International Higher Education Commission

Supported by Oxford International Education Group

Towards a future UK International
Higher Education Strategy:

Resilience, Purpose and Precision

Oxford International Education Group

Contents

Foreword

**The Right Honourable
Chris Skidmore OBE**

Chair, International
Higher Education
Commission

As the Universities Minister who launched the UK's last International Education Strategy in 2019, I look back with a clear-eyed recognition of the lessons we have learned. That strategy marked a pivotal moment: for the first time, the UK outlined an ambitious, cross-government plan to expand its global education footprint. The years that have followed have brought unprecedented challenges and change. The COVID-19 pandemic, shifting global geopolitics, and domestic debates on immigration created a de facto policy vacuum in the wake of the 2019 strategy. We learned the hard way that setting goals isn't enough – we need mechanisms to update and refine our approach continually. After 2019, there was no built-in refresh point; once the targets were achieved, early uncertainty arose about whether the government wanted further growth. In that void, policy became reactive rather than proactive. We saw ad-hoc measures and mixed messages that, at times, left universities unsure of their footing. The lesson is clear: we must never allow success to breed complacency or challenges to paralyze us. Instead, we need a living, breathing strategy for international education – one that is regularly reviewed, aligned with national needs, and capable of managing growth deliberately and thoughtfully.

That is why, in 2023, a group of us came together to establish the International Higher Education Commission (IHEC) – a coalition of the willing formed to fill the strategic gap where an updated government strategy should have been. IHEC has been working across the sector – with university leaders, sector bodies, representatives from industry, and students – to generate fresh ideas and evidence-based recommendations for a **future International Higher Education Strategy**. Our approach has been purposefully collaborative and apolitical, unconstrained by any single interest group. We have drawn on data and insights from across the country to ensure our proposals are grounded in reality and best practices. This document, *A Framework for a Future UK International Higher Education Strategy*, reflects IHEC's work and framing.

It translates the Commission's findings into a roadmap for government and the sector. It has been my privilege to chair this effort, and I am immensely grateful to all the Commissioners and contributors who have lent their expertise. This evidence-led, consultative process has

demonstrated that the best way to craft policy is through collaboration – government, educators, and industry working together towards our shared goals.

There could not be a more pivotal – or promising – time to do this. The UK higher education sector stands at a crossroads. On the one hand, our universities continue to be a source of national pride, innovation, and influence, educating global talent and producing research that has a profound impact on the world. On the other hand, financial and operational strains are increasingly apparent, and public narratives about international students have become strained. Yet, I am optimistic. Compared to even a year ago, I sense a new spirit of proactive collaboration across the sector, with everyone – universities, businesses, communities – prepared to come together to find solutions rather than react to problems.

There is also a more explicit message from today's government that they recognize the enormous value of international education and the contribution of international students to the UK. This positive momentum provides us with a window of opportunity to transition from ad-hoc responses to a truly strategic approach. Now is the time to **be ambitious and deliberate** – to shape the next decade of international higher education rather than be buffeted by events. Our new International Education Strategy must fill the gaps that were left before, address current challenges head-on, and chart a confident course for the future.

What might that future look like? First and foremost, it will be forward-looking and purpose-driven. We need to ensure that international higher education isn't just about achieving significant numbers, but also aligning with Britain's broader economic, diplomatic, and educational objectives. A successful strategy will safeguard the critical importance of UK universities and secure Britain's position as a global leader in higher education

It will need to demonstrate more clearly to the British public the broad benefits that global engagement brings here at home – from jobs and local investment to new ideas and cultural richness. By linking education to innovation, research partnerships, and soft power influence, the UK will also support its aspirations to be a science superpower and an outward-looking trading nation.

In short, a future strategy must focus on value and values: deriving maximum value from international education for our society and economy, while upholding the values of openness, excellence, and integrity that define UK higher education.

Foreword

The International Higher Education Commission has distilled a set of key priorities that have shaped this framework. I fully endorse these priorities, which offer a vision of a more managed, strategic, and ambitious approach to international education. They include:

Long-Term Strategic Planning and Policy Gaps

A central theme is the need for a coherent, long-term plan for international education, acknowledging deficiencies in the 2019 strategy. There is a recognition that while the strategy set ambitious targets (e.g., 600,000 international students and £35 billion in economic value by 2030), it lacked built-in mechanisms for review, updates, and accountability. There was ambiguity over whether the targets were ceilings or floors, causing uncertainty within the sector.

Policy Certainty and System Sustainability

Our report emphasizes the need to establish greater clarity on policy intent – particularly regarding the Graduate Route – to foster sustainable growth in international student numbers. We stress the need for adaptable planning (Plan A, B, C) rather than a single rigid approach. To reflect this adaptability, a live, updateable policy document is proposed, rather than a static five-year plan.

A competitive and welcoming offer, informed by the student's voice

The Graduate Route is crucial; however, its actual uptake is modest. It should be promoted more effectively, but I believe we should also explore more nuanced models – such as a two-tier fee system or financial bonds – to ensure compliance and manage public perception regarding immigration. However, we must be cautious to avoid undermining the route's importance for student recruitment. Better capturing and responding to the "Student Voice" is key to delivering on this central plank of our proposed new framework. The report makes several recommendations in this respect.

Joined-Up Government and Institutional Coherence

We need a joined-up approach to policy-making across government departments. To provide oversight, coherence, and interdepartmental alignment, we propose a focussed "International Higher Education Strategy Group" – that includes the Home Office, the Foreign, Commonwealth and Development Office and Department for Science, Innovation, and Technology – to replace the current Education Sector Advisory Group, from which they are absent and which has a broad remit

of boosting UK education exports. We must also more effectively reflect the diversity across English regions and devolved nations, as well as the growing importance of Regional Mayors and the new local government framework.

Diversification, Market-Specific Strategies, and Smarter Investment

We must develop mechanisms to diversify the UK's portfolio away from the current reliance on a small number of markets – we make several recommendations in this regard, including the need to develop an effective destination marketing campaign that links to concrete enrolment outcomes so there is a clear feedback loop between investment and results, with data-driven, country-specific campaigns to attract students from key growth regions.

Public-Private Collaboration and Strategic Bodies

We need to leverage public-private partnerships to better manage our international education portfolio. This includes working more systematically with student champions, such as UKCISA and NISAU, and with BUILA as the representative body for overseas recruitment professionals. We suggest introducing modest but strategic funding (e.g., £5 million per year for destination marketing, creating a TNE Academy, and fostering Internationalisation at Home, in part to better demonstrate the benefits to the communities in which universities are situated).

Perceptions of Migration and Public Opinion

We need to manage public perceptions of international students more effectively within the broader context of the migration debate. We must much more clearly communicate the significant economic and social contributions of international students and that, in almost all cases, they leave after graduation, thereby differentiating them from broader migration narratives. This will require measures to track students more effectively and accurately record their status.
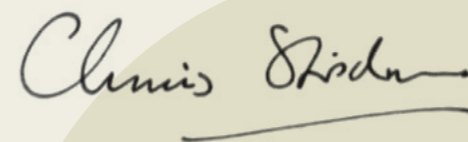
Data and insight

The sector must have access to better and more timely data about what is happening in international recruitment markets, as well as how this is playing out at institutional and sector levels, to more effectively address challenges and opportunities. We propose a public-private sector data group, recognizing that many of the most valuable and current data sources are supplied by private providers.

The document captures a reflective and forward-thinking discussion on how the UK can recalibrate its international education strategy by building structural flexibility, enhancing coordination, improving transparency, and responding to global shifts with targeted interventions.

This is a call to action but also a call to confidence: confidence in what UK higher education has to offer the world and confidence that, with the proper framework, we can secure its future for decades to come.

Being part of this journey from the 2019 strategy to today has been a personal honour. Back then, we set the UK on a new path; now, we must build on that success with renewed clarity and purpose.

I encourage Ministers, officials, and educators alike to take forward the recommendations in this report. They represent a balanced approach to managing growth, addressing concerns, and unleashing opportunities. By implementing this framework, the UK can strengthen its position as the **destination of choice** for students from around the globe and as a powerhouse of international collaboration. I hope that in ten years, we will look back and say this moment was when we chose not to rest on our laurels but to lead with vision. The future of UK international higher education is bright – if we are bold enough to shape it.

Summary Recommendations

A Competitive & Welcoming Offer

- The simple act of the Secretary of State for Education publishing welcoming videos has had a profound effect. We need more champions for UK higher education to communicate clearly that we welcome international students.

- Ensure policy stability by maintaining the integrity of the study visa and Graduate Route. This will be achieved by more effectively gathering and utilising data and evidence to more directly address perceptions that students use these routes for migration, and by more clearly demonstrating their unique contributions to employers, particularly SMEs, as part of the UK's growth agenda.

- Ensure the effective operationalisation of the Graduate Route by making it the responsibility of an identified body accountable for its management and monitoring, and clearly articulating to employers and communities the means of access and benefits.

- The Government should provide quarterly updates of overseas student numbers for the previous quarter, demonstrating that robust oversight measures are in place. It should also seize the opportunity of the new eVisa programme to develop an effective means of recording student status in real-time, which can inform policy evolution and reassure the public that students' "come, contribute, and catch a plane home."

- The immigration policy focus should be clearly and consistently on the MAC's 2018 recommendation – to treat overseas students as temporary visitors and concentrate on those who seek to remain in the UK permanently.

- The contribution of overseas students to supporting the UK's industrial and skills needs should be codified in the new Industrial Strategy.

- Shift the focus from student employability to a focus on employment and entrepreneurialism by integrating AGCAS into the new strategy and oversight bodies. This will serve as a source of intelligence, advocacy, and implementation of a step-change in service delivery.

- Establish a national mechanism to leverage the contribution of overseas alumni better, given their exceptional scale and significance, including the soft power and fund-raising agendas, but more prosaically to focus on opening up opportunities for graduate employment. We should learn from the example of NISAU, which demonstrates its ability to effectively link industry, soft power, and higher education.

Governance and Oversight

- The current Education Sector Advisory Group, co-chaired by BDT and DfE, should be reconstituted to include representation from the currently missing Government departments, with the addition of UKCISA as the designated body to represent the student voice and BUILA to represent overseas recruitment professionals. Multi-agency collaboration and inter-government dialogue are a cornerstone of success; people must feel empowered to be involved, and the sector must take responsibility for regulating itself.

- The operation and focus of the Education Sector Advisory Group should be re-engineered to aggressively foreground the critical importance of UK universities and the need to secure the UK's position as a global leader in HE. The restructuring, whether within or by separating the streams of the IES to create an International Higher Education Strategy Group, would ensure that higher education receives the essential policy focus and support. This move to an International Higher Education Strategy (IHES) be accompanied by the management and monitoring of progress against a series of SMART targets.

- All UK regions and devolved nations should feel a sense of ownership and benefit from the new IHES, which should better reflect the diversity across the UK. It should encourage formation of regional coalitions of the willing – groupings of universities, colleges, local authorities, and businesses in a region working together on international attraction and support. Metro mayors and regional bodies should be engaged to better connect international student growth with local economic plans, e.g., linking students to local internships or graduate job schemes

- Regional Higher Education Champions should be established, building on the successful role of the UK's International Education Champion.

- An International Higher Education Foundation or similar forum should be established as a permanent public-private body for ongoing policy dialogue on global engagement, continuing the work of the International Higher Education Commission.

Summary Recommendations

Diversification for Sustainable Growth

- The Government should lay out a growth agenda on a transparent and credible basis, with enrolments growing at a pace that can be accommodated through necessary changes in support mechanisms; this would include the delivery of public services, access to housing, etc. – supported by joined-up policy development across Government, with mechanisms to guarantee that students will return home at the end of the permitted period in the country.

- To better manage major strategic relationships with source countries, a series of People-to-People dialogues should be established. The UK's pre-eminence in areas such as health, education, and culture will provide a solid foundation for meaningful strategic dialogue and the development of opportunities in higher education. An initial focus on China, India, Indonesia, Nigeria, and Pakistan is suggested.

- Mechanisms must be established quickly to support and encourage diversification, limiting reliance on any single country. Initiatives should expand recruitment in tier 2 and emerging markets. A focus on educational development in Africa is recognised to have particular benefits for all. The success of the PMI initiative provides one basis for development.

  — Establish a rolling market development programme for 10 emerging countries identified for potential, with support for marketing and partnership-building in those regions. Under the Department of Business and Trade, a public-private sector market development group should be established that draws together key parties from both sectors to explore the development of new models and approaches to enhance recruitment performance.

  — A revamped and re-engineered marketing and messaging campaign should make driving articulations a key part of its objectives by working in partnership to develop new models and messages appropriate for key territories.

  — Measures should be implemented to repair and strengthen ties with European partners as part of efforts to diversify. As European study destinations grow in popularity, they create an international market close to home that is open to innovative new mechanisms for engagement.

Student Voice, Experience & Welfare

- Clear mechanisms should exist for international students to be heard in national policy discussions. A designated body should formally represent the interests of international students at all relevant policy and practice meetings and sit on relevant Government and sector committees. An enhanced and extended UKCISA would be central to delivering this, working in collaboration with broader student community representatives.

- The QAA should be designated to work with universities and funded to help them implement Internationalisation at Home initiatives, such as cross-cultural projects, global classrooms, and events. Modest pump-priming funding, estimated at £0.25M, would foster these activities and enable the creation of a national recognition scheme for outstanding IaH programmes, which would become self-sustaining over time. This leveraging of global engagement activities would drive much more imaginative engagement of domestic student populations, increasing outbound student mobility through schemes such as Turing and supporting routes to employment and global competence. This would help to bridge the gap with local communities.

Global Opportunities & Partnerships

- A TNE Academy (modeled on Advance HE) should be established with new funding to further develop the QAA's role in helping establish new models and approaches, including advice on creating robust business cases. With start-up funding estimated at £0.5M and a remit to become self-sustaining over time, the Academy could collaborate with the sector and its service providers to build capacity, share best practices, and engage with foreign governments to reduce regulatory barriers to UK TNE.

- We should promote Transnational Research (TNR), including collaborative doctoral programmes (e.g., cotutelle arrangements and jointly supervised PhDs with universities overseas), and seek means to establish more overseas research & innovation hubs and collaborative Doctoral Training Centres.

Promotion, Messaging & Regional Impact

- The UK needs a substantial enhancement in destination marketing and effective messaging to students, policymakers, and influencers overseas. Additional £5 million per annum funding should be provided for 5 years to establish a strategic, commercially-focussed approach to destination marketing; while this funding would not match Australia's investment, it reflects current financial constraints and signals a meaningful step forward. Marketing initiatives should reflect the diversity of the offer across the UK in English regions and devolved nations. Engagement of regional mayors and leveraging the Governments new framework for combined authorities will be crucial.

Data and Insight

- A coherent data and insight infrastructure that enables evidence-based decisions at national and institutional levels and transparent outcomes tracking needs to be created. This includes:

  — a digital data portal for international student information accessible to universities and relevant public bodies, including that which is currently "missing";

  — a comprehensive global demand forecasting tool and

  — a public-private sector International Education Data and Insight Group to ensure rapidly developing sources of private sector data and insight are systematically wrapped into strategic thinking and policy action.

Introduction

It is essential that the Government move beyond the constraints of the 2019 International Education Strategy and develop a distinct, explicit, focused, and purposeful International Higher Education Strategy (IHES) to foreground the critical importance of UK universities and secure the UK's position as a global leader in HE.

This clear concentration on HE, either within or by separating the streams of the current IES, will ensure HE receives the essential policy focus and support it requires. The new IHES needs to allow adaptation to shifting global conditions, student preferences, and national needs; a "living" strategy – reviewed regularly, updated transparently, and framed around multiple scenarios, not a single trajectory. Growth must be deliberate, not accidental, and underpinned by managing and monitoring progress against a series of SMART targets. We need to create more certainty and clarity on key policy intent, with pillars to support sustainable growth in international student numbers, which requires adaptable planning (Plan A, B, C) rather than a single rigid approach.

This move to focus on international HE would also tackle the potential for growing divisions between HE and the wider public by more clearly demonstrating and delivering broad public benefits at home (from global engagement in general and overseas recruitment in particular). "International" is only one area of concern in a potential disconnect between universities and the UK communities in which they sit, but it is a crucial one, and the measures that the previous Government introduced to address concerns about migration and pressure on public services, accommodation, etc., from rapidly growing numbers of overseas students have not fundamentally changed the narrative.

This document reflects the work and framing of the *UK International Higher Education Commission* (IHEC). IHEC and studies from Universities UK (UUK), the Higher Education Policy Institute (HEPI) and WonkHE, amongst others, have highlighted the substantial financial, academic, and societal value international students generate. Our report also notes that by fostering global knowledge exchange, supporting the UK's industrial and skills needs (to be shortly codified in a new Industrial Strategy),

and enhancing our soft power, a "fit for purpose" International Higher Education Strategy (IHES) will help ensure the UK remains a top destination for talented students and broader academic and industrial partners worldwide. It aligns with the UK's broader goals of being a science superpower and an outward-looking trading nation, linking international education to innovation, research collaboration, and global influence, all of which are closely tied to the growth and productivity agenda of the current (and any future) UK Government.

However, it will not be sufficient for a future IHES to focus on generalised benefits or broad policy intent. To be effective, a future IHES must address current issues in policy operation and support mechanisms that hinder the sector's global engagement potential. Without resolving these issues, the sector's effectiveness will remain compromised, preventing sustainable growth.

Our strategy proposals outline **five core objectives** and **detail strategic pillars** and actionable **policy initiatives** under each objective, drawing directly on insights and recommendations from the IHEC's 2023–2024 reports. A coherent implementation plan with clear timelines, targets, and governance will ensure these actions translate into tangible outcomes. Ultimately, this strategy template provides a roadmap for sustainable, comprehensive growth in international education – benefiting students, communities, and the nation's prosperity – and is designed to be adapted as needed by the UK Government and stakeholders.

The document makes recommendations for the modest investment of resources to bring about necessary changes. Not as a transformation fund, but the effect would be transformative in realising the potential for the sector to deliver a step change in performance in overseas recruitment, TNE development, and value-added for domestic and overseas students that will drive additional recruitment of both. It is recognised that this is challenging in the current financial climate; however, the economic impact of UK HE is approaching £300 billion and significantly impacts the economic, social, and cultural capital of young people in cities and towns across the UK. Failure to secure the future of the sector, which is reliant on revenue from overseas students, would indeed be "an act of national self-harm"; there are only two sectors that are guaranteed to deliver uninterrupted growth and HE is central to both – health, as people want to live longer, and education, as people wish to realise their potential – and the payback periods are rapid, and the return multiples from sophisticated and strategic investment to address current HE capability deficiencies will be substantial.

Strategic Objectives

01
Increasing our competitiveness

Making the UK a first-choice destination through a superior student experience, an attractive visa/post-study work regime, and a competitive offer across a diverse range of source countries, levels of study, and subject areas.

02
Driving diversity

Expanding recruitment across a broader range of source countries. This involves re-engaging Europe post-Brexit, exploring new markets, including high-growth regions in Asia and Africa, and selecting opportunities in Latin America. It also requires more effective support for developing transnational education and transnational research.

03
Focusing on employment and enterprise

Improve graduate outcomes by bolstering entrepreneurship and work experience opportunities, including offshore measures, to drive a step change in employment, effectively evidenced by an enhanced and updated Graduate Outcomes survey.

04
Strengthening global and domestic marketing

Promoting a compelling and coherent narrative through sophisticated, integrated marketing initiatives that track student progression from interest to enrolment, combined with effective public diplomacy. Segmenting by the audience will allow distinct messaging that differentially addresses overseas policymakers, influencers, intermediaries, and students to better manage the portfolio for the quantity and quality of students. A parallel domestic messaging initiative will help to maintain public support.

05
Improving strategy development and delivery

Involves joined-up policy development and setting SMART targets, monitoring progress with data-driven insights, including from new private sector sources of intelligence, and ensuring measures are executed efficiently and coherently across Government and the sector. Streamlined regulation, strong partnerships with devolved administrations and local regions, and continuous sector engagement are key to this objective.

Strategic Pillars

These foundational pillars represent significant action areas with details and justifications for each pillar from IHEC.

Pillar 1:
A Competitive & Welcoming Offer

We must have an attractive and welcoming offer to ensure we can fulfil our goals including recruiting talented students from around the world, so we can not be accused of filling places simply to meet financial targets.

- The Graduate Route with the right to 2 years of post-study work (PSW) experience (3 years if studying for a PhD) contributes directly to the competitiveness of the UK HE offer – even markets that have not traditionally valued work experience have seen a growing recognition of the value of measures that provide routes to employment. The imminent Industrial Strategy offers an opportunity to more clearly articulate and operationalise the link between overseas student recruitment and securing the talent needed to drive growth and productivity – at least in some key areas and at Masters level and above. However, the rate at which the re-introduction of PSW drove recruitment – particularly for Master's students where there is a significant difference from our competitors in that one year of UK study provides 2 years of PSW – gave some in the previous Government cause for concern. Uncertainty around the future of the route remains, not least because it delays the return of students to their home country. So, net migration figures have not declined as sharply as they would have otherwise following the recent decrease in recruitment after the change in dependents policy and other changes introduced by the previous Government.

Bridget Phillipson
UK Secretary of State for Education

"International students are still welcome in the UK and the visa route remains intact"

- It is clear that there will be challenges – the recent introduction of trade tariffs will likely reduce employment opportunities in the UK and elsewhere, and the recent increase in National Insurance has also been identified as likely to adversely affect employment opportunities, particularly for young people. In addition, Government plans to encourage more UK citizens to become economically active to reduce benefit payments will impact labour market opportunities. Notwithstanding this, there is a way for the Graduate Route to be preserved and improved as a bridge to employment while addressing any abuses to maintain public confidence. Individuals on the graduate route have been shown to produce a net benefit to the Exchequer, and importantly, they also bring unique skills and insights of real value that can support economic growth and development, particularly for SMEs. However, the scheme's effectiveness will be reduced if the immigration white paper pushes forward with higher salary requirements for the skilled worker visa, which many graduate route visa holders hope to transition to, or if there are other changes such as a salary threshold for the Graduate Route itself. We should not lose sight of the wider contribution these students make after graduation. Further, International students go on to work in vital public sector roles in our NHS, schools, and associated areas where roles, although demanding, do not necessarily command high salaries – so it is important to view their contribution through much more than just an economic lens.

We recommend ensuring the integrity of the study visa and Graduate Route by tackling perceptions that students use it for migration and more clearly demonstrating its unique contribution to employers and the UK so that it fulfils its promise.

This includes better tracking student outcomes and systematically highlighting how international graduates contribute to the UK economy through case studies, best practice analysis, and exemplars. It is also crucial to ensure that it can be more actively used by employers seeking to increase productivity and growth for whom overseas students can provide unique insights and support. The All Party Parliamentary Group (APPG) for International Students found very low levels of understanding about the graduate route amongst employers, particularly SMEs who might be expected to benefit most. However, no organisation has responsibility for its promotion – and this is a more

general finding across international activities – there are policies, but no one is responsible for their oversight and delivery and this is inconsistent with the fact that we need this area to succeed.

> We recommend that the effective operationalisation of the Graduate Route needs to be the responsibility of an identified body that is accountable for its effective management and monitoring and for the means of access and benefits to be clearly articulated to employers and communities.

- **Visa monitoring to ensure students are genuine and return home:** It is essential that HE leaders understand that we have allowed students to become conflated with legal and illegal migration debates and that migration remains a significant and divisive political issue. We can only develop confident and proactive messaging underpinning a positive and welcoming offer when we address this. Individual case studies about exceptional overseas students who transform UK life are not in themselves effective in addressing concerns that overseas students come to the UK with settlement in mind. This is not an issue that is going to go away if ignored. There is an urgent need for an integrated immigration tracking system that links student visa issuance, university enrolment data, and post-study departure information. It was noted that the Home Office already holds much of this data but does not currently share it in a format that the education sector can readily use for oversight and planning. It would be possible for the Office for National Statistics (ONS) to leverage administrative data and regularly report the number of active student visa holders in the country at a realistic frequency (e.g., quarterly updates). The Home Office clearly has more information on students than it chooses to release, as illustrated by last year's unexpected decision to release data on Master's students that had been sought previously. However, even if directed by the Government, it seems unlikely that historical datasets collected for different purposes can be made into the coherent Management Information System needed for the Government and institutions to manage overseas student recruitment better.

- Nevertheless, until it is clear that the Government has accurate, robust, and analysable information about when an overseas student enters the country to begin their studies and leaves the country at the end of the permitted period, this will remain problematic for the sector and Government. The International

Passenger Survey was suspended during the COVID-19 pandemic and later resumed without the 'migrant boost' module. Its role in estimating immigration and net migration has been adjusted. The ONS now uses a broader range of data sources to compile migration statistics, reflecting the need for more accurate and comprehensive information. Despite these changes, the IPS remains a significant tool for understanding migration <u>trends</u>, and it and the processes around it are not fit for purpose. By contrast, the Australian Provider Registration and International Student Management System (<u>PRISMs</u>) provides a detailed assessment of the status of a student.

> We recommend that the Government provide quarterly updates of the overseas student numbers in the UK for the previous quarter, demonstrating that there are robust oversight measures in place. We further suggest it grasps the opportunity of the new eVisa programme to generate an effective means of recording student status in real-time – like the Australian PRISM system – that can feed both policy evolution and reassure the public that student flows are appropriately monitored and managed, as part of the wider Immigration Strategy – that they "come, contribute, catch a plane home".

- We hope the Government will clearly explain why international students cannot simply be removed from the net migration figures. As defined by the United Nations, net migration is a standard measure for comparing population dynamics across countries – and not something the UK Government can unilaterally redefine. However, the Government can and should do more to provide context and nuance in how international students are discussed within the migration debate. The current narrative urgently needs to be addressed. With well-articulated messaging, it is possible to counter claims that ministers are trying to

"fiddle the figures," as it is recognised that net migration will likely remain a focus of media scrutiny by custom and practice. The emphasis should be on long-term immigration trends. Quarterly statistics have been used as part of the politicisation of international students in immigration discussions. However, similar to the proposals on net migration, we propose a new focus, with proper contextualisation and clear linkage to the overall policy intentions, without abandoning existing measures. In this context, quarterly figures are an important tool for overall monitoring and managing progress towards our declared strategic intent. Fortunately, there is a suitable alternative measure. As the Migration Advisory Committee (MAC) noted in its 2018 report, the issue is not how the UK calculates net migration but rather that this is the primary measure used for political debate. To align with international practice, the UK should instead utilise other indicators – such as grants of settlement – to inform operational or political debate. Given the MAC's growing authority and profile, **we recommend that policy attention be firmly and consistently placed on the MAC's 2018 recommendation to focus on the small proportion of overseas students who remain in the UK long term. Delivering this shift will depend on implementing a robust data framework – such as the Australian PRISM system – to evidence when students arrive, and leave, or settle.**

- If we can establish confidence in mechanisms to manage and monitor overseas student numbers in the UK we can establish a convincing and positive narrative and consistently welcoming position that can be the basis of marketing UK HE to the world.
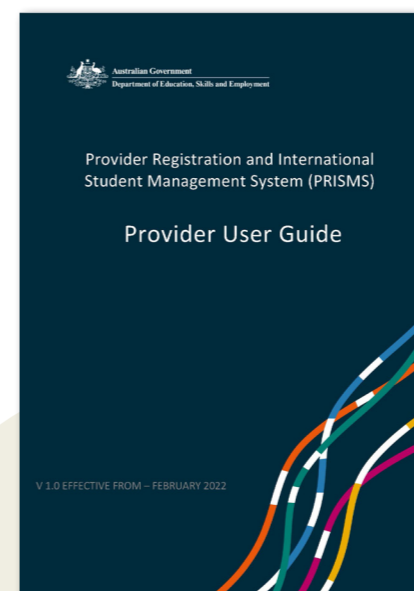
- **Enhance the Offer (Quality and Support):** When we talk about the competitive advantage of the UK, we rightly focus on the quality of our institutions and the support they provide. Less often do we clearly articulate the exemplary outcomes for students that come from that approach – combined, of course, with the fact that universities are increasingly sophisticated in attracting talent. Rather, talk of "Mickey Mouse degrees," alleged recruitment of poor-quality overseas students, and the associated rhetoric, helped to undermine the brand proposition of the UK. However, international **students' continuation and success rates in the UK are significantly better than that of our competitors**.

- <u>A recent OECD country report noted that the UK had the highest continuation rates amongst OECD countries</u>. Further comparison with Australia undertaken for IHEC shows that the non-continuation rates for overseas students in Australia are more than double those of the UK. <u>https://www.education.gov.au/higher-education-statistics/student-data/selected-higher-education-statistics-2023-student-data/key-findings-2023-student-data#toc-attrition-rate-remains-stable-over-the-last-year</u>

- This provides a basis to both promote the success of UK HE and on which to build additional academic support – extending the range of initiatives ensuring overseas students can thrive – from pre-arrival guidance to ongoing English language and academic skills support. Taken together this broader support provided to students, as noted in the sections below, affords a significant marketing and messaging opportunity. <u>The IHEC report with London Higher and Middlesex University</u> identified a series of enhancements that could be the building blocks for a more compelling offer across the UK. These issues are further explored below in the section on the need for more centrality of the "Student Voice."

- **Employment and enterprise:** Career support systems within universities remain primarily evaluated against domestic undergraduate employment outcomes, resulting in limited incentives to invest in international student services. This misalignment is exacerbated by outdated and costly data-gathering frameworks, which are widely regarded as sub-optimal in representing international student trajectories and ineffective in accounting for regional nuance – both in terms of local salary levels and recognising key skills shortage areas such as the public sector and creative industries

Provider Registration and International Student Management System (PRISMS)

Provider User Guide

which do not traditionally attract high remuneration. However, with growing economic uncertainties globally, routes into employment have become an increasingly important determinant of student choice, even in those markets for whom it has not historically been a strong driver. The current focus on employability is not meeting the needs of domestic or overseas students. There is good practice across the sector involving innovative schemes that provide creative approaches to access work experience, and support in developing the skills that will support personal enterprise, entrepreneurship and intrapreneurship on graduation; these provide excellent routes into employment in the dynamic economies of many of our leading source markets. **To support a necessary shift from a narrow focus on employability to a broader strategy around jobs and enterprise, we recommend that AGCAS be integrated into the structures responsible for delivering the new International Higher Education Strategy. AGCAS should serve as a source of intelligence, implementation ideas, and advocacy – helping embed proven best practices and drive forward more inclusive, internationally relevant career services focused on Employment, not Employability.**

- **Doctoral training and research:** International students are often the pipeline for research talent (postgraduates and PhDs), which feeds the UK's aspiration to remain a "science superpower." However, there are significant challenges to the UK's research talent pipeline. Global demand for UK postgraduate research degrees has essentially been flat since 2015, with post-Brexit declines in EU enrolment initially compensated for by growing non-EU enrolment. However, the most recent PGR enrolment data shows a precipitous decline from the 2021/22 level for both EU and non-EU students. Thus whilst PGR numbers from the EU were badly impacted by

Brexit, the most recent non-EU PGR enrolment data shows a further significant deterioration. There is, therefore, significant and growing insecurity in our research base, and 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 innovation base. Given its importance to growth and productivity, this is a particular area of concern and it is essential that we make it clear that we welcome students both if they intend to progress to study for a research degree after an undergraduate or Master's degree, and if they come here directly to study for a research degree.

- **Leveraging Alumni:** alumni, particularly overseas alumni, are underutilised. Global alumni networks such as the National Indian Students and Alumni Union (NISAU) can facilitate internships and placements for UK students overseas, particularly enhancing graduate employment prospects and extending global influence. Data fragmentation and limited coordination have constrained progress in this area. Efforts to support more sophisticated overseas alumni strategies with dedicated investment and data-sharing agreements are needed. However, we are conscious that the sector can only manage so much change, particularly when finances are so constrained. We therefore, as an initial first step, suggest that the enhanced marketing and messaging campaign we believe is essential includes engagement with alumni alongside its primary focus on driving new student enrolments, which will, in turn, grow initiatives to more effectively leverage alumni.

- We considered suggestions such as the inclusion of the International Student Barometer into the national policy framework as a balanced scorecard metric to reflect student experience more comprehensively. This would offer greater visibility of a variety of measures important to international students. It would also allow comparison with other countries, including on international graduate outcomes, and encourage institutions to systematically respond to overall messages for the UK sector and particularly integrate employment into internationalisation strategies. A further suggestion was to establish an "International" Teaching Excellence Framework. As with alumni, we are conscious that the sector already feels overburdened by regulatory requirements and has limited bandwidth to deal with new measures, notwithstanding their crucial importance. Therefore, we believe it is best that these issues are dealt with through our recommendations on the Graduate Outcomes Survey and the urgent need to more systematically wrap in private sector data sources to manage and monitor the performance of the sector.

International Graduate Routes: Narratives from the UK job market

February 2023

AGCAS | The Association of Graduate Careers Advisory Services

Pillar 2:
Diversification for Sustainable Growth

It is crucial that the IHES is clear about objectives in terms of the number and type of students that the UK should be looking to recruit (by geography, level, and broad subject areas). In an increasingly unpredictable world, active portfolio management is a key principle for any significant activity at national and institutional levels.

Institutional autonomy is, of course, a foundational principle for HE. Top-down national target setting for international recruitment is challenging, but there is potential for a bottom-up approach that aggregates institutional strategies; this is only one step from the mandate presented to the OfS already. Institutions clearly differ significantly in mission, market position, subject portfolio, and regional context. They need to be supported to systematically move away from opportunistic or purely volume-based targets and instead employ rigorous analysis and forecasting. This means integrating data on recruitment costs, student retention, and long-term outcomes into planning decisions and aligning recruitment strategies with institutional strengths and it is realistic that this information is aggregated and "advice" provided on how institutions sit within the overall picture so that individual institutional decisions can be refined based on best-demonstrated practice and collective position.

International Higher Education Commission
Supported by Oxford International Education Group

International Higher Education Strategy 2.0: Targeted Growth for Resilience

Authors:
Janet B. Ilieva
Pat Killingley

Oxford International | Education Insight

It is almost impossible to define an appropriate basis for how many overseas students a country should be seeking to support. The 2013 strategy "International Education: Global Growth and Prosperity" identified targets based on projecting historic growth forward, and the 2019 IES "Global potential, global growth" identified 600,000 similarly based on historic growth rates combined with an "aspirational" element. Even comparisons between countries are difficult, not least because of the different economic bases and socio-demographic profiles. That said, it was interesting that the IHEC report *Evidence versus Emotion* identified that overseas student numbers in the UK, then around 660,000, would need to rise to more than 1 million to form a similar proportion of the population as they do in Australia's, suggesting there was room for growth.

It can be argued that the previous Government's pushback on international recruitment was in large part due to the rate of growth in overseas enrolments – it felt rapid and unmanaged – compounded by narratives around stretched public services and rocketing accommodation rental costs. The impact of students on rental costs was claimed to be a major driver of discontent. Rising rents have subsequently been shown to be more a function of limited new housing construction than the specific impact of students.

We recommend then that the Government lays out a growth agenda but at a pace that can accommodated through necessary changes in support mechanisms; this would include public service delivery and access to housing. This will require joined-up policy development across Government and measures to guarantee that students will return home at the end of the permitted period in the country.

IHEC reports highlighted a worrying decline in the diversity of source countries post-Brexit. 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, with many institutions now relying on one or two countries for most of their overseas students. Such concentration poses risks to financial stability and cultural mix. Diversification is critical to resilience – and it aligns with global development and soft power goals by extending UK opportunities to a broader audience. The current concern about relying on overseas students for the financial sustainability of the UK sector would be ameliorated if the risk was not so concentrated in such a small number of markets – just as with the stock market, steady returns can be expected with a diversified
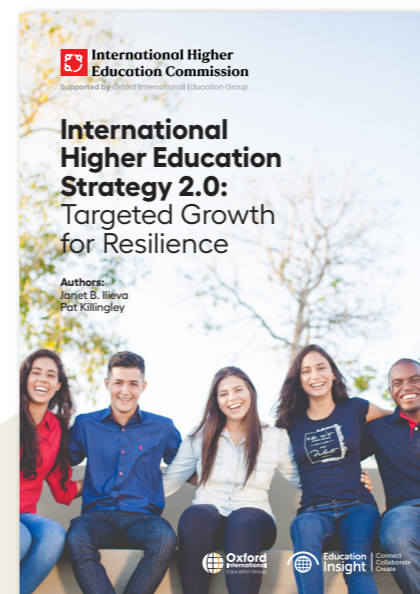
portfolio; and for those that argue that market risk is unmanageable, it should be recognised that increasing dependence on the public purse in a world of political volatility brings its own set of risks, and not just financial ones.

- **Diversify Recruitment Markets:**

We recommend measures to encourage diversification, and limit reliance on any single country; and that in parallel there should be initiatives to expand recruitment in tier 2 and emerging markets.

- It is recognised that the overall cost of acquisition is already creating issues for the sector in general, and this may be exacerbated in the short term by seeking to recruit in smaller and/or more difficult-to-access markets. The role of the International Education Champion has been critical, but the Government has an enhanced role to play in more actively identifying and realising new recruitment opportunities.

- Regional HE groups and mission groups also have a role to play in encouraging open conversations between institutions about recruitment plans to ensure that their recruitment efforts are, as far as is possible, created and implemented in the recognition of the intentions of others – so that opportunities for synergy and avoiding destructive competition can be explored.

- Further simply identifying "5 priority countries" is not enough – more countries and a more granular, "horses for courses" approach is needed, tailoring market focus to the strengths of the different parts of the sector and providing sufficient scope for a medium-term development agenda. We already see a significant divergence in geographic focus by mission group and this should be recognised and reflected in efforts to support differentiated recruitment strategies. We recommend the strategy include a rolling programme of market development from a set of 10 emerging countries identified for potential, with support for marketing and partnership-building in those regions).

- We recognise that the sector increasingly relies on commercial partners to support recruitment – from small agents to multinational educational service companies. This landscape was documented by a NOUS report in 2022. These relationships are at the institutional level, and the report showed that a number of universities did not sufficiently understand them. There is no forum to bring universities and potential service providers together to establish new service and collaborative models that could cost-effectively open up, scale, or reduce the cost of acquisition in existing and new markets. Further, there are significant new opportunities to access markets differently, opening up through the rapid development of EdTech and artificial intelligence, which are not comprehensively understood in the sector.

We recommend establishing a public-private sector market development group under the Department of Business and Trade that draws together key parties from both sectors to explore the development of new models and approaches.

- We note the success of the People-to-People dialogue in supporting the growth of overseas student numbers from China as part of a broader strategic commitment to working together in areas of importance – then and now – to both countries, including health, education, and culture. Whilst the UK-China P2P dialogue ceased in 2018, the EU has continued its engagement, recognising the power of this framework for building relationships and driving trade in areas of joint focus. Leaving aside the global power of the UK sports and cultural sectors, many nations look to the UK for

guidance on enhancing educational opportunities. In addition to HE, the UK's strong reputation for qualifications, skills training, and the flexibility of the British curriculum is highly attractive, alongside a focus on evidence-based policy, special educational needs, and teacher development.

We recommend the initiation of a series of P2P dialogues with strategic countries of interest where the UK's pre-eminence in areas such as health, education, and culture will provide the basis for meaningful strategic dialogue and development of opportunities for higher education and suggest an initial focus on China, India, Indonesia, Nigeria, and Pakistan.

- **Deepen engagement with Africa:** The need for an **Africa initiative** is particularly highlighted, given the continent's rapidly expanding youth population and the UK's relatively low engagement. We should explore new partnership and scholarship schemes in key African countries, positioning the UK as a partner in capacity-building and human capital development.

- The recent enthusiasm for Transnational Education (TNE) has focussed on the development of branch campuses and the intent to deliver the entirety of programmes overseas. However, this approach will not deliver one of the most attractive elements of coming to the UK – an almost unique educational experience of studying with large numbers of students from up to 150 different countries. Recognising this exceptional context, which is highly sought after, provides an opportunity to drive articulations where students spend a proportion of their time in the UK to secure the benefit of our exceptionally diverse educational milieu. Articulations from China were highly significant before COVID-19 but have declined substantially since, and we have yet to adapt the model to support a similar scale of articulation from countries that have a very different socio-economic makeup.

We recommend that the revamped marketing and messaging campaign proposed in this report makes driving articulations a key part of its objective by working in partnership to develop new models and messages appropriate for key territories.

- **Re-engage Europe:** We recommend ways to strengthen ties with European partners as part of diversification. The sharp drop in EU students since Brexit (due to loss of home fee status and funding access) needs to be addressed. Notwithstanding the difficulty of the politics, not least those evident from the challenges around agreeing a potential youth mobility scheme, the strategy could explore mechanisms like **bilateral fee arrangements or more systematic scholarship schemes**. This could even be done at a regional level in partnership with metro Mayors and regional HE groupings. There could be legislation for discounted fees for EU students (potentially via the putative "youth mobility" scheme) to regain competitiveness in Europe. Additionally, increasing participation in exchange programmes (such as an expanded Turing Scheme) with more flexible support for less affluent students and more systematic implementation of mechanisms to expose students to global engagement and build inter-cultural capital such as COIL will keep European and UK students connected, fostering reciprocity and goodwill that will translate into renewed interest in UK study.

Public meets private:
The growth of educational services in international student recruitment
October 2022

nous | Oxford

UKIERI
UK-India Education and Research Initiative

TURING SCHEME

Funded by the UK's global programme to study and work abroad

Pillar 3:
Student Voice, Experience & Welfare

International students contribute significantly to campuses and communities, but their experiences and needs differ from those of domestic students. Moreover, recent concerns around housing, services, and community impacts have put the spotlight on how well the sector and Government cater to overseas students. This pillar addresses those issues, framing international education as a mutually beneficial exchange. Ensuring they have a positive experience is both an ethical imperative and critical for word-of-mouth advocacy. The IHEC report "Expressing the International Student Voice" stressed that policy must incorporate students' perspectives and focus on welfare.

The recommendations were quite extensive and listed below:

01 To improve employability and ease cost pressures
The Mayor of London and London business groups should commit to working with London's higher education institutions to demystify the process for employing international students, either for paid-employment or course placements, to ensure that international students have the widest range of options for work experience while they are here.

02 To avoid unnecessary hardship and exclusion
Shops on or close to university campuses, or located in or close to student residences, should consider offering an option to pay in cash for essentials for international students, to ensure they retain a sense of dignity and still have access to groceries and essentials while they wait for UK bank accounts to be set up.

03 To help foster a sense of belonging
London Councils should commit to working with London's higher education institutions to provide pre-arrival welcome information about their local borough (conscious that in London this may be different to the borough in which the students are studying), highlighting local services such as GPs, hospitals and libraries, as well as faith, sport and wellbeing groups that students may wish to join, to help them integrate into local communities in addition to those provided by the university.

04 To reduce transportation costs
Transport for London should consider dropping the off-peak restrictions on its student travelcard to ensure students can be on campus all day without worrying about the extra costs.

05 To ensure international students have a say in key governance issues
Higher education institutions should make efforts to ensure the international student voice is represented in key governance structures. The Office for Students (OfS) in England and the devolved administrations in Wales, Scotland and Northern Ireland should also consider the creation of an international student panel to ensure their views are reflected in key decision-making processes. In London, the GLA could ensure an international student voice is represented on the Mayor's Academic Forum to give an additional perspective on issues pertaining to the academic and accommodation experience.

To amplify the Student Voice in Governance, **we recommend the need for clear mechanisms to enable international students to be heard in national policy discussions. We propose that the UK Council for International Student Affairs (UKCISA) become the designated body to lead on representing the interests of international students and sits on relevant Government and sector committees.**

LONDON HIGHER / Middlesex University London

Expressing the international student voice

What international students in London tell us about their experiences of studying at university

A note prepared for the International Higher Education Commission (IHEC) by London Higher and Middlesex University London

There are many sources of student views, and it is important that this richness is captured and distilled. UKCISA can play a central role in this. Working collaboratively with others it could lead on key requirements such as:

- A focal point for stakeholders on issues related to international student policy and research, and a dissemination channel for Government messaging on international students, with direct links to those who support students in sponsoring institutions. UKCISA has the widest membership of student sponsors and, therefore, the greatest convening power.

- Coordinating activity under their established WeAreInternational brand, including the successful student ambassador programme. Provide regular research into the student experience and campaigns to highlight it in support of destination marketing campaigns.

This will ensure student feedback informs policy in areas like visas, accommodation, and campus inclusion.

While a dedicated "Office for International Students" was considered, IHEC advises against creating new bureaucracy. We also considered but rejected the idea that universities should adopt an **international student equivalent of the Teaching Excellence Framework (TEF), even though something light touch could be done** in partnership with UKCISA. However, we strongly encourage the development of an **International Student Experience Framework** that institutions can use to benchmark and improve support services, academic guidance, and student integration efforts, potentially in a public-private partnership agreement.

- **Ensure Welfare and Service Provision:** International students should receive support proportionate to their investment. We can no longer sustain the view that overseas students pay more because the Government funds UK students. This pillar calls for concerted action to improve areas like housing availability, healthcare access, banking, and induction support for overseas students. It is difficult to justify the higher fees overseas students pay if essential services are lacking. This may include working with local authorities and universities to guarantee a minimum service standard – e.g., sufficient student housing plans for growing intakes, easier NHS registration processes, and cultural orientation programmes. The rollout of the combined authority structure and the growing role of regional

mayors, many of whom have shown real interest in the higher education agenda – as both a source of economic power and talent – provides a reasonable basis for developing new and enhanced regional partnerships. The recently relaunched 'Study London' initiative by London Higher provides one such platform in the capital through which the Mayor of London could encourage better service standards from all involved parties in return for enhanced promotion of the region's international education offering. Additionally, compliance and workload rules around students working part-time could be reviewed in collaboration with the Home Office, to better balance integration and academic success. These initiatives not only improve individual outcomes but also help maintain positive public sentiment by addressing community impacts e.g., preventing "overheated accommodation markets" through proper planning.

- We considered whether recommending that Universities should be made accountable for the accommodation needs of overseas students, but rather take the view that if growth is better managed, allowing the market to respond, and that students are better informed about the real costs of living and studying in the UK, and that visa regulations reflect this, then the issues can be mitigated without the need for further intervention. AccessHE produced a good student cost of living guide some time ago. This was mainly for domestic 6th formers, but there's an argument to produce an updated one for international audiences, perhaps as part of the proposed new role of UKCISA.

- **Recognise and Celebrate Internationalisation at Home (IaH):** The IHEC report on IaH identified the many areas of good practice and potential for the UK to become a world leader in this area, which significant benefits home students, especially those from less affluent backgrounds, as well being attractive to overseas students. IaH is also, principally through COIL, both a driver of outbound mobility and a means for universities to enhance their TNE journey; it is, therefore, not just a nice to have but an essential piece in the international strategy enabling framework at national and institutional levels. We recommend below that the Government enhance the funding it has provided from the Department for Business and Trade (DBT) to the Quality Assurance Agency for Higher Education (QAA) to address regulatory burdens and provide more developmental support for the sector, particularly with respect to new models for TNE and precursors such as IaH. Armed with this

investment, and recognising the need to address the fact that the QAA is not the designated quality body for the OfS anymore, **we recommend that the QAA becomes the designated body to work with universities to help them implement IaH initiatives (such as cross-cultural projects, global classrooms, and events) and create a national recognition scheme for outstanding IaH programmes.** Strengthening IaH improves the student experience for all and helps communicate the campus and community benefits of international education to the broader public (including showcasing how global diversity on campus enriches learning and employability for UK students). We need to recognise the importance of giving every UK child access to cultural understanding, regardless of their background, to prepare them for a connected world; these students are future global ambassadors.

- **Outward Mobility and Exchange:** We need to encourage more students, particularly domestic students, to study abroad or participate in exchanges, as this strengthens international partnerships and enhances the student experience. While this IHEC strategic document focuses on inbound student mobility, we acknowledge that **study abroad experiences for UK students** improves their employability and creates reciprocal flows. Programmes like the Turing Scheme should be expanded and made more accessible; IHEC recommends providing additional support for students from less affluent backgrounds as it will widen participation in outbound mobility.

> We recommend that a target for outbound mobility should be set, e.g., "Double the number of UK students with an international placement by 2030".

- There is extensive evidence that international experience contributes significantly to intercultural competence, employability, and good graduate outcomes. Even short durations (HESA records experiences of 5 days or longer) provide significant direct benefits and often start students on a journey to engage more substantively with global issues and the acquisition of global competencies. It is not true that UK students, or overseas students here, are not interested in outbound mobility. There are notable examples that disprove this, where there has been an institutional commitment to explaining the value, evidencing the benefits, and implementing the mechanisms necessary to address perceptions of risk, costs, and returns. For example, before the pandemic, Coventry University, through its Centre for Global Engagement, was

responsible for 25% of all of the UK's outbound mobility and was the top-ranked institution for outbound mobility since the data began being recorded 5 years previously – because driving outbound mobility was a key part of its international strategy focussed on providing value to students which in turn drove its exceptional levels of overseas student recruitment.

The move away from markets where home savings primarily fund students to those where they are funded, in many cases, by loans, is likely to remain and potentially intensify as new second-tier markets are opened up as part of diversification efforts. This, along with the rising costs, means that the issues around students being able to afford study and living costs, with the inevitable consequences for wellbeing, will continue. IHEC considered **piloting a financial guarantee scheme similar to Canada's "Guaranteed Investment Certificate (GIC)"** for high-risk markets which might have benefits for both ensuring that students have the necessary financial resources and universities are not encumbered by bad debt. However, we do not think it is appropriate to recommend this measure at the moment; instead, we believe this is an issue best left to individual institutions to address, with the support of the new expanded OfS mandate to both safeguard the interests of students and better ensure institutions' financial sustainability. However, it should be recognised that securing cash flow will be an increasingly significant issue for universities and that new approaches may be required to ensure this and safeguard the quality of service to students.

Pillar 4:
Global Opportunities & Partnerships

Expanding transnational education (TNE) and transnational research (TNR) partnerships is essential to cementing the UK's role in global knowledge creation, and to providing more pathways for international engagement (including outward student mobility and collaborative research initiatives). TNE has a long history in the UK, going back at least to the foundation of the University of London External Programme in 1858. Its subsequent development, driven by post-war cultural extension, then by expansion of private providers powered by the internet and opening up of GATS, and most recently by changing student behaviours and debates about migration has seen structures and approaches evolve. Global partnerships via TNE support the UK's foreign policy goals (e.g., development and diplomacy) and create opportunities for UK students and faculty abroad
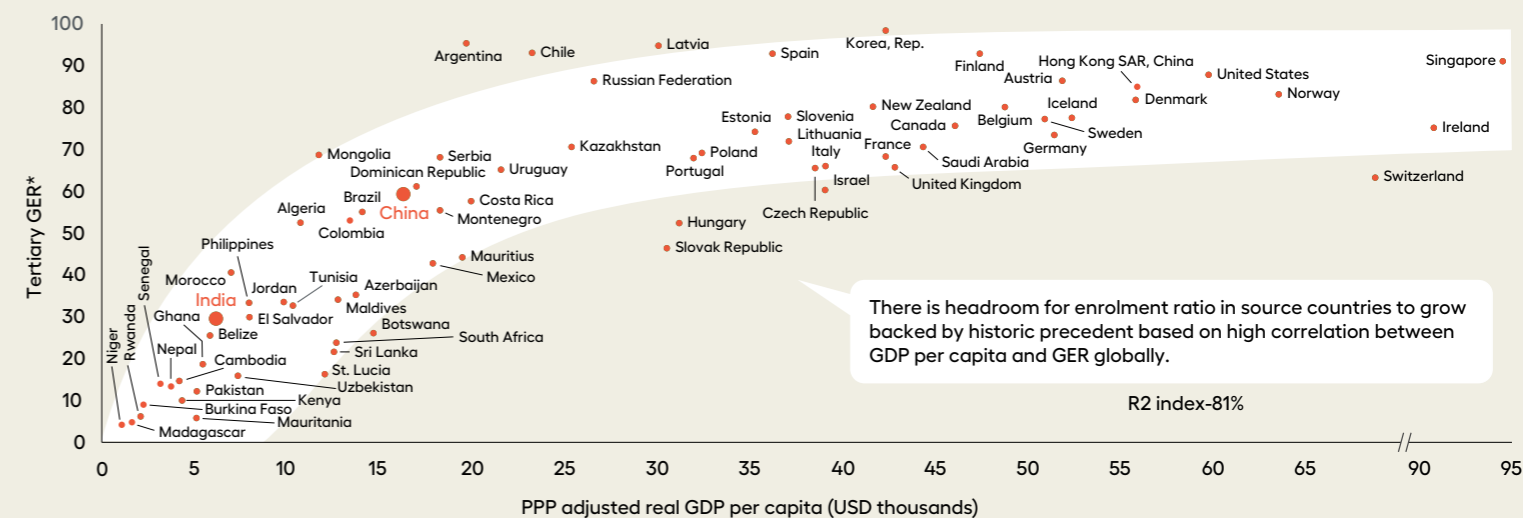
TNR is an essential part of aligning international engagement with the UK's research and innovation agenda, amplifying the country's soft power and economic impact. IHEC has particularly underscored the need for a national commitment to Transnational Research (TNR) alongside TNE to counter declines in international doctoral enrolments.

- TNE, by allowing students to access UK education overseas (through branch campuses, partner institutions, online learning, etc.), is a diversification strategy, a means to extend global reach, and a way to deliver equity by making world-class education available at a scale impossible through student mobility. As IHEC has outlined, the UK has the means, the right, and indeed an obligation to do this:

  — Our education is world-class and highly sought after – the independent data on this is unequivocal and overwhelming

  — Most UK universities undertake some form of TNE

  — We offer a wider range of TNE models than our competitors

  — We have a more extensive and more diverse TNE portfolio than any other country

  — The costs of organically developing a competitive HE system that meets local needs are beyond the means of many countries.

Whilst the UK already has a large and diverse TNE footprint, and enrolment numbers are increasing, as the IHEC report on this topic identified, UK TNE has "failed to realise its full potential" to date. This strategy establishes TNE as a core pillar and suggests setting national TNE targets (by volume and economic value) – to mirror the

Increasing GER* will drive the demand for higher education in source countries

There is headroom for enrolment ratio in source countries to grow backed by historic precedent based on high correlation between GDP per capita and GER globally.

R2 index-81%

Source: Euromonitor, L.E.K. research and analysis

*GER stands for Gross Enrolment Ratio which represents total enrolment in tertiary education expressed as a percentage of the population in the official age group corresponding to this level of education

ambition of the 2019 IES student number targets, and supporting universities to pursue new TNE opportunities, especially in countries building their higher education capacity so that we may support their development and increase diversity by geography, subject and level.

> We recommend that a TNE Academy (modeled on Advance HE) be established as part of further developing the QAA's role in helping create new models and approaches. This Academy would work with the sector and its service providers to build capacity, share best practices, and engage with foreign governments to reduce regulatory barriers to UK TNE.

As the QAA is no longer the Designated Quality Body for the OfS, we would need to address head-on how this would work in England, especially if the OfS is going to increase its focus on TNE students as part of its wider franchising/quality review. Notwithstanding this, by expanding the quality of TNE and online offerings (including in markets where online degrees are not yet recognised), the UK can diversify its international student base (and some TNE students later come to the UK for study under articulations, as noted above) and amplify its global educational influence. We particularly propose focusing on developing new TNE models with corporates to support upskilling and economic development. This is likely to be more attractive to those countries dubious about the purposes of TNE, if they consider it is pursued as a source of revenue for the UK, not a source of value for the host country.

Such capacity and capability development would not be limited to educational delivery; many TNE ventures fail because of inadequacies in "the business of education" – identifying the actual market and effectively marketing the proposition. The Academy would support a more business-like approach to assessing opportunities – providing tools to ensure there is careful vetting of the business case (including with external audits) and processes that secure dependable in-country partners (including Government and industry allies) as these are essential for success. This recommendation logically extends a process that has long been underway in universities where the professionalisation of TNE delivery has seen central Academic Partnership Units established so that faculties and schools have a support framework to ensure strategic fit, scale, and become sustainable. We now need to do this on a national basis so that institutions can realise both the potential revenue and academic returns as well as to enable the UK to extend its soft power and promote equity by helping to open up access to world-class education globally.

- **Transnational Research (TNR) Initiatives:** This strategic framework proposes leveraging the UK's strength in research by fostering cross-border research capacity and capability building. **We recommend promoting collaborative doctoral programmes (e.g., cotutelle arrangements and jointly supervised PhDs with universities overseas) and seeking the means to establish more overseas research & innovation hubs.** IHEC proposes creating overseas collaborative doctoral training centres and boosting co-funded research scholarships to drive TNR. By doing so, the UK attracts PhD talent and helps train researchers who become

Figure 13: Countries or territories by GDP (nominal) per capita in 2023

25,000 or more
15,000 - 25,000
5,000 - 15,000
1,000 - 5,000
under 1,000
no data

©IMF, 2023, Source: World Economic Outlook (October 2023)

Source: World Economic Outlook (October 2023) International Monetary Fund

ambassadors for UK excellence in their home countries. This directly ties into the UK's industrial strategy by ensuring a pipeline of skilled researchers in fields like health, engineering, and AI – often in partnership with countries where those skills can address global challenges.

- We noted above the opportunities to use IaH, and COIL specifically, to develop TNE opportunities, outlined in more detail in IHEC reports.

- **Government-to-Government Collaboration:** Building on the successful work of the UK's International Education Champion, we propose more systematically integrating international education into the UK's trade and diplomatic engagements. This involves leveraging Free Trade Agreements and bilateral talks to reduce barriers to educational exchange (for instance, ensuring **mutual recognition of qualifications** and including education services in trade discussions). The UK's International Education Champion and diplomatic missions should have a clear mandate to advance TNE opportunities and inter-governmental scholarship programs. We suggest initiatives akin to a "Chevening for joint degrees" – for example, a scholarship fund for dual Masters/PhDs between the UK and partner countries. These efforts would underpin the UK's soft power by contributing to partner nations' development goals (education, upskilling) while forging lasting academic ties.

Pillar 5:
Promotion, Messaging & Regional Impact

It can be argued that with enrolment numbers seemingly not falling as far or as fast as initially feared, a marketing campaign is unnecessary. This would be to misunderstand the issues:

- Overseas recruitment is not a tap to be turned on and off and marketing campaigns do not produce instant results – building a presence in the market takes time, and if we want to optimise our position, we should start now.

- If the costs of studying in the UK rise significantly (given that many universities have declared their intention to increase fees and reduce scholarships and discounts) and/or affordability declines, we may see rapid shifts in demand

- Marketing should not just be about volume but also the quality of the students we attract

- Increasing diversity is key. We should manage the portfolio more actively by mixing it by country, level, and broad subject area.

- De-risking the financial challenges of the sector involves a concerted effort to move away from the current dependence on a small number of markets

- We currently have no means of dissociating messaging by the Government intended for domestic audiences from those intended for overseas students and in particular discriminating between the different user groups we wish to influence – Governments, agents, students etc.

- There is growing competition from emerging, new destinations in the Middle East and Asia as well as continued growth in overseas enrolments in Europe and China

- We are likely to see overseas enrolment resurgent in Australia, and potentially Canada, at least in the medium term

- We do not know what will happen even in the short term to actual enrolments in the USA

- We need a tool to proactively manage our global engagement in a world that is increasingly competitive and volatile.
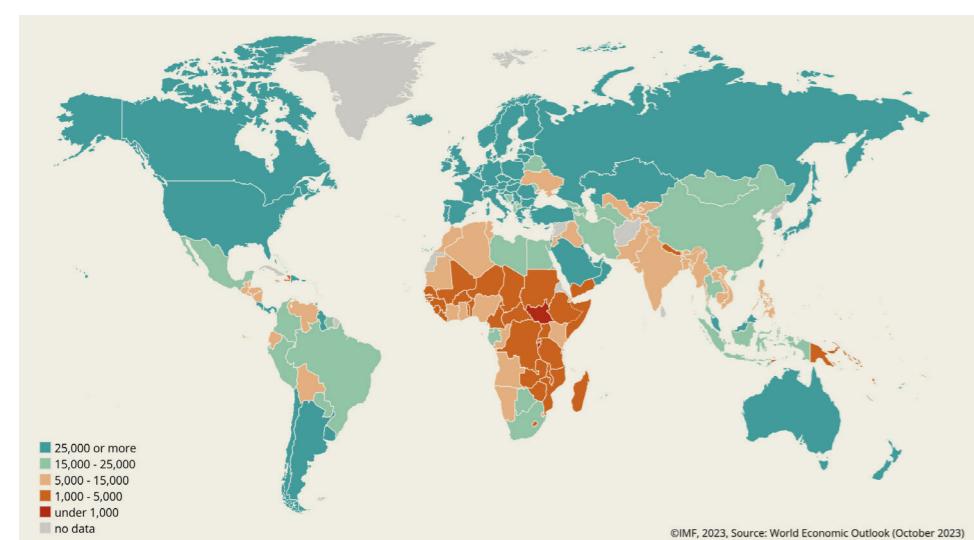
Strategic Pillars

We must deliver globally a powerful, cohesive message about UK education and ensure that the benefits of these promotional efforts are distributed across all UK regions and nations. Of all the things we could do to enhance the performance of the UK in overseas recruitment markets, it is arguable that more effective destination marketing is one of the quickest easiest to implement:

- We have extensive evidence of the quality and utility of UK higher education
- We have seen the benefits of the recent positive policy statements, which contrasts starkly with the negative impact of the previous rhetoric
- We have existing expertise; however, Study UK is significantly underfunded
- We have an example of how effective an adequately funded, commercially focussed destination marketing campaign can be in the form of national and state initiatives from Australia – the Study Victoria marketing is particularly impressive.

It is particularly needed because we have allowed the brand to be devalued by things as wide-ranging as the "Mickey Mouse degrees" discourse and the failure to focus on the sector's excellent performance, including exemplary retention and progression levels compared to competitors.

However, impact will require a significant increase in investment and a "controlling mind," as opposed to the current split of responsibilities, to ensure that objectives are set that are clear and measurable and are demonstrably shown to flow through into enhanced

enrolment – a shop window is not sufficient, we need a mechanism that facilitates and monitors students enrolling in the UK as a result.

> We recommend additional funding of £5 million per annum is provided for 5 years to establish a more strategic, commercially focussed approach to destination marketing. This level of funding does not equate to those in Australia, where regional campaigns (e.g. Study Victoria) also receive significant investment, but we recognise the constrained financial circumstances.

The benefit, as outlined earlier in this report, is that this modest investment will help the sector to "trade out of trouble" securing the continued economic contribution estimated to approach £300 billion per annum and which significantly impacts the economic, social and cultural capital of young people in cities and towns across the UK.

It is time for radical thinking and seizing at least one clear mechanism to drive change. Re-engineering our international marketing approach would create new opportunities to promote not just study in the UK but also our world-leading research. Research is a critical part of the UK's growth and productivity agenda – yet, as noted above, following Brexit and more recently given the downturn in non-EU post-graduate research enrolments, we are increasingly facing significant challenges in attracting the global talent needed to sustain it.

It is also important to recognise that this report's recurring themes – accountability and focus – have particular resonance in this area; we should not treat education merely as a subset of the generic GREAT campaign.

There is clear frustration across the sector that, despite the economic importance of international students, the budget for national marketing and recruitment support remains very limited. A substantial increase in marketing expenditure is needed to sustain and enhance the UK's position. There is also a need for better alignment between priority markets, UK campaigns, and university initiatives. Whilst there are currently five designated priority markets, inconsistencies in follow-up activities between institutions and trade visits have limited their effectiveness. It is important there is better coordination and more strategic investment to maximise results in targeted regions.

If it is decided to stick with Study UK as a brand and operating model, then we recommend innovative cost-sharing models that would boost the overall budget. Indeed, there could be a sector-wide co-investment fund where universities, colleges, independent schools, and language providers could all contribute alongside the Government to a central promotional campaign. Such a collective approach would distribute both the costs and benefits of marketing: all parts of the education ecosystem would have a stake in attracting global talent, and messaging could be unified under a single "Study UK" umbrella for greater impact. This would emulate the Prime Ministers Initiative (PMI) model of shared investment, updated for the current context.

PMI provided examples of robust, well-funded international education strategies. Under PMI Phase 2 (2006–2011), for example, the UK Government and the sector jointly funded a suite of global marketing efforts under the "Education UK" brand. Those initiatives, which included overseas roadshows, targeted media campaigns, and agent training programmes, significantly raised the country's profile and helped drive growth. This kind of ambition is needed again.

However, we must not be backward looking; how the UK markets itself must evolve. Expanded funding should be coupled with a modernised strategy – leveraging cutting-edge digital marketing, social media, and data-driven targeting to reach prospective students with personalised content that speaks to the motivations of today's students. Competing destinations are increasingly savvy in their recruitment techniques, often conducting country-specific campaigns and employing alumni influencers. In sum, a step-change in both the **scale** and **sophistication** of international marketing is essential for the UK to remain a top-choice destination.

Regional and Devolved Alignment: All UK regions should feel ownership of and benefit from the international higher education strategy. The IHES needs to align with Scotland's, Wales's, and Northern Ireland's education and export strategies, respecting local priorities. There are also well-defined regional groupings in some areas – London Higher is a long-standing and well-respected representative body for most of the capital's universities and has worked effectively in multiple areas – acting as a convenor, hosting collaborative networks, undertaking policy analysis and promoting London as a destination via its recently launched Study London initiative; Yorkshire universities is a great example of one of the regional networks outside the capital. It has been working since 1987 to champion the specific knowledge and skills in the region and brokering and lead partnerships.

Overall student number growth targets should reflect consultation with devolved governments. We recommend that the strategy should encourage formation of regional coalitions of the willing – groupings of universities, colleges, local authorities, and businesses in a region working together on international attraction and support. Metro mayors and regional bodies should be engaged to connect international student growth with local economic plans (e.g., linking students to local internships or graduate job schemes) – as noted above, a number of these individuals have shown real engagement with the issue. The implementation framework should provide guidance and share best practices for developing **local international education action plans**, recognising that opportunities and challenges (such as housing or industry links) vary by location. By empowering regional perspectives, we maximise positive impacts in every community.

Community and Public Engagement: To bolster the public narrative, this pillar also includes a focus on communicating the benefits of international students to the UK public. We need to better support outreach programmes that connect overseas students with local communities (volunteering, cultural exchanges in schools, etc.), and enhance the information provided to local stakeholders on the economic contributions (for instance, spending and job creation) attributable to international education in their area. We need an evidence-led consensus to address potential eroding public support – by systematically and regularly sharing the overwhelmingly positive data as part of an ongoing narrative and messaging campaign that maintains positive public sentiment and pride in the UK's international education role. The Higher Education Policy Institute has consistently produced excellent reports quantifying the economic contribution of international students to UK constituencies.
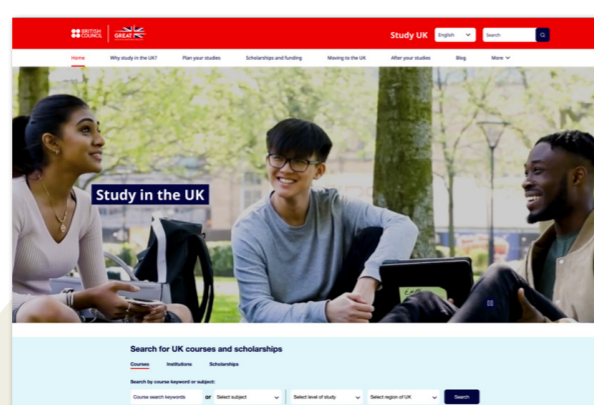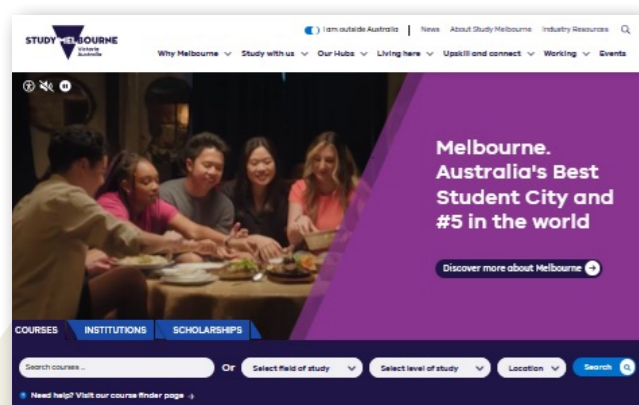
Implementation Framework

Governance and Oversight: The Education Sector Advisory Group currently exercises oversight of the IES and benefits enormously from the ongoing role of Sir Steve Smith as the UK Government International Education Champion. His contribution is universally recognised and unreservedly welcomed. A coordinated, ecosystem-wide strategy to address issues has proved valuable and there is consensus that Government and sector bodies need a focus beyond universities alone and support the recovery and sustainability of all education export sectors. This means aligning strategies across higher education, schools, and language providers so that the UK's international education offer remains comprehensive and globally competitive.

However, whilst having a high-level group that brings together key players across the education ecosystem has been a part of the success to date, it is not clear that it provides sufficient focus to address the specific needs of HE going forward, and HE does, and will continue, to constitute the overwhelming majority of education exports. Further, the group does not include key players for HE – the Department of Science, Innovation and Technology (research), the Home Office (visas) nor the Foreign, Commonwealth and Development Office (soft-power and international relations). It also lacks a student voice, as noted above. Given the importance of joined-up policy and ensuring the sustainability of the HE sector, **we recommend that the current Education Sector Advisory Group, co-chaired by DBT and the Department for Education (DfE), should be restructured to include representation from the Government departments that are currently missing: the Home Office, the Department for Science, Innovation, and Technology, and the Foreign, Commonwealth, and Development Office. Additionally, UKCISA should be included as the designated body to represent the student voice, along with the British Universities' International Liaison Association (BUILA) to represent overseas recruitment professionals. Multi-agency collaboration and intergovernmental dialogue are cornerstones of success; individuals must feel empowered to engage, and the sector must assume responsibility for self-regulation.**

In challenging times, difficult choices need to be made and priorities established; therefore, **we recommend that the operation and focus of the Education Sector Advisory Group should be re-engineered to aggressively foreground the critical importance of UK universities and the need to secure the UK's position as a global leader**

in higher education (HE). **The restructuring, whether within or by separating the streams of the International Education Strategy (IES) to create an International Higher Education Strategy Group, would ensure that higher education receives the necessary policy focus and support. The management and monitoring of progress against a series of SMART targets should accompany this transition to an International Higher Education Strategy (IHES).**

Given the wealth of data on performance becoming available, including from private sector sources, the fact that the challenges facing HE need to be front of mind, and the need for more active guidance and management of the system, we recommend that the oversight group meets more regularly, we propose every 2 months. Further, **we recommend that regional international higher education champions are established to create more capacity and capability for policy development and to enhance engagement aligned with local priorities and the make-up of the higher education sector in each region. These roles would also ensure each part of the country is recruiting sustainably according to the local supply of accommodation and other vital support services, as well as in lockstep with employer demand. Local Skills Improvement Plans (LSIPs) should reflect the opportunities that international students bring and can encourage more employer engagement and ownership of the outcomes of international graduates.**

> **We recommend the creation of an International Higher Education Foundation or similar forum as a permanent public-private body for ongoing policy dialogue specifically in relation to global engagement to continue the work of the International Higher Education Commission.**

Despite its crucial importance to HE and its stakeholders, there is no such group. This would provide a forum for systematic partnership between practitioners and policymakers, provide a focus for ongoing analysis and spreading of best practice and provide insights that ensure the new IHES remains dynamic and evidence-informed beyond initial implementation, akin to the model of the Lifelong Education Commission.

We note that the Office for Students (OfS) and equivalent bodies in the devolved nations will have a mandate to support this strategic framework – not just as regulators but as facilitators of best practice. IHEC emphasises that the OfS should evolve to better support sector planning and share intelligence on overseas recruitment as part of its new mandate to ensure the financial sustainability of institutions and the sector as a whole in England.

SMART Goals and KPIs: Each strategic objective should be accompanied by Specific, Measurable, Achievable, Relevant, and Time-bound targets. These will need to be finalised by the oversight group, but examples are provided below as placeholders:

Objective	Key Performance Indicator (KPI)	Target (SMART)	Lead Responsibility
Increase competitiveness	UK global market share of international students (percentage of globally mobile students choosing UK)	Increase from [X]% to [Y]% by 20[30]	DfE / DBT (with Home Office input)
Drive diversity	Diversity index of student origins (e.g., Herfindahl-Hirschman index of country concentration)	Improve index by [Z]% (no country > [N]% of total) by [Year]	DfE / DBT / UUKi (sector-led initiatives)
Enhance employability	International graduate employment rate in UK or positive outcomes (as per Graduate Outcomes survey)	Increase to [X]% in professional or further study within 6 months by [Year]	DfE / OfS / AGCAS collaboration
Strengthen messaging	Brand awareness and appeal (survey-based or web analytics for "Study UK")	Achieve top [2] rank in student perception surveys by [Year]; [Number] of engagements online	DBT
Improve delivery (execution)	Establishment of governance and data systems (milestones)	IHES Strategy Board operational by [Month Year]; annual public report on progress; Data portal live by [Year]	Strategy Board secretariat

Table: Illustrative goals.

Implementation Framework

These KPIs would need to be monitored regularly. An **annual progress report** would need to be published to update stakeholders and the public on achievements and areas for improvement, holding the system accountable. The strategic framework also requires regular review points (e.g., a mid-term review in [Year+2]) to allow for recalibration in response to global or domestic changes.

Timeline and Milestones: A phased timeline (e.g., immediate actions in Year 1, medium-term by Year 3, long-term by Year 5 and 10) should guide implementation. For instance: in the **first 6–12 months**, establish governance bodies, protect the Graduate Route in immigration rules, launch the marketing campaign, and initiate the data portal project. By **Year 3**, achieve initial diversification targets (e.g., X% new enrolments from Africa/Asia), have the regional International Higher Education champions in post, and show measurable improvement in student satisfaction metrics. By **Year 5**, reach or surpass mid-term recruitment and diversification goals, have the TNE Academy fully functioning, and see evidence of improved graduate outcomes tracking. A detailed Gantt chart or implementation plan (not shown here) should accompany the strategy, mapping actions to quarters and responsible owners.

Roles and Responsibilities: Clear ownership is assigned for each action. The UK Government (DfE and DBT to co-lead as now) will steer policy changes (e.g., visa policy adjustments in collaboration with the Home Office). The OfS (England) and counterpart bodies in Scotland/Wales/NI will integrate strategy metrics into their regulatory oversight – for example, monitoring diversity of intake and publishing data on overseas student cohorts and risks. Universities UK International (UUKi) and the British Council would be instrumental in diversification and alumni engagement initiatives through partnership with private sector service providers. UKCISA and student groups will be key in student experience improvements. Crucially, joined-up working is emphasised: one of IHEC's lessons is that fragmented efforts must be replaced by coordinated action (hence the need for a single "controlling mind" for marketing and a unified data infrastructure. This strategic framework therefore establishes a clear division of labour but within a collaborative framework where all actors work towards shared goals.

Funding and Resources: Implementing these initiatives will require appropriate resourcing. The strategic framework outlines funding streams for key components – for instance, a **special investment fund** to support diversification (IHEC suggests a sector-wide partnership fund to seize opportunities), a dedicated fund for the enhanced marketing campaign (with contributions from the Government and perhaps the sector), and monies to enable the development of a TNE Academy and efforts to promote the role of Internationalisation at Home. Wherever possible, existing resources should be reprioritised, but is recognised that additional funding will be necessary, justified in the current climate by the scale, significant and rapidity of the return on investment.

Policy Recommendations and Actions

Building on the strategic pillars, the following policy recommendations are put forward. These have been directly informed by IHEC's 2023 and 2024 recommendations and exemplars from other leading countries:

- **Reform and Strengthen Regulation & Oversight:** There needs to be a review of the current strategic and regulatory framework. This includes re-engineering the current Education Strategy Advisory Group to provide a greater focus on and oversight of HE and ensure that it works alongside other bodies (especially the OfS in England) to ensure that innovation is supported and risk mitigated in international engagement. Rather than adding bureaucracy, the focus is on smarter regulation – for example, requiring OfS to regularly publish data on the composition of overseas students at sector level and flag systemic risks. Build on the Agent Quality Framework to **empower action on agent misconduct** by gathering agent performance data (student completion rates, visa refusal rates) and instituting a "whistleblower" system. This mirrors successful elements of **Australia's agent quality framework**, where problematic education agents are identified and sanctioned. By adopting such measures (while respecting institutional autonomy), the UK can enhance the integrity of its recruitment pipeline and assure quality. Additionally, work with sector bodies on exploring **application fees or deposits** on a systemic basis to discourage speculative applications should be considered – any such move would be carefully evaluated.

- **Secure the Post-Study Work Route and ensure Visa Integrity:** Reiterate the Government's commitment to the Graduate Route and build safeguards around it. This includes **maintaining the two-year post-study work visa** in its current form and **shielding it from net migration target debates** by more systematically communicating its economic benefits, its temporary nature (graduates return home, since the UK does not offer an easy path to citizenship), and facilitating take-up, particularly by SMEs, showing how this is a means to foster growth not competition for labour supply. At the same time, tighten oversight

of student visa issuance to address concerns about misuse: implement enhanced financial verification enhancements and collaborate with education providers to develop and implement measures ensuring applicants meet academic preparedness criteria. The goal is a system where genuine students face minimal hassle, but fraud is proactively deterred – thereby **protecting the reputation** of the UK system.

- **Boost Destination Marketing and "Welcome" Messaging:** Launch a refreshed and re-engineered marketing and recruitment campaign with significantly increased investment and coordination (as detailed in Pillar 5). This campaign will emphasise that **"International students are welcome"** in the UK, countering negative perceptions. A single agency should manage this effort, ensuring coherence. It should benchmark marketing spend and strategy against competitors – for instance, noting that Australia heavily funds centralised marketing and agent training, the UK will need to do the same. A related recommendation is to simplify and amplify the **visa and immigration messaging**. Clear messaging will extend to the domestic audience including the systemic gains from global engagement, not just highlighting success stories of international students, in order to underline public benefits, along with evidence that the system is being properly monitored and managed to achieve specific outcomes.

- **Elevate the Student Voice and Experience:** Formally establish UKCISA in the lead **International Student Champion** role, working alongside other significant sources of the student voice such as the National Indian Students and Alumni Union (NISAU), and designating it as the means by which student input at the policy level is secured. Encourage universities to adopt an **International Student Experience Charter**, possibly linked to recognition or incentives, covering areas like induction quality, academic support, English language help, employment advice, and harassment protection. Through an initiative led by QAA, provide funding for initiatives improving integration – for example, a competitive grant for universities or student unions to pilot new integration programmes or intercultural training modules. Finally, require that student satisfaction data for overseas students (from surveys or a potential expansion of the National

Policy Recommendations and Actions

Student Survey to flag international respondents) be reported and acted upon, similar to domestic student feedback.

- **Diversify Markets and Pathways:** Implement a **Diversification Strategy** with two main components: (a) **targeted market development** – the Government and sector jointly identify priority emerging markets and invest in recruitment enhancement activities, and (b) **reduce single-country dependence** – where any institution has over 50% of its international students from one country (a scenario increasingly common post-2020), encourage risk-mitigation plans and offer support to broaden their reach. One option is to create an **"International Education Opportunities Fund"** (perhaps co-funded by Government and universities) to seed projects in regions like Africa, Asia, and selected countries in Latin America. For example, this fund could support a consortium of universities to deeply engage across several African capitals each year, or to develop joint marketing initiatives in Vietnam, Indonesia, or Brazil. Additionally, maintain flexibility in the Immigration Rules to respond to new markets (e.g., if a promising country is hindered by visa barriers, be ready to adjust sponsor policy or create a pilot scheme to facilitate growth).

- **Expand Transnational Education (TNE):** Set a bold ambition for TNE – such as **doubling the number of offshore students** learning through UK programmes by 2035, with growth across diverse countries. Achieving this will involve diplomatic support (embedding education in trade deals, as mentioned, and resolving regulatory issues abroad) and capacity-building at home (hence the TNE Academy proposal to train staff and share expertise). In parallel, push the frontiers of online and blended learning internationally. The pandemic spurred online delivery; the UK can capitalise by reaching students in countries where full-time abroad study is not feasible. Pilot projects in countries where local recognition of online degrees is an obstacle should be pursued, with Government lobbying support to those governments to accept UK online qualifications. Such innovation in TNE and online platforms extends the UK's global education footprint and creates pathways for students who may later transition to onshore study.

- **Promote Graduate Employability and Industry Links:** Work with employers and careers services to improve opportunities for international graduates both in the UK (during the Graduate Route period) and back home. A specific recommendation is to **engage SMEs and regional employers** to hire international graduates, as we know many are not aware of the Graduate Route's benefits. A government-backed awareness campaign or incentive (like a wage subsidy or recognition scheme for SMEs hiring international grads) could increase uptake. Moreover, include entrepreneurial support: build on successful pilot programs that help students start businesses or develop entrepreneurial skills. For example, expand mentorship and incubator programmes open to international students, and ensure visa rules allow Graduate Route students to establish a business. To measure success, we need to **track international graduate outcomes** more systematically. We must re-instate the Graduate Outcomes process for overseas students on a comprehensive basis – this can be done cost-effectively; it is not true to say this is too expensive to achieve. If there is reluctance to assume responsibility for this we recommend that, given its importance in attracting students, that a national effort (via tender or partnership) be made to collect data on what international alumni do after graduation. This data will inform future iterations of the strategy and help universities tailor their employability services. We recommend that AGCAS is the vehicle by which careers services are refocussed on employment not employability and promote the systematic embedding of entrepreneurship programmes. To do this we can build on the success of pilot schemes and a particular focus on cost-effective means to provide capability to be enterprising – personal enterprise, creating businesses, intrapreneurship – the UK innovation ecosystem is more appropriate for much of the world than that of the USA. We need to skill up UK and overseas students for work in dynamic economies in Asia and SSA by providing tailored extra-curricular programmes that provide insight, guidance, skills, and expertise for successful workforce (re)entry – experience in the sector shows that this can be done cost-effectively.

- **Enhance Data, Insight and Transparency:** Underpin all the above with robust data systems (see next section for details). Key actions include developing a **data portal** for providers and an open data dashboard to compare the UK's performance (e.g., visa processing times, student satisfaction) with competitor countries in near real-time. Better data will enable proactive policy adjustments – for instance, if application numbers from a certain country drop or visa refusal rates spike, the system can respond quickly. There is currently significant frustration in the sector with the slow availability of existing education data – for example, significant lags in HESA's student statistics. New data approaches (such as HESA's Data Futures program and the changes in the submission of TNE data to the Aggregate Offshore Record) must result in faster, more up-to-date insights for policymakers. Transparency is also crucial: publishing annual statistics on international student enrolments, economic impact, and progress on diversity goals will keep the public informed and engaged.

Each of the above recommendations should be further detailed with owners and timelines. The template here provides the core idea and justification. Policymakers can add or remove recommendations based on the latest context but should aim to maintain the coherence of linking back to the strategic objectives and pillars.
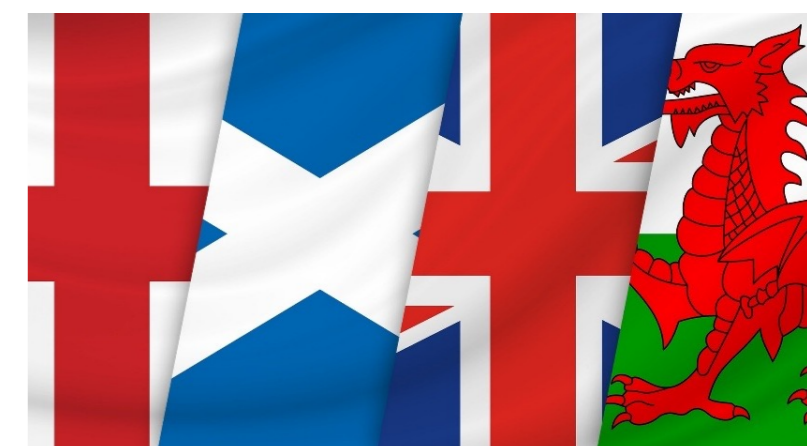
Regionally and Devolved-Aligned Elements

The international higher education strategy framework is UK-wide and recognises and values the distinct contexts of the four nations and English regions:

- **Devolved Nations Collaboration:** Higher education is a devolved matter in Scotland, Wales, and Northern Ireland, so any future strategy will need to be implemented in partnership with devolved governments and it is suggested that each nation develop its own international education action plan under the umbrella of a UK strategy, focusing on its unique strengths (for example, Scotland's post-study work offer under the Graduate Route, or Wales's Global Wales program). The proposed re-engineered IHESG should, like the ESAG, include representatives from the devolved administrations to ensure **policy coherence and information sharing**. Where appropriate, targets and initiatives should be tailored, e.g., setting region-specific diversification targets or marketing campaigns that highlight particular institutions (Scotland's historic universities, Wales's strength in specific sectors, etc.). We should also learn from innovative approaches in the devolved nations – for instance, if Scotland pioneers a new graduate internship scheme for international students, it could be scaled up UK-wide.

- **Regional Empowerment in England:** In England, the strategic framework encourages a localised approach alongside national policy. We should foster **Regional Higher Education Networks** (such as groups of universities in Yorkshire, London, etc.) to align the international strategy with regional economic plans.

Policy Recommendations and Actions

Elected mayors and Combined and Local Authorities should be engaged to link international student growth with local skills needs and opportunities. For example, a region with a growing tech industry might form a partnership between its universities and tech firms to attract more international postgraduates in AI and offer them placements. Regions facing accommodation shortages should get advice to address infrastructure needs that will assist them in expanding student numbers. The idea is to **support differentiated strategies**: a smaller, teaching-focused institution in one region might aim for modest growth with a niche in certain countries, whereas a research-intensive cluster in another region might pursue large-scale partnerships abroad. This "horses for courses" approach ensures that each institution and region plays to its strengths in contributing to the national strategy.

- **Showcasing National and Regional Diversity:** The UK's appeal partly lies in its diverse locales – from cosmopolitan cities to historic towns. The strategy's marketing pillar should promote not just the UK as a whole but also its regions and nations as study destinations. While London and Oxbridge hold significant international appeal, other regional higher education clusters deserve more positive promotion too under a nuanced UK-wide promotional campaign. Data from Studyportals shows that the countries driving student demand, and the relative importance of different markets, varies significantly by region across the UK, and that the shifts in market share reflect evolving student preferences and the relative attractiveness of each regional offer. A student could, for example, study engineering in the Northeast, life sciences in Scotland, or arts in Wales – and each offers a rich experience. By **broadening the geographic spread** of international students and building a pipeline of opportunity from undergraduate to postgraduate degrees, we also distribute economic benefits more evenly and avoid over-concentration in a few city centres.

- **Consistent Welcome and Support Standards:** International students should receive a consistently warm welcome regardless of location. We should promote the adoption of specific common standards across the UK – for instance, all regions should ensure that their airports have multilingual welcome signage and local student volunteer greeters and that registration processes are streamlined. Sharing best practices among devolved and regional authorities will raise the overall standard. If Northern Ireland, for instance, develops a successful model for integrating international students into the community (perhaps through a friendship family scheme), this model can be propagated elsewhere.

- **Respect for Policy Differences:** While aligning goals, we must respect differences such as tuition fee arrangements. Any UK-wide policy changes (like visa rules) will need to be consulted on with all devolved nations to assess differential impacts. The strategy thus acts as a unifying vision with flexibility for local nuance.

In summary, regional and devolved alignment ensures the strategic framework is not one-size-fits-all but a coordinated mosaic of efforts – everyone rowing in the same direction on overarching aims (quality, growth, diversity), but with the freedom to innovate and emphasise what works best in each part of the UK. This cooperative approach strengthens the overall outcome and secures buy-in at every level of governance.

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

Data and Insight Requirements

Accurate data and timely insights are the lifeblood of an effective international education strategy. We recommend building a data infrastructure enabling evidence-based decisions at national and institutional levels and transparent outcomes tracking.

- **Integrated Data Portal: We recommend that the Government develop a digital data portal for international student information, accessible to universities and relevant public bodies.** This secure portal should compile data from various sources – visa issuance (Home Office), enrolments (HESA), accommodation, and health service usage (local authorities, NHS) – to give a near real-time picture of where international students are coming from and studying. For example, a university could log in to see updated statistics on student visa grants by country, or local councils could foresee how many overseas students will likely be in their area next year. By sharing data in a timely way, institutions can better plan (for housing, support services, etc.) and policymakers can react faster to trends. A system like this is entirely within our competence to establish. The Australian Department of Education already provides an interactive tool that allows analysis of monthly overseas student data with a lag of only 3 months between enrolments and the data appearing publicly. https://www.education.gov.au/international-education-data-and-research/international-student-monthly-summary-and-data-tables

- **Data Futures and Jisc:** we urge rapid completion of the Data Futures program led by Jisc, which aims to modernise how student data is collected and reported. Once implemented, Data Futures will need to provide more frequent updates on student numbers and characteristics rather than annual lagged data. IHEC underlined the urgency here – the traditional data lag means policy is nearly two years behind reality. The sector needs quarterly (if not monthly) snapshots of international enrolments and applications, enabling agile management of recruitment and resources.

- **Global Demand Intelligence Tool: We recommend the creation of a comprehensive global demand forecasting tool.** Via a public-private partnership (perhaps a tender to specialist data firms), we could build a system that aggregates data on international education demand worldwide – including demographics, economic indicators, competitor country trends, search engine, and agent application data – to predict future demand patterns. This tool will help answer questions like "Which emerging markets are showing upticks in interest?" or "What is the projected demand for STEM Masters in the next five years?" Armed with this, the UK can proactively target new opportunities or address potential downturns. The data platform should incorporate comparisons of key performance metrics across destinations (as an open source "competitor tracker" comparing aspects like visa processing times, tuition costs, and scholarship offerings). This level of market intelligence will be a game-changer in strategy execution, ensuring the UK stays ahead of the curve.

- **Public-Private Data Group: To steer these efforts, we recommend establishing a public-private sector International Education Data and Insight Taskforce.** This group should include statisticians and analysts from the Government (DfE, DBT, Home Office, ONS) as well as industry experts (education technology companies, UCAS, etc.) and leaders from the growing number of private sector companies that provide sophisticated data about current and potential future trends such as Enroly, Studyportals, IDP and QS. It should foster a culture of data sharing between
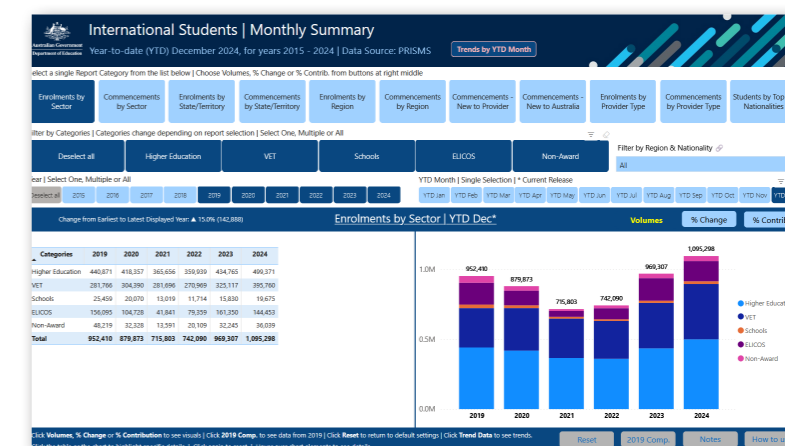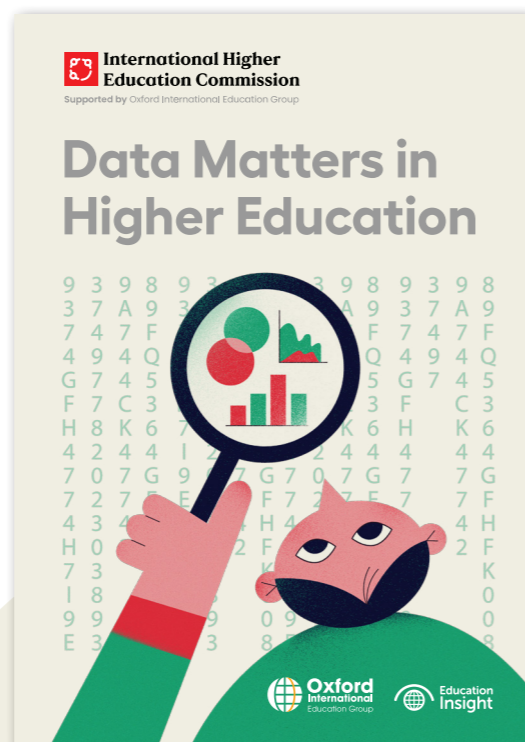
Data and Insight Requirements

public and private sources. By collaborating, we can gain a fuller picture of student interest well before applications even hit the universities. The task force should also oversee the ethical use of data, ensuring compliance with privacy standards while enabling insight-driven innovation.

- **Key Metrics and Research:** there are specific metrics that need consistent tracking: geographic diversity index, conversion rates from offer to enrolment by country, student satisfaction, graduate outcomes, net economic impact per student, etc. We suggest commissioning research to fill gaps where data is missing – notably on international alumni career trajectories. For example, working with the Association of Graduate Careers Advisory Services (AGCAS) to follow up with international graduates could yield insights into how UK education benefited them and their employers that can developed into policy in a positive feedback loop. We also recommend continued qualitative research, like the IHEC's own studies (e.g., "Evidence versus Emotion," which examines narratives around international students), to understand public sentiment and student experiences in depth.

- **Transparency and Reporting:** The data gathered should not sit in a silo. A commitment should be made to **publish annual dashboards** on international education in a form that is easily digestible and fit for purpose – instead of having to pick through Home Office and ONS data sets developed for different purposes. These might include infographics on where students come from, their fields of study, satisfaction levels, contributions (academic and economic), and progression outcomes. Such transparency helps demonstrate the impact of the strategy. It also allows external stakeholders (industry, media, researchers) to hold us accountable and contribute ideas. Wherever possible, data should be openly available (while protecting personal information), supporting independent analysis – for instance, allowing economists to model the impact of policy changes or academics to study internationalisation trends.

By investing in these data and insight capabilities, the UK can manage its international education sector with precision and agility, much like a business uses real-time data to adjust strategy. This fulfills the aim of giving institutions the tools to control their future and ensuring government policy is always informed by the latest evidence rather than outdated information. This proactive, information-rich approach would be a decisive advantage for the UK's international higher education ambitions in an uncertain global environment.

International Higher Education Commission

Supported by Oxford International Education Group

Data Matters in Higher Education

Oxford International Education Group · Education Insight

Conclusion and Next Steps

The Right Honourable **Chris Skidmore OBE**

Chair, International Higher Education Commission

The recommendations set out in this report are the result of an extensive engagement process with the international higher education sector and wider stakeholders that has taken place over the past two years. The mission for the Commission has been to ensure that through the collaborative effort the key voices on the international higher education journey have been engaged and listened to. Indeed there can be no international education without recognition that every step that an international student takes on their learning path is supported by a wide and diverse variety of institutions, organisations, communities and fellow students. Just as they all have a key role to play, so their voice and inclusion in the policy debate is equally critical.

The Commission has concluded its work with a recognition that for U.K. international higher education policy to succeed, we must ensure all these groups continue to be engaged by policy makers. For this reason, we hope that the wider sector can engage with this final report which we have published in the hope of sparking wider debate and engagement across the sector. We would welcome feedback on our proposals as we take forward our next stages, which will include evolving the initial Commission into more permanent policy and developmental activity. For those interested in helping us to continue to shape the international higher education policy debate please email the Secretary of IHEC, Dr David Pilsbury at dpilsbury@oxfordinternational.com

In conclusion the Commission would like to thank once again the dedicated work of our Commissioners, whose involvement and insights have been deeply appreciated.

Outline Recommendations

A Competitive & Welcoming Offer

- HE champions communicating clearly that we welcome international students.
- Policy stability by ensuring the integrity of the study visa and Graduate Route.
- Codify the contribution of overseas students in the new Industrial Strategy.
- Ensure the effective operationalisation of the Graduate Route.
- Develop the UK eVisa to replicate the Australian PRISM system to reassure the public that we are managing and monitoring the system and can ensure students' "come, contribute, and catch a plane home".
- Immigration policy to focus on those who seek to remain in the UK permanently.
- Engage with AGCAS to shift the focus from student employability to employment and entrepreneurialism.
- Establish a national mechanism to leverage the contribution of overseas alumni better

Governance and oversight

- Reconstitute the Education Sector Advisory Group to include missing Government departments, along with UKCISA and BUILA.
- Foreground the critical importance of UK universities, whether within or by separating the streams of the IES to create an International Higher Education Strategy Group
- Better recognise the unique characteristics of the Devolved Nations and English regions and ensure all feel a sense of ownership of the new IHES; leverage opportunities to work with Regional Mayors and the new local Government structures.
- Regional Higher Education Champions should be established.
- A forum should be established to continue the work of the International Higher Education Commission.

Conclusions and Next Steps

Diversification for Sustainable Growth

- The Government should lay out a growth agenda on a transparent and credible basis.
- A series of People-to-People dialogues should be established. An initial focus on China, India, Indonesia, Nigeria, and Pakistan is suggested.
- Mechanisms must be established quickly to support and encourage diversification.
  - Establish a rolling market development programme for 10 emerging countries.
  - A re-engineered marketing campaign should drive articulations
  - We should repair and strengthen ties with European partners as part of efforts to diversify.

Student Voice, Experience & Welfare

- Clear mechanisms should exist for international students to be heard in national policy discussions.
- The QAA should be designated to work with universities and funded to help them implement Internationalisation at Home initiatives.

Global Opportunities & Partnerships

- A TNE Academy (modeled on Advance HE) should be established with new funding to further develop the QAA's role in helping establish new models and approaches, including advice on creating robust business cases.
- We should promote Transnational Research (TNR), including collaborative doctoral programmes.

Promotion, Messaging & Regional Impact

- An additional £5 million per annum funding should be provided for 5 years to establish a strategic, commercially-focussed approach to destination marketing.

Data and insight

- A coherent data and insight infrastructure needs to be created. This includes:
  - a digital data portal for international student information;
  - a comprehensive global demand forecasting tool; and
  - a public-private sector International Education Data and Insight group

Commissioners

The Rt Hon Chris Skidmore OBE, Chair IHEC

Professor Shearer West
International lead for the Russell Group Universities & VC University of Leeds

Professor Simone Buitendijk
Interim Deputy Vice-Chancellor and Provost at the University of Salford

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

Professor Nic Beech
Executive and Board Member University Alliance and Chair of UK Standing Committee for Quality Assessment, Vice Chancellor of Salford University
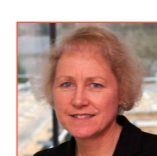
Dr David Pilsbury
Secretary to the Commission and Chief Development Office at OIEG. Former DVCI at Coventry University.
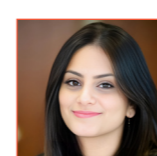
Sanam Arora
Founder and Chair, National Indian Students and Alumni Union

James Purnell
Former President and VC, University of the Arts London, and former Secretary of State for Culture/Work and Pensions (until June 24)

Professor Karen Bryan
Chair of Yorkshire Universities & VC York St John University

Jonathan Bewes
Non-Executive Director on the Court of the Bank of England and Trustee on the Council of Durham University
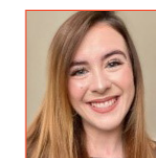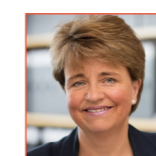
Sára Kozáková
Student Commissioner – Postgraduate student, Newcastle University, Cross-Cultural Communication and Media Studies

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

Professor Shitij Kapur
President and Principal, Kings College London

Baroness Wendy Alexander
Deputy Chair, British Council, Former VP International, University of Dundee, Scottish Government Higher Education Trade & Investment Envoy, former Scottish Higher Education Minister
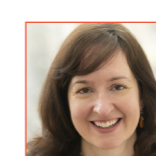
Anne Marie Graham
Chief Executive, UKCISA

Lucy Stonehill
Former CEO, BridgeU

Siqi Jia
Student Commissioner – Final year undergraduate student, University of Glasgow, Economics and Politics

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

Professor Diana Beech
Director of the Finsbury Institute, Assistant Vice-President of Policy & Government Affairs, City St George's. Former CEO, London Higher

Professor Katie Normington
Midlands Enterprise Universities Board Member and VC, De Montfort University

For more information please visit:
www.ihecommission.uk