



The All-Party Parliamentary **University Group**

21 October 2020

Agenda

This meeting of the All-Party Parliamentary University Group is being held to discuss international issues within higher education

- | | |
|----------------|---|
| 4:00pm | Daniel Zeichner MP , Chair, All-Party Parliamentary University Group |
| c4:05pm | Vivienne Stern , Director, Universities UK International |
| c4:15pm | Simon Emmett , CEO, IDP Connect |
| c4:25pm | Graham Stuart MP , Minister of Exports |
| c4:35pm | Questions, comments, and discussion with university leaders, MPs and peers |
| 5:30pm | Meeting concludes. |

Speaker Biographies

Graham Stuart MP

Graham Stuart joined the Department for International Trade in January 2018 as Minister for Investment. In February 2020 he appointed Minister of Exports. This role involves export policy and promotion, including the export strategy, GREAT campaign

Graham was elected as the Member of Parliament for Beverley and Holderness in 2005. He spent three years as a member of the Education and Skills/Children, Schools and Families Select Committee.



He started his own publishing company, Go Enterprises, at the age of 22 and became managing director of CSL Publishing three years later. He remains non-executive chair of CSL. He was elected to Cambridge City Council in 1998, and went on to become leader of the Conservative Group.

Vivienne Stern

Vivienne is the Director of Universities UK International (UUKi) which represents UK universities around the world.

Prior to her role in UUKi, Vivienne was Head of Political Affairs at Universities UK. In this role she led the sector's response to several major pieces of legislation relating to universities, including the Higher Education Act 2004.

She previously worked in the UK Parliament for the Chair of the Education and Skills Select Committee, and as a higher education policy specialist working on topics including quality, student experience, innovation and university-business links.



She is a Director of Universities UK; a member of the Board of the UK India Research and Innovation Initiative and the Strategic Partnerships in Higher Education Fund; she is a member of the British Council's Education Advisory Group and a number of other Boards and Committees.

She is a graduate in English Literature from the University of Cambridge.

Simon Emmett

Simon leads the strategic direction and operational delivery of the IDP Connect, including strategic partnerships and developing people and culture. He joined the commercial teams in 2000, running individual divisions and became CEO in September 2015.

IDP help international students to study in UK, Australia, New Zealand, the USA, Ireland and Canada. IDP has more than 100 offices in 31 countries and 550 counsellors. IDP Australia partners with University of Cambridge ESOL Examinations and the British Council for IELTS tests. IELTS is recognised by more than 10,000 organisations across the world and is the world's leading English language test for study, work and migration purposes.



As part of IDP Education, IDP Connect uses global expertise, data-driven insights and trusted human connections to match universities, schools and colleges with the right students from around the world.

IDP's UK HE insight tool helps institutions to determine where demand is coming from, which courses are being researched, which research methods are being used, status on widening participation, what student profiles look like and who your main competitors are. Institutions can understand the real-time impact that current affairs and policy decisions have in a rapidly changing market.

Briefing: international issues within higher education

Prepared for members of the All-Party Parliamentary University Group

This is not an official publication of the House of Commons or the House of Lords. It has not been approved by either house or its committees. All-Party Parliamentary Groups are informal groups of members of both houses with a common interest in particular issues.

This briefing document has been produced by Universities UK which provides the secretariat for the University APPG.

Introduction

This meeting of the All-Party Parliamentary University Group will explore UK universities' role on the global stage and the extent to which UK trade policy enhances or inhibits the growth of higher education as an export sector will become increasingly important. Speakers will also consider the opportunities and challenges posed by the new points-based immigration system, the move to online or blended learning due to Covid-19 and how negotiations on the UK's future relationship with the EU may affect progress on achieving the stated ambitions of the International Education Strategy.

New points-based system and EU/EEA student recruitment

The introduction of the points-based immigration system represents one of the biggest changes to EU/EEA student recruitment in a generation. This would be a significant policy challenge at any point, but 2020 presents unique risks due to the on-going coronavirus pandemic. With freedom of movement coming to an end and the announcement regarding EU student tuition fees, there is a need for an immigration system that treats EU and non-EU citizens equally. However, this change will have a significant impact on EU/EEA student recruitment. Many across the sector had already been planning for a downturn in EU/EEA student inflow however Covid-19 has turned this into an issue of critical importance. As a result, universities fear a domestic and international recruitment crisis that lasts far beyond the coming academic year.

The UK is one of the most popular destinations in the world for international students to come and study. Each year, we attract around 450,000 students from overseas, with EU students making up almost a third of the [total](#). Research by [HEPI, Kaplan and London Economics](#) has found that one EU cohort can add as much as £5.1 billion to the UK economy through the direct and indirect economic benefits associated with student spending, a figure that amounts to an individual contribution of £87,000 per student.

The change to a points-based immigration system is very likely to lead to a decline in enrolments from EU/EEA students. The government's own [impact assessment](#) estimates that the points-based system will result in a 20% reduction of EU students, yet other estimates, such as research from [HEPI and Kaplan](#), show that enrolments of EU students could decrease by 57% (over 31,000 students).

EU-UK Future Relationship Negotiations

The UK government and the EU are currently engaged in negotiations on a possible future relationship, covering a vast range of matters from trade to security. However, there remains a risk that no agreement will be reached by the time the transition period ends. This would have many implications for universities' students, their staff, their international partners and their operations.

Research collaboration

The UK will remain a full member of Horizon 2020 until the programme ends, but no agreement has yet been reached on the UK's participation in Horizon Europe, due to start 1 January 2021. Should the UK not associate, the UK government has committed to fund international research collaboration in place of Horizon Europe participation. If an agreement on programme association is reached by the end of the transition period, then UK-based researchers will be able to participate fully in Horizon Europe from the outset.

If full association to Horizon Europe is not possible, the government has confirmed that '[they] will make funding available to allow UK partners to participate in European schemes open to third countries.' However, it is not yet clear whether if the third country participation funding guarantee if the UK does not associate will cover all researchers. This leaves open the possibility that the government could choose specific topic areas where they will guarantee funding in order to limit the cost.

If the UK does not associate to Horizon Europe, the government has also agreed to establish a 'Discovery Fund' to support researchers at all career stages to pursue discovery-led, ground-breaking research, as well as scaling up certain existing domestic grant schemes. Details of the Discovery Fund have not yet been confirmed.

Erasmus+

The UK will remain a full member of the current Erasmus+ programme until it ends in 2020, but no agreement has yet been reached on the UK's participation in the next Erasmus+ programme, which is due to start 1 January 2021.

If an agreement on programme association is reached by the end of the transition period, then UK-based students and staff will be able to participate in the next Erasmus+ programme (also titled Erasmus+). Depending on when formal association is agreed, it may not be possible for the UK to participate in the first year of the new programme. For example, this will be the case if formal association agreements are not signed until after the 2021 call for funding has closed.

If no agreement on Erasmus+ participation is reached, if the UK government opts not to associate, or if the UK is not able to participate in the first year of the new programme, the Department for Education is accelerating plans to introduce a 'UK International Educational Mobilities Scheme', a national alternative scheme to facilitate international student mobility. The Department for Education has advised that this scheme will be ambitious, UK-wide and global in its reach, however, government have not made a formal commitment to the roll out of a new scheme and the scale and scope of a new scheme is subject to the Comprehensive Spending Review.

The UK government has not committed to replace the non-mobility aspects of the Erasmus+ programme, or reciprocal incoming mobility, should a new national scheme be necessary.

If no agreement is reached on the 'mobility of students for the purpose of exchanges' outlined in the UK-EU Political Declaration on a future relationship, UK and EU students on Erasmus+, exchanges and short term study will be subject to new immigration regulations.

Transnational education (TNE)

UK universities operate a wide range of collaborative models for TNE, including supported distance learning, franchising, validation, twinning and dual and joint degrees. How no deal at the end of the transition period would affect this provision will depend on range of factors, mainly:

- the nature of the agreement (or lack thereof) reached with the EU
- the specific TNE arrangement
- the territory where TNE is delivered.

The negotiation of the future UK-EU relationship on professional and business services provides an opportunity to devise a system that keeps the UK's position as a partner of choice in the EU and recognises the importance of TNE for the UK economy.

International student market

The UK is one of the most popular destinations in the world for international students to come and study. Each year, universities attract around 450,000 students from overseas. The impact of these students is not just felt across university campuses – where they enrich the diversity of our institutions and university life – but also across the wider UK economy.

The UK's direct competitors are showing significantly stronger year-on-year growth and are developing larger market shares from key countries. Additionally, new study destinations are emerging due to a shift towards intra-regional mobility – often facilitated by Transnational Education (TNE) provision.

For many years, the US, the UK and Australia have been the top three destinations for international students. But global student mobility has begun to shift.

To strengthen UK international student recruitment, the government made two crucial announcements:

- In March 2019, the government's new International Education [Strategy](#) stated an ambition to increase education exports to £35 billion per year, and the number of UK-hosted international students to 600,000 per year, both by 2030.
- In September 2019, a two-year post-study work route (the 'Graduate Route') was [announced](#), expanding opportunities for talented international students to build successful careers in the UK. In summer 2020, the scheme was expanded to three years for PhD students.

The UK has been the second most popular international student destination (after the US) for many years, but competition is increasing. In August Universities UK International published '[why aren't we second?](#)' a report on International student recruitment which includes short-term and mid to long-term recommendations for practitioners and policy makers to maintain, regain or develop its market position.

Impact of Covid-19

The Covid-19 pandemic and restrictions imposed to slow the spread of the virus have had an immediate impact on student mobility. A global recession following the pandemic, depending on its severity, is likely to have a lagged impact over possibly five years or more.

As a recession likely reduces middle-class families' purchasing power, international demand for higher education will likely decrease, while domestic demand will likely increase. This could push international demand towards more cost-effective options nearer to home, meaning regional student mobility is likely to grow. A recession will also likely impact public spending on education: overseas governments are expected to prioritise developing domestic higher education provision, rather than providing scholarships and grants for studying abroad, and might raise tuition fees for international and home students. The regulatory environment is expected to facilitate TNE partnerships.

The current necessary switch to online teaching is likely to boost online, distance and blended learning (ODL) in the long-term. It is likely ODL will become more familiar to students, institutions and regulatory bodies across the world. Not only might ODL provision be enhanced so as to be more prepared in the future, it might also become embedded as part of standard education provision.

As a result, the Covid-19 pandemic and post-Covid-19 recession might accelerate trends that would otherwise have taken decades to unfold, such as intra-regional mobility, the expansion of TNE and the recognition of online, distance and blended learning.

International Education Strategy

In March 2019, the Department for Education and the Department for International Trade launched an [International Education Strategy](#) that set out the government's ambition to increase education exports and increase the total number of students choosing to study in the UK.

The strategy set out 5 strategic actions, developed in consultation with the sector:

1. Appoint an International Education Champion to spearhead overseas activity.
2. Ensure Education is GREAT promotes the breadth and diversity of the UK education offer more fully to international audiences.
3. Continue to provide a welcoming environment for international students and develop an increasingly competitive offer.
4. Establish a whole-of-government approach by implementing a framework for ministerial engagement with the sector and formalised structures for coordination between government departments both domestically and overseas.
5. Provide a clearer picture of exports activity by improving the accuracy and coverage of our annually published education exports data.

Sir Steve Smith was [appointed](#) the International Education Champion and took up his post in September, he served as Vice-Chancellor of the University of Exeter up until this point.

An [Education Sector Advisory Group](#) was established to co-ordinate efforts to boost UK education exports and set the strategic direction for the Department for International Trade's (DIT) education team. The group meets three times a year and brings together industry, government and relevant partners through inclusion of important representative bodies from the sector.

18 months from the launch, this meeting will give an opportunity for the Minister to update the group on progress of the strategy.

Transnational education (TNE)

Transnational Education (TNE) is the delivery of an educational award in a country other than that in which the awarding body is based. It includes but is not limited to online and distance learning, joint and dual degree programmes, fly-in faculty for short courses or international branch campuses.

In 2018–19, 142 UK universities delivered some form of TNE to [666,815](#) students in 226 countries and territories worldwide. The UK is a world leader in this field and there are 1.4 times as many students on UK TNE programmes worldwide than there are international students studying in the UK. Over £1.8 billion generated by our transnational education (TNE) activities, an increase of [73% since 2010](#) in current prices. The latest data for 2016 estimates its export value including TNE activity at over [£14 billion](#).

UK TNE has significantly contributed to other strands of international activity in UK universities, from capacity building in quality assurance and enhancement to creating hubs for intra-regional mobility.

The top five host countries for UK TNE are Malaysia, China, Sri Lanka, Singapore and Hong Kong. The numbers of TNE students in China and Sri Lanka have increased by 12.0% and 5.4% respectively since 2017–18, while there has been a small decrease in the other three countries. The top host country for TNE outside of Asia is Egypt, ranking sixth globally.

For UK universities, approaches to TNE are part of wider internationalisation strategies aimed at building mutually beneficial partnerships that embrace research and knowledge transfer, and support education, staff and student mobility. Internationalisation helps to ensure that all students studying for UK awards are equipped to operate in a global society.

In July 2020, Universities UK International and GuildHE commissioned QAA to develop a new approach to reviewing and enhancing the quality of UK TNE in response to the Future Approaches to the External Quality Enhancement of UK Higher Education Transnational Education [report](#).

The Government explicitly expressed interest in supporting the growth of TNE by higher education institutions, recognising its economic benefits and soft power returns. The International Education Strategy: global potential, global growth, published in March 2019, aims at 'supporting TNE as a key growth area'. Specific initiatives, including 'Global Wales' and 'Connected Scotland', also support TNE.

The International education strategy outlined three actions in relation to TNE:

- The Department for Education and Department for International Trade will work with the higher education sector and the British Council to identify more accurately the overall value of TNE to the UK economy. We will seek to provide better insight into potential markets for both new and existing providers, and to improve the overall evidence base around best practice and impact.
- The Department for International Trade will encourage the sector to grow TNE by engaging in dialogue with countries with recognised export potential. We will work to resolve regulatory barriers through international agreements and the work of the International Education Champion. We will work to ensure these agreements include the recognition of UK degrees, including online and blended learning programmes.

- The Department for International Trade will work with Universities UK international and the British Council to inform the UK sector of global opportunities for TNE through exhibitions, webinars and engagement sessions. We will support TNE activity by producing country-specific guides that support targeted partnership development and by actively facilitating partner matching between UK providers and potential international collaborators. These guides, which will be produced for 2020, will focus on countries of particular interest and opportunity for the sector.