International Higher Education Commission

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International Higher Education Strategy 2.0: Targeted Growth for Resilience

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Foreword

From the International Higher Education Commission Chair, The Rt Hon Chris Skidmore MP

The International Education Strategy launched in 2019 was a pivotal moment in UK higher education. For the first time, the strategic ambition of the UK in this crucial area was clearly articulated, and a policy framework across Government was established to deliver the strategy in a coherent and compelling way. That strategy proved an important element in the subsequent success of the UK higher education (HE) sector – not limited to, but with the important outcome for the UK of, already surpassing the 2030 target of 600,000 international students. However, there are increasing questions about where that strategy takes us, the consequences of it for the sector and stakeholders, and speculation that future policy announcements may be made on international student visas, in the context of changed geopolitics since 2019, that are at variance with the vital role that UK HE plays socially and economically.

It is time, then, to revisit the strategic framework for UK HE and to establish a clear narrative around the significant social, cultural, and economic benefits that international students bring to the UK; how international students influence the learning and other experiences of domestic students; and the wider links of global activities to the international research, reach out and knowledge transfer roles that universities perform.

The Commission, which I am delighted to chair, is defining the means and mechanisms by which we can deliver those benefits through an evidence based approach, engaging with the people and organisations that can provide the data, insight and evidence to produce a new "International Education Strategy 2.0". The Commission is apolitical and already benefits from cross-party support in Parliament. A number of leading figures and organisations have pledged to support the initiative and the names of the Commissioners can be found at https://ihecommission.uk/commissioners1/, whose combined experience, knowledge, and expertise, informed by commissioned research, data and insight, steer the work of the IHEC. We are committed to ensuring that the many voices interested in establishing a successful future strategy, particularly those from students and from outside of the "Westminster village", are heard. Starting in January 2023, and ending in September, we are supporting a series of events that are delivering a transparent process.

The terms of reference have presciently proved to address the key challenges – and opportunities – for the sector in a world of increasing change. Universities need greater support across Government, along with policy clarity and stability, in order to maintain a globally attractive higher education sector. Not only is the revenue international HE generates essential, but engagement with the world through higher education is rightly regarded as the jewel in the UK's crown, by fostering our reputation internationally, providing access to talent and driving research and knowledge exchange opportunities, but also by opening doors and being the source of many opportunities for UK and its citizens.

This interim report focuses on key overseas market information and is the first substantive review of the recently released Higher Education Statistics Agency data for 2021–22 in the context of HE policy over the past 30 years. It shows unequivocally that this is not a time for complacency; current buoyant international student numbers are largely the result of a particular set of circumstances and unlikely to be sustainable in the long term. Further, student numbers alone do not ensure resilience in the UK sector. Shifts in global student demand for UK higher education – in terms of the sending geographies and the move from undergraduate to postgraduate recruitment – are creating serious vulnerabilities, including increasing non-completion rates, and there is a significant loss in diversity and particular threats to the research talent pipeline. EU numbers have fallen dramatically and the pivot to recruitment of student from South Asia and Sub-Saharan Africa has not just changed the nationality mix, but the type of students, who now tend to be older and therefore increasingly likely to come with dependents. The good news in amongst all these changes is that there is no evidence of the "crowding out" of domestic students by rising overseas student numbers.

In the context of record numbers of overseas students it may seem perverse to talk about the increasing affordability challenges of accessing UK higher education. But, as this report shows, it is growth in one-year postgraduate recruitment that is driving these numbers – making us, currently, good value compared to competitors in this niche but driving up the overall cost, and particularly of accommodation, for all overseas students. As our specific session on student accommodation noted, there are no quick fixes for the accommodation challenges, and these are generally more acute where there are larger universities in smaller cities.

Underlying all this, key to the ability to establish a coherent and compelling International Education Strategy 2.0 is the need for better data. We should not be reliant on one-off reports, as welcome as they are, to define the economic value of higher education to the country, and whether students do or don't overstay, and so drive long-net migration; further, universities can not engage substantively with the communities in which they sit – the health and welfare ecosystem and local government agencies – unless they have timely information about visa information about dependents. We also need to better document the diversity of our sector that, in general, sees very different overseas student flows to different types of institution, and indeed the problems of those institutions with few overseas students, of whatever type, who are increasingly finding it difficult to manage the rapid increase in their cost base. Overseas student revenues, from fees and the other services which universities provide to overseas students, do not just subsidise our crucial research infrastructure but increasingly domestic student teaching costs; and in return, through the social and intellectual capital these students also bring, these students also enrich the experience of UK students. And it is not just universities that benefit – a recent study showed the extent to which every UK citizen benefits from the income generated by overseas students.

Now we know just how significant the impact of the pivot from undergraduate to postgraduate recruitment has been, and how difficult it is diversify our recruitment base, it is time for joined up approaches and a focus on strategic action that targets growth for resilience. The Prime Minister's Initiatives of 1999 and 2006 to 2010 were arguably the spur for the current cycle of global engagement of UK higher education – we need similarly bold and foresighted initiatives from policy makers now, delivered in partnership with the sector and its stakeholders. The reintroduction of Post-Study Work Experience is arguably the only substantive example of such an approach, and that came only after much advocacy on the part of the sector.

What we do not need is mission creep, expansion of the regulatory role of Government and non-governmental organisations, or messages, intentional or not, that say that overseas students are a problem and are not welcome. Global Britain needs to continue to attract the brightest and best from around the world; we need to proactively project a positive view of our sector with the undoubted conviction that UK higher education is truly world class, and to evidence this with the data that exists but is not accessed in a way that ensures world-class policy development.

Our next report will focus specifically on the growing importance of diverse approaches to overseas recruitment across different UK regions, the rising significance of "internationalisation at home", in particular in providing a "global gateway" for UK domestic students, and the growing role of transnational education, driven by a wide range of factors from the fragmentation of traditional academic pathways, embracing the need for a reversion to the recognition of higher education as a key role in building civic societies in an increasingly turbulent world, to the need to address the growing carbon footprint of global higher education.

Main findings

The global international education markets are changing rapidly as they reopen after the pandemic. While the ambitions of the UK's International Education Strategy remain valid, they will not be achieved by maintaining the status quo or doing "more of the same".

Highly focused strategic initiatives will be essential to target critical challenges. Our analysis, which includes the most recent Higher Education Statistics Agency (HESA) data, finds that:

- While obviously good news, the 2021 growth in international student numbers is largely the result of a particular set of circumstances and is unlikely to be sustainable long term. Data for competitor countries shows a strong rebound in 2021 commencement figures.
- Government policies on post-study work are directly related to international student numbers. In 2012 the UK saw its first decline in international student numbers, followed by seven years without growth. The UK's drop to third place behind the USA and Australia in 2019 was largely unacknowledged.
- Student numbers alone do not ensure resilience in the UK sector. Shifts in global student demand for UK higher education are creating serious vulnerabilities, in particular:
    - A shift from first degree to master's programmes. Master's students now significantly outnumber those on undergraduate courses, principally because most undergraduates came from the EU and China. These groups have declined and been replaced by students from India, Nigeria and Pakistan on short-term master's degrees, which are typically nine months long. The recruitment cycle is much shorter and more expensive.
    - Some master's courses, particularly in science, technology, engineering and maths (STEM) and in business-related subjects where over 90 per cent of the full-time students are from overseas, may become unviable if overseas recruitment is limited. International students do not displace home students. Home students will not, therefore, replace international students on these courses.

- A significant and increasing loss of diversity. Following Brexit, the UK is losing talent from 27 countries, with undergraduate recruitment and research students mainly affected. Postgraduate recruitment is becoming heavily reliant on India. At the same time, future recruitment of postgraduate research students from China is becoming less predictable, making this an area of potential vulnerability.

- Insecurity in the UK's research talent pipeline. Global demand for postgraduate degrees in the UK is declining. 2021 saw a 6 per cent drop in doctoral students (almost 1,500 fewer entrants). The majority of postgraduate research students are in STEM subjects, meaning that this is the hardest-hit area, with obvious implications for the continued growth of the UK's research and innovation base.

We conclude that the International Education Strategy 2.0 must focus on strategic action that targets growth for resilience. Priority areas need to be identified, and action focused on these. We identify the following as particularly important:

- Market diversification (in terms of countries and study levels).
- Staying competitive: reviewing and updating UK's higher education offer, including from the devolved administrations and regions. Feeding into this are:
  - Student decision making across different countries.
  - International graduate outcomes and international student experience.
  - The UK's global engagement and contribution to the UN Sustainable Development Goals (particularly through transnational education).
  - Better communicating the UK's offer – to students and stakeholders globally.

If action is to achieve these aims, it must be underpinned by a clear understanding of the challenges and an evidence base that enables informed decisions between options to be made. Currently, there are important gaps in our understanding and evidence base which means that we do not have a "single version of the truth" on key issues. These range from net economic benefit to the extent to which students do or don't overstay their visa. The speed of change in global markets has exacerbated the already urgent need to identify and rectify these. Only by doing so can evidence-led policy development across Government be achieved together with good decision making by universities and their stakeholders. One obvious example is:

- The lack of an effective system to capture education exports. Analysis suggests these are largely invisible to the general public. One consequence is that the balance between international students as economic contributors and international students as migrants is often skewed. Reliable figures would provide evidence to inform decisions on post-study work (PSW) policy.

1. Background

The International Higher Education Commission's purpose is to develop recommendations for a new "International Education Strategy 2.0". This paper aims to contribute to that purpose, specifically through in-depth data analysis of the international student recruitment market to provide a reliable evidence base for recommendations on future action.

1.1 Assumptions

Several assumptions abound across the media, the sector and the government, including that:

- The UK has achieved its international student targets 10 years early, securing a healthy future for the sector – and that perhaps the target should therefore be raised.
- The loss of students from China and the EU is easily replaced from India, and other countries such as Nigeria and Pakistan. Universities just need to diversify their markets.
- International students displace UK students, so UK students can easily fill those places if international students are lost.
- The talent pipeline for research is secure.
- The UK's success in 2021–22 means it is back as a leader in the global competition. The UK's brand is strong.
- Education exports are being measured and are visible and attributable.

Our analysis of the data suggests that many of these are misunderstandings at best, and myths at worst. Certainly, they do not provide reliable evidence on which to base future decisions.

In this paper, we analyse data over two decades, from 2000–01 to 2020–21, to track changes in the UK's international student population. The UK's long track record in international education enables us to identify not only the major trends in its international student recruitment but also the significant drivers and barriers[1]. 1999 saw a major strategic development in UK strategy, with the Blair government launching the Prime Minister's Initiative (PMI) for International Education. Ground-breaking at the time, this produced the first national brand (Education UK) globally, accompanied by a comprehensive student recruitment campaign in over 30 countries across South and East Asia, Latin America and Africa. Over five years, the target of recruiting 50,000 additional international students into UK higher education and 25,000 into further education was exceeded. The model was quickly adopted by competitor countries, which developed their own national brands and campaigns. The second PMI under the Labour government radically developed a strategy to respond to the changing global education markets. Subsequent initiatives and strategies are largely built (whether knowingly or unknowingly) on the foundations laid in 1999.

In 2023, after the Covid-19 pandemic, global markets are changing radically and rapidly. Alongside the shifting economic dynamics, geopolitics is also having a profound and growing impact. Our data analysis points to critical challenges for the UK. The volatility in the markets amplifies these. The status quo and more of the same are unlikely to achieve the ambitions of the UK's 2019 to 2021 International Education Strategy. Much more focused and targeted strategic initiatives will be needed. These must be informed by data and based on evidence rather than assumptions.

1.2 Methodology

This is the first substantive analysis of trend data using the new HESA data. All the data analyses for the past two decades use HESA's Standard Registration Population data[2]. For recent shifts in international student demand, the data analysis is based on the full-time entrants to UK higher education unless otherwise specified. Focusing the analytical work on student entrants allows us to capture the most recent shifts in global demand. Data on EU students excludes the UK.

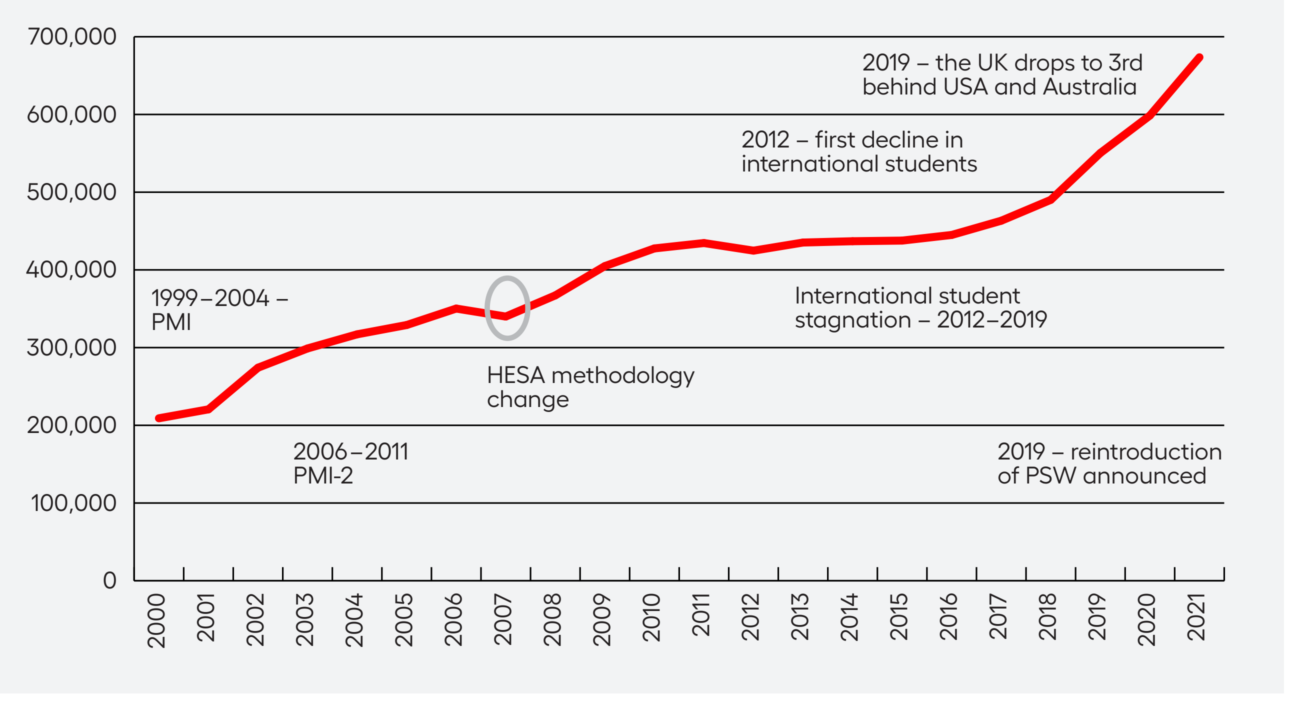
[1] See the Appendix for details.
[2] Higher Education Statistics Agency, www.hesa.ac.uk.

2.
International student numbers: The trends over the past two decades and what the data tells us

HESA figures for the academic year 2021–22 record almost 680,000 international student enrolments in the UK. While this shows the UK achieving its 2030 numbers target 10 years early, a more detailed analysis (Figure 1) raises serious questions about the longer-term sustainability of these numbers, and whether they contribute to the resilience of the UK higher education (HE) sector.

Unpacking the data on the numbers suggests two things: that they result from a very particular set of circumstances, and that they are unlikely to be sustainable without proactive and continuing government policies.

Figure 1: International students in UK HE 2000 to 2021



Source: HESA Student Record for the relevant years.

Note: A methodological change by HESA in 2007–08 led to fewer students being reported. The change relates to the exclusion of students who are on sabbatical or writing up[3].

[3] For details, see https://www.hesa.ac.uk/support/data-intelligence/population-changes-200708.

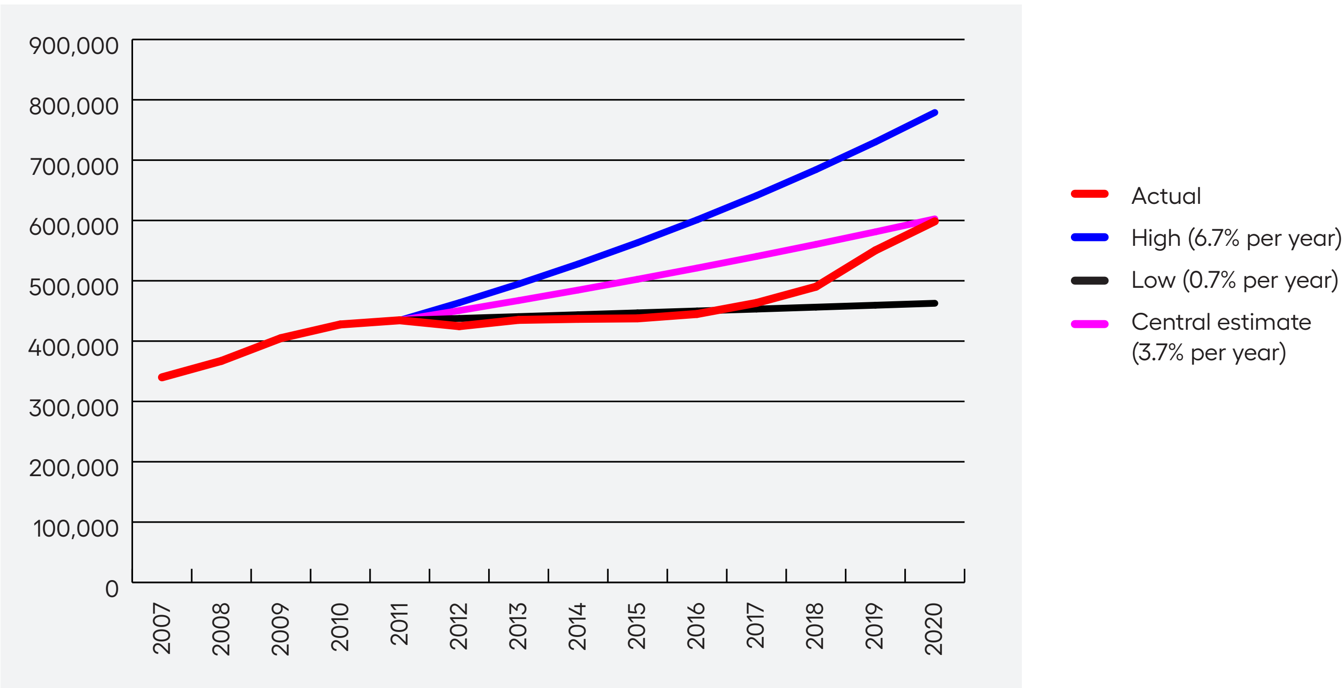
Table 1 shows a summary of policy developments.
A detailed policy timeline is available in the Appendix.

Table 1: Summary policy timeline

1999	2005	2006–2010	2011	2012	2013	2014	2019	2022
National marketing campaign under the PMI. Strong focus on China	The Fresh Talent initiative in Scotland created considerable interest among Indian students in Scottish higher education institutions	Second PMI Post-study work opportunities extended to the rest of the UK devolved nations Launch of the UK India Education and Research Initiative	Significant tightening of the student visa system. The end of the PSW route was announced[4]	Highly Trusted Sponsors' refusal rate set at 20%	New strategy. 'International Education: Global Growth and Prosperity' published[5]	Highly Trusted Sponsors' refusal rate set at 10%	International Education Strategy: global potential, global growth Cross-party support for the two-year post-study work visa. The two-year PSW visa announced The UK drops to third place as an international study destination	International Education Strategy – 2022 update (May 2022)
Labour			**Conservative / Liberal Democrat**				**Conservative**	

However, comparing the current international student enrolments with the government's own forecasts in 2011, 600,000 international students were part of the baseline forecast, which used the average growth rate from the previous three years at 3.7 per cent (See Figure 2). The projected export value of this growth was significantly more modest compared with the current estimates.

Figure 2: Projections of international students in the UK in 2020



Source: Projections are sourced from BIS (2013, p42), International Education: Global Growth and Prosperity. https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/340600/bis-13-1081-international-education-global-growth-and-prosperity-revised.pdf
The historical HESA data is used to produce the actual numbers.

[4] See https://www.gov.uk/government/news/major-changes-to-student-visa-system.

[5] See BIS (2013), International Education: Global Growth and Prosperity, https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/340600/bis-13-1081-international-education-global-growth-and-prosperity-revised.pdf.

2.1 External and policy influences on international student demand

Our analysis points to a particular set of circumstances that have created pent-up demand. In turn, this has resulted in raised numbers for the UK:

- The first ever decline in international student numbers in the UK was recorded in 2012. This was a response to restrictive student visa policy and reductions in the post-study work opportunities for international graduates.
- This was followed by a period of stagnation and zero growth from 2012 to 2019. Competitor countries were able to take advantage, and in 2019, for the first time, the UK dropped to third position behind the USA and Australia. This significant change in the UK's market position went largely unannounced.
- The Covid-19 response in the UK and its main competitor countries meant that the UK was among the few countries that stayed open for international students' arrivals.

Changes in the UK's international competitiveness for international students over the past five years was studied in the "Why aren't we second" series published by the Universities UK International (UUKi)[6].

Data for competitor countries show a strong rebound in the commencement figures. New enrolments were up 80 per cent in the USA in 2021–22 compared with the previous year[7], and the latest data for Australia shows a 38 per cent increase in commencements in December 2022 compared with the same time the previous year[8]. While the overall student numbers remain below their pre-pandemic levels, this raises the critical question of whether the rebound in demand for UK higher education is temporary – and whether the UK will lose market share as other countries reopen their borders for international student arrivals.

2.2 Importance of government initiatives and post-study work opportunities

Government policies around the world have an important impact on international student numbers. The most recent example is obviously the Covid-19 lockdown of multiple countries. A longer timeframe analysis, however, points to the significant impact of government interventions – some positive and some negative. For the UK, the two PMIs running from 1999 to 2010 had a positive impact on student numbers.

The analysis also shows the critical importance of post-study work regulations. For the UK, government policy on PSW was one of the major factors causing the decade of zero growth. This resulted in an uncompetitive student proposition compared with other countries. A report for Universities UK International found 'a strong positive correlation between post-study work options and growth in international student enrolments'[9]. The analysis provides evidence that global PSW policies are a major factor influencing the growth in international student numbers.

Government policies impact students' choice of which country to study in, not their decision to study abroad[10]. As a result, most price-sensitive students from India, Nigeria and Pakistan opted for other study destinations when the PSW route in the UK was closed. In 2019, the UK government's announcement of the reintroduction of post-study work visas heralded the beginning of a climb out of the period of stagnation and no growth. It mainly impacted student demand from price-sensitive countries.

[6] See UUKi (2022), Why aren't we second, Part Two. https://www.universitiesuk.ac.uk/universities-uk-international/insights-and-publications/uuki-publications/international-student-recruitment-why-0 and also UUKi (2020) "Why aren't we second" Part One. https://www.universitiesuk.ac.uk/universities-uk-international/insights-and-publications/uuki-publications/international-student-recruitment-why

[7] Institute for International Education, Open Doors, https://opendoorsdata.org/data/international-students/new-international-students-enrollment/.

[8] Australian Government Department for Education (2023), International student monthly summary and data tables (monthly summary). https://www.education.gov.au/international-education-data-and-research/international-student-monthly-summary-and-data-tables#toc-international-student-data-full-year-data-based-on-data-finalised-in-december-2022-.

[9] https://dera.ioe.ac.uk/32070/1/Five%20little-known%20facts%20about%20international%20student%20mobility%20to%20the%20UK_web-1.pdf.

[10] IDP Connect "New Horizons" research (2021) presentation at the Australia International Education Conference. Report available to IDP Connect members only.

2.3 Demand for UK higher education – by world regions

Asia was home to 58 per cent of the international students in the UK in 2021. This proportion is significantly higher than the region's 30 per cent market share in 2000. This increase in market share was mainly at the expense of EU students, who dropped from 45 per cent in 2000 to 18 per cent in 2001.

Figure 3: International students in the UK by domicile region, 2020–21

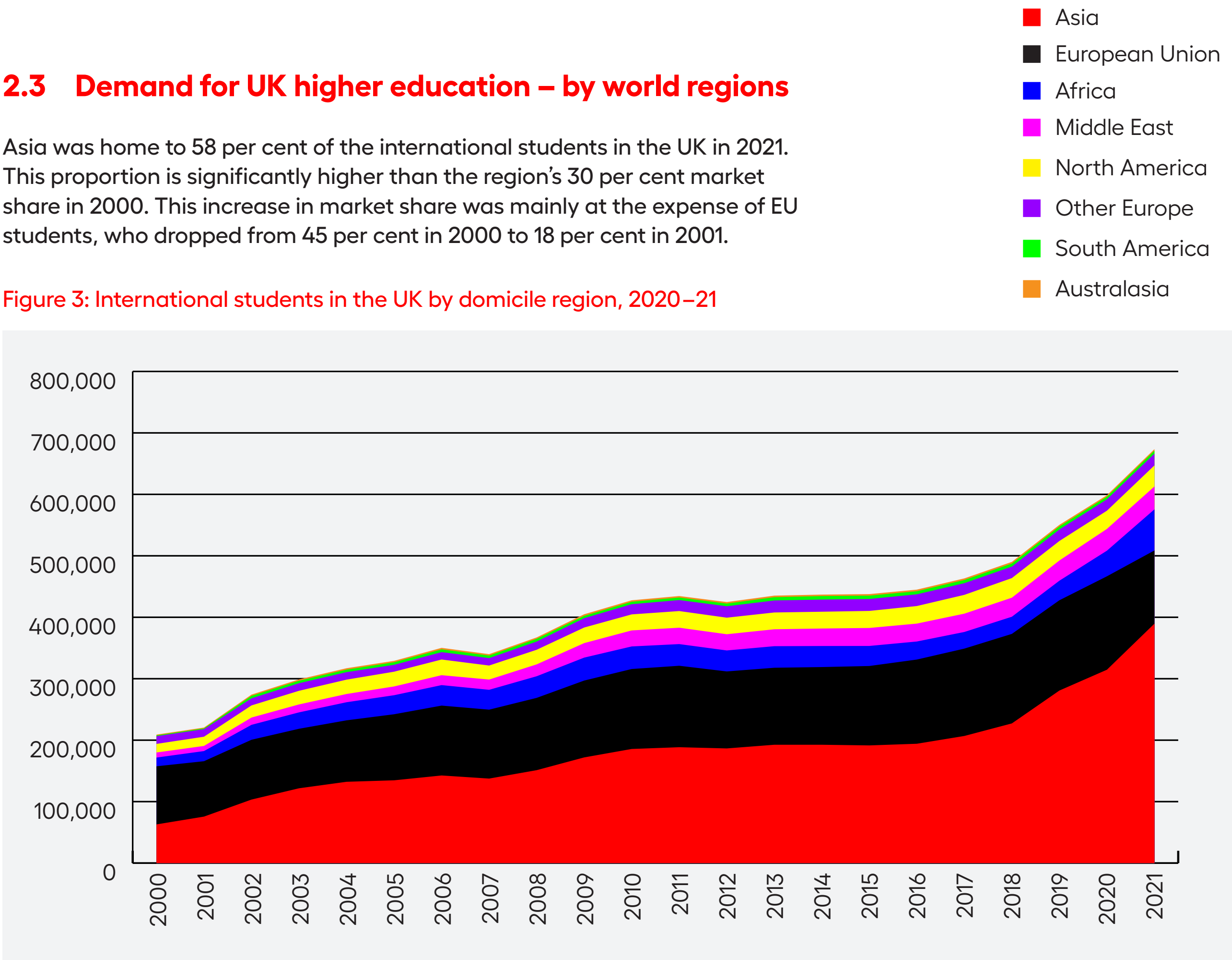
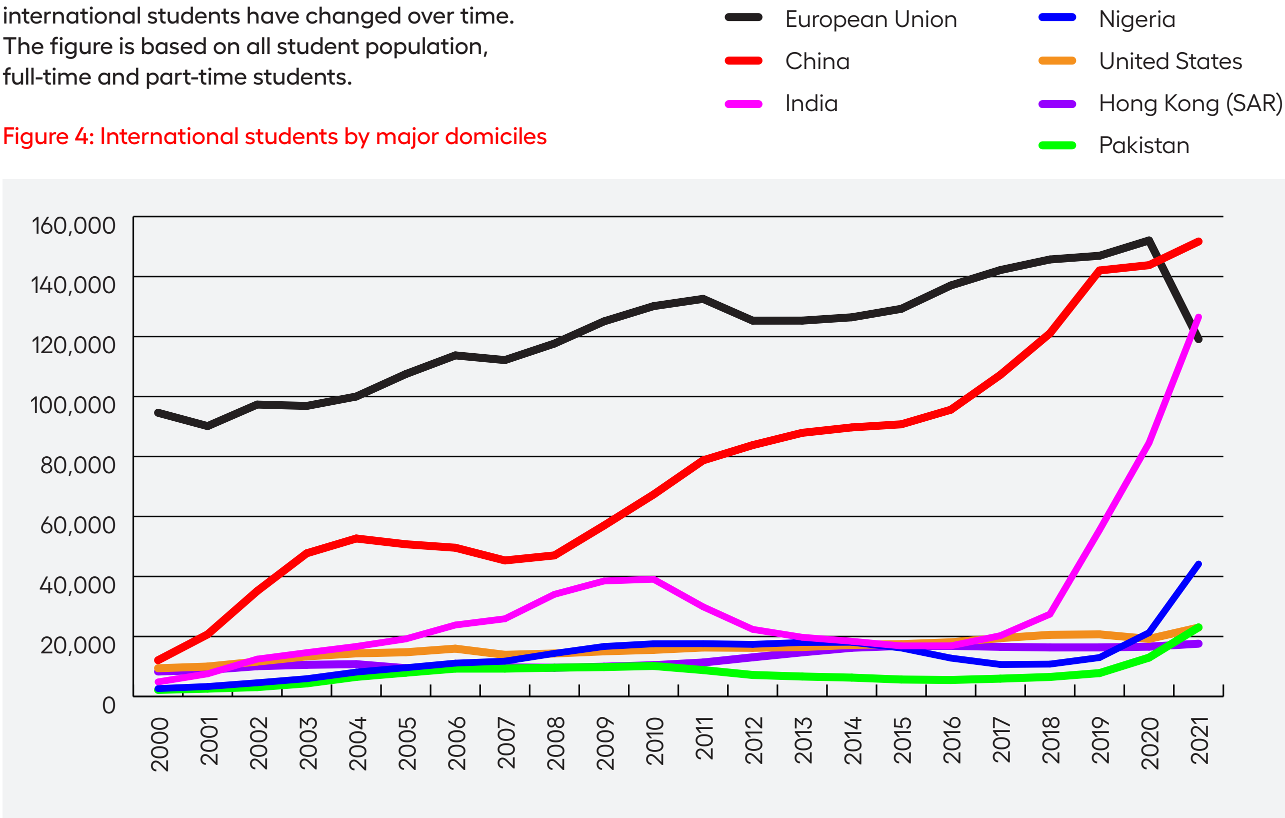


Figure 4 shows how the main home domiciles for international students have changed over time. The figure is based on all student population, full-time and part-time students.

Figure 4: International students by major domiciles



In 2000, The list of the top 15 countries was significantly different from 2021. There were three European countries in the top five in 2000 and none in 2021. Also, a different set of countries were the main source nations for students in the UK: China moved to first place from third; India to second place from 12th; Nigeria to third from 20th, and Pakistan to fourth from 28th.

However, there is a growing reliance in UK HE on a small number of sending countries. The top two countries in 2000, Greece and Ireland, accounted for 21 per cent of the overall student numbers. In 2021, China and India collectively accounted for almost twice as much – 41 per cent of international students in 2021.

Table 2: Top 15 domiciles for international students in the UK in 2000 and 2021

Rank	Top 15 domiciles in 2000	2000
1	Greece	31,150
2	Ireland	13,510
3	China	12,095
4	Germany	11,370
5	Malaysia	10,005
6	France	9,950
7	United States	9,425
8	Hong Kong	8,335
9	Japan	6,470
10	Spain	5,860
11	Italy	5,415
12	India	4,875
13	Taiwan	4,525
14	Singapore	4,410
15	Cyprus	4,030

Rank	Top 15 domiciles in 2021	2021
1	China	151,675
2	India	126,505
3	Nigeria	44,170
4	Pakistan	23,060
5	United States	22,985
6	Hong Kong	17,610
7	Bangladesh	12,695
8	Malaysia	12,115
9	France	11,875
10	Italy	11,295
11	Spain	10,295
12	Germany	9,920
13	Ireland	9,860
14	Romania	8,900
15	Saudi Arabia	8,745

3.
Shifts in global demand for UK HE

There is significant potential for the recent shifts in global higher education demand to create a UK HE sector that is highly vulnerable in the longer term. Growth in numbers does not equate to a resilient and sustainable sector. There is a danger that an overriding focus on numbers may disguise the precarious future for many universities.

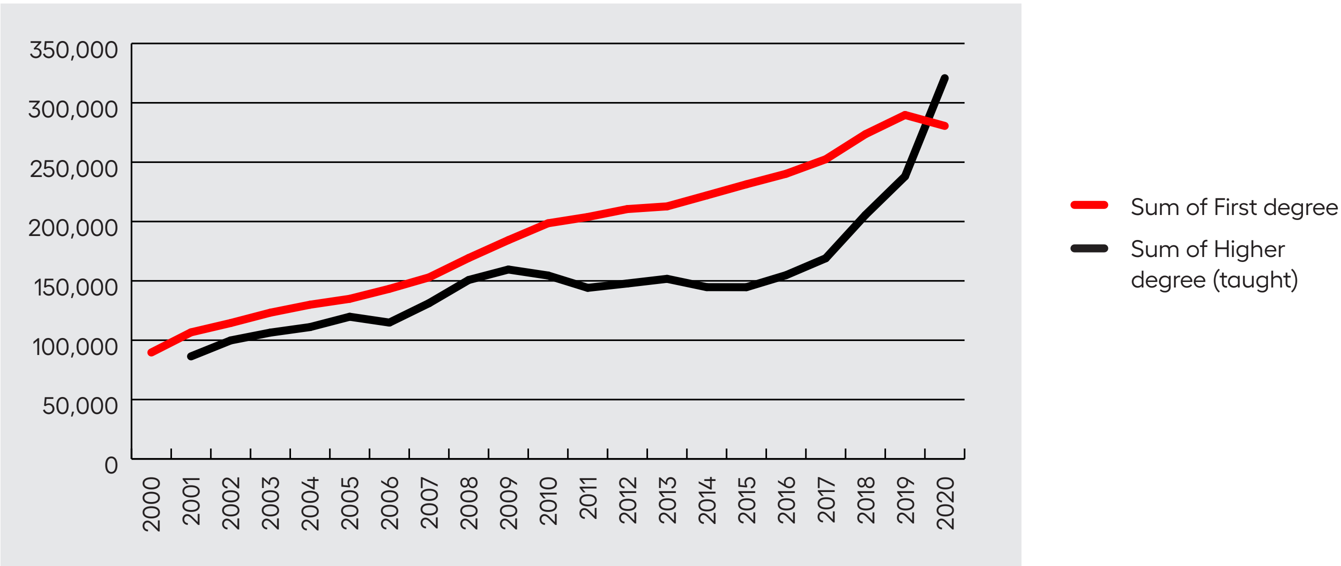
3.1 Post-2019, international demand switches from first degrees to mainly master's courses

Previous analyses by Kernohan (2023)[11] and Preece (2023)[12] show that the rebound in student demand in 2021 was mainly driven by postgraduate taught students. The gap between first degree and master's students closed in 2020–21 and, at present, master's students significantly outnumber first-degree students.

Most of the undergraduate student population was made up from EU and Chinese students – these two student groups have declined in the past year. Increases in student demand from India, Nigeria and Pakistan were mainly at the master's level.

The declining numbers of EU and Chinese students place huge pressure on sustaining some undergraduate programmes. Instead, there is a shift towards short-term master's degrees, which are typically nine months long. This significantly shortens the student recruitment cycle. Figure 6 shows the most significant changes in the proportions of master's entrants, who increased from 52 per cent in 2017 to their highest level of 68 per cent in 2021. This increase was mainly at the expense of first-degree entrants, whose proportion dipped from 39 per cent in 2017 to just over a quarter, 26 per cent, in 2021. In absolute terms, first degree entrants dipped by over 16,300 students and PhD entrants by 1,100. Over the past year, the intake of master's students increased by almost 62,000 students.

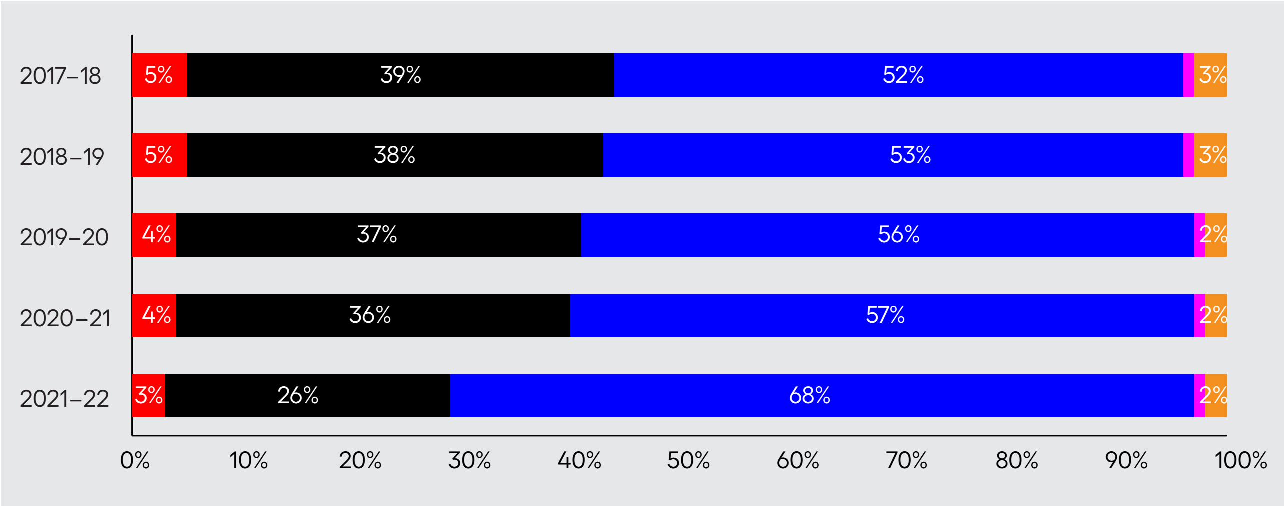
Figure 5: International students in UK HE 2000–01 to 2020–21



Source: This data is from www.hesa.ac.uk and is published under the Creative Commons Attribution 4.0 International (CC BY 4.0) licence.

[11] https://wonkhe.com/blogs/hesa-spring-2023-students-and-place/.
[12] http://www.viewfromabridge.org/2023/02/02/uk-international-enrolments-unchained/.

Figure 6: Shifts in the proportions of full-time international entrants to UK HE



Source: Student Record (excluding alternative providers) 2017–18 to 2021–22; full-time international entrants.

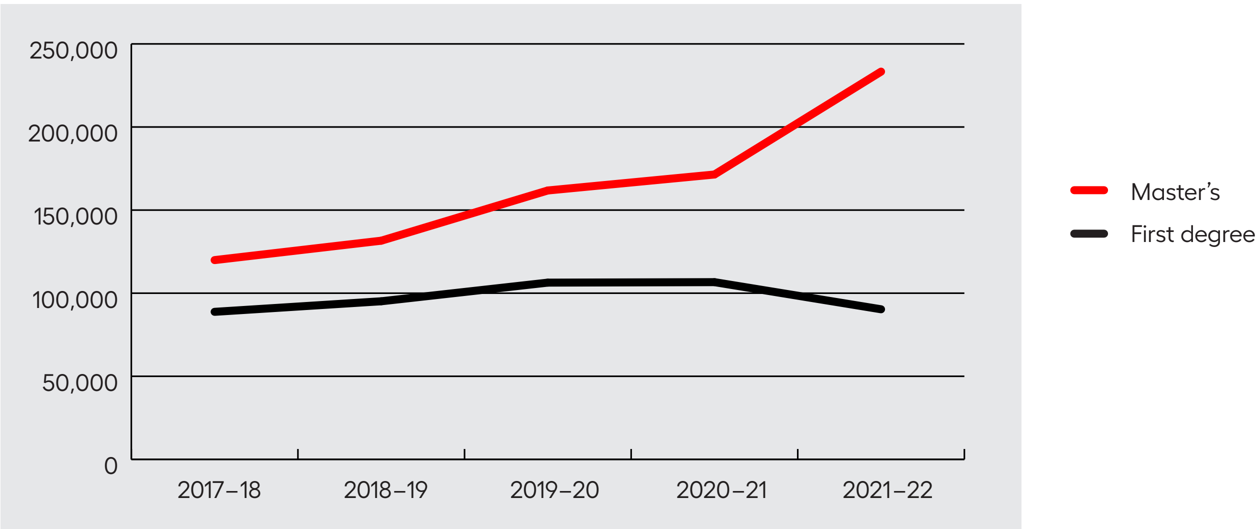
- Doctorate
- First degree
- Master's
- Other postgraduate
- Other undergraduate

Significant reductions in the entry of EU and Chinese students to undergraduate programmes impacted the overall proportions of the undergraduate student population. The reintroduction of post-study work visas boosted demand from India, Pakistan, Nigeria and other countries, mainly at the postgraduate level. The divergence in entry to first-degree and master's programmes entry in 2021 compared to the previous year is illustrated in Figure 7.

The most recent changes in the international student population and the pivot from undergraduate to master's programmes have the following implications:

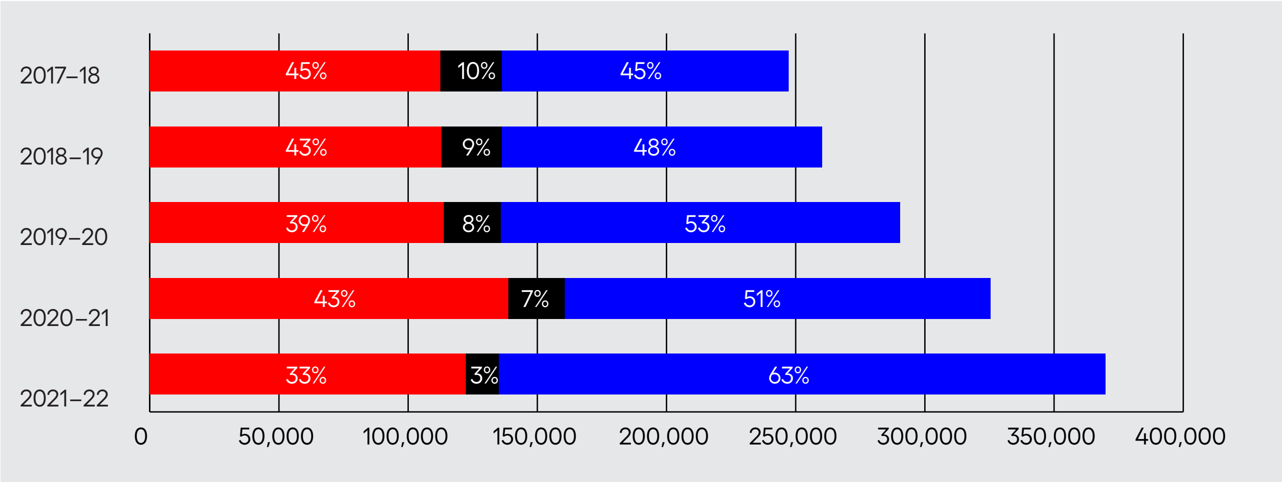
- There are substantially increased costs of recruitment associated with the significantly shorter cycle of education – most master's students need to be recruited annually, whereas the typical first-degree programme is three years. Master's entrants now account for over two-thirds of the overall student population (68 per cent).
- Full-time entrants from China and India accounted for 57 percent of the overall international master's students.

Figure 7: Full-time international entrants to first-degree and master's programmes



Source: Student Record (excluding alternative providers) 2017–18 to 2021–22; full-time international entrants.

Figure 8: Full-time entry to postgraduate programmes by domicile (in absolute numbers and percentages out of total)



Source: Student Record (excluding alternative providers) 2017–18 to 2021–22; full-time international entrants. UK EU Non-EU

3.2 Increasing reliance of postgraduate programmes on international entrants

Non-EU entrants drove most of the growth into postgraduate programmes. While the numbers of UK and EU students dropped the proportion of non-EU entrants increased from 51 per cent to 63 per cent in 2021–22

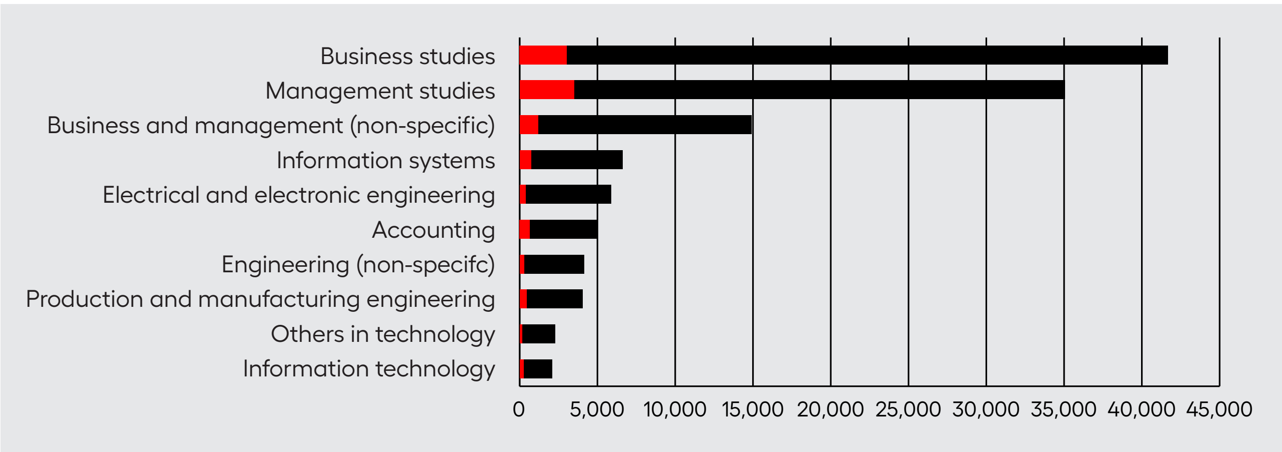
At the master's level, business and management, engineering and technology related courses have the highest concentration of international students.

International entrants are critical to the viability of these programmes. Any shifts in global demand away from the UK will impact courses with very few UK students. International students do not displace home students. Home students will not, therefore, replace international students on these courses.

Figure 9 lists the 10 subjects at the master's level that are most reliant on international full-time students. Subjects with over 1,000 students are included in the chart.

Figure 9: Most popular subjects at the master's level

UK master's students
International master's students



Source: Student Record (excluding alternative providers) 2021–22; full-time students (all students).

3.3 Significantly reduced geographical diversity of students

The data shows the UK losing talent from 27 countries, a loss that mainly affects undergraduate recruitment and doctoral programmes.

The chart below shows that master's programmes are becoming heavily reliant on recruitment from India – also making this an area of potential vulnerability.

Without urgent actions to diversify markets and ensure a more balanced distribution of international students across programmes of study, the UK HE sector is potentially in an extremely vulnerable position.

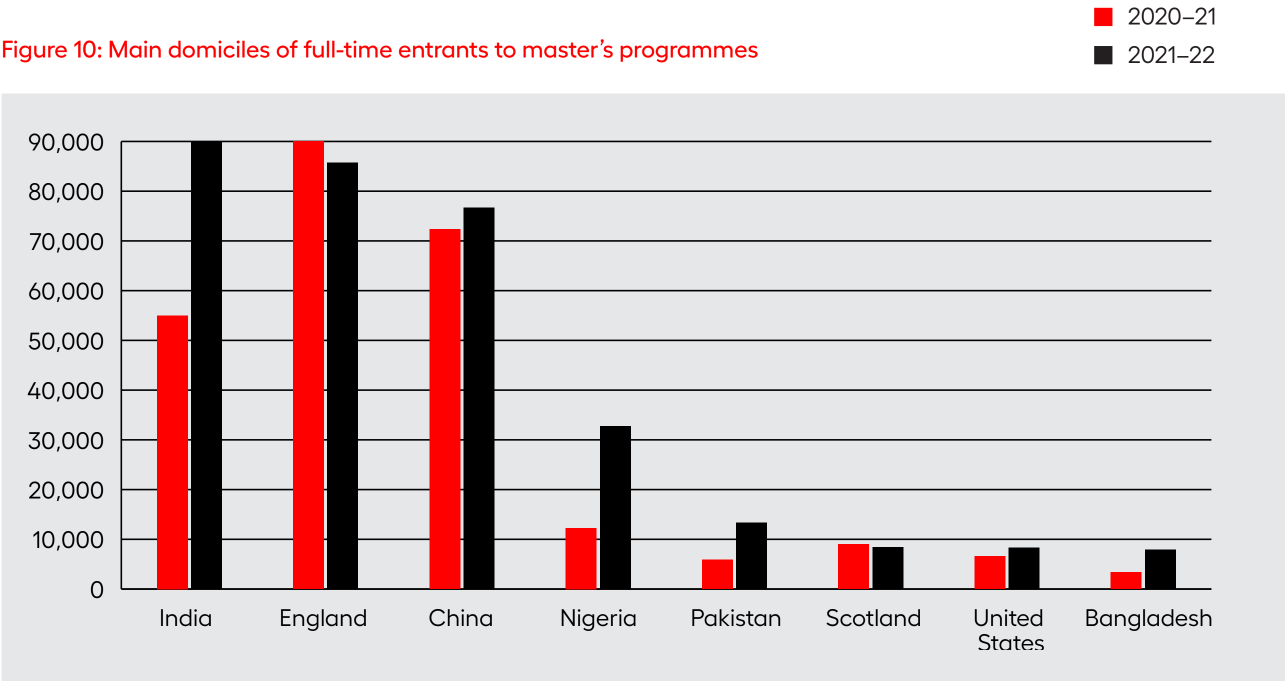
3.4 Declines in global demand for postgraduate research degrees

The reality, clearly shown by the data, is that the UK's research talent pipeline is not secure into the future. Global demand for postgraduate research (PGR) places peaked in 2013, mainly driven by non-EU PGR students. While non-EU demand recovered in 2020–21, following the peak in 2013, EU student demand for PGR has been in a slow decline since 2015.

Our analysis suggests:

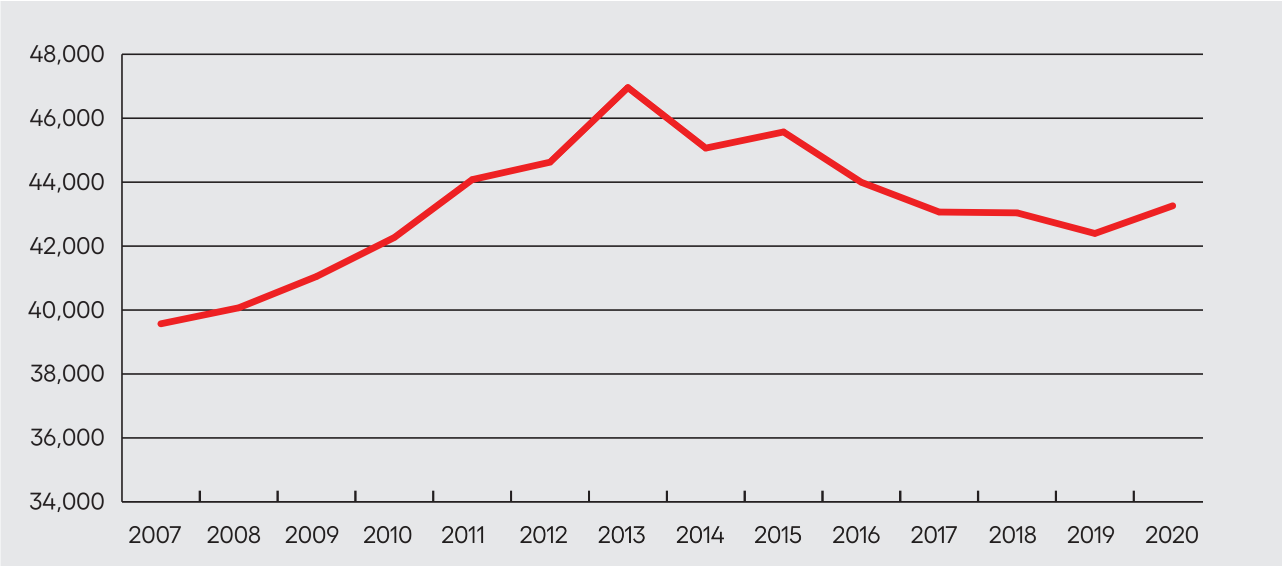
- A reduced appeal of UK research to globally mobile researchers.
- A peak in 2018 of students funded by overseas governments, followed by a decline. This is likely to impact the students' subject choice with government-funded scholars mainly researching STEM disciplines
- A decline in the number of self-funded students and those funded by their higher education institution declined.

Figure 10: Main domiciles of full-time entrants to master's programmes



Source: Student Record (excluding alternative providers) 2017–18 to 2021–22; full-time international entrants.

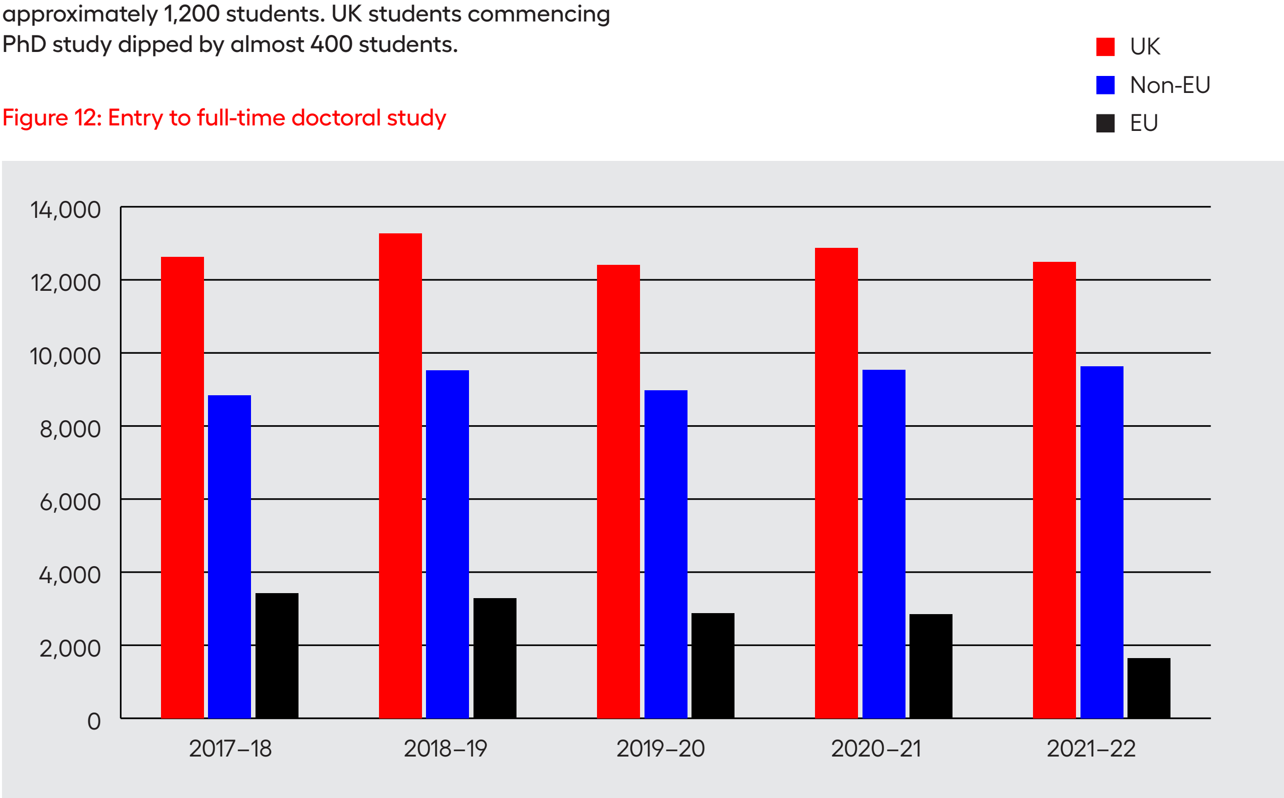
Figure 11: Global demand for postgraduate degrees in the UK



Source: This data is from www.hesa.ac.uk and is published under the Creative Commons Attribution 4.0 International (CC BY 4.0) licence.

There was a significant decline in the entry of doctoral students in 2021. Overall, there was a 6 per cent drop, almost 1,500 fewer entrants. This was caused by reductions in the entry of EU students, who dipped by 42 per cent, approximately 1,200 students. UK students commencing PhD study dipped by almost 400 students.

Figure 12: Entry to full-time doctoral study



Source: Student Record (excluding alternative providers) 2017–18 to 2021–22; full-time international entrants.

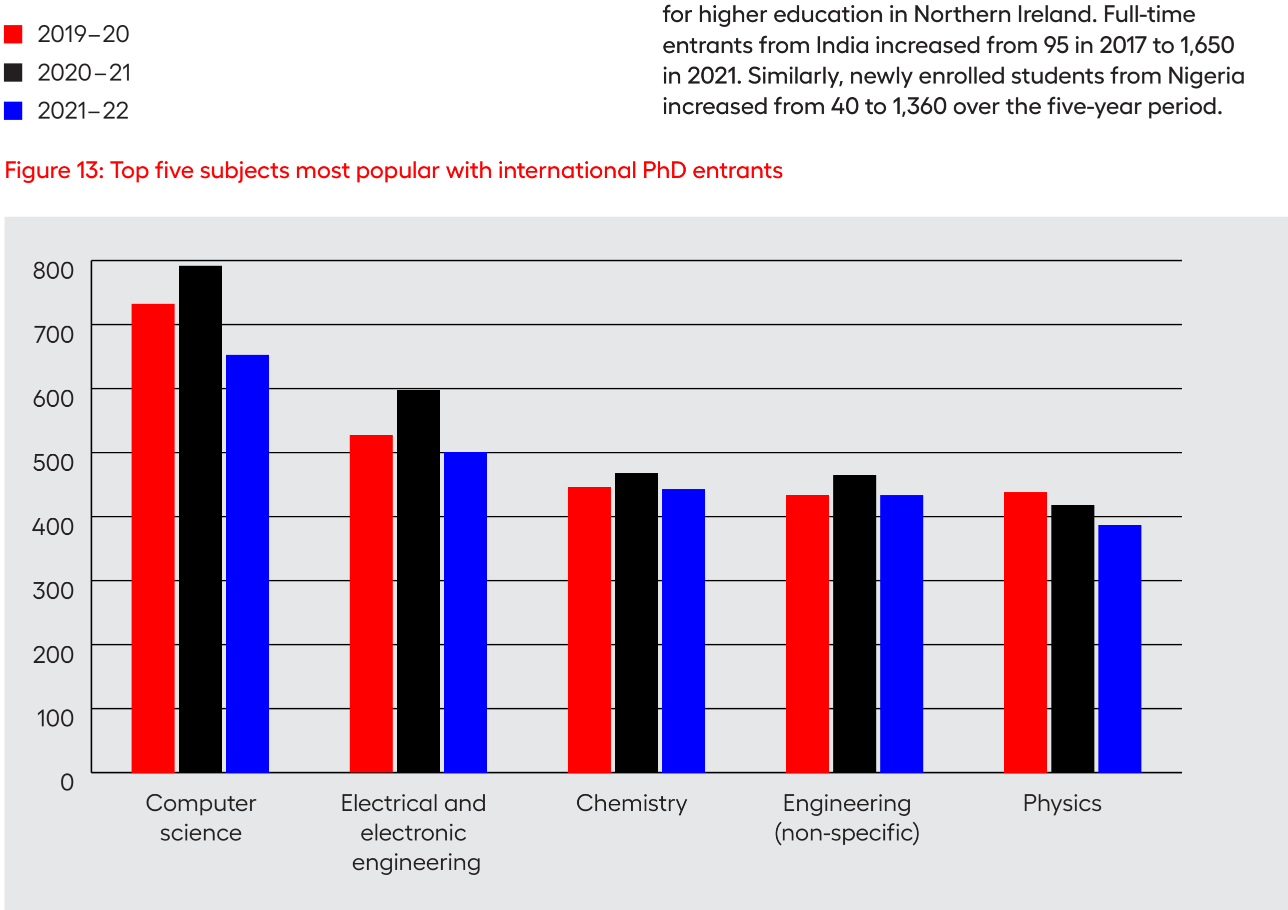
The top five subjects in highest demand from international doctoral students are all in STEM areas. A continued decline in PGR students will inevitably hit hardest here. In turn, this has the potential to affect the continued strength of the UK's research and innovation base.

3.5 International students across the devolved nations

Overall, the UK experience is reflected across all the devolved nations. There is a similar growth in postgraduate demand for master's courses.

India and Nigeria fuelled international demand for higher education in Northern Ireland. Full-time entrants from India increased from 95 in 2017 to 1,650 in 2021. Similarly, newly enrolled students from Nigeria increased from 40 to 1,360 over the five-year period.

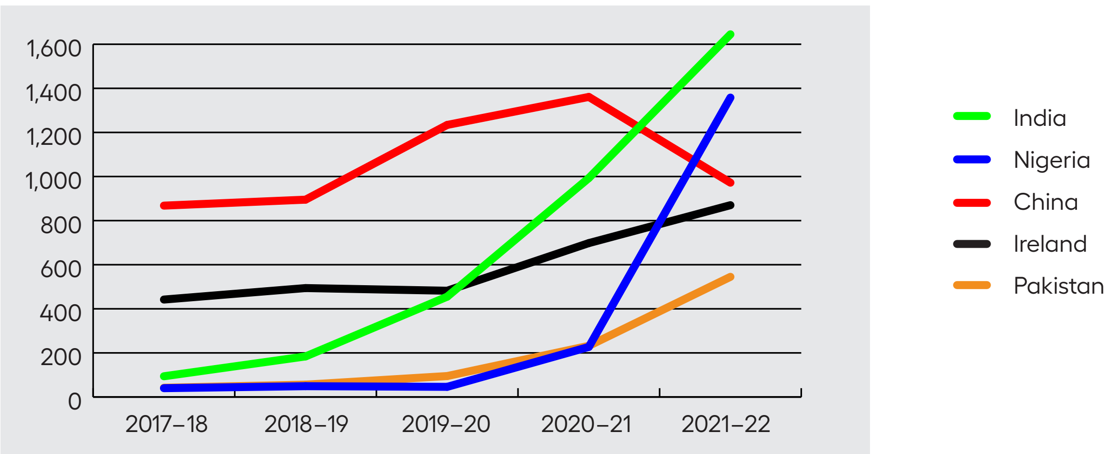
Figure 13: Top five subjects most popular with international PhD entrants



Source: Student Record (excluding alternative providers) 2017–18 to 2021–22; full-time international entrants.

Note: Figure 13 shows the past three years only, since a new subject coding system – the Higher Education Classification of Subjects – was implemented from 2019–20[13].

Figure 14: The top five sending countries for full-time international full-time entrants to HE in Northern Ireland



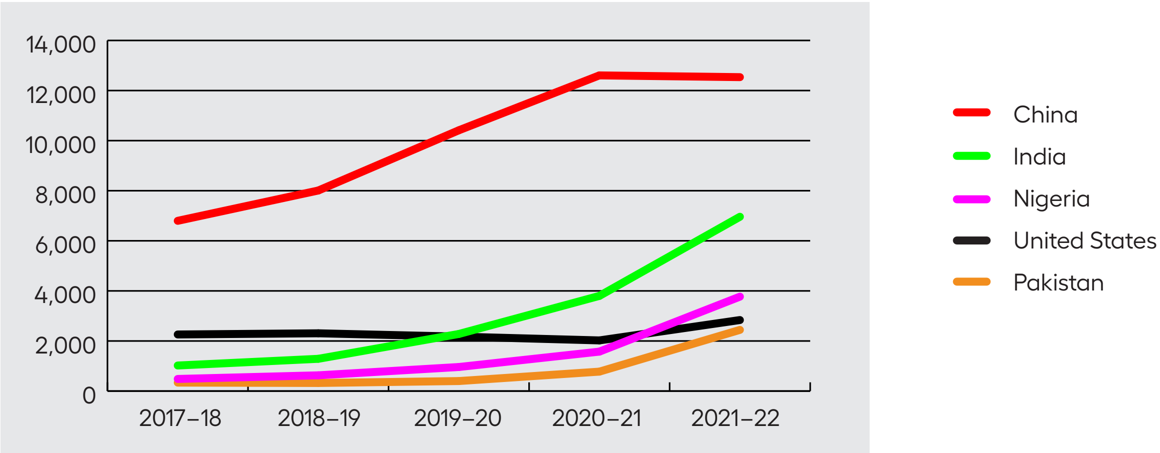
Source: Student Record (excluding alternative providers) 2017–18 to 2021–22; full-time international entrants.

[13] For details, see https://www.hesa.ac.uk/support/documentation/hecos.

Compared with Northern Ireland and Wales, the impact of EU declines in Scotland was greater. The proportion of EU full-time entrants dropped from 22 per cent in 2020 to 9 per cent in 2021. China and India were the two main sending countries, collectively accounting for almost half of the international entrants (48 per cent). China continues to be the main source for international students in Scotland.

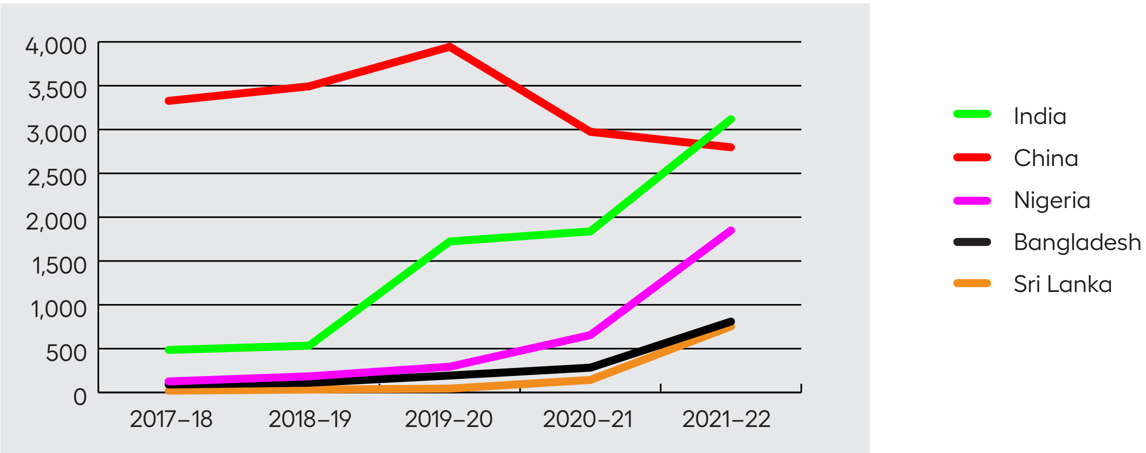
In Wales, most growth in international enrolments was attributed to South Asia and Nigeria over the past year. India overtook China to become the top study country of origin for international students in 2020. Higher education demand from China dropped by 29 per cent compared with its peak in 2019.

Figure 15: The top five sending countries for full-time international entrants to HE in Scotland



Source: Student Record (excluding alternative providers) 2017–18 to 2021–22; full-time international entrants.

Figure 16: The top five sending countries for full-time international entrants to HE in Wales



Source: Student Record (excluding alternative providers) 2017–18 to 2021–22; full-time international entrants.

The UK regions also play a significant role in hosting international students, communicating their value locally and ensuring they have good student experience. One example is the International Education Strategy for London, launched by London Higher in 2022. This communicates a strong signal of commitment to international students.[14]

[14] https://londonhigher.ac.uk/resource/international-education-strategy-for-london/.

4.
Data on the value of UK education exports

A main ambition of the International Education Strategy is to increase the value of education exports to £35 billion per year by 2030. The UK does not, however, have an effective system to capture education exports.

An analysis by London Economics for a jointly published report by the Higher Education Policy Institute, Universities UK International and Kaplan International Pathways found that the 2021–22 cohort of first year non-UK students' net contribution to the UK economy was £37.4 billion over the period of their studies[15]. This analysis updated previous estimates and reflects the 40 per cent increase in the international student population since 2018, which respectively resulted in 33 per cent increase in their economic impact (in real terms) from 28.2 billion in 2018.

While there is good data collection on student statistics, based on visa data and HESA returns, the international student contribution to the economy remains broadly invisible to the taxpayer. It also makes it extremely difficult to establish a clear narrative about the significant economic benefits that they bring to the UK. One danger is that this may lead to conflicting, rather than coherent, approaches to international students as economic contributors and as migrants.

At present, education services are reported both as:

- Education-related travel exports, which include students' tuition fees and other expenses incurred in the UK.
- Non-travel-related education services exports include the UK transnational education provision overseas – through the means of online and distance education or through locally delivered courses (international branch campus, forms of teaching provision delivered in partnership with local higher education institutions or independently).

There are ongoing improvements to education-related travel exports aiming to improve the accuracy of the current estimates[16]. However, the most constructive approach would be to consolidate all education exports irrespective of whether they are related to travel or not.

Other countries, like Australia, have systematic data capture of their international students' contributions to the home economy[17].

[15] Higher Education Policy Institute, Universities UK International and Kaplan International Pathways (2023), The benefits and costs of international higher education students to the UK economy. Report by London Economics. https://www.hepi.ac.uk/wp-content/uploads/2023/05/Full-Report-Benefits-and-costs-of-international-students.pdf

[16] See Pink Book 2023 planned improvements https://www.ons.gov.uk/businessindustryandtrade/internationaltrade/articles/methodologicalimprovementstoukeducationservicesexports/2022-11-02#pink-book-2023-planned-improvements

[17] The Australian Bureau of Statistics captures international students' exports, and the data is regularly reported to the Australian government. A huge advantage this approach offers is an independent account of international students' contribution to the economy. Alongside any declines in the international student numbers, there is an accurate account of the economic impact of these declines on the economy – see https://www.afr.com/work-and-careers/education/data-shows-crash-in-export-income-from-overseas-students-20220203-p59tk0.

5.
Targeted growth for resilience: Recommendations for the International Higher Education Commission

The analytical findings raise a number of important questions in the following areas. These require further analysis and debate.

5.1 Market diversification: Countries and pathways

What are the current levels of reliance on one or two markets at the undergraduate, master's and research levels? How has this reliance changed over the past year?

How can we ensure that universities do not become overdependent on specific countries for recruitment, and what does a sustainable recruitment strategy look like? What does a balanced recruitment portfolio look like, and how should the effectiveness and returns of recruitment channels and pathways be evaluated?

Research shows that only 9 per cent of international students in the UK used the services from education agents in the early 2000s[18]. Estimates from recent research shows that between 45 and 55 per cent of international students used education agents[19]. Those are complemented by recruitment routes such as transnational education and recognition agreements, alongside pathways provision and partnerships. The complexities of the international student recruitment landscape are continuously evolving,[20] but there is no corresponding evolution in the policy framework.

5.2 Priority countries for the UK international education strategy

Which countries should the UK prioritise for its global education engagement for the purpose of international student recruitment, research collaboration, transnational education partnerships and other forms of engagement? Should a future UK international strategy focus on the contribution of the UK HE sector to the global sustainable development agenda?

5.3 Graduate outcomes for international students and their experience

The international student population in the UK has increased significantly over the past two to three years. However, we know little about whether this expansion impacts international students' continuation, satisfaction and graduate outcomes. Many of the measures are likely to have been affected by the pandemic. These areas require continuous monitoring.

The latest HESA data shows an early indication of a deterioration in international students' continuation rates. While continuation rates are key performance indicators for UK HE, they only focus on home students[21].

Last year's increases in non-continuation are likely to have been pandemic-related. However, further analysis is required to establish patterns across major domiciles and subjects of study.

[18] MORI (2003, p.24), Education UK: The Prime Minister's Initiative. Executive Summary: The views of international students and UK educational institutions. Research study conducted for British Council.

[19] https://monitor.icef.com/2021/11/education-agents-poised-to-play-a-greater-role-in-international-student-recruitment/

[20] British Council (2023, forthcoming), Pathways and recruitment channels to undergraduate study in the UK: Analysis of the evolving international student recruitment landscape.

[21] https://www.hesa.ac.uk/data-and-analysis/performance-indicators.

In recent years, the profile of the international student body has changed significantly. This has an impact on the overall continuation rates and degree outcomes, as shown in Table 3. Further research needs to identify the type and levels of support needed by students from different countries.

Students from China stand out, with particularly low non-continuation. However, rising geopolitical tensions have exerted pressure on the recruitment of Chinese students.

To illustrate the difference they make in the overall non-EU student data, Table 4 singles out their non-continuation rates.

Work undertaken over two decades by the UK Council for International Student Affairs, the British Council and HE sector bodies has consistently pointed to the vital importance of student experience. Recent research for the International Higher Education Commission highlights the importance of welfare, social and health issues. That survey needs to be significantly expanded. to make it possible to track the importance of these issues. The student experience is a vital element of the UK's competitive global proposition.

Table 3: Non-continuation rates from 2017–18 to 2020–21

Students' domicile	2017–18	2018–19	2019–20	2020–21
UK	6.8%	7.7%	6.6%	7.7%
EU	5.1%	6.5%	6.5%	8.2%
Non-EU	3.0%	3.9%	4.9%	6.4%

Source: Student Record (excluding alternative providers) 2017–18 to 2021–22; full-time first-degree entrants.

Table 4: Non-continuation rates for Chinese students

Students' domicile	2017–18	2018–19	2019–20	2020–21
China	2.0%	2.7% 2.1%	2.9%	7.7%
Non-EU (excluding China)	3.5%	4.5%	6.4%	8.3%

Source: Student Record (excluding alternative providers) 2017–18 to 2021–22; full-time first-degree entrants.

5.4 Staying competitive: Drawing on the distinctive higher education offer of the UK, its devolved administrations and regions to attract students

How can the UK continue to be competitive in its international offer to students, recognising that other countries such as Canada, Australia and the USA will also seek to attract students? Over the last two decades, there has been considerable work on student decision-making factors across different country markets, with the aim of ensuring that the UK's brand communicates messages directly relevant to student demand. The pandemic has reshaped Generation Z's thinking, their priorities and their expectations. We now need to update our understanding of these factors and review the effectiveness of the brand. To stay competitive, the UK must have an engaging and competitive proposition and articulate this clearly and coherently in global markets. This needs to include attractive propositions for devolved administrations and UK regions.

5.5 Sustainable global partnerships

UK universities' engagement with the global sustainability agenda should be an increasingly important part of the UK's international proposition. Research points to students' increasing concern globally for sustainability and green agendas and for contribution to the public good. One way in which the UK currently addresses the UN Sustainable Development Goals is through transnational education. The UK government is committed to supporting this. However, for that support to translate into action in the most effective way, there needs to be a greater exploration of TNE engagement and its impact on countries and communities.

Appendix
Policy timeline[22]

Date	Policy details
1981	Introduction of tuition fees for international students. While in the long term this created commercial incentives to recruit international students, in the short term, it created a backlash from Commonwealth countries.
1983	Chevening, an award funded by the Foreign, Commonwealth and Development Office and partner organisations. Since 1983, over 50,000 Commonwealth scholars and professionals have studied Chevening Scholarships and Chevening Fellowships in the UK.
1984	British Council establishes the Education Counselling Service to support universities' overseas recruitment activities. 72 education institutions subscribe.
1992	HE expansion (from 52 higher education institutions) under 1992 Further and Higher Education Act. The number of players in international education is expanding.
1994	Introduction of student number controls for home students. This policy further incentivises international recruitment by growth-minded institutions seeking to increase their student numbers.
1999	National marketing campaign under the Prime Minister Initiative aimed at international student recruitment. Strong focus on China.
2006	Second PMI with the following strands: ▫ UK positioning and diversification of markets to reduce dependence on a small number of countries. ▫ Ensuring the quality of the student experience. ▫ Developing strategic partnerships.
2005	The Fresh Talent initiative in Scotland creates considerable interest among Indian students in Scottish higher education institutions.
2006	Post-study work opportunities extended to the rest of the UK devolved nations.
2006	Launch of the UK-India Education and Research Initiative.
2008	Research Councils UK (RCUK, now UK Research and Innovation) opens an office in Delhi. An impact evaluation of the RCUK-India relationship reports significant growth of the bilateral portfolio from £1 million to over £300 million in co-funded research and innovation programmes comprising over 200 individual projects, with over 175 UK and Indian research institutions and more than 100 industry partners[23]. Other RCUK offices were opened in Beijing and Washington.
2011	A Home Office review reveals "widespread abuse" of the student visa system, which results in a significant tightening of the system. The end of the PSW route is announced, and education institutions recruiting students are required to hold "highly trusted sponsor" status[24].

[22] Adapted from Johnson, J., et al., (2022), Natural partners Building a comprehensive UK-India knowledge partnership, https://www.kcl.ac.uk/policy-institute/assets/natural-partners.pdf.

[23] Brandenburg, U., Ilieva, J. and J. Taylor (2018), Together for Impact: A decade of UK-India partnership (2018), report for UK Research and Innovation; https://www.gov.uk/government/news/together-for-impact-uk-research-and-innovation-launched-in-india.

[24] https://www.gov.uk/government/news/major-changes-to-student-visa-system.

Date	Policy details
2012	Highly trusted sponsors' refusal rate is set at 20%.
2012	Between April 2012 and March 2020, UKRI funded over 3,000 projects involving researchers in the UK and Canada or the US, with a value of over £3 billion. Those are managed by the UKRI North America team based in the British Embassy in Washington DC and the British High Commission in Ottawa[25].
2013	New strategy, "International Education: Global Growth and Prosperity", published[26].
2014	Highly trusted sponsors' refusal rate set at 10%.
2014	Newton Fund brings together UK and overseas researchers to cooperate on global challenges. Capacity building is a critical strand of the partnership and includes: ▫ Newton International Fellowships – support for early-stage postdoctoral researchers for two years at a UK research institution ▫ PhD placements – an opportunity for UK and overseas PhD scholars to spend a period of their study (two to six months) in a higher education institution in the other countr[27].
2019	The UK government announces the new International Education Strategy: Global Potential, Global Growth.
2019	Cross-party support for the reintroduction of the two-year post-study work visa for international students[28]. In September 2019, the government announced the reintroduction of a two-year post-study work visa for international students[29]. The policy change is implemented in 2021.
2019	For the first time, the UK slips to third place, behind the USA and Australia, as a study destination for international students[30].
2021	The International Education Strategy is updated[31].
2021	Enhanced UK-India trade partnerships, including cooperation in educational services and concluding the work on the recognition of UK higher education qualifications.
2022	Special Young Professionals scheme to allow young Indian and British professionals to work and live in each other's country for two years[32].
2011	International Education Strategy – 2022 Update[33].

[25] https://www.ukri.org/what-we-offer/international-funding/our-international-offices/ukri-north-america/#contents-list.

[26] Department for Business, Innovation and Skills (2013), International Education: Global Growth and Prosperity https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/340600/bis-13-1081-international-education-global-growth-and-prosperity-revised.pdf.

[27] https://www.newton-gcrf.org/impact/where-we-work/india/.

[28] https://www.timeshighereducation.com/news/cross-party-backing-uk-post-study-work-visa-amendment.

[29] https://www.gov.uk/government/news/uk-announces-2-year-post-study-work-visa-for-international-students.

[30] https://www.oecd-ilibrary.org/education/education-at-a-glance-2020_69096873-en.

[31] https://www.gov.uk/government/publications/international-education-strategy-global-potential-global-growth.

[32] https://www.gov.uk/government/news/uk-india-agree-partnership-to-boost-work-visas-for-indian-nationals.

[33] https://www.gov.uk/government/publications/international-education-strategy-2022-update.

Commissioners

Professor Shitij Kapur

President and Principal, Kings College London

Professor Shitij Kapur is the President & Principal of King's College London. He returned to lead King's in June 2021, following more than four years at the University of Melbourne, where he was Dean and Assistant Vice Chancellor (Health) for the Faculty of Medicine, Dentistry and Health Sciences and interim Deputy Vice Chancellor (International). Professor Kapur is recognised worldwide for his own research on understanding psychosis and antipsychotic treatment – with over 300 papers, numerous presentations and an H-index of over a hundred.

Professor Andrea Nolan

Convener of the International Committee of Universities Scotland and Principal & Vice Chancellor, Edinburgh Napier University

Professor Andrea Nolan became the Principal and Vice-Chancellor of Edinburgh Napier University in July 2013. Andrea has contributed to the development of policy and strategy in Higher Education through work on a range of committees including for example the Scottish Funding Council Research and Knowledge Exchange committee, and the Scottish Science Advisory Committee and convenorship of the Scottish Higher Education Enhancement Committee.

Lucy Stonehill

CEO, BridgeU

A true third culture kid, Lucy grew up between the US and the UK. She graduated Magna Cum Laude from Dartmouth College in 2010 where she studied literature and psychology. In 2015, Lucy founded BridgeU, the leading university and careers guidance provider connecting international schools and students in 140+ countries to higher education institutions globally. BridgeU mission is to connect global talent with the best higher education opportunities worldwide and to help schools and universities alike to harness the advantages of digital solutions to drive international student mobility. Over the course of her career, Lucy has raised $50m+ in funding from institutional and strategic investors and in 2020, BridgeU was acquired by Kaplan, one of the world's largest, most diverse education providers. Lucy has been labelled an 'Entrepreneur Role Model' by the European Commission, and won Tech Entrepreneur of the Year at a ceremony hosted at the House of Commons celebrating leading UK female tech entrepreneurs. Early in her career, Lucy was named to the Forbes '30 under 30" list and in 2021, Lucy was named one of the top 100 Dartmouth Alumni having a profound impact on various areas of technology.

Sanam Arora

Founder and Chair, National Indian Students and Alumni Union

Sanam Arora is the founder and chairperson of the National Indian Students and Alumni Union UK (NISAU). She is also the chief architect of the India UK Achievers Honours and a consistent voice championing for international students in the UK. Professionally, she is a senior strategist to the Investment Management industry, providing transformation advice to global asset & wealth management houses. For her work towards the welfare of young Indians abroad and promoting the India-UK educational relationship, Sanam has won numerous awards, including most recently the prestigious PIEoneer award for Outstanding Contribution to the Industry and holds the Honorary Studentship of the London School of Economics SU. Sanam is a regular contributor on education and UK-India relations in the press and has spoken at various prestigious forums including the Indian Government's flagship Pravasi Bharatiya Divas, British Parliament, Westminster Forum and the University of Oxford. She tweets at @arora_sanam.

Lord Jo Johnson

Former Minister of State for Universities, Science, Research and Innovation (2015–2018)

Jo Johnson MP was Minister of State attending Cabinet at the Department for Business, Energy and Industrial Strategy and Department for Education from 24 July to 5 September 2019. Jo was Minister of State at the Department for Transport and Minister for London from 9 January 2018 to 9 November 2018. He was elected Conservative MP for Orpington in May 2010, re-elected in May 2015 and July 2017.

Commissioners

Lord David Willetts

Former Minister of State for Universities, Science, Research and Innovation (2010–2014)

The Rt Hon. Lord David Willetts is the President of the Foundation's Advisory Council and Intergenerational Centre, and chaired the Foundation's recent Intergenerational Commission. He served as the Member of Parliament for Havant (1992–2015), as Minister for Universities and Science (2010–2014) and previously worked at HM Treasury and the No. 10 Policy Unit. Lord Willetts is a visiting Professor at King's College London, Governor of the Ditchley Foundation, Chair of the British Science Association and a member of the Council of the Institute for Fiscal Studies. He is also an Honorary Fellow of Nuffield College, Oxford. Lord Willetts has written widely on economic and social policy. His book 'The Pinch', which focused on intergenerational equity, was published in 2010, and he recently published 'A University Education'.

James Purnell

Former Secretary of State for Culture and VC, University of the Arts, London

James Purnell joined UAL on 1 March 2021 to become President and Vice-Chancellor. James came to UAL from the BBC where he was the Director of Radio & Education. In 1997, he left the BBC to be Special Adviser on the Knowledge Economy, including the arts, internet and broadcasting policy, to Tony Blair after he became Prime Minister. He was elected Member of Parliament for Stalybridge and Hyde, before becoming Secretary of State for Culture and then for Work and Pensions. In 2009, as Secretary of State for Culture, James commissioned the McMaster Review, which reset the debate around access and excellence in culture. James has also served on the boards of the National Theatre, the Young Vic and the BFI.

Diana Beech

CEO, London Higher

As CEO of London Higher, Diana is responsible for leading the organisation's aims and objectives, being a voice for London's universities and higher education colleges. Diana has previously worked in government as a policy adviser to three Ministers of State for Universities, Science, Research and Innovation. Prior to this she was the first Director of Policy and Advocacy at the Higher Education Policy Institute (HEPI).

Anne Marie Graham

CEO, UKCISA

Anne Marie joined UKCISA in 2019 from the Association of Commonwealth Universities, where she was Director of Chevening, the Foreign & Commonwealth Office's flagship global scholarship scheme. Prior to that, Anne Marie led on a range of educational programmes and projects promoting international mobility and intercultural exchange at Universities UK International. At the National Centre for Languages, she directed the development of new national occupational standards in translation and interpreting and led on the National Networks for Translation and Interpreting for the Routes into Languages programme. She continues to support the professional standards in the language professions and is a member of the Qualifications and Standards Committee of the National Register of Public Service Interpreters.

Nic Beech

Executive and Board Member University Alliance and Chair of UK Standing Committee for Quality Assessment, Vice Chancellor Middlesex University

Nic Beech is Vice-Chancellor of Middlesex University having previously been a Vice-Principal of the University of St Andrews and Provost of the University of Dundee. He is President of the British Academy of Management and hon. Treasurer of the Academy of Social Sciences. His research focuses on identity, diversity, change leadership and learning and he has worked extensively with industry, particularly creative industries and health. Nic's eight books include Managing Creativity (Cambridge, 2010), Organising Music (Cambridge, 2015), Managing Change (Cambridge, 2017) and Impact in Business and Management Research. (Routledge, 2021). Nic has held visiting chairs in the UK, the Netherlands and Australia and holds fellowships or companionships of the British Academy of Management, the Academy of Social Sciences, the Royal Society of Arts, the Chartered Management Institute, the Chartered Institute of Personnel and Development and the Australia and New Zealand Academy of Management.

Shearer West

International lead for the Russell Group Universities & VC University of Nottingham

Professor Shearer West is the seventh Vice-Chancellor and President of the University of Nottingham, taking up office on 2 October 2017. Professor West is a Professor of Art History and has held a number of significant leadership roles in universities and higher education. She obtained her BA degree in Art History and English at the College of William and Mary in Virginia, and her PhD in Art History at St. Andrews.

Karen Bryan

Chair of Yorkshire Universities & VC York St John University

Professor Karen Bryan joined York St John University as Vice Chancellor in April 2020. She was previously Deputy Vice Chancellor (Academic) at the University of Greenwich. Prior to that she was Pro Vice Chancellor for Regional Engagement and Dean of the Faculty of Health and Wellbeing at Sheffield Hallam University. Professor Bryan qualified as a speech and language therapist from the University of Newcastle upon Tyne and also gained her PhD there. She is involved in the development of Registered Intermediaries working for the Ministry of Justice, and was previously a member of the Health Professions Council.Professor Bryan is a Visiting Professor in the Department of Neuropsychology at the University of Warsaw, and is a Fellow of the Royal College of Speech and Language Therapists. She was awarded an OBE for services to higher education in 2018.

Wendy Alexander

VP International, University of Dundee, British Council Trustee, Scottish Government Higher Education Trade & Investment Envoy, former Scottish Higher Education Minister

Wendy Alexander is Vice Principal, International at the University of Dundee and Scottish Government International Trade and Investment Envoy for Higher Education. She is a Trustee of the British Council and a member of UK Government's Education Sector Advisory Group supporting the delivery of the UK International Education Strategy. She is Chair of the Global Advisory Board for Times Higher Education' Student, and a Venture Partner at Emerge Education, the leading UK seed fund and network for EdTech. She is Vice Chair of Advisory Board of UK National Committee on China, a Fellow of the Royal Society of Edinburgh and a Patron Social Investment Scotland. As a Member of the Scottish Parliament (1999–2011), she served in the first three Scottish Cabinets, including as Minister for Further and Higher Education, holding the Enterprise and Lifelong Learning, Transport and Communities portfolios. She also served as Scottish Labour Leader in the Scottish Parliament. She holds honorary degrees from University of Strathclyde and University of West of Scotland.

Katie Normington

Midlands Enterprise Universities Board Member and VC, De Montfort University

Professor Katie Normington joined De Montfort University as Vice-Chancellor in 2021 from Royal Holloway, University of London, where she was Deputy Principal (Academic). Following her arrival at DMU, Katie launched a university-wide consultation to co-create a new strategy to ensure the university remains relevant and continues to meet people's real needs in the decades ahead. Katie has also successfully extended the university's term as a United Nations Academic Impact (UNAI) global hub for Sustainable Development Goals (SDGs), aimed at transforming lives around the world. Katie is a member of the GREAT Private Council.

IHEC Terms of reference

- What should a future student number target be set at, and how can this most effectively be integrated with the broader purposes of UK higher education and the policy and economic objectives of the UK?
- What are the future target countries that the UK should be working with to establish or expand future international student pathways, and how do these link to international research collaboration and knowledge transfer objectives of individual institutions and the sector more broadly?
- How can we make sure that universities do not become overdependent on specific countries, subjects, or study levels; what does a sustainable recruitment strategy look like?
- How do we manage the conflation of overseas student visas and the wider migration debate?
- How should a new International Strategy engage with the growing importance of employability and develop a coherent approach that links to the UK Industrial Strategy?
- How should local regions develop tailored local international education strategies and plans to reflect local strengths and priorities?
- How can the UK continue to be competitive in its international offer to students, recognising other countries such as Canada, Australia and the US will also seek to attract students?
- How can we help international students to fully integrate on campus by taking an inclusive approach to international education, and the same time realise benefits for domestic students?
- How can we prioritise student welfare and success so that international students have the best possible experience of life in the UK?
- How can we make sure that student numbers are matched to accommodation and support services?
- How can we most effectively communicate the agreed objectives of the new International Higher Education strategy to address national and international challenges arising from the current approach?
- What are the implications of a new international higher education strategy for FE and related sectors?

For more information please visit:
www.ihecommission.uk

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