International Higher Education Commission

Supported by Oxford International Education Group

Evidence versus Emotion:

The facts about international student recruitment and what they mean

Oxford International Education Group

Education Insight

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Introduction

The International Higher Education Commission (IHEC) is an evidence-led, apolitical, forum where experts from all the key stakeholder communities can review evidence, source new research and make recommendations without representing any specific interest group. Its central role is to focus on what is in the best interests of ensuring the UK higher education sector remains vital, vibrant and relevant, and is resourced appropriately. It seeks to help rebuild a consensus on the role of international HE in our civic society.

This report plays a crucial role in that objective by reviewing the evidence underpinning a number of commonly stated assertions employed when seeking to influence the direction of future higher education policy.

Foreword

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

Universities are central to who we are as a nation and how our society develops in the future. More people than ever are benefiting from UK higher education, improving not just their employability but also their health outcomes and quality of life through scientific and cultural programmes, the training of skilled professionals, and research and development activities that impact all aspects of our daily experience.

Given this centrality to public life, it is not surprising that we find ourselves being challenged on the sector's nature and purpose, particularly as HE has grown so substantially in recent decades.

It is arguable that the sector has proven its adaptability and ability to change, and the continued excellent performance on international measures is to be welcomed. However, whilst many might celebrate the general increase in participation, the picture is complicated. As the recently published "Equality of access and outcomes in higher education in England" – House of Commons Library report highlights, some of the sector's long standing challenges reverberate in current political discourse. See also HEPI's "The cost of participation: perceptions of higher education amongst young, white British males from areas of educational disadvantage".

Culture wars, questions about the purpose of HE and who controls institutions, and freedom of speech issues also weigh heavily on a sector that sits ambiguously between the public and private realm. We also forget at our peril that the recent marking boycott revealed increasing tensions between employers and staff and ongoing concerns about casualisation.

A recent paper "UK universities: from a Triangle of Sadness to a Brighter Future" by Professor Shitij Kapur, Vice-Chancellor of King's College London and a member of IHEC, outlined the case for a "reset" given the challenges confronting the current relatively undifferentiated higher education system, including for home undergraduate tuition fees. For all its benefits, Professor Kapur asked whether the current system is sustainable.

It is clear the sector is struggling with burgeoning expectations across all dimensions of a University's mission, including expanding compliance requirements, growing institutional differentiation, increasing politicisation and diminishing consensus. Whilst there have been a series of policy initiatives from Government, the sector has not been subject to the wholesale changes in operating context that have been forced on other parts of the public realm by an extended period of austerity. The sector has demonstrated the capacity for growth, innovation and change including the rapid move to online as part of the pandemic response, but it is not clear that it has embraced the opportunity to re-imagine and re-engineer operations during the "good times". So, it is fair that people ask questions of our efficiency and commitment to new models of operation, and whether we have embraced opportunities to do things differently during an unprecedented period of growth.

It is naive to assume that the sector will escape the questioning that is so extensively unfolding around other major elements of "public life". It is not just individuals in the HE sector that recognise the transformative power of a university education, the centrality of universities to civic society and their role in developing the critical powers of young people. Consequently the sector will be subject to scrutiny and different visions of what we should be doing.

Global engagement is something that universities have been doing for longer than many industrial sectors have existed. However, it is only to be expected that when this global vision is challenged, by new geo-politics and growing nationalism, universities should rethink their local, regional, national and international place in our society. The growing scale of universities has foreground their contribution to economic and social development – along with their impact on local communities (the new challenges range from the delivery of public services to access to affordable residential accommodation). Again, because of the significance of our sector we should not expect to remain unchallenged.

Clearly a key issue in this discourse is that the data architecture for higher education is not fit for purpose – academically, operationally or politically. It is spread across many organisations, some still part of Government, others essentially NGOs that have progressively developed paid-for services and, most recently, private companies who provide services to the sector and offer new insights about what is happening now and what is likely to happen in the near future.

Not only is this data universe distributed across multiple organisations, it primarily looks backwards not forwards – reflecting a time when universities were funded almost exclusively by Government and the core requirement was reporting how grants had been spent rather than planning for future performance in a market-led funding system. University leaders are entirely justified in describing their role as being like trying to drive a car whilst looking in the review mirror.

The role of regulators across the 4 nations of the UK has evolved over time, not as part of a great national plan, but through bolting-on additional responsibilities – including widening participation, reach out to industry, impact, overseas trade promotion, foreign direct investment, economic regeneration, Equality, diversity and inclusion, campus freedoms, quality assurance, teaching quality, KEF etc.

As noted previously, the 2019 International Education Strategy (IES) was a creature of its time and we are in a very different context – not just in terms of radically changed market dynamics, but a fundamentally changed financial context and diminishing consensus on the role of our universities and their contribution to civic society. Hence the need for an "International Higher Education Strategy 2.0" fit for the future.

In this report we focus on providing a detailed evidential basis, where relevant recording past policy changes and "system effects", in order to review a number of oft repeated assertions. We approach this not seeking to diminish or undermine views but rather to focus on what the evidence shows is actually happening. Thereby we hope to encourage a debate about how best to build on the success of the UK HE sector.

Clearly, in many cases there are interdependencies and we try to navigate between the risks of over-simplification and the dangers of losing focus when engaging with the complexity of the sector.

This report should be read in conjunction with the recent short paper by Harry Anderson of UUKI entitled "International Students and Graduates: Myths and Reality".[1]

[1] https://www.universitiesuk.ac.uk/universities-uk-international/insights-and-publications/uuki-insights/international-students-and-graduates

Assertion 1:
There are too many international students in the UK

Notwithstanding the challenges of establishing national strategies, they are important in protecting and developing the things we care about most in a world of competing priorities. In that context, the 2019 International Education Strategy (IES) was a brave effort to focus on the opportunities while recognising some of the challenges for UK HE following Brexit.

However, there was at that time, and there still is, no objective basis on which to establish how many international students the UK should be hosting. The 2019 strategy was based on earlier work from 2013 using forward projections of historic growth rates calculated by the British Council provided to BIS. The 2013 report introduced by David Willetts, a member of IHEC, had a central forecast of 600,000 students by 2020, while the 2019 strategy had a target of 600,000 by 2030 reflecting changed assumptions surrounding UK attractiveness following the withdrawal of Post Study Work (PSW). But even with the growth since 2018, international student numbers are currently only slightly higher than what was predicted in the 2013 analysis.

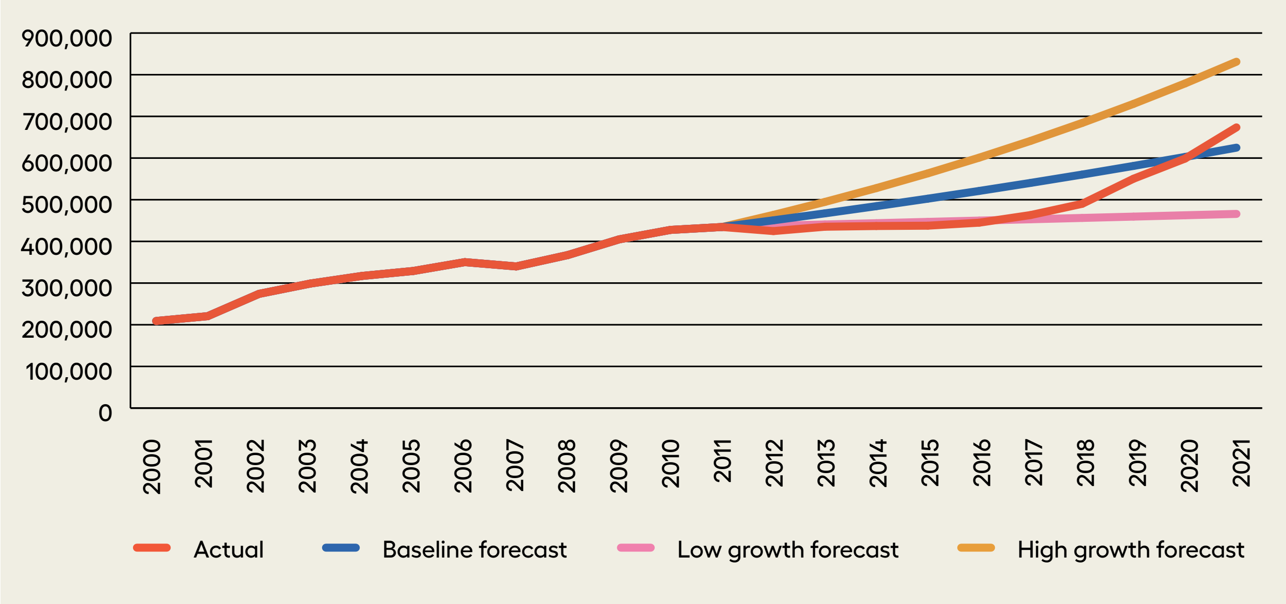
Worryingly, data from Enroly on CAS issuance, and ad hoc institutional surveys, suggest that policy measures implemented in 2023 have significantly reduced recruitment against prior years. So, we can expect the actual levels to plateau in the near term and it is increasingly likely to fall, bringing us back to or potentially underneath the levels forecast in 2013.

The BIS forecasts in 2013 were based on growth rate from the previous 3 years prior to 2011, when international students in the UK had PSW rights:

- **Baseline forecast** – 3.7 per cent growth
- **High-growth forecast** – 6.7 per cent growth
- **Low-growth forecast** – 0.07 per cent growth

International enrolment growth stalled following the PSW removal (in 2012), and followed the pattern of low growth forecast until 2018. It then accelerated following the announcement about reintroduction of PSW (in 2019[2]). The growth from 2020 to 2022 was unusually high, in response to many factors but particularly Covid effects as the UK remained "open" to students, and further significant growth in demand from emerging source nations, notably South Asia and Nigeria driven by the reintroduction of PSW (and this is reflected in the differential uptake of both dependant visas and the graduate route).

Figure 1: Actual international students vs projected growth



Source: HESA Student Record and BIS (2013)[3].

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

[3] 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.

We are then broadly at the level of overseas recruitment that was defined by the baseline forecast in 2013 and potentially about to see a significant fall or at best a plateauing. It is in this context that the assertion is made that there are "too many international students in the UK". There is no objective basis for this statement – it is based on a view that overseas students contribute to net migration, which is "too high" because it makes undue demands on "stretched" public services and "pushes out domestic students" from "top universities". The evidence for and against all of these statements is reviewed in this paper.

Further, we can conclude that the rate of growth since 2018 rather than the absolute level of recruitment has contributed to the anxiety about overseas student numbers. In that case it would seem that the desire to see international student recruitment stall or decline has been achieved. Recently published Home Office statistics for 2023 showed a 5% fall in the number of study visas issued for the year, primarily as a result of sharp declines in visas for Indian and Nigerian applicants.

This might reduce pressure on the review of Graduate Route "abuse", but that has to be judged against a background of record numbers of visas granted overall.

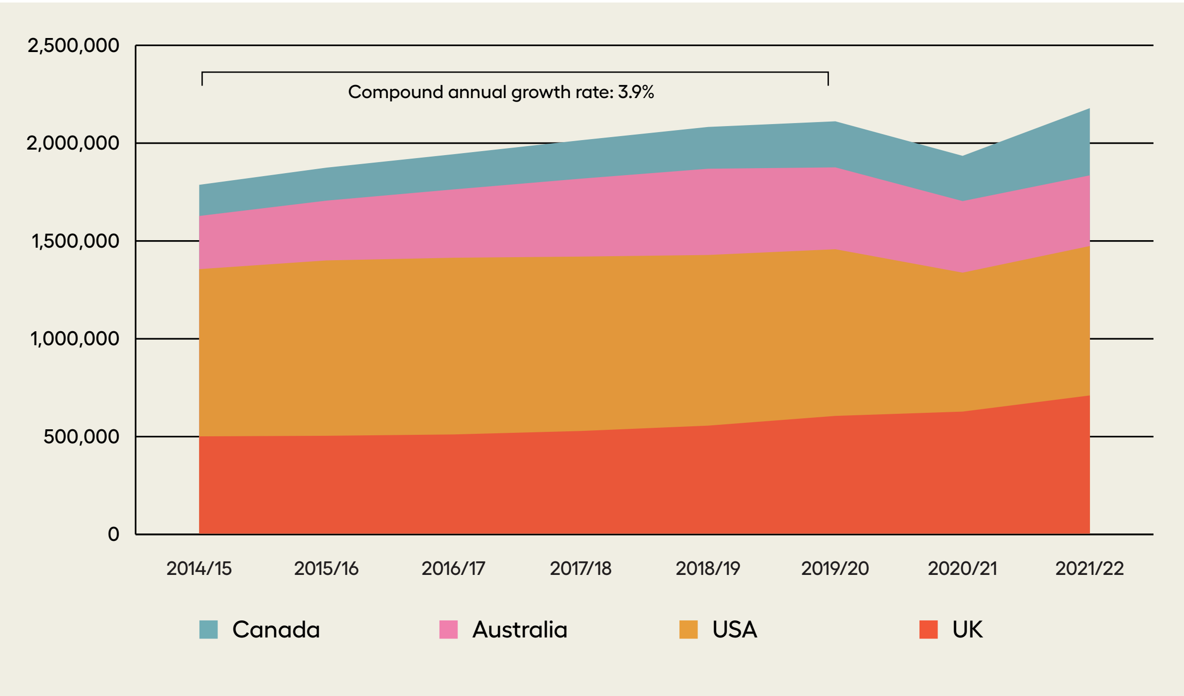
https://www.gov.uk/government/statistics/immigration-system-statistics-year-ending-december-2023/why-do-people-come-to-the-uk-to-study

However, significant lags in the reporting of higher education enrolment data will not register the declines experienced by many institutions in 2023/24 for some time and, as we discuss below, issued visas are an increasingly unreliable proxy for numbers of students who will enrol.

In defence of the Government, many set targets based on growth against historic performance or in the case of too rapid expansion, implement measures to depress demand. However, for an area so central to the success of the sector and the UK we should be establishing the appropriate level of overseas recruitment on a more informed basis.

As Figure 2 below shows, enrolment in the big 4 study destinations has been and is predicted to continue growing at 3.9%.

Figure 2: Total international enrolments in the big 4 study destinations



Source: Nous from StatCan, HEIMS, IIE Open Doors, HESA

The challenge is establishing the proportion that should, or could, come to the UK; much of the change in national performance in overseas recruitment over the recent period has been the result of swings in market share between these 4 big English-speaking destination markets. The volatility has been primarily driven by different approaches of respective governments, notably around visas and post-study work (PSW) opportunities, with government policy tinkering undermining predictive power at an institutional level.

We comment below on the benefits of, and potential basis for, policy stability. Key to that is defining our level of aspiration: Do we want to continue to be a world leading IHE player, attracting students across the full range of programmes to enhance the academic, operational and finances underpinning all our universities; or are we content to be a niche player attracting a much smaller segment of the global market – with defined limits by area, level, geography or other measures?

It is worth noting that if international students in the UK were to comprise a similar proportion of the general population to that in Australia, that would see overseas student numbers rise to nearly 1 million. Alternatively, were we to compare the numbers of students based on GDP, international student numbers hosted in the UK would still need to rise significantly to match that of Australia. Whilst a single country comparison is not an appropriate basis on which to set policy, it signals that there is a much deeper debate to be entered into on this topic.

To get to any agreed level will be another challenge – requiring a focus on managing a national portfolio – by level, subject and source geography. Earlier IHEC reports have emphasised the benefits of investing more in targeted promotion, destination marketing and enhanced messaging into international education markets to promote and shape demand. This process would be aided by the quantum change in the quality and quantity of data now available from new private sector sources.

But in some other critical areas the data quality is deteriorating and we may be making policy decisions based on fundamentally flawed assumptions. HESA provides a robust estimate of historic numbers, around 18 months after the beginning of an enrolment year so recent policy changes and current policymaking is based on issued visas and this raises serious questions.

Evidence shows that students are making multiple applications and paying for visas to study in several countries at the same time – as they seek to ensure certainty for their learning journey in the face of unpredictable changes in immigration and other policies in the major destination countries. The recently announced Migration Advisory Committee (MAC) review of the PSW route is signalling further uncertainty of the "graduate route" to international students, which means they are increasingly considering other countries where the HE post-study work policy is perceived to be more stable, alongside applying for a visa to the UK. A survey for the British Council shows that students from India are increasingly applying to study in more than one country. In addition, 18 per cent of the surveyed students enrolled on HE programmes in the UK in 2022 had applied for student visas to other countries. This point was highlighted in a recent Financial Times article, where the university leaders interviewed observed that many students who had paid their deposits did not enrol[4].

In conclusion, there is no reason to determine that the current level is the "right" level or "too many". Compared to Australia it can be argued that there is still room for growth, which may or may not be realised in the short term given the impact of the policy measures that have been introduced restricting access to the UK for dependants of overseas Master's students and the current negative messaging from the UK Government.

It does seem appropriate that the UK focuses on ensuring that the rate of growth is better managed. It is clear that there are issues around capacity within the HE system – and for the public and private sector services on which it depends. These issues, some of which are generalised and some specific to particular parts of the UK, need to be addressed. IHEC has previously recommended a greater role for regions in establishing relevant strategies that reflect the local context as the opportunities and challenges are different across the UK.

Whatever the agreed level, there clearly would be benefits in managing the portfolio – by level, subject and source country, in ways that make it more sustainable and more aligned with the wider strategic intent of the UK.

[4] https://www.ft.com/content/9f5bdf46-41ae-450e-a625-117fd19865f4

Assertion 2:
International students are abusing PSW rights as a route to employment when a Tier 4 visa should be a study route

The re-introduction of the post-study work (PSW) route has attracted significant political and media attention and it is a key area where it is crucial to establish the evidence base. The MAC's Annual Report (2023)[5] concluded that "the rise in student visa numbers is the largest single factor accounting for the rise in net migration over this period [2019-2022]". What is not generally appreciated is that the change in mix as a result of the higher number of visas is largely due to the growth in demand for Master's programmes – undergraduate students generally stay in the UK for at least three years on one visa, whereas the visas for one year Masters students, need to replenished annually. So the switch from UG to PG students will see three times as many visas issued for any given number of students enrolled per year over any given period. This growth in visas as a result of the change in mix was compounded by the fact that these Master's students were at the time able to bring dependants.

Another assertion that has gained some credence is that the UK's PSW route has encouraged non-genuine students to seek university places so that they can switch to working in the UK. The opportunity to switch routes whilst studying has been closed, but it has left the concern that overseas students complete a master's and then move to the graduate route and remain in the country thereafter. The conditions attached to the PSW route are stringent. It is only open to students who have successfully completed their HE course of study. As such, students who have dropped out do not qualify to access post-study work. The route is deliberately only aimed at graduates.

We need to remember that a key driver of the return of PSW in 2021 was the UK slipping into third place after Australia (and the United States) amongst the big 4 English-speaking destinations – the re-introduction of PSW was a deliberate policy decision to increase the interest in the UK as a HE study destination.

There is a meaningful debate to be had about whether the new flows to all major destination nations were driven both by a desire to study and the opportunity to earn post study work rights and, for some, the potential seek a new life in their destination nation. Anxieties around the post Covid pace of growth in international student numbers has led to policy tightening in UK, Australia and Canada. In the UK, as well as a ban on visa switching whilst studying, the most decisive step was to restrict dependant visas to research degree candidates. The impact of this tightening is amplifying a slow-down in international demand for UK HE as key markets like Australia bounced back later following the end of the pandemic.

It is clear the UK is undergoing a correction in 2023/24 and there is evidence that this is going to continue in 2024/25 given data from institutional surveys and from private providers that offer services to institutions. There is potential for this to continue even further into 2025/26 and beyond given the likely increase in the skilled worker salary threshold and ongoing anxiety about the future of the graduate route. The UK's medium term performance is likely to be dependent on PSW outlook and how it compares to the other major English speaking destinations. Taking a long-term view of the international mobility flows to the UK, enrolment growth can be expected to stabilise at comparable growth trajectories to the other major destinations, but if PSW in the UK were significantly restricted or discontinued our relative share would decline.

As part of any future international education strategy, we need to consider the contribution students make to the workforce whilst they are studying and/or after they have graduated as part of the Graduate Route, or when they move onto other visa routes, noting that the majority return home or to other nations to work in skilled occupations. What often gets lost in discussion of net migration is that when students return home they are recorded as emigrants – so if total overseas students numbers are not changing then student flows make no contribution to net migration (although a changing pattern of switching to other routes by the main applicant or dependant could have a material impact on net migration numbers). The challenge is that the growth in master's students who brought large numbers of dependants has not yet "worked through", in part because many intend to take advantage of the graduate route – so they have not yet reached the point where, under the agreed framework, they would be expected to leave. This is an entirely predictable outcome of how the agreed policy framework was meant to work – it is not abuse of the system.

[5] https://www.gov.uk/government/publications/migration-advisory-committee-annual-report-2023/migration-advisory-committee-mac-annual-report-2023-accessible

At the time of writing this report, the basis of the MAC review of 'abuses' of the Graduate Route had not been publicly announced. As UUK have noted, it is hard to identify abuse beyond overstaying, since the Graduate Route did not set parameters for success in terms of the nature of employment for those participating on the route. This is something that may now be done retrospectively.

Jo Johnson, a member of IHEC, in his recent FT article[6], suggests establishing a system that reflects the fact that overseas students, whether in the net migration targets or not, are temporary migrants when studying. When students move into work, through better policies and systems, depending on the desired outcome, we can better manage students' contribution to the workforce immediately post-graduation and longer term. This notion was promoted in the MAC Report (2018)[7] on the impact of international students, which reads, "What is unusual about the UK is not how it calculates net migration, but the fact that net migration is the measure of migration that politicians focus on. If there is a desire to bring the UK approach to migration targets in line with other countries, it would not involve dropping students from the IPS figures but rather using a different data source, such as grants of settlement, to develop political or operational targets". This would appear to be a much more sensible approach which would adopt a long-term view on the impact of immigration in contrast to the development of policies on the back quarterly statistical releases of immigration statistics.

Assertion 3:
Universities are recruiting International students simply to plug funding gaps and this is reducing the places available for home students

Given that the recent growth in overseas students has been overwhelmingly in post-graduate taught programmes where, as we detail below, the level of overseas demand is an important part of maintaining the viability of programmes in the face of declining enrolments from UK students, we explore here the basis on which displacement might take place.

Figure 3 shows an analysis of the proportion of domestic and international entrants to first-degree programmes in the UK. It shows the effect of different higher education policies on the proportions of students in either group. This includes a rise in tuition fee and, before that, number controls for domestic students as well as visa changes for international students.

It should be noted that international students have higher continuation and completion rates than home students, which may impact the overall proportions of students. The analysis focuses solely on the full-time entrants to remove any impacts on the overall proportions of domestic and international students.

The analysis shows:

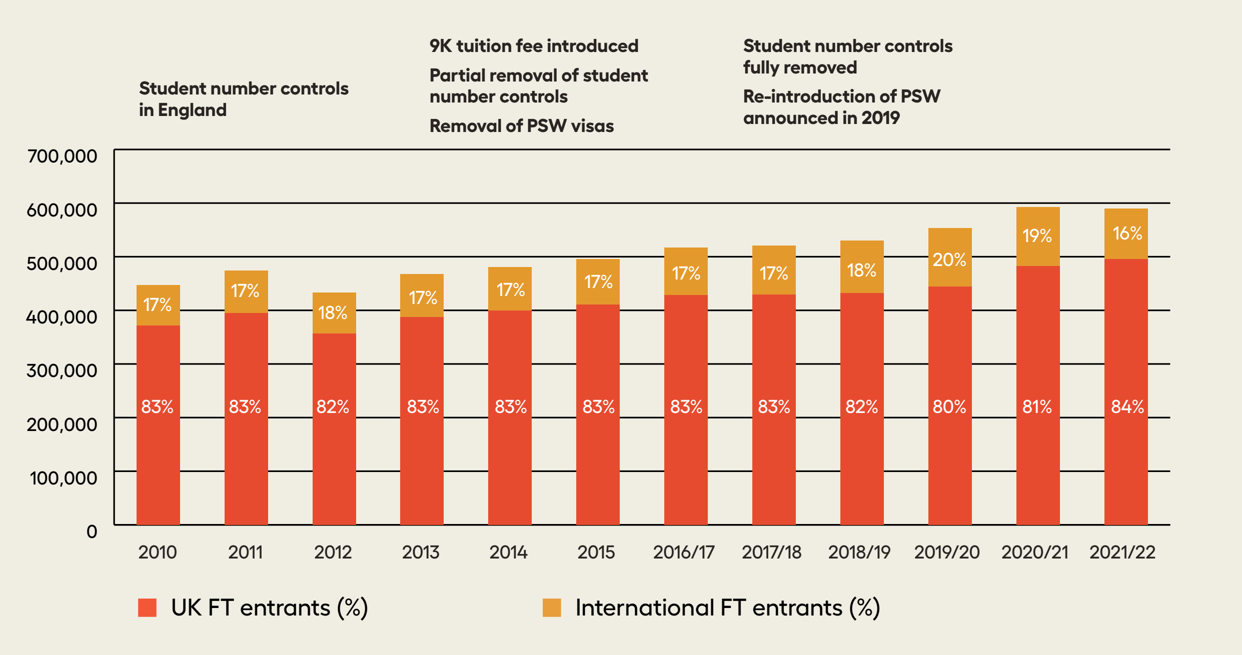
- Over the period 2010 to 2021/22, the proportion of home full-time home entrants remained comparatively stable at ~83 per cent
- Student number controls meant limited scope for growth in the domestic student population until 2012
- The introduction of higher tuition fees, at £9,000, resulted in a temporary reduction in domestic students in 2012
- International student numbers dipped in response to the removal of the post-study work visas in the same year; however, their decline was not as pronounced as that of domestic students
- The proportion of home entrants returned from 82 per cent to 83 per cent in the following year

[6] Johnson, J (2024), How to fix the internationalstudent debacle. Financial Times. https://www.ft.com/content/c2e67ce8-371a-4e4d-9841-615062c0267a

[7] Migration Advisory Committee (2018, p.47), Impact of international students in the UK. https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/739089/Impact_intl_students_report_published_v1.1.pdf#page=53

- The proportions of international full-time entrants to first-degree programmes peaked in 2019/20 in response to the announcement on the reintroduction of the post-study work route which mainly affected non-EU students. Their proportion reached its highest level at 20 per cent. The number of EU entrants increased significantly in 2020, due to the imminent end of the transition period, after which they were no longer classed as home students (and had to pay higher international tuition fees and were required to obtain student visas) keeping the level of international students above its historic level
- The latest available data for 2021/22 shows the lowest recorded levels of international entrants on first-degree programmes – at 16 per cent – and respectively, the highest proportion of home entrants at 84 per cent

Figure 3: Proportions of UK and International full-time entrants to first degree programmes

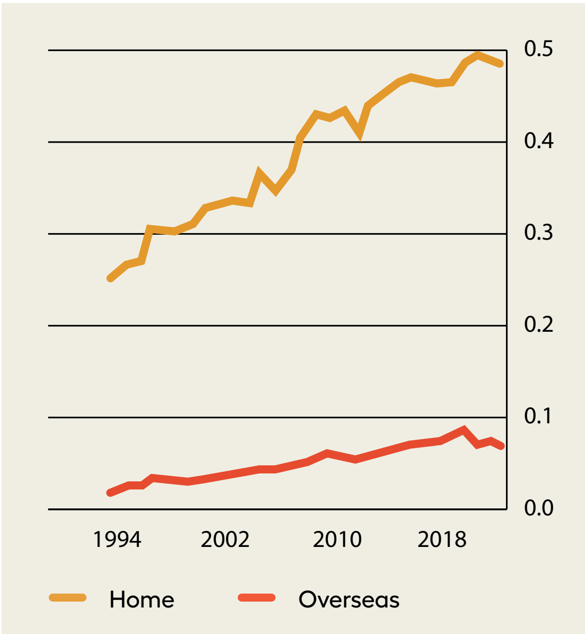


Source: Analysis of HESA standard registration population 2010–2021

If we look at UCAS data there is also no evidence that UK students are being denied access to UK universities because of the growth of overseas students. There has rather been a plateauing of acceptances for home and overseas students following the significant growth in enrolment immediately post-Covid.

It is of important to look at this issue from all relevant perspectives – for example, there might be impacts for particular subjects. However, there is no evidence of crowding out when looked at by subject, Economics is one of the areas with the highest concentration of international students on undergraduate (UG) courses – it is a highly competitive one. Still, there is no evidence that this is a result of displacement. European languages is another area popular with international students but, as we reported in an earlier IHEC report, there is increasing concern at declining levels of interest by domestic students in foreign languages not international students pushing out domestic ones.

Figure 4: Acceptances (Millions)



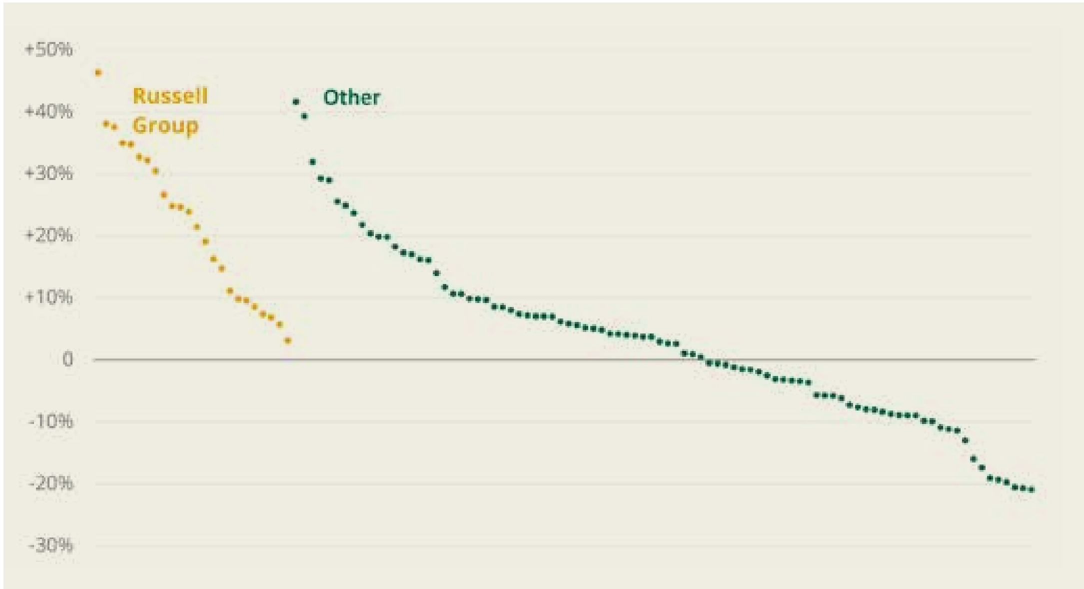
Source: End of cycle data resources 2023 (and earlier), UCAS

A third dimension is entry tariff; it has been asserted that overseas students are crowding UK students out of high tariff universities. There is a complicated picture across the sector that reflects where and how individual institutions have decided to grow capacity (including the significant increase in UCAS acceptance rates of Russell Group universities following Covid) overlaid with both changes in the domestic/overseas student mix and changing recruitment patterns for domestic students. Emotions run particularly high in respect of Oxbridge acceptance; the HE debate in the UK is dominated by discussion about these 2 institutions and it distorts HE policy in a way not seen in the other major English-speaking destinations. So, we address it here. Since 2014/15 Oxbridge UG student numbers have grown by just over 6%, compared with UG provision in the sector as a whole growing by 22%. When one factors in ongoing widening participation efforts by these two universities, it is clear why there is increased pressure on Admissions – and it is rightly the role of universities as autonomous institutions to make those decisions.

More broadly, the latest UCAS data shows domestic student numbers at Russell Group universities are rising faster than international student numbers, with the current pattern of growth in domestic provision broadly similar between Russell Group and other institutions

We do not have space here to undertake a more detailed analysis to understand the interplay between the complexities of UK HE capacity in the face of changing overseas and domestic student behaviours, greater volatility in overseas markets, and the most recent UCAS data – which shows a 2% fall against the previous year in entry of both 18-year-old domestic students and UG overseas students. The decline probably reflects the combined effect of a wide range of factors from increased costs (particularly given the rise in the cost of accommodation) through to increased availability of alternative routes including Apprenticeships for domestic students and increased competition for globally mobile students from other recruiting countries.

Figure 5: Wide range in changes to recruitment in 2021, but little overall different between Russell Group and other universities



Source: 2021 entry provider-level end of cycle data resources, UCAS

A variant of the argument that universities are showing preference to overseas students is that their numbers are growing excessively simply to meet financial shortfalls and this is having negative consequences for the sector and the public services in the communities where universities reside.

The Office for Students (OfS) report on the financial sustainability of the higher education institutions (HEIs) shows the institutional projections for domestic and international enrolments based on forecasts supplied by institutions in England. This shows that while EU students are projected to drop by 38 per cent between 2021 and 2025, tuition fee income is set to grow by 6 per cent (£60 million) as EU students now pay full international fees. Equally, non-EU students are projected to grow by 35 per cent over the same period; however, the tuition fee is expected to be significantly higher than the growth in student numbers, at 53 per cent (£4.13 billion).

The analysis shows that HEIs are making up for the funding gaps through increased overseas student numbers and through an increase in international tuition fees which have increased by just over a third and boosted overseas fee revenues by over a half.

Table 1: Forecast change in tuition fee income by domicile, 2021–2025

						Forecast change 2021 to 2025		
Tuition fee income by domicile £M	**2021 (Actual)**	**2022 (Forecast)**	**2023 (Forecast)**	**2024 (Forecast)**	**2025 (Forecast)**	**Tuition fee income change £M**	**Tuition fee income change %**	**Total student FTE change %**
Total	£21,310	£22,859	£24,578	£26,192	£27,690	£6,380	29.9%	17.5%
UK	£12,439	£12,825	£13,552	£14,104	£14,635	£2,196	17.7%	16%
EU	£989	£950	£972	£990	£1,049	£60	6%	–37.8%
Non-EU	£7,881	£9,083	£10,054	£11,098	£12,006	£4,125	52.3%	35.3%

Data source: Office for Students (2023), Financial sustainability of higher education providers in England. 2023 update.
https://www.officeforstudents.org.uk/media/0b7d9daa-d6c7-477e-a0b2-b90985d0f935/financial-sustainability-report-2023-updated-june-2023.pdf

The chart below shows that the gap between the tuition fee income from home and international students is closing, with the latter expected to represent 47 per cent of the overall tuition fee income in 2025.

Universities vary in the "contribution", (income minus costs) associated with securing and teaching overseas students – from marginal to significant. The increase in overseas tuition fee revenues will generally have improved contribution levels and, together with rising numbers, be responsible for ensuring the sector's financial viability. Many universities are already running deficits, but this would be substantially worse if international student numbers fell in 24/25. In that scenario, it is forecast that between a half and 4/5ths of universities would be running a deficit in 24/25, according to the recent report by Pwc[8].

As UK universities spend more on educating domestic students than they receive from even the highest home capped fee in any of the four nations of the UK, it is the growth in the "contribution" from overseas student revenues that is funding both the increasing cost of domestic provision and also being used to subsidise the costs of research as well as funding other activities like knowledge transfer, alumni support and widening participation, which are either not funded, or not fully funded, by the Government.

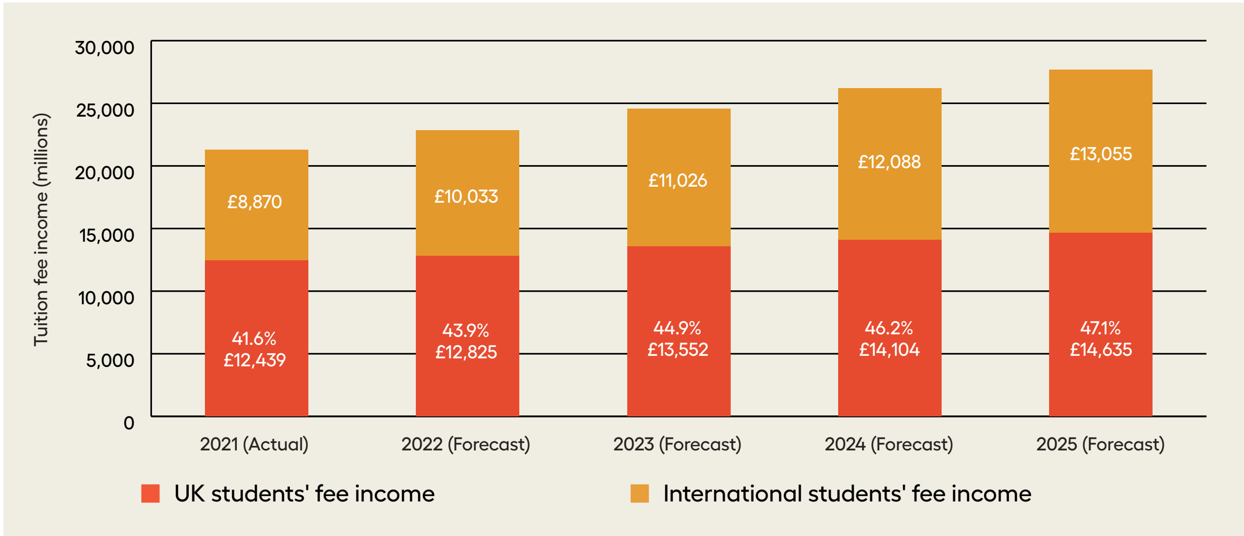
However, international engagement is about much more than just meeting shortfalls from underfunded activities. Earlier IHEC reports have identified areas like "Internationalisation at Home", outbound mobility and transnational education (TNE) that are substantial activities undertaken to enhance the learning experience of students, provide development opportunities for staff and enhance benefits for wider stakeholders. We believe such activities should form part of the international strategy of every university, contextualised for local situation and mission.

As noted by Jo Johnson, communicating this broader purpose – and its wider links to Britain's global reputation for higher education excellence as well as its soft power and ability to foster knowledge diplomacy – are all important to rebuilding political support for overseas recruitment.

We conclude that there is no evidence that universities are pursuing financial returns from international students to the disadvantage of UK students or stakeholders. Rather, to the contrary, it is the growth in overseas fee revenue that is an important part in growing domestic student provision and cross-subsidising other key activities of Universities.

There is a growing debate about the overall financial sustainability of the sector and the appropriateness of having domestic provision and other key activities dependent on recruitment of overseas students. However, that does not take away our responsibility to work harder in developing and evidencing suitably strategic, sophisticated and sustainable approaches to international engagement and communicating these benefits to local, national and international stakeholders. The challenge is not "solved" by short term action, this is a journey the sector needs to embark on, with identified mechanisms to foster and facilitate a roadmap, complete with established milestones that can be measured.

Figure 6: Tuition fee income in England by student domicile



Data source: Office for Students (2023), Financial sustainability of higher education providers in England. 2023 update.
https://www.officeforstudents.org.uk/media/0b7d9daa-d6c7-477e-a0b2-b90985d0f935/financial-sustainability-report-2023-updated-june-2023.pdf

[8] (https://www.pwc.co.uk/government-public-sector/education/documents/higher-education-financial-sustainability-report.pdf)

Assertion 4:
UK higher education attracts non-genuine students

One of the measures monitored by the Office for Students as part of the "Teaching Excellence Framework" is students' continuation rates. The table below shows the continuation rates for full-time first-degree students by domicile. Non-EU international students have the lowest non-continuation rate. While non-continuation increased during the pandemic, when many students switched to online learning, non-EU students continued to perform better than their UK (and EU) counterparts.

Table 2: Non-continuation rate for full-time first-degree students by domicile

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: HESA Student Record: calculations for full-time first-degree entry cohorts, various years

OECD analysis backs this up. It shows the UK has one of the highest higher education completion rates across the OECD. Their findings show that 85 percent of UK bachelor's students graduated within three years of the end of the programme duration, which was also the highest among OECD countries with data. This compares with an average across the OECD of 68% of bachelor's students graduating within three years of the end of the programme duration[9].

Our analysis provides no evidence that international students are academically less able than their UK counterparts or that they had a higher drop-out (non-continuation) rate. Rather, the evidence points to the reverse.

[9] https://www.oecd-ilibrary.org/sites/2d088c0c-en/index.html?itemId=/content/component/2d088c0c-en#:~:text=Across%20the%20OECD%2C%20the%20completion,between%20OECD%20countries%20somewhat%20narrower.

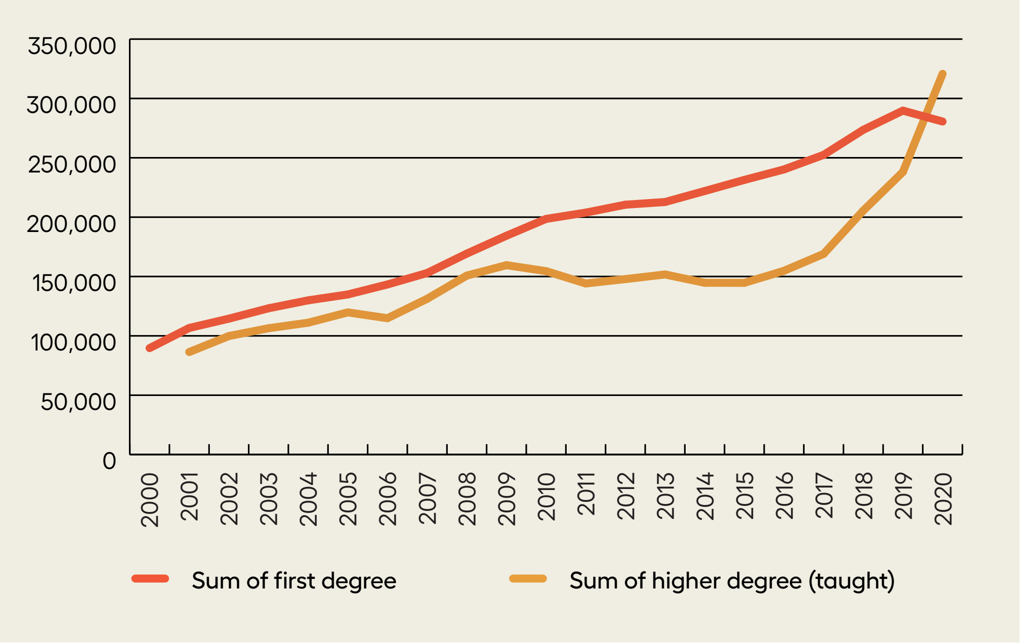
Assertion 5:
The UK is recruiting too many Master's students, and should be focussed on recruiting more UG students

IHEC was one of the first to identify the extent to which growth in overseas student demand was being driven by postgraduate taught students. Master's entrants increased from 52 per cent in 2017 to 68 per cent in 2021. In absolute terms, first degree entrants dropped by over 16,300 students and PhD entrants by 1,100. Over the following year the intake of master's students increased by almost 62,000, with enrolments driven by the re-introduction of PSW (after growth in PGT essentially stalling for almost 10 years after the elimination of PSW in 2012) and wider changes particularly in two major UG source markets; Covid and subsequent geo-political events changed patterns of study for Chinese students and Brexit impacted both sentiment about study in the UK for continental European students and removed access to important means of funding through the Student Loans Company.

The reintroduction of PSW particularly boosted demand from a small number of specific countries at the postgraduate level. Data from Enroly indicates that this growth has declined since the elimination of the right for dependants to accompany master's students (HESA data does not yet cover this period).

There is a concern that the decline will continue and prove to be substantial, bringing further challenge to the sustainability of the UK HEIs. Previous evidence produced by IHEC showed that international masters students are important to maintaining the full extent of post-graduate provision for domestic students as well as producing potentially highly skilled individuals for UK industry through the graduate route. Over the period from 2017/18 to 2021/22 the proportion of UK full-time entrants to master's programmes dropped from 45 per cent to 33 per cent, and the EU entrants from 10 per cent to 3 per cent, whereas non-EU entrants increased from 45 per cent to 63 per cent, meaning international entrants are critical to the viability of these programmes. In 2021, non-UK students accounted for 64 per cent of all student entrants to UK postgraduate programmes.

Figure 7: 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.

We conclude that relying on a large number of students from a small number of countries who are only here studying and paying fees for a short period of time (they may of course be here for longer if they take advantage of the Graduate Route) presents significant risks, and notwithstanding the benefits of maintaining capacity for domestic students and companies wanting to access skilled workers across the UK, measures to enhance the overall diversity of the overseas portfolio and rebalance it would be beneficial.

Assertion 6:

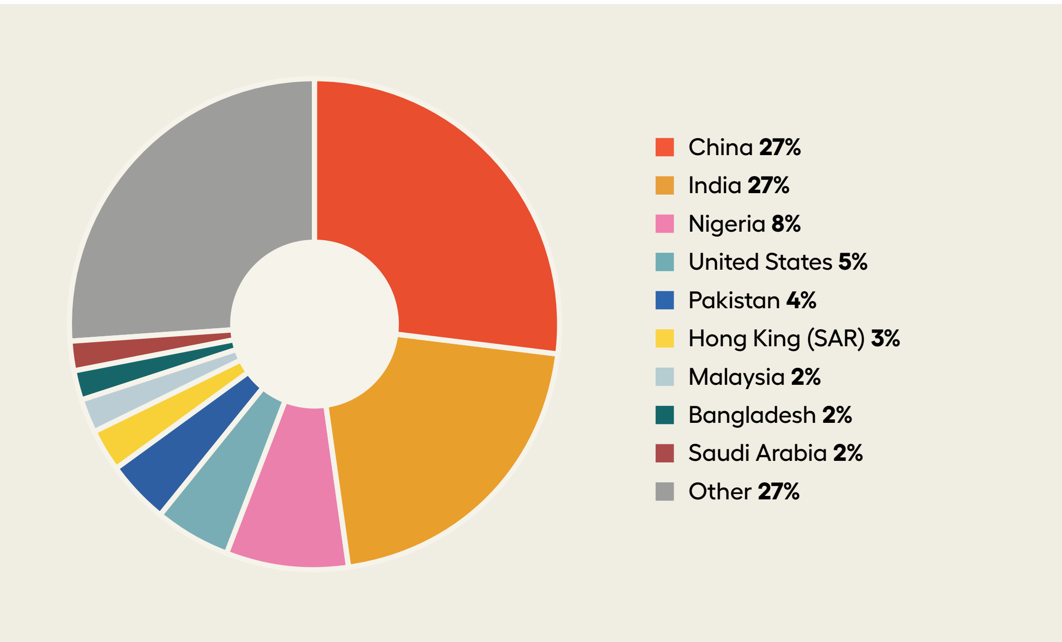
UK universities recruit too many students from too few countries and need to focus on increasing diversity

Earlier IHEC reports identified that UK recruitment is dependent on a rapidly decreasing number of sending countries for the majority of overseas students we recruit. This is inconsistent with both delivering the diversity that enriches the learning experience of all students and the need for financial risk mitigation. The greatest single loss of diversity was a result of Brexit which has significantly reduced, mostly UG, recruitment from the 27-member countries, though there is some evidence that interest in studying for at least for part of a learning programme in the UK is recovering.

Analysis of HESA data shows that whereas 70% of overseas student recruitment was drawn from 13 countries 20 years ago and this continued up until 2018/19, it has now declined to 7 countries – so diversity has almost halved.

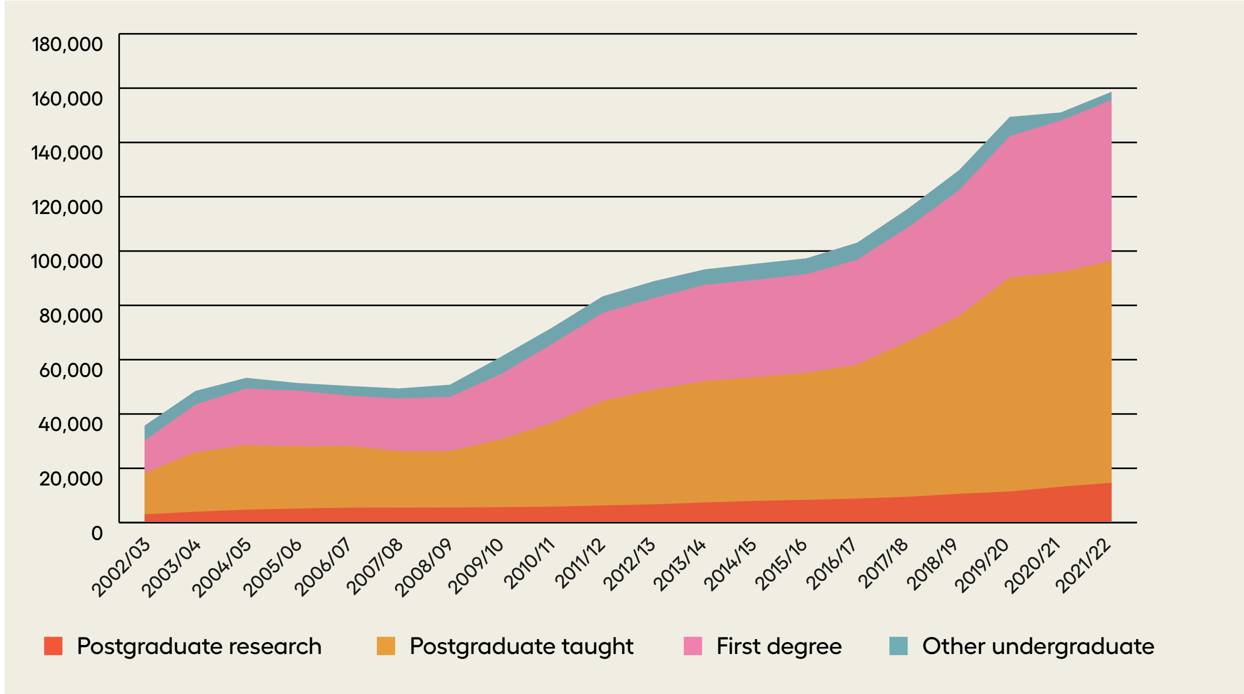
The 2021/22 mix by nationality, according to HESA, is shown below left, with the profile changes for China and India, the two top sending markets, top right and bottom right respectively.

Figure 8: Major source countries of international students for 2021/22



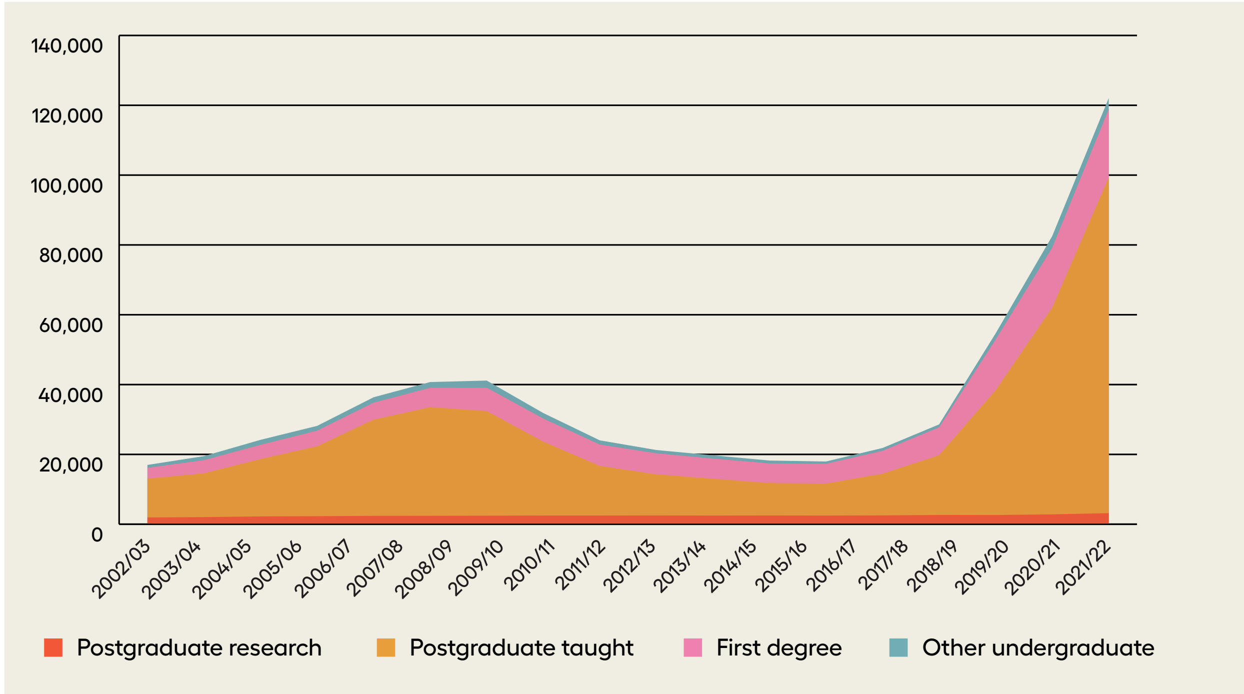
Source: HESA Student record

Figure 9: Growth in recruitment from China by level over time



Source: HESA Student record 2002/03–2020/21

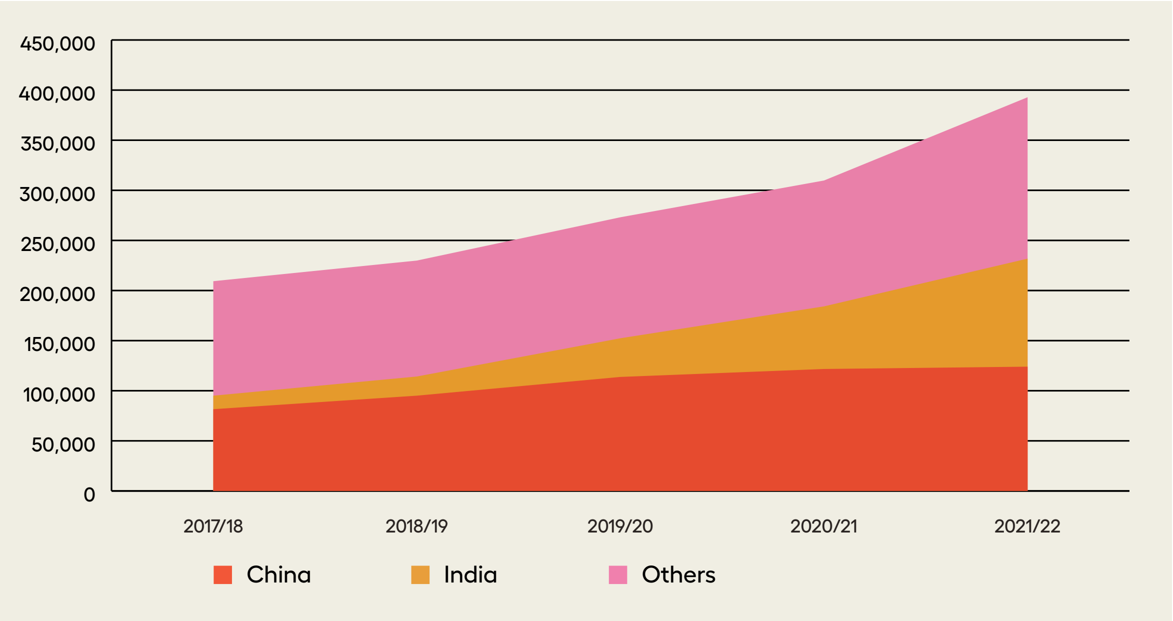
Figure 10: Growth in recruitment from India by level over time



Source: HESA Student record 2002/03–2020/21

It should be particularly noted that the growth in masters students has come from a remarkably narrow range of countries.

Figure 11: Full-time PGT students in the UK



Source: HESA student record

However, global HE markets are not like global goods markets:

- There are relatively few source countries with large numbers of outbound students
- The costs of acquisition of students in smaller markets is significantly greater
- Flows of students are dependent on more than just the efforts of universities – there are historic relationships, intermediaries like agents and a complex network of decisions involving family influencers, social media, access to funding etc
- Some markets have limited interest in/capacity for study in English
- Applicants in some markets will find securing a visa to the UK challenging

It is also clear that there is a significant rise in the numbers of students going to “new” destinations, Turkey in particular has seen inbound student numbers grow substantially. Though the fact that Turkey is also growing as a source market for the UK – it is bigger than more prominent source markets like Nepal, Sri Lanka, Ghana and Indonesia – at the same time shows just how complicated overseas markets are post-Covid, with changing student behaviours combining with changing geo-politics driving significant changes in the overall pattern.

One clear strategic opportunity is for UK universities to become more embedded in these other growth markets. For example, a number of UK universities are looking at developing partnerships in Turkey. There is also the well-established rise of joint institutes in China and growing interest in establishing campuses in India and elsewhere; hence our last report suggested a greater focus on TNE in a future international education strategy.

We conclude that while the UK is worryingly reliant on a declining number of countries for the overwhelming majority of its recruitment, the challenge is how to develop a more strategic and sustainable mix. Having recognised the benefits of greater diversity there are decisions to be made nationally and at an institutional level about developing cost-effective mechanisms for new market development and using new tools to access markets such as through TNE and engagement with industry. There is no sector wide innovation fund to support the development of new markets or systematically share good practice.

Assertion 7:
The recruitment of international students places an unsustainable burden on public services

For many years overseas students did not make any special payments to access public services. Contributions were through general taxation or access to taxed services like owning a car etc. However, the growth of international students amid increasing immigration concerns and a long standing debate about “Health Tourism” saw a £200 per year international health surcharge introduced in 2015 for students and immigrants to “ensure that migrants make a proper financial contribution to the cost of their NHS care”. The Government has stated that the Immigration Health Surcharge (IHS) has raised over £5 billion for healthcare spending since 2015 and £1.7 billion in gross surcharge revenue in 2022/23. Funds are transferred to the health departments in England, Scotland, Wales and Northern Ireland, but there is no central record of how much is spent on the NHS specifically.

This contribution will soon substantially increase. Government policy is to charge an amount at least equivalent to the estimated average cost of providing healthcare to migrants delivered by the Department of Health and Social Care, which has been currently estimated to be £1,036 per person per year. As a result the current fee, £624, was increased to £1,035 per year in February 2024.

In a further move visa fees increased in October 2023 to £490 per applicant, fees for the super priority service increased to £1,000 and Graduate Route applications went up to £822 per applicant.

There are, then, measures through which the Government secures funding to ensure that students contribute to the wider costs of providing public services, though there is no mechanism to assess whether these funds are applied to the areas of service that students particularly use.

The ending of the dependant visas for all but research students has largely addressed local authority concerns around the demand for nursery and school places.

It is recognised that unplanned growth in student numbers, both domestic and international, will put a strain on relevant public and private services and it is essential that better and more timely data is made available in order that a better managed HE ecosystem can be developed. This will be addressed in our next report.

Earlier IHEC work on the impact of overseas students on the student residential accommodation market benefited from the insights of Jim Dickinson at WonkHE and Jon Wakeford of the UPP Foundation. This is an area of specific concern, particularly in smaller cities with universities of significant size, in terms of the capacity of the residential housing market. The capacity of the UK residential market across the UK and that of dedicated student accommodation has not grown to match demand in key locations leading to significant increases in rent. The issue of student accommodation, which is a global concern, has been addressed extensively elsewhere and so we do not focus on it here.

Assertion 8: Universities are offering places to low-quality students who want entry through a back door

Foundation programmes

Claims of "back door" access to UK university courses for "low quality" international students has attracted significant media attention[10]. These articles mainly refer to foundation programmes and International Year One courses, what they do not do is recognise that there are multiple pathways into universities – for both domestic and overseas students – and there is an assumption that all students use A-levels to gain entry to undergraduate courses. The conflation of sub-degree programmes with undergraduate degrees is also unhelpful.

These access programmes for overseas students are typically designed to bridge the gap between students with different length of schooling, such as 12 years vs 13 years[11]. Increased access and widening participation to students with talent are among the main characteristics of foundation programmes. There is a focus on 'value added' and 'learning gain' and pathway providers enable 'equivalent learning outcomes' at the progression point – terms used positively within widening participation literature.

HESA data shows that students from over 230 countries and territories enrol on UK higher education programmes – many with very different educational systems to ours, and a globally competitive education system should connect and engage with those in other countries.

International Year One

Unlike foundation programmes that prepare students to enter degree programmes, International Year One (IYO) leads to direct access to the second year of the first-degree if the students meet the respective language and academic requirements.

IYO is aimed at students whose English language proficiency is not sufficient or because the students did not achieve the required grades to meet the respective university entry requirements,[12] but where both are better than the students who are required to undertake an extra year on a Foundation Programme that provides progression to the first year of an UG programme.

Typically, these are offered by private pathway providers, alongside other access programmes, like Foundation Programmes. However, they require intensive study with considerable educational "scaffolding" provided, underpinned by extensive classroom teaching and require self-directed learning in keeping with an "accelerated" learning programme.

There is no data in the public domain on how widespread IYO programmes are, or how many students access such programmes. Alan Preece (2024) has reviewed 5 pathway providers who between them have 56 university partners and estimates that 34 of these universities are involved in offering IYO and that the number of students on such programmes has grown significantly over the past three years. The clear purpose of IYO is to bridge students' English language proficiency and academic readiness to that of their cohort studying at the respective university. Whilst there is no systematic data to show that these students' academic levels are comparable to their counterparts, pathway providers are regulated by OfS and/or QAA with judgements based on:

- the provider's management of its responsibilities for academic standards
- the provider's management and enhancement of the quality of learning opportunities available to students
- 'confidence' in academic standards and quality of learning opportunities
- student outcome data is considered in QAA submission by pathway provider
- reference to subject benchmark statements and Credit and Qualifications Frameworks in design of programmes and modules

There is a built-in quality mechanism for all higher education institutions in England, where students' outcomes, such as continuation, completion and progression, are part of the Office for Students (OfS) regulatory approach.

[10] https://www.thetimes.co.uk/article/cash-for-courses-the-foreign-students-with-low-grades-at-top-universities-pcskjb6xx
[11] https://www.universitiesuk.ac.uk/latest/news/universities-uk-responds-sunday-times
[12] For more details, see https://www.universityworldnews.com/post.php?story=20240209045704766

The student outcomes data dashboard shows detailed information for each higher education institution (HEI)[13]. If "low quality" students were admitted, this would lead to deteriorated TEF metrics, which would affect the TEF rating of the respective institution (gold/silver/bronze/requires improvement). Further, most pathway providers use external examiners, who provide another objective measure of performance

The respective IYO students' outcomes are agreed with universities and are equivalent to those required of mainstream university students. In order for international year one students to progress into second year of undergraduate degree the exit outcomes have to match with those expected of other students. There is no guarantee of success and international students must meet the required thresholds in order to progress into further study at the respective university mainstream provision.

Whilst we see no evidence of systematic abuse of the system in order to gain "backdoor" entry, greater transparency around learning outcomes equivalencies and how such programmes contribute to the universities' student enrolments, and their impact, such as widened access to students, increased international competitiveness in certain geographical locations , would lead to a more informed conversation.

Assertion 9: Unscrupulous agents are helping unqualified international students to access UK universities

Universities' use of education agents in recruiting overseas international students is another area that has generated significant media attention. The use of agents by the sector has grown over time, particularly by "recruiting" universities, though they are employed by the majority of universities. Used effectively, "agents" can perform a valuable role. They can help students identify and prepare applications for appropriate universities and help universities to secure high quality students for courses that might otherwise prove unviable and have to be closed. Good agents are, therefore, an important part of ensuring the dynamism and diversity of the sector.

There is the opportunity for "bad actors" to misadvise and misrepresent. However, it is not possible for an agent to recruit a student that a university does not wish to take, Universities are in control of the offer and enrolment process, but it can be challenging to check the credibility of students. So, it is crucial that universities can rely on their agents to undertake the checks necessary to ensure that only bona fide students are enrolled.

"The National Code Of Ethical Practice for UK Education Agents 2021"[14] defines an education agent as "a person or organisation that deals directly with prospective international students on behalf of education providers. To a student, these services would ordinarily include education counselling, such as course and institution matching, and assistance with academic and visa applications." Ethical student recruitment is at the core of the national code and builds on an earlier initiative, known as the London Statement of 2012. Hosted by the British Council, the London Statement is a joint statement of principles for ethical student recruitment signed by national agencies from Australia, Ireland, New Zealand and the UK.

The Code is part of the recently launched UK Agent Quality Framework (AQF), a joint initiative between the British Council, the British Universities' International Liaison Association (BUILA), the UK Council for International Student Affairs (UKCISA) and Universities UK International (UUKI)[15]. The framework aims to strengthen the cooperation between education agents and student counsellors across the world and UK higher education institutions. Ethical student recruitment is at the core of the AQF. Universities and agents are rapidly signing up to the AQF and the framework will be enhanced and developed overtime providing the necessary confidence in the integrity of the sector.

[13] https://www.officeforstudents.org.uk/data-and-analysis/tef-data-dashboard/data-dashboard/
[14] https://www.buila.ac.uk/uploads/docs/National-Code-of-Ethical-Practice-for-UK-Education-Agents-FINAL-Flag-version-2.pdf
[15] https://www.britishcouncil.org/education/agents-counsellors/uk-quality-agent-framework

Assertion 10:
The UK's excellence, particularly for research, will always appeal to global talent irrespective of visa policies, scholarships and earning thresholds

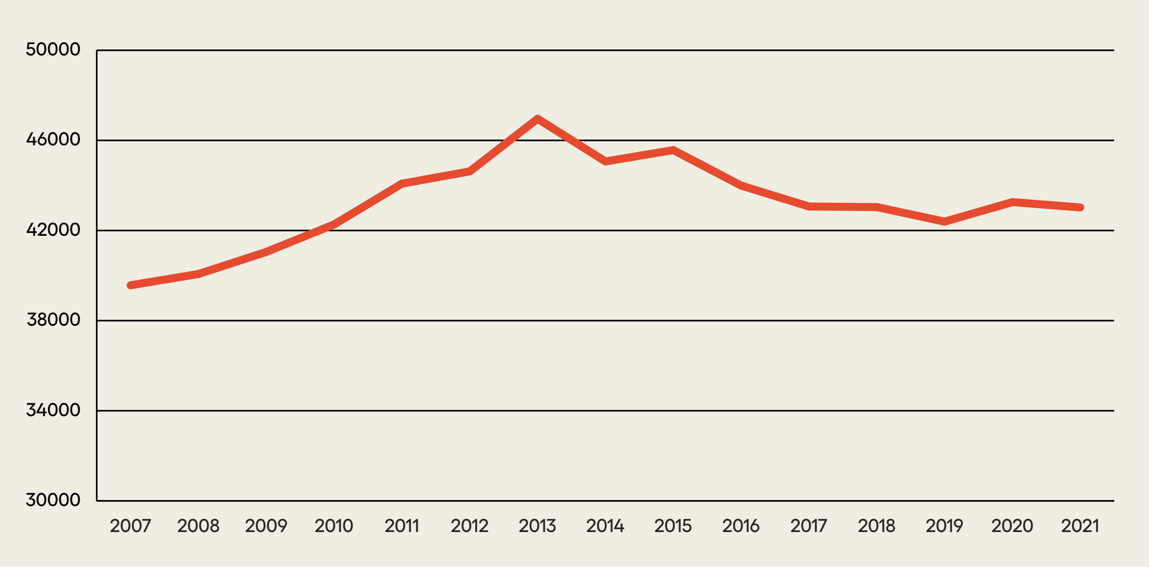
We have provided evidence in the sections above that HE policy is a major determinant of whether a potential undergraduate or Master's student chooses to study in the UK. One of the areas that should be without contention is the recruitment of PhD students, as the UK is largely dependent on overseas students to fill the PhD positions that power our research engine. The research excellence of the UK HE sector is responsible not just for much of the reputation of our universities but for the research and innovation that will drive economic performance, social progress and, it is hoped, increased productivity.

However, there has been a long-term decline in the global demand for postgraduate research degrees in the UK. International postgraduate research (PGR) students peaked in 2013, followed by a steep decline in 2014. The reductions were primarily concentrated in the non-EU student population and were mainly attributed to the discontinued post-study work route. The declines in 2016 were driven by EU students choosing not to come and were likely related to the Brexit vote earlier that year. Since then, there has been a continued decline in full-time PGRs in the UK, with some rebound in 2020.

HESA data shows that full-time PhD entrants from the EU dipped by 42 per cent (1,205 entrants) in 2021/22 compared to the previous year[16]. In the same year, the newly enrolled fulltime PhD students dropped by 3 per cent (380 entrants), whereas non-EU students remained comparatively unchanged (1 per cent growth).

Globally mobile students tend to be more concentrated at advanced levels of education. Across many OECD countries, the proportion of international doctoral researchers is comparable to that of home students. National research and innovation ecosystems rely on continuous flows of high-calibre talent. We conclude that the observed reductions in global demand for research degrees should be addressed with urgency and treated as an early signal of disruption in the talent pipelines.

Figure 12: Global demand for PGR degrees in the UK



Source: Analysis of HESA standard registration population 2007–2021.

[16] https://www.kcl.ac.uk/research/the-china-question-revisited-de-risking-higher-education-and-research

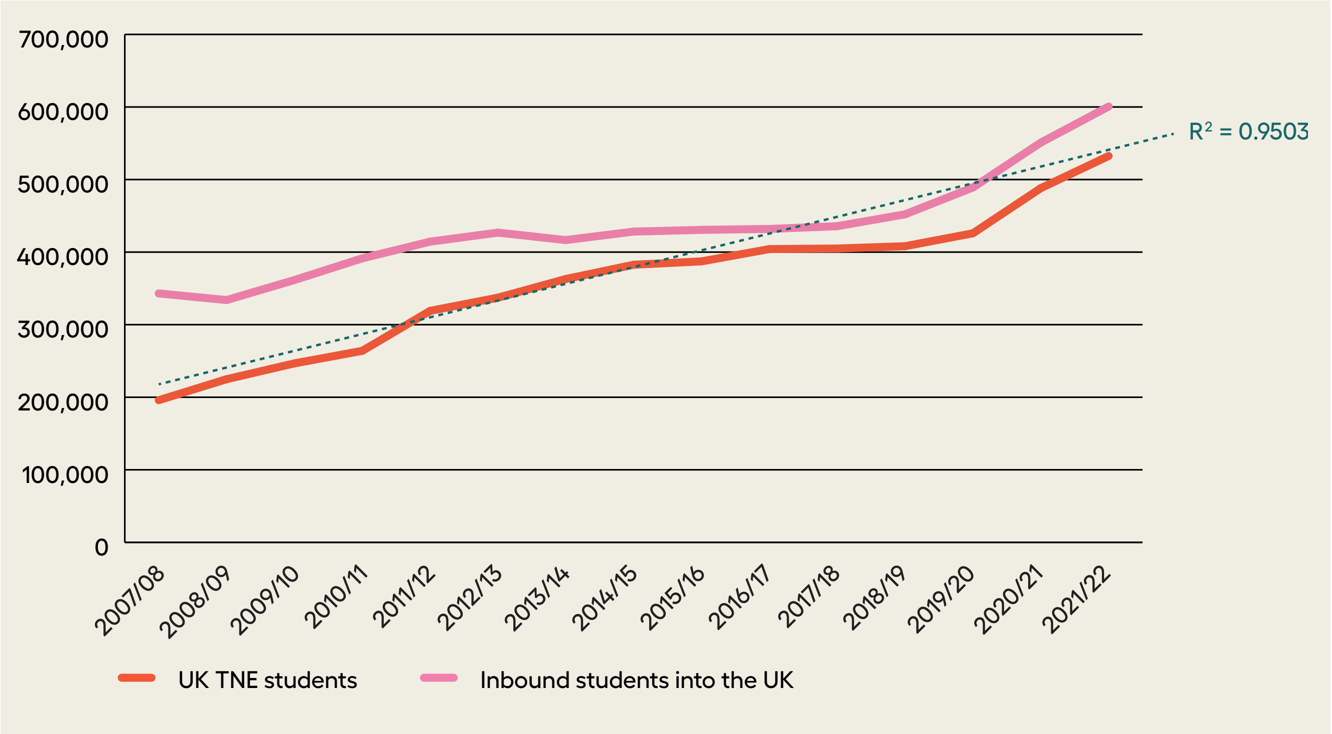
Assertion 11:
TNE is a distraction from the issues that UK HE is facing

This section draws on the main findings from a report for the International Higher Education Commission "The Role of Transnational Education Partnerships in Building Sustainable and Resilient Higher Education"[17].

That analysis showed that UK transnational education (TNE) and international student mobility to the UK complement each other. The chart below shows a strong positive association between them over the past 15 years. The evidence suggests that TNE plays a crucial role in securing resilient international student recruitment, both through direct means such as articulations and transfers and through profile raising and brand building. This is particularly important in times of significant downturns in international student demand.

Given the evidence repeated here and documented more fully in the earlier IHEC report, we conclude that UK TNE is worth the effort and investment, not just now but in the longer term. The larger the proportion of domestic tertiary learners, the greater the scope for UK universities to engage in TNE with students and HEIs globally. An additional 30 million learners are expected to join tertiary education globally by 2035, which brings the overall number of learners in the world to 280 million[18]. If UK TNE maintains its current growth rates, it will likely result in one million UK TNE learners by 2030. The evidence suggests that this is likely to continue to grow international student mobility to the UK and increase the resilience of the HE sector.

Figure 13: UK TNE vs inbound international student mobility to the UK (2008–2022)



Source: IHEC (2023).

[17] Tsiligiris, V., Ilieva, J., Alexander, W. and D. Pilsbury (2023), The Role of Transnational Education Partnerships in Building Sustainable and Resilient Higher Education. Report for IHEC. https://ihecommission.uk/wp-content/uploads/2023/12/IHEC_TNE-report_13_12_2023.pdf

[18] Ibis.

Recommendations

Whatever the pros and cons of the changes over the past year, including removing the right for master's students to bring dependants, discontinuing the opportunity for students to switch their visas and the ongoing debate about the Graduate Route, they signalled policy volatility in the UK. As a result, students' and prospective students' and parents' perceptions of the UK as a study destination were negatively impacted. Early indications from institutional surveys and data from Enroly[19] on CAS issuance indicate that this has resulted in significant declines in overseas recruitment for September 2023 and January 2024 intakes. Course search sites also signal a decline in interest in the UK amongst prospective students . The largest sources of international student growth were most impacted by these changes, including India and Nigeria, and most recently, Pakistan. It is recognised that the purpose of these policy changes was to address the recent significant growth from these countries. However, the impact of the changes made so far combined with the "pricing in" of potential changes in policy that have been floated but not yet implemented – such as changes to the Graduate Route – will be challenging for the sector to manage.

It is important to reassure potential learners they are welcome, and that the post-study work route in the UK is secure. This will be interpreted as a strong signal of support by the entire ecosystem – students, parents, education agents & counsellors, employers and scholarship agencies. One of the most practical solutions is the one advanced by MAC (2018) – that immigration is measured through more stable and trackable indicators, such as grants of settlement. This should smooth the current disruptions and ease the temptation to change policies in response to the quarterly publications of the net migration figures.

We also recommend greater investment in promoting the sector and a specific focus on destination marketing to improve messaging for key market segments. In tandem with this, we recommend the development of significant regional international higher education strategies which could reflect different patterns of demand, migration and occupational need. A more sophisticated approach will provide an operating context to drive the recruitment of overseas student numbers and mix to serve the strategic interests of the UK.

The scale and speed of the changes taking place in the global markets has dramatically increased the need for relevant, reliable and timely data. Uncertainty in the operating environment and changes in student behaviours are reducing the predictability of the indicators of global demand that we once relied upon. Creating a fit-for-purpose data architecture that allows fast and reliable access to relevant data collections held in both public and private sector organisations in a coherent way, is essential to provide the sector and policy makers with the tools they need to monitor and manage. We believe that new public-private partnerships will be needed to deliver the transformation required.

We also need to reassure politicians and the public that the UK is attracting and admitting appropriately qualified students and that benefits accrue to the country, and to individual citizens, as a result. That means restating the broader benefits of global engagement, demonstrating that abuse of the system is rare and re-emphasising the financial importance of continuing to recruit international students at scale. We need to better articulate that the fundamental premise of the sector is integrity and authenticity and build on the evidence of success outlined in this document through further developing the Agent Quality Framework.

Continued inflationary pressure on the capped fees for home students has eroded universities' tuition fee income from home students by a third in the last decade. Currently the only way to make up the gap in funding is by recruiting international students, despite this "making the education of UK students hostage to shifting geopolitics and fuelling national concerns about too many immigrants" (Kapur, 2024)[20]. Ensuring long-term financial sustainability of HE funding through a new agreement on domestic fees, alongside appropriate levels of maintenance loans, is essential to stabilising the system.

IHEC will continue to review the potential basis on which to set future targets for overall numbers and the make-up of the portfolio, and further work on this will be published as part of the Final Report due at the end of March. Key to effective implementation will be developing cost-effective mechanisms for market development to enhance diversity by level, geography and subject. There is no sector wide innovation fund or mechanisms to support the development of new markets or cost-sharing, or systematically share good practice. Hence the recommendations we make here, and will make in our final report.

[19] For details see https://www.enroly.com/blog

[20] S. Kapur (2024), UK universities: from a Triangle of Sadness to a Brighter Future. The Policy Institute, King's College London. https://www.kcl.ac.uk/policy-institute/assets/triangle-of-sadness.pdf

In terms of establishing a new international higher education strategy, a durable approach will require greater policy certainty across 5 key metrics

Figure 14: Durable national IHE strategies create policy certainty across five metrics

Source: Nous

More specifically, there are lessons to be learnt from the publication in February 2024 of the Australian Universities Accord. Its intent is much broader than International Higher Education, but the recommendations in respect of IHE align closely with the work and ideas that have been explored as part of IHEC:

- greater alignment and coordination between the courses and programmes marketed to international students and the national skills agenda and relevant migration initiatives
- the development of regional international higher education plans
- working with universities to explore opportunities and review visa requirements to support diversification of international student markets within a national strategic framework, including through innovative transnational education delivery modes
- support universities, in partnership with relevant government agencies, to enhance alumni engagement in students' countries/regions of origin. These alumni networks should aim to foster enduring connections which strengthen international research networks and partnerships
- working across government and with universities to ensure trust and integrity in the visa system is maintained
- ensuring that universities have appropriate risk management strategies in place particularly in respect of:
    i. managing demand volatility
    ii. course concentrations and the quality of the student experience
    iii. access and availability of affordable student housing

This comprehensive approach, led by a panel of individuals with a broad range of experience and expertise, is a result of the commitment of the Australian Government to supporting transformation in Australia's higher education system through engagement with the sector. With a wider remit than international higher education, it is all the more powerful in reminding us that an effective strategy has to sit, and be sustainable, at the intersection of university objectives, market realities and Government plans.

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Wendy Alexander is Vice-Principal (International), and Professor of International Education at the University of Dundee. She is Scottish International Trade & Investment Envoy for Higher Education, a British Council Trustee, an Emerge Education Venture Partner and on DBT/DfE Education Sector Advisory Group. She Chairs Times Higher Education Student, Global Advisory Board; is Vice Chair, UK National Committee on China Advisory Board; on StudyPortals UK Advisory Board; SEP LLP's Investment Advisory Board; and former Co-Chair UUK Pro-Vice Chancellor's International network. She is a Fellow, Royal Society of Edinburgh; Patron of Social Investment Scotland and holds honorary degrees from Strathclyde University and UWS.

Wendy spent over a decade in government and elected office, serving the first three Scottish Cabinets, including as Minister for Further & Higher Education, also holding the Enterprise & Lifelong Learning, Transport and Communities portfolios and served as Scottish Labour Leader in the Scottish Parliament.

Janet Ilieva

Janet Ilieva is the founder and director of Education Insight, a research consultancy specialising in international higher education.

Janet's research focuses on international student mobility, university partnerships, transnational education, and national policies for global engagement. Janet regularly researches higher education engagement for government departments, universities, and international organisations in Europe and Asia.

Education Insight's Global Engagement Index (GEI) evaluates UK higher education institutions' internationalism and involvement with sustainable development. Education Insight is a co-founder of the TNE Impact repository.

David Pilsbury

David Pilsbury is Chief Development Office for Oxford International, a global educational services provider. He sits on the advisory boards of JISC, China-Britain Business Council, Times Higher Education, StudyPortals, EURIE, ECCTIS, Emirates Aviation University and Macao Millenium College. He is a member of the UK's International Higher Education Commission. He was previously Deputy Vice Chancellor of Coventry University and led its transformation to become an internationally focussed university: as the UK's 3rd largest recruiter of overseas students; the largest provider of programmes overseas; and host of the world's largest global enhancement programme. His contribution to global higher education has been recognised by The Queen's Award, EAIE's premiere award and an Honorary Fellowship from Hong Kong's VTC. Pilsbury was founding CEO of WUN, HEFCE Head of Research Policy and spent several years in the City after a D.Phil at Oxford.

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