest TNE category in Africa (66.2%), Australasia (100.0%), North America (83.0%) and South America (99.0%), it's significant in the European Union (41.6%), and it's the fastest growing category in Asia (155.8% growth between 2015-16 to 2019-20). The improvement of digital capabilities and the progressive liberalisation of recognition and regulatory regimes in host countries accelerated by the pandemic could see even more

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

- We may see more overseas campus provision in the coming years. Students at Scottish overseas campuses grew 25.4% between 2015-16 and 2019-20 and 9.2% in the last year on record. It's the largest category in the Middle East (50.6%) and it's growing in Asia (16.7%). The definition of what constitutes an overseas campus varies from jurisdiction to jurisdiction and it's likely that some provision, such as that of joint institutes in China, 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 priority countries such as India, Indonesia or Saudi Arabia.
- Innovation in provision and diversification in location will ensure Scottish providers are ready to face future challenges. Scottish TNE is generally more diversified than that of the UK as a whole. The leading territory hosts just 10.5% of student numbers and no provision category is above 40%. However, Scottish providers should continue to diversify their TNE to include hybrid modes of provision and more partnership-based 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 Covid pandemic, growing geopolitical tensions or increasing global competition for 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 through a diverse range of modes of delivery. With continuing support from the UK and devolved administration as signalled in the commitments of the UK International Education Strategy and the announcement of a Scottish International Education Strategy, we hope the sector will continue growing and improving the life chances of students globally.

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