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Research

TNE - What we know

Data and insight

November 2024

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Pulverness, A., & Carter, D. M. (2024). Transnational Education – What we know (Data and Insight). British Council. https://doi.org/10.57884/586A-RS92

Series edited by Sarah Mount, TransformELT.

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Introduction

British Council has researched TNE for over two decades and has built up a wealth of knowledge and understanding of the role TNE plays and the environments in which it operates.

This brief summarises some of the findings from British Council research papers published since summer 2022 which relate to Action 1 within our TNE Strategy: “Contribute to better data and insight on UK TNE”.

This is only a summary of a small window of our research – see the back page for how to find out more.

Our approach to gaining better TNE data is inseparable from our commitment to understanding its value to a broad range of stakeholders.

Data and insight

The UK and global TNE

How do we understand the UK's place in a global TNE landscape? The question is not without its challenges, including the following:

- There is the question of how we define UK TNE. It is generally understood as UK *tertiary qualifications delivered outside of the UK* (British Council TNE Strategy, page 16) – in other words, any course where the student is studying for a UK award while living in another country. Behind this definition, however, sit various modes of delivery. Stakeholders in the UK tend to use the typology used in the HESA Aggregate Offshore Record, although other models are available.
- The Aggregate Offshore record (AOR) is limited in some respects: it reduces a great variety of activity to just four categories (given below); and it does not tell us much about the student experience of TNE. However, it gives a more comprehensive account of TNE student numbers than is available elsewhere, and planned changes to AOR are set to enrich the dataset. There is a lack of globally comparable data from other countries that provide TNE.
- The UK is a net exporter of higher education. The implied definition of TNE, therefore, is of UK providers working in other countries and not the other way round. This state of affairs can lead to inequitable partnerships and differences in the perceived value of TNE.

For these reasons, it is easy to take a UK perspective, rather than a more global view of the issues. Our TNE Strategy seeks to correct this imbalance, for example through the development of a Framework for a shared understanding of TNE. The following should be understood within the limitations set out above.

Source: HESA (2024)

The scale of UK TNE

The 2022-23 Aggregate Offshore record includes 576,705 TNE students with 173 UK higher education providers in 228 countries and territories worldwide. This continues the pattern of steady increase in UK TNE activity over four years, although growth has slowed slightly:

	UK TNE students	% Growth on previous year
2019-20	433,170	
2020-21	489,285	13.0%
2021-22	532,460	8.8%
2022-23	576,705	8.3%

TNE students are studying for awards with providers across the four nations of the UK:

- in England, 495,570 (85.9% of UK TNE students)
- in Scotland, 45,875 (8.0%)
- in Wales, 33,005 (5.7%)
- in Northern Ireland, 2,255 (0.4%)

These numbers are recorded across four broad categories of provision:

- distance, flexible or distributed learning: 141,800 (24.6% of UK TNE students)
- international branch campuses: 40,060 (6.9%)
- other arrangements including collaborative provision: 248,775 (43.1%)
- registered at overseas partner organisation: 146,075 (25.4%)

Our analysis of the Aggregate Offshore record shows the following proportions of UK TNE students in regions of the world:

- in Asia, 298,185 (52.1%)
- in the Middle East and North Africa, 106,750 (18.7%)
- in Europe, 104,460 (18.3%)
- in Sub-Saharan Africa, 31,780 (5.6%)
- in North America, 13,260 (2.3%)
- in Central and South America, 14,890 (2.6%)
- in Australasia, 2,550 (0.4%)

(See note on data sources in 'To find out more' below)

The value of TNE

The government estimates that total UK education-related exports were £25.5 billion in 2021, an increase of 72.2% in current prices since 2010. TNE activity contributed £2.4 billion, an increase of 123.9% in current prices since 2010, *albeit from a lower base*.

These figures give a sense of the value of TNE to the UK economy, as well as the extraordinary growth in TNE activity over the last ten years or so. However, at an institutional level, this value becomes harder to capture. In the first place, TNE activity is inherently complex and risky. The income from TNE must be set against the cost (including the opportunity cost) of entering into any such activity. Secondly, the fees paid by TNE students tend to be whatever the market can bear – in other words, a good deal less than international fees in the UK. The effect on income to UK providers comes largely through the transfer of TNE students to the UK. This occurs either directly, through formal articulation agreements with TNE

partners, or indirectly through enhanced reputation in countries where the provider operates. In other words, *the financial benefit of TNE to exporting HEIs is likely to be significantly higher from the induced flow of international students to the home campus than from the net tuition fee income generated directly in the TNE partnership* (The Value of TNE Partnerships, page 56).

The last few years have seen growing appreciation of these issues within the UK tertiary sector. Providers are no longer likely to consider only the financial benefits of TNE activity but focus also on the broader strategic issues. These include opportunities to build institutional reputation and establish a presence in key offshore markets; to bring the provider's academic mission – in education and research – to new global stakeholders; and to promote sustainable development. Our research also shows that *international higher education partnerships contribute significantly to the UN's Sustainable Development Agenda and its 17 SDGs* (International higher education partnerships and the SDGs, page 5).

Our approach to gaining better TNE data is inseparable from our commitment to understanding its value to a broad range of stakeholders. But it is sometimes harder to capture the value for overseas stakeholders than it is for providers in the UK. This is partly for reasons given above, including the availability of data. It is also because many of the in-country benefits are harder to quantify: academic quality and educational development, research capacity and reputation. Some of the most useful evidence is in the form of single case studies.

Where we are in the world

We can, however, quantify the contribution made by UK TNE to tertiary education in individual countries. Based on our analysis of the 2022-23 data, the ten countries or territories hosting the largest numbers of UK TNE students are:

China	81,150
Sri Lanka	53,910
Malaysia	41,940
Singapore	29,290
Egypt	27,830
Greece	25,775
United Arab Emirates	21,825
Hong Kong	19,215
Saudi Arabia	18,025
India	14,980

Source: HESA/British Council (2022)

Between them, enrolments in these ten countries represent 44.2% of UK TNE enrolments. The picture is different if we consider UK TNE students as a proportion of home tertiary enrolments in each country. The following data, from our report on The Value of TNE partnerships (page 23), show the ten countries with the highest proportion of UK TNE students among the general student population:

Cyprus	21.1%
Oman	13.2%
Singapore	13.2%
Sri Lanka	9.9%
Qatar	8.0%
Mauritius	7.2%
Kuwait	7.1%
Hong Kong	7.1%
Bahrain	6.5%
United Arab Emirates	5.1%

Source: HESA/British Council (2022)

Note that this is taken from a 2022 study and uses earlier data than in the first set of figures. For example, Sri Lanka is likely to have overtaken Singapore in any more up-to-date account
Our understanding of TNE student numbers is constantly changing.

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Research

To find out more

British Council's research and insight on TNE (and other areas of international higher education) can be accessed via the following pages:

Research and insight | British Council

Opportunities and insight | British Council

Data sources: Headline data on UK TNE participation are supplied on their website by the Higher Education Statistics Agency (HESA). More detailed data are available for UK HE providers through data mining portals on our Opportunities and Insight pages. Note that: although the data mining portal is based on the HESA Aggregate Offshore record, the overall numbers are slightly different because of the rules under which data are compiled; and the way in which HESA accounts for TNE students among English and Welsh providers will change, yielding more granular data from 2026-27.

The definition of TNE given in the British Council TNE Strategy is based on one adopted by UNESCO and the Council of Europe in 2002. Compare the QAA definition: *the delivery of higher education level awards by recognised UK degree-awarding bodies in a country, or to students, other than where the awarding provider is based*.

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