

Think TNE 2023/24

# UK TNE: Global Picture and EA/Viet Nam Overview

19 October 2023

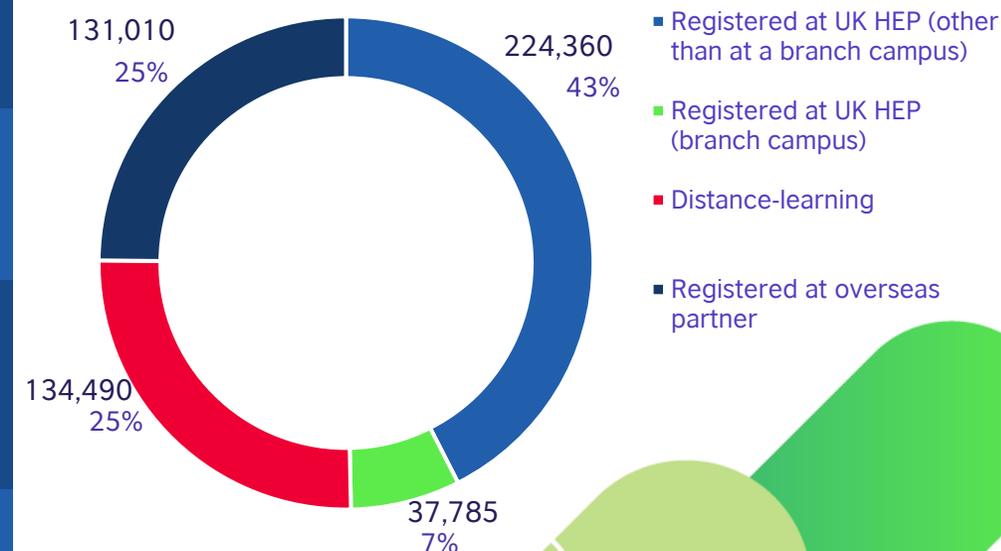


# Overview: What is UK TNE?

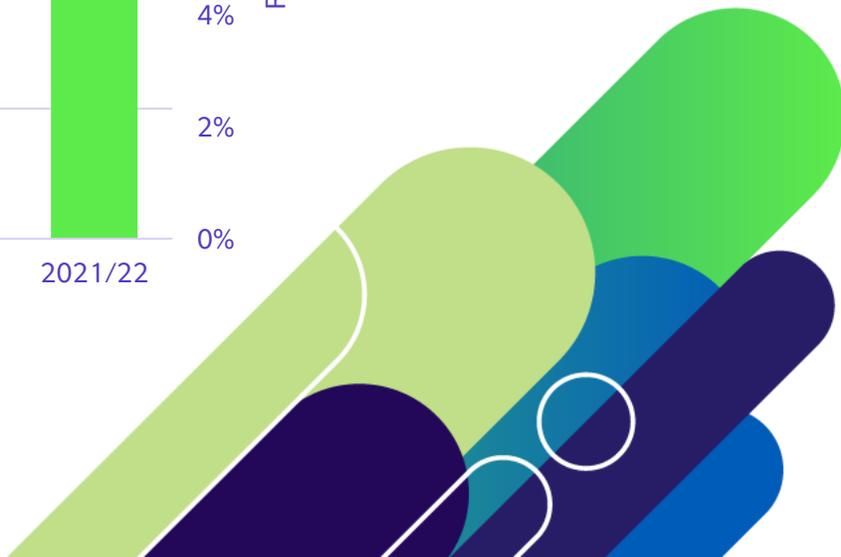
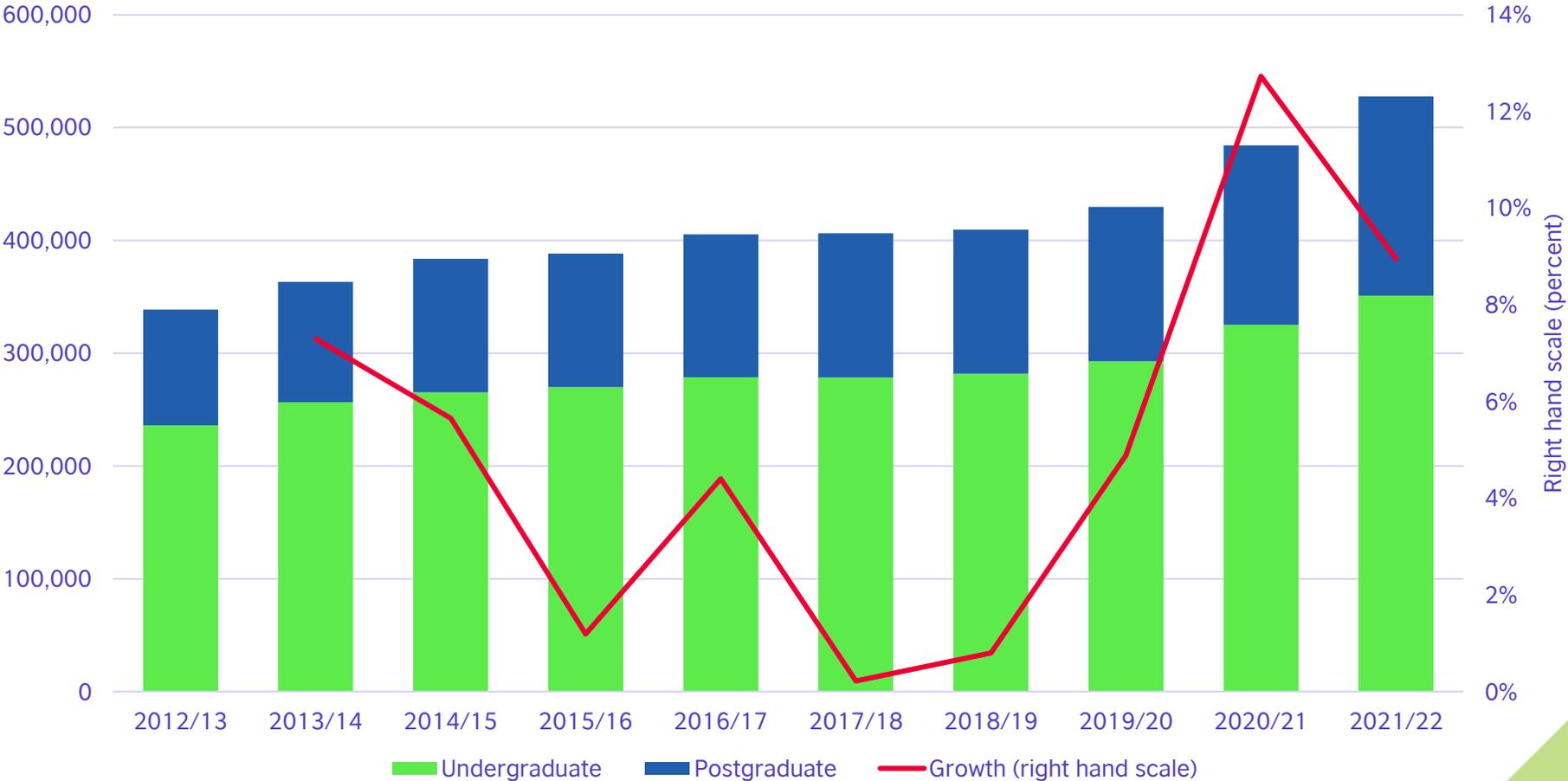
Transnational education (TNE) in the UK refers to study programmes in which learners are in a different country from the one where the awarding institution is based

Mode	Definition
1. <b>Registered at reporting provider</b> – studying overseas at UK HEP award at overseas campus of reporting provider	Overseas students studying at branch campuses
2. <b>Registered at reporting provider</b> – studying overseas for UK HEP award other than at an overseas campus of reporting provider	Overseas students studying on franchise, joint degree programmes and other types of collaborative provision
3. <b>Registered at overseas partner organization</b> – studying overseas for an award of the reporting provider	Students are not registered students of the registered provider but are studying overseas for an award of the reporting programme. Includes validation arrangements.
4. <b>Registered at reporting provider – distance, flexible and distributed learning</b> for UK HEP award and where students is known to be overseas	Students are not required to attend classes or events at particular times and particular locations. Includes online learning.

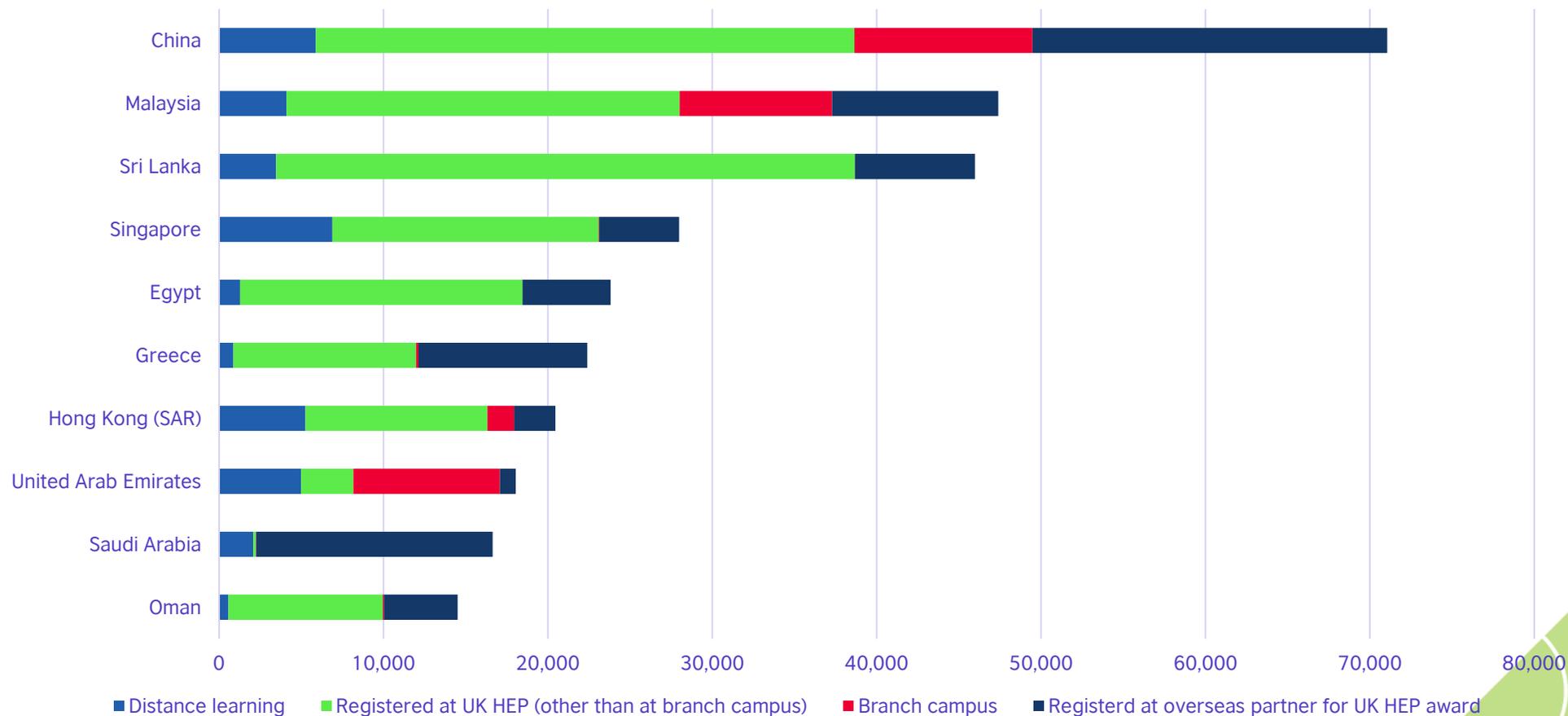
UK TNE (Global): Modes of study



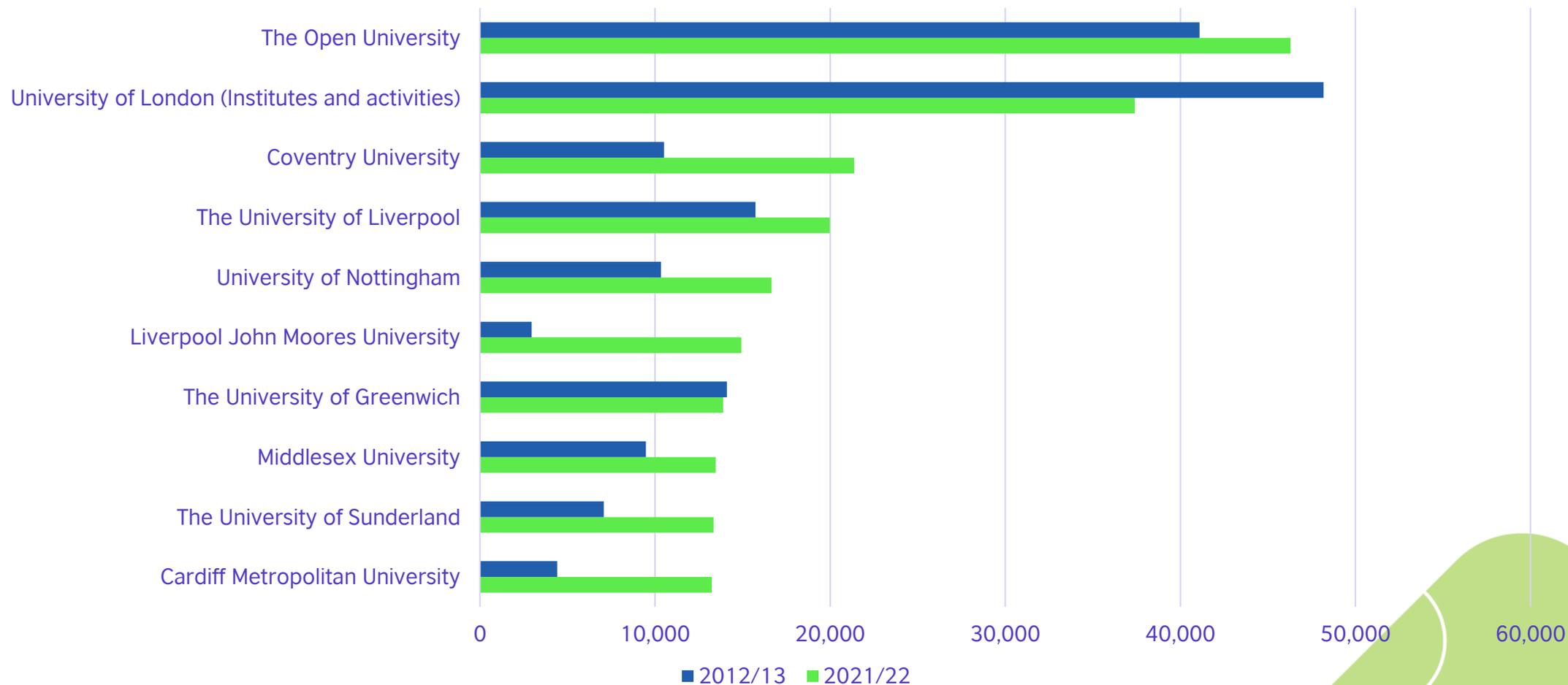
# Global: Strong growth in UK TNE enrolments during COVID-19



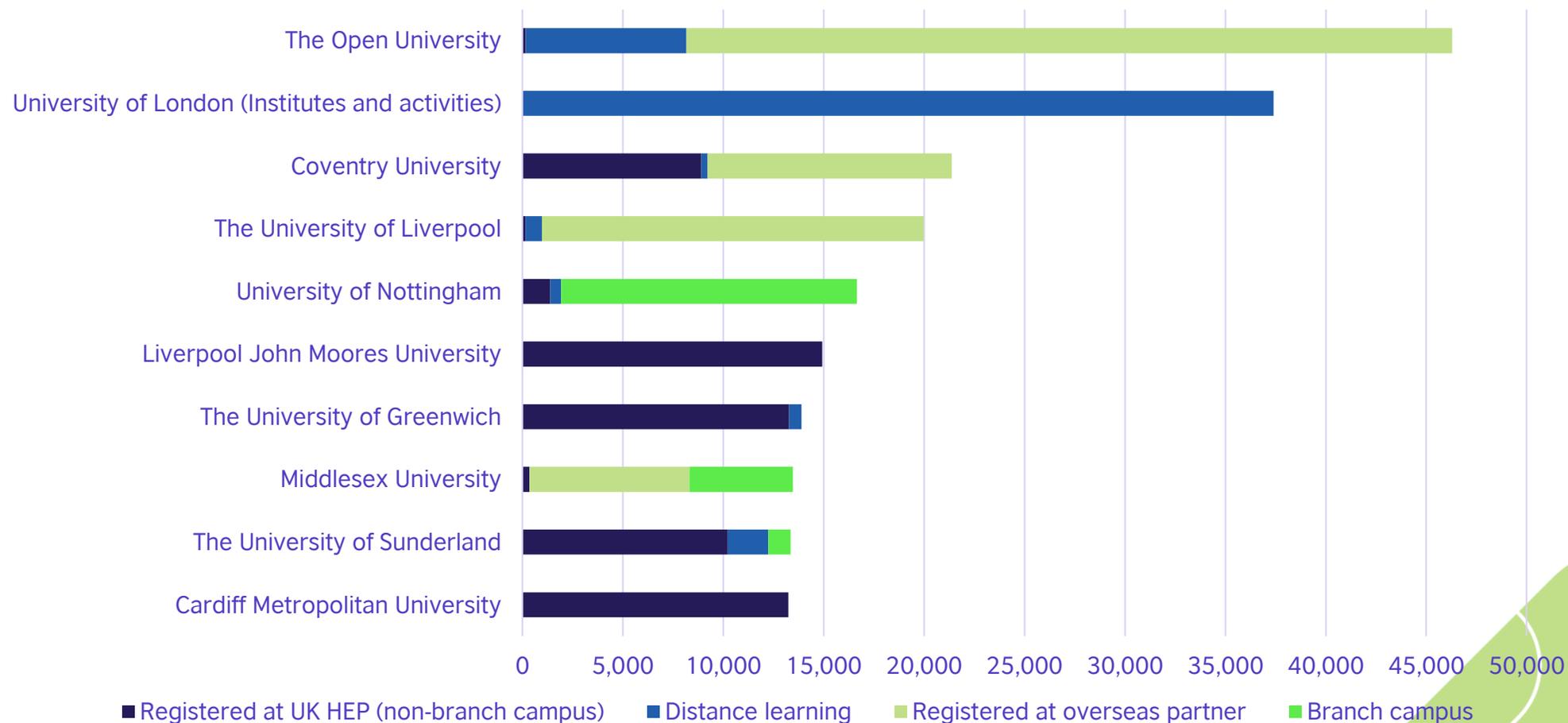
# Global: Top 10 host countries account for more than 50% of enrolment in UK TNE (2021/22)



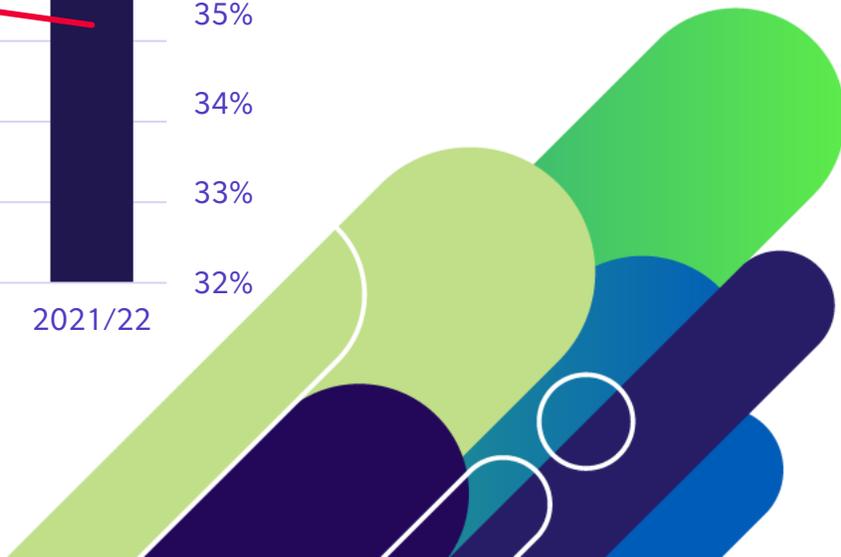
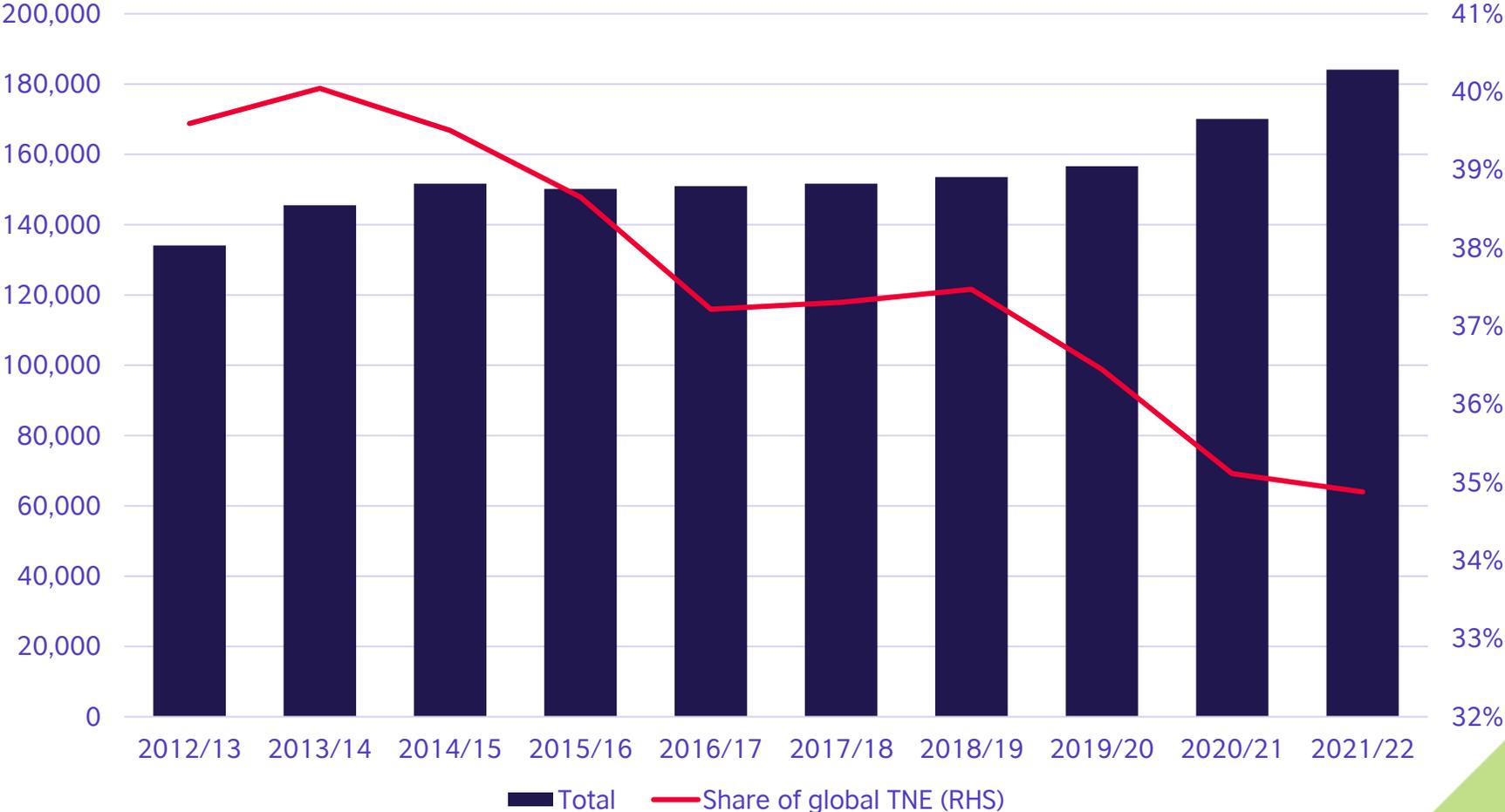
# Global: Top 10 universities account for 40% of UK TNE enrolments



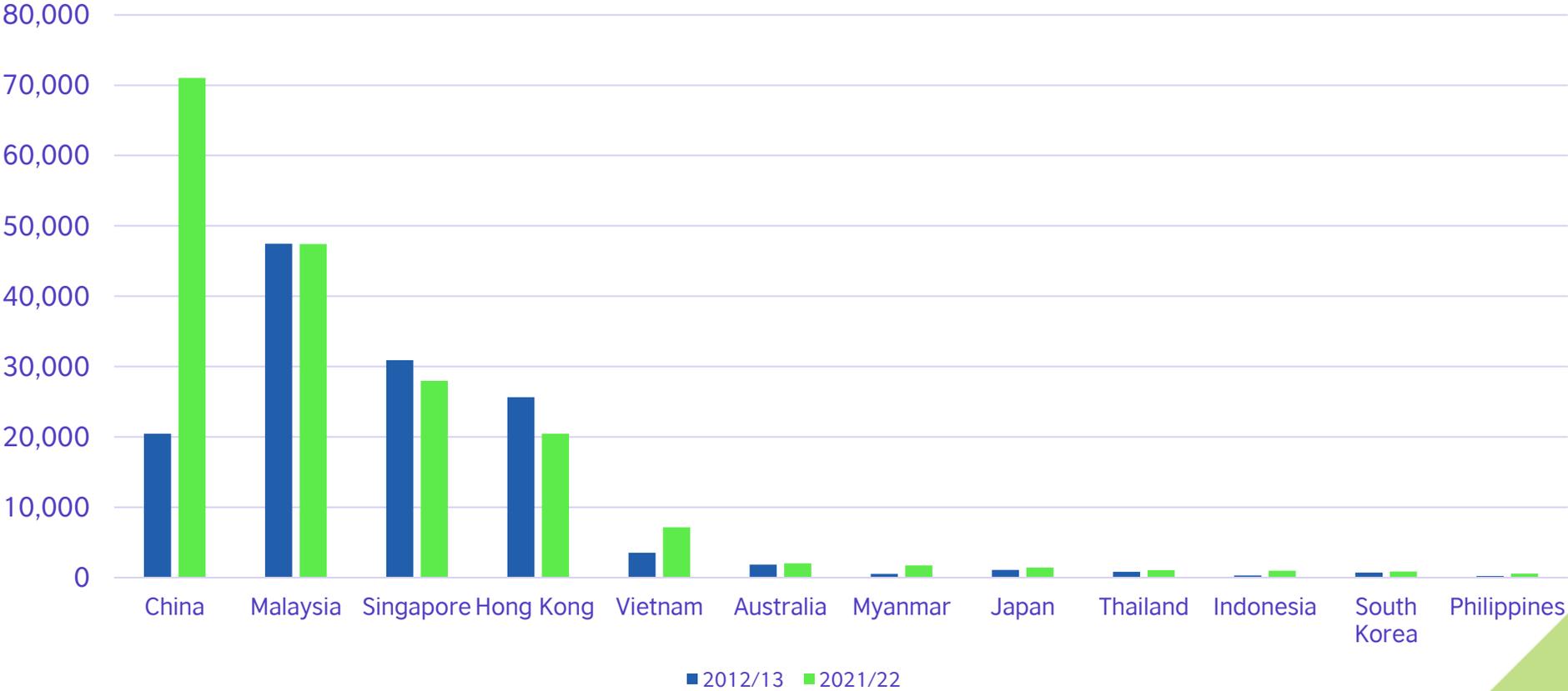
# Global: Top 4 Universities mostly facilitate validation and partnership arrangements and/or distance learning



# EA: Declining but significant share of UK TNE

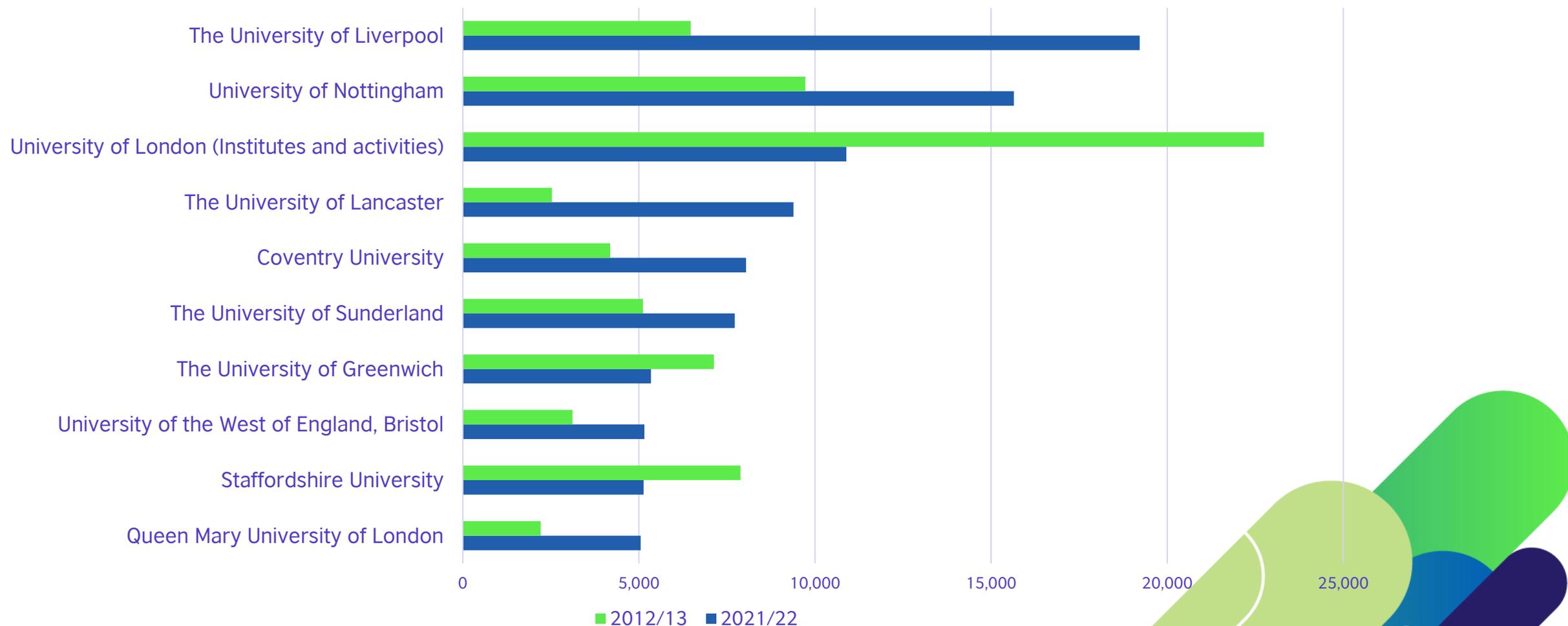


# EA: UK TNE enrolments are concentrated in 5 host countries

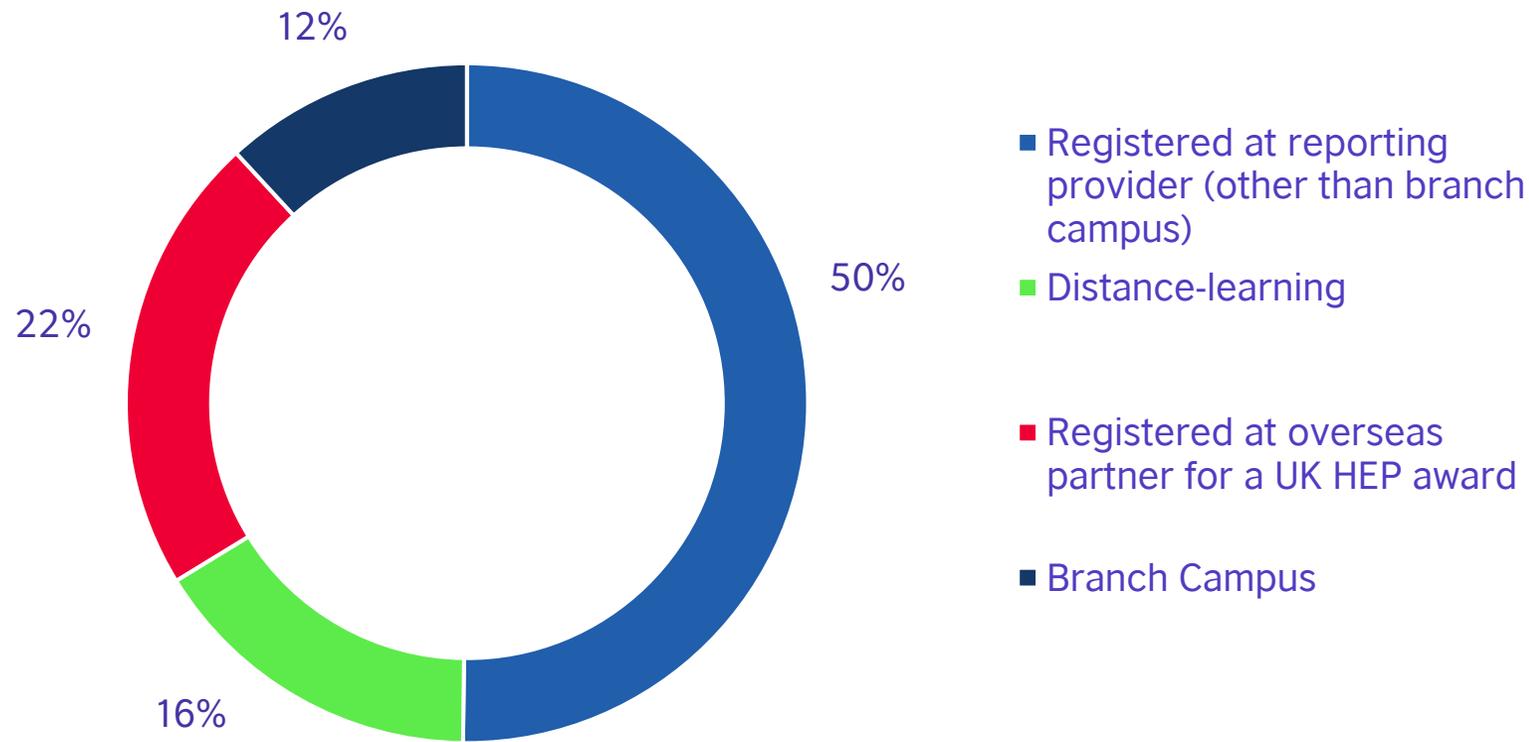




# EA: Top 10 universities have 50% of UK TNE enrolments



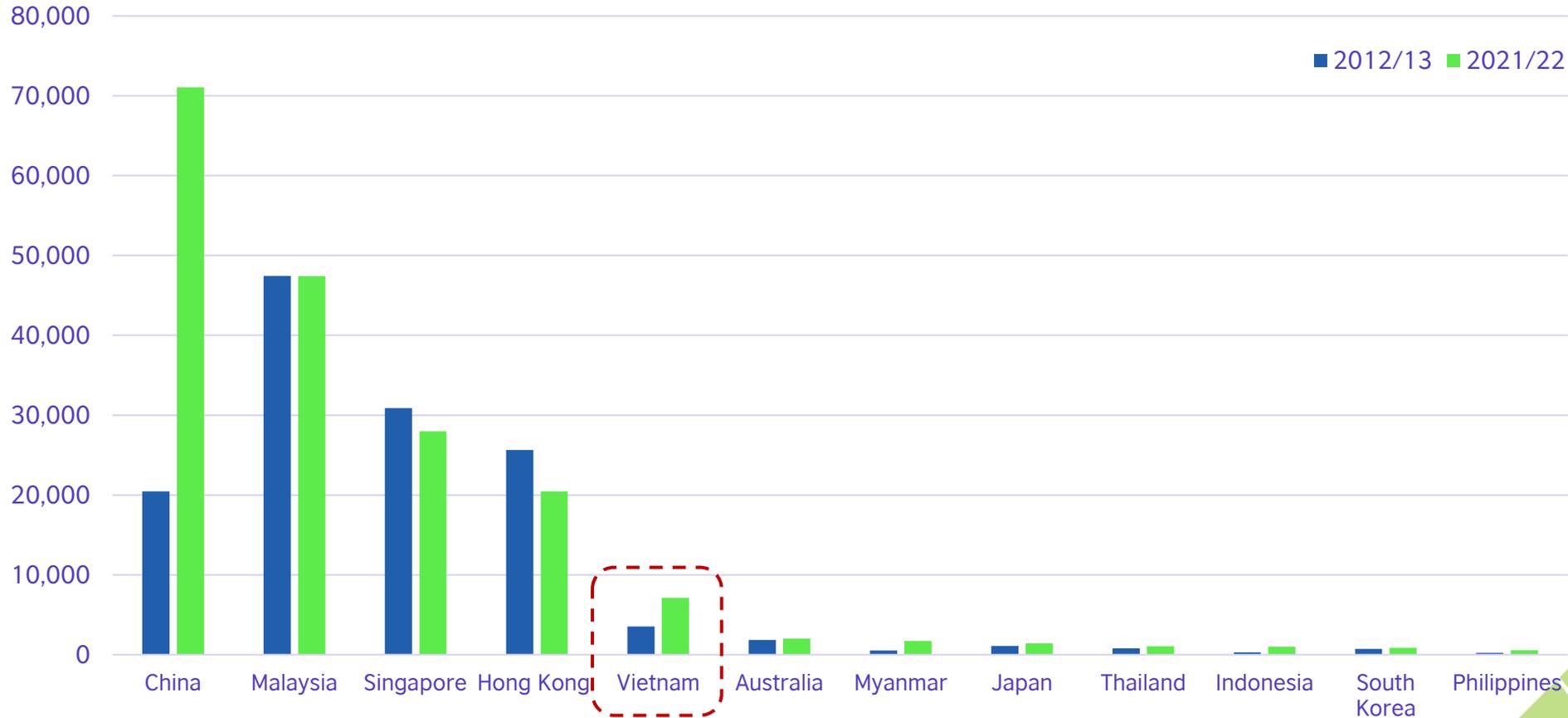
# EA: Preference for joint-degrees, franchises and validation arrangements



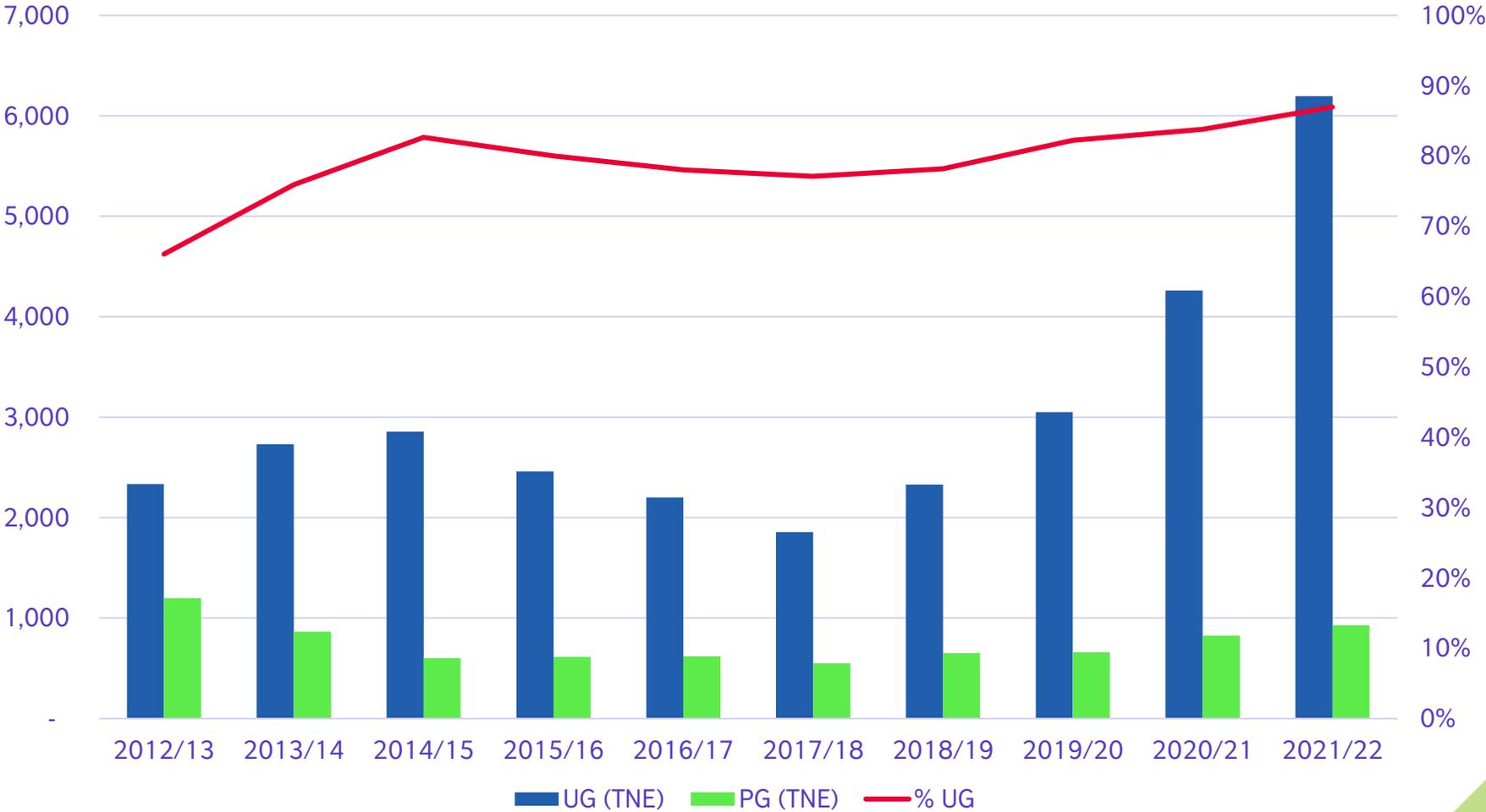
- Registered at reporting provider (other than branch campus)
- Distance-learning
- Registered at overseas partner for a UK HEP award
- Branch Campus



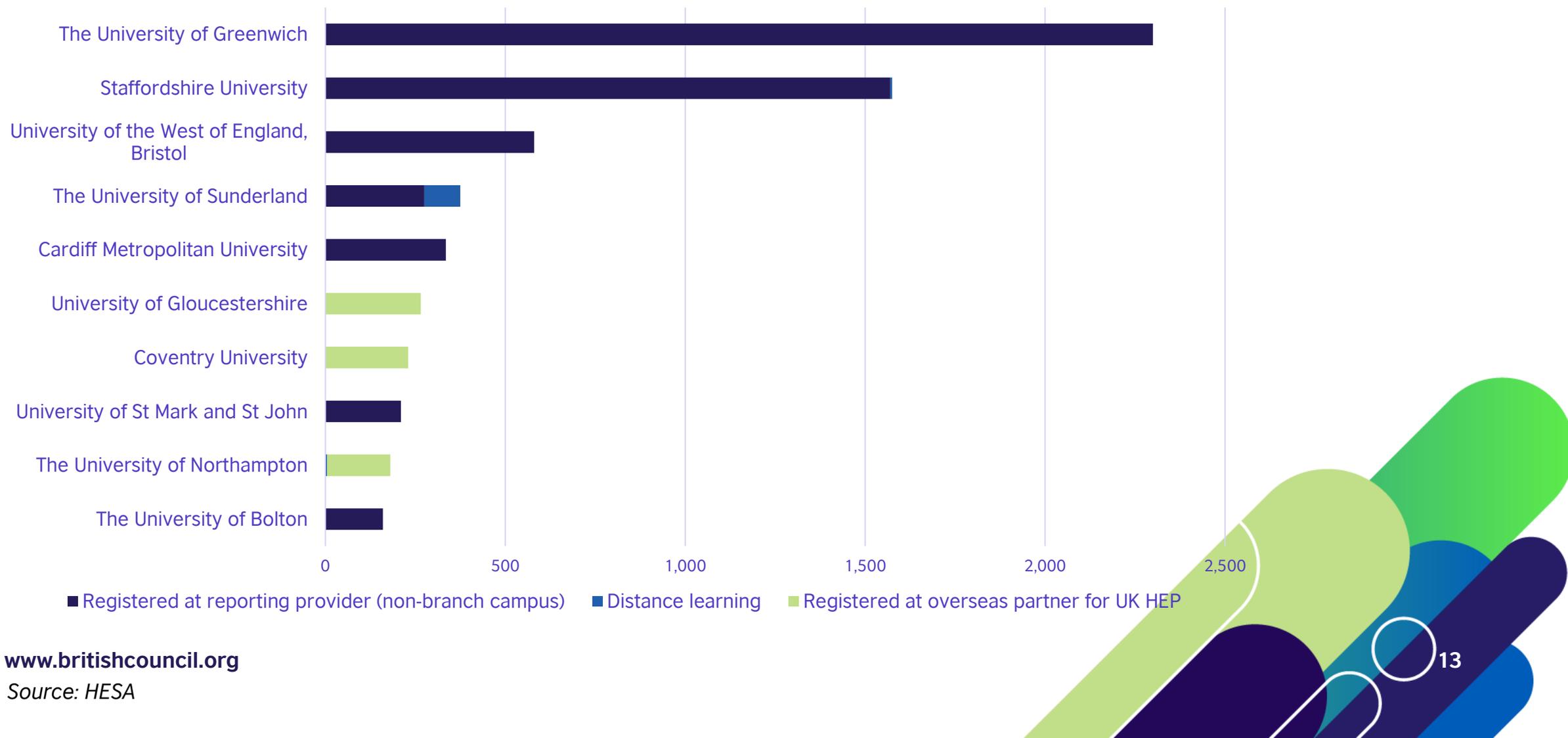
# VN: 5<sup>th</sup> largest number of TNE enrolments in EA, 3<sup>rd</sup> largest in SEA



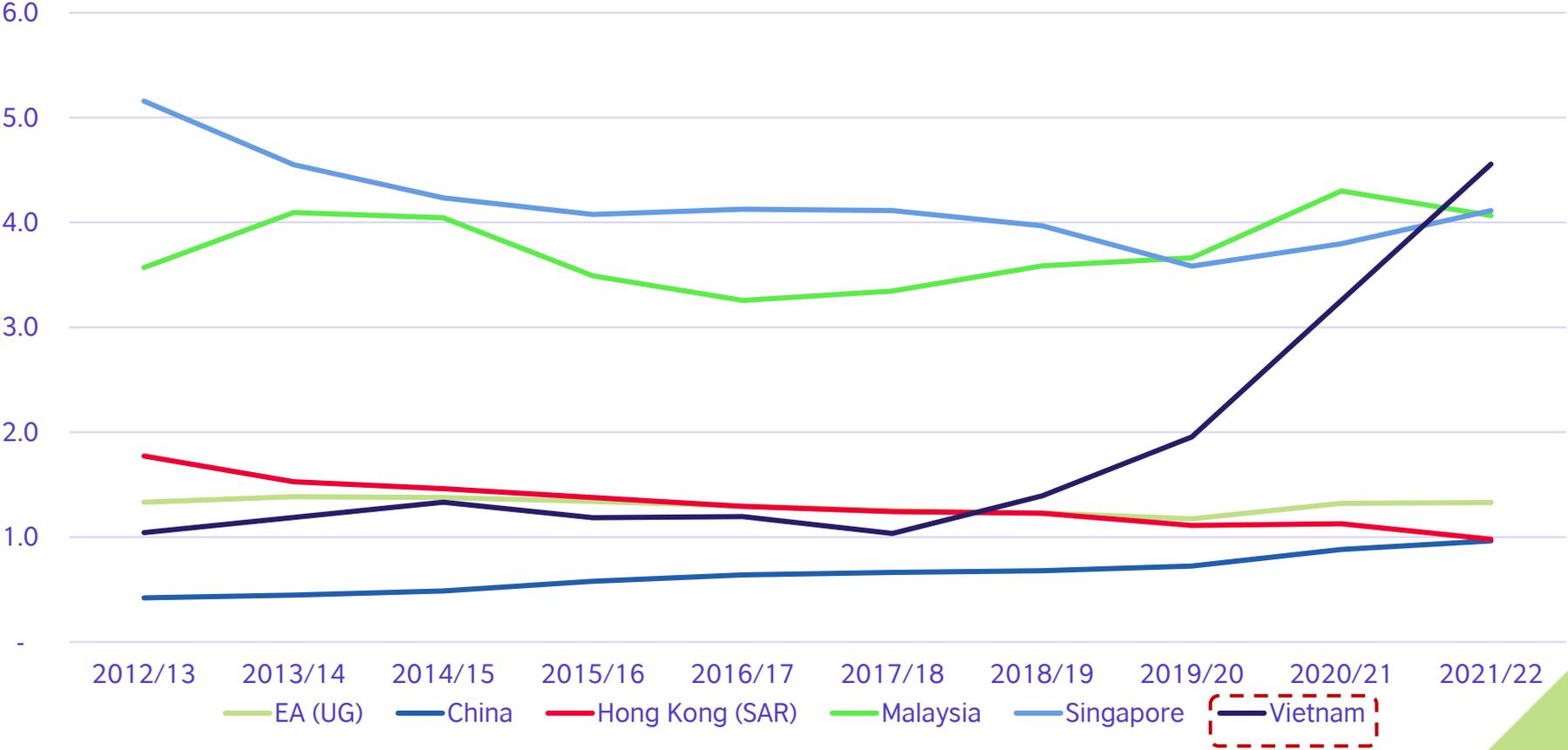
# VN: Highest enrolment in 2021, UG dominates



# VN: Strong preference for franchised and joint degree programmes



# VN: Highest TNE/Mobility ratio in EA for UG TNE – for every UG student studying the UK, 4.5 enrol in UK TNE



# Conclusion

- There is a small but growing market for TNE in Viet Nam
- UK TNE is much more popular than UK mobility among Vietnamese students
- Viet Nam is a price sensitive market and TNE tuition fees are low compared with other countries
- Most TNE in Viet Nam is collaborative provision – which requires significant nurturing and investment until local partners develop their capacity to deliver high-quality UK TNE with less UK support