



Prifysgolion
Cymru
Universities
Wales

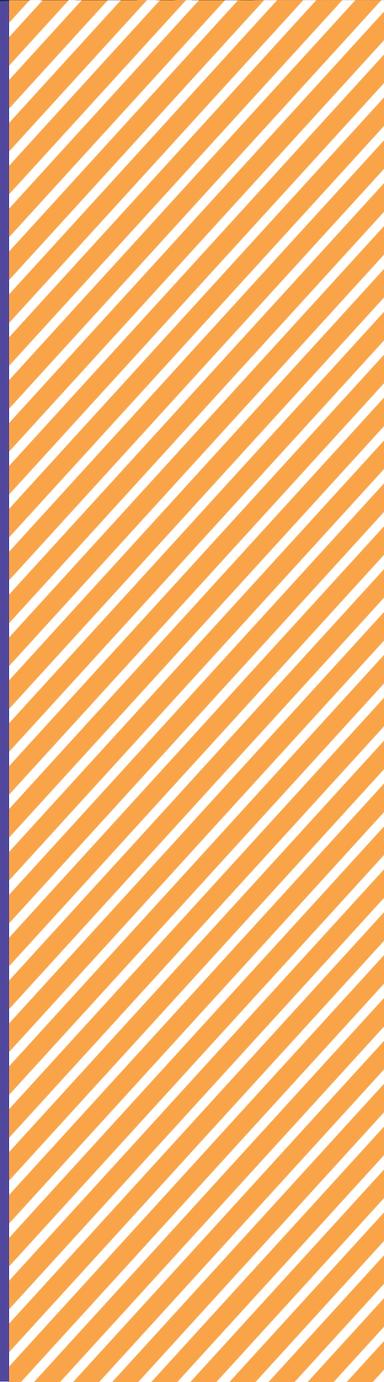
Wales beyond borders

A future approach to
international tertiary
education and research



Foreword

Wales has a proud history of internationalism. It has long been a strong global citizen, building bonds with communities and nations for a better world. As colleges and universities, we have a notable heritage of raising Wales's voice and welcoming the world to Wales.



Welsh tertiary education has an exciting internationalisation story to tell. Over recent years, our colleges and universities have led the way by working collaboratively to grow international partnerships and promote Wales across the world. Global competition in all aspects of international education is increasing, and it is by continuing to learn together, collaborate across borders, and innovate on an international scale, that we will meet the challenges and opportunities ahead.

Today's international students are tomorrow's entrepreneurs, investors, and leaders. Students choosing to study in Wales present us with a golden opportunity to be connected to lively networks of international ambassadors for our culture and nation. Likewise, Welsh students studying abroad gain exposure to new cultures and ideas that they bring back home for the benefit of their communities. Ultimately, these inbound and outbound connections bring benefits to Wales as a whole.

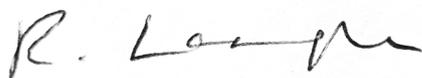
The financial benefits gained from international education are substantial. Generating over £1.26bn in educational exports a year, international education creates relationships between Wales and global partners at individual, institutional and national levels. These partnerships bring further engagement and economic activity long into the future, while speaking to our values as a welcoming and diverse nation.

The establishment of Medr, Wales's new Commission for Tertiary Education and Research, provides an exciting opportunity to set out a vision for Wales's post-sixteen international education into the future. The recommendations featured in this report will help Medr in delivering this vision, while supporting the Welsh Government's aim to raise the profile of Wales internationally and to grow Wales's economy.

I would like to thank the many people and organisations whose contributions were invaluable to the conclusions of this report. It was an honour to have the opportunity to Chair the Expert Panel, constituted of a group of experts in international education whose knowledge, constructive challenge, and enthusiasm provided exceptional insight that has informed this report.

Fundamentally, this is a report about delivering on Wales's values, and ensuring we remain the open, welcoming, tolerant, and dynamic country we want to be now and for many years to come.

**Professor Rachael Langford, Chair of International Education and Research
Expert Panel, President and Vice-Chancellor of Cardiff Metropolitan University.**



Executive summary

Context and importance

International engagement enriches Welsh communities, and reinforces Wales's identity as an outward-looking, progressive, and globally connected country. International education and research play a crucial role in supporting Wales's national interests by enhancing its global reputation, driving economic growth, and addressing key societal challenges. Internationalised curricula and mobility opportunities equip Welsh students with the skills and cultural competencies needed to thrive in a globalised workforce, boosting their employability and ensuring Wales remains competitive in a rapidly changing world. Educational exports provided by Welsh institutions through their international activity contribute £1.26bn of economic impact. International collaboration drives research excellence and impact, positioning Wales as a leader in tackling pressing global issues.

Challenges

Colleges and universities face significant post-pandemic difficulties, including geopolitical tensions, funding constraints, and inconsistent immigration policies. Changes to UK immigration policy have led to a sharp decline in the recruitment of international students at a time when their fees have become increasingly critical to the financial sustainability of institutions. Brexit has further compounded these issues, reducing student enrolments from European countries and cutting access to Horizon Europe and Erasmus+. The strain on public finances also jeopardises the continuation of mechanisms that support international education and research. These issues undermine Wales's ability to compete in the global education market, the quality of the domestic student experience, and the long-term sustainability of its institutions.

Opportunities

Wales needs to strengthen the reputation and competitiveness of its tertiary institutions and develop a more sustainable approach to international education and research. A collaborative approach is essential to unlocking Wales's full potential in the global academic and innovation landscape. By fostering close partnerships between the Welsh Government, Medr, and institutions, Wales can leverage the strengths of each stakeholder. The Welsh Government can provide targeted funding support and advocate for Wales in the UK and internationally; Medr can provide strategic co-ordination across the education system; and institutions can contribute their expertise, home and global networks, and research capacity. Emerging UK policies and renewed political landscapes present opportunities for better policy alignment, advocacy, and funding optimisation at the UK level.

Structure

Part 1 of the report sets out the Welsh, UK, and international context we are operating in. The proposals in Part 2 have been developed in consultation with Welsh further education colleges and universities. They also draw on UK-wide perspectives, including insights from the Association of Colleges' Opportunity England: Internationalisation and Universities UK's Blueprint for Higher Education. Crucially, the ideas are shaped and validated through discussions with an Expert Panel comprising independent international educational experts from across the UK and beyond.

A wide range of topics and issues were considered during the development of this report, alongside numerous potential recommendations. For practical reasons, the report focuses on the most important recommendations—those that address significant and pressing issues and those that propose strategic actions with the potential to drive further developments over time. This targeted approach ensures that the recommendations are both impactful and manageable, paving the way for meaningful progress in addressing key challenges and opportunities. These recommendations are grouped into categories focusing on:

- Strategic direction
- Promotion of trust between institutions and stakeholders
- Funding
- Advocacy

Part 3 provides a concise summary of the report's conclusions and highlights the proposed recommendations for action. By promoting collaboration between the Welsh Government, Medr, and institutions, and by leveraging Wales's unique strengths, these recommendations offer a clear pathway to strengthen Wales's global standing in international education and research.

Part 1 - Context

What is a global outlook and why is it important?

In the context of tertiary education and research, a global outlook is an approach that seeks to advance international engagement, collaboration, and perspectives in learning, teaching, and research activities. It encompasses fostering cross-border partnerships by:

- a) promoting mobility for students and staff
- b) integrating global and intercultural dimensions into curricula
- c) hosting international students
- d) conducting research that addresses global challenges, and
- e) building networks that enhance international reputation and competitiveness.

Global outlook is manifested in many ways:

- Students with a global outlook understand and value diverse cultures, perspectives, and global contexts. They possess strong intercultural competence, enabling them to communicate and collaborate effectively in cross-cultural settings. These students readily embrace new experiences and ideas and are equipped with the skills needed to thrive in a globalised world.
- Academic staff with a global outlook engage in cross-border research and teaching collaborations, contributing to global academic networks and driving innovation. They design curricula enriched with international perspectives and intercultural competencies, mentor students to develop their own global competencies, and take a leading role in tackling critical global issues through research and the advancement of knowledge.
- Institutions with a global outlook actively build partnerships with organisations, industries, and other institutions worldwide to advance teaching, research, and innovation. They facilitate opportunities for students and staff to study, work, and collaborate internationally, while integrating global perspectives and intercultural competencies into their programmes and research.

- A regulator with a global outlook upholds international standards and best practices in education and research. It supports internationalisation by providing guidance and funding that enable institutions to build global partnerships, attract international talent, and engage in international research collaborations. By collecting and analysing global data, it monitors sector-wide performance and assesses the risk exposure of individual institutions, promoting sustainability international engagement amongst providers. It also advocates for the sector, ensuring it can fully engage with and benefit from national and international initiatives and partnerships.

International education also equips students with the skills and cultural competencies needed to thrive in a globalised workforce, boosting their employability and ensuring Wales remains competitive in a rapidly changing world. Furthermore, by fostering cultural exchange and inclusivity, international engagement enriches Welsh society, reinforcing its identity as an outward-looking, progressive, and globally connected nation.

International education and research play a crucial role in supporting Wales's national interests by enhancing its global reputation, driving economic growth, and addressing key societal challenges. By attracting international students and researchers, Welsh institutions generate £1.26bn per year for the economy¹. Collaborative research with global partners fosters innovation and positions Wales as a leader in tackling pressing global issues, such as climate change and public health, while leveraging these efforts to benefit local communities.

¹ The benefits and costs of international higher education students to the UK economy



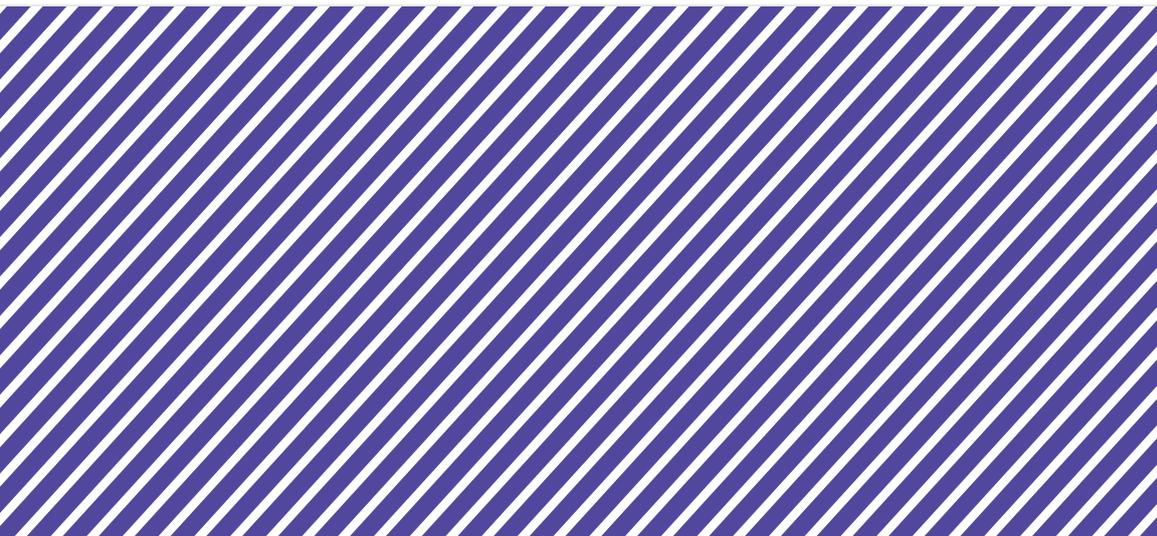
Relevance of international education and research to Welsh Government priorities

One of the four purposes of the Curriculum for Wales (ages 3-16) is to develop learners as 'Ethical, informed citizens of Wales and the World'². This international approach was extended to post-16 education when the Welsh Government further legislated to mandate Medr to promote a Global Outlook.

International education and research align strongly with seven of the ten objectives in the Welsh Government's Programme for Government by:

- Driving economic growth through attracting international students and fostering global partnerships, generating jobs and innovation in key industries.
- Supporting decarbonisation through research collaborations and sustainability focused education which advance green skills and renewable energy solutions.
- Enhancing education and equity through international mobility and partnerships that reduce inequalities and improve curriculum quality.
- Promoting diversity and inclusion by encouraging cultural exchange and supporting underrepresented groups through access to mobility placements.
- Strengthening Welsh culture by showcasing Welsh language and culture globally, bolstering the arts, tourism, and community ties.
- Revitalising local communities and boosting local economies through international student spending and enriching cultural vitality in towns and cities.
- Amplifying Wales's global presence by promoting Wales as a globally connected, outward-looking nation.

Institutions are uniquely positioned to support national and government objectives because they simultaneously drive economic growth through education exports, attract global talent, and foster research and innovation that address pressing societal challenges. Their global networks and partnerships enable them to enhance the nation's soft power, cultural diplomacy, and reputation, while also contributing to trade, industrial strategy, and workforce development in ways that few other sectors can match.



Specifically, international education and research reinforce the Welsh Government's International Strategy by:

- Raising Wales's profile by leveraging education and research to enhance soft power and cultural diplomacy, strengthening Wales's global reputation and influence.
- Boosting economic impact by generating significant export earnings and creating jobs via international student fees, student spending and research funding.
- Fostering global responsibility through embedding the United Nations's Social Development Goals into curricula and tackling global challenges through research and innovation.

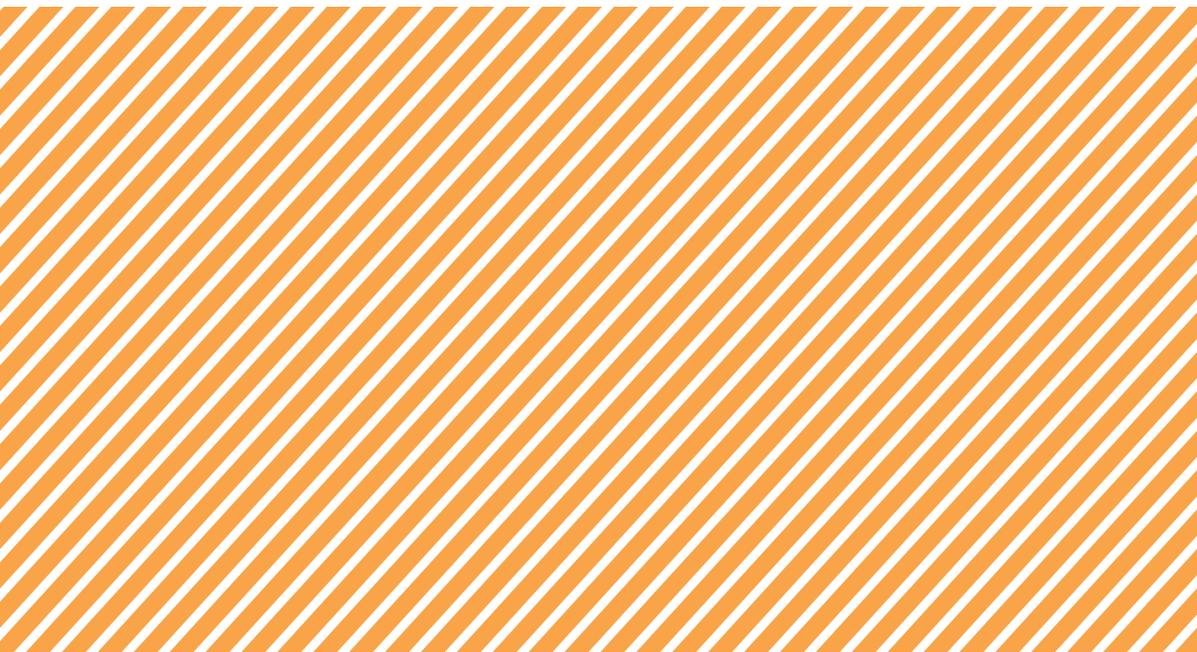
Developing a global outlook amongst learners supports Welsh Government's Anti-racist Action Plan by facilitating the understanding and appreciation of diverse cultures, challenging stereotypes and prejudices. This encourages empathy, inclusivity, and critical thinking, which are essential for addressing systemic racism and promoting an anti-racist mindset.



Relevance of international education and research to Medr's powers and responsibilities

The Tertiary Education and Research (Wales) Act 2022 mandates Medr to promote a Global Outlook. The Act sets Medr 11 strategic duties in total. Many of these, together with specific powers and responsibilities listed in legislation, are also relevant to international education and research:

- Financial health - overseeing the financial sustainability of individual institutions and the sector as a whole, promoting long-term stability and resilience while mitigating financial risks.
- Strategic planning – Medr is empowered to develop strategies to enhance the global competitiveness of Welsh tertiary education.
- Student experience – ensuring that the international student experience in Wales meets high standards.
- Data collection – Medr is empowered to collect data from providers on international activities.
- Quality assurance – through directions and advice to Estyn and the Quality Assurance Agency, ensure that institutional reviews highlight best practices, encourage continuous improvement, and provide assurance to international partners and students about the credibility and excellence of Welsh institutions.
- Reputation management – maintaining and enhancing the international reputation of the Welsh tertiary education sector.
- Collaboration – Medr is empowered to facilitate international collaborations and partnerships for Welsh institutions.
- Standards alignment – ensuring that Welsh qualifications and standards align with internationally recognised benchmarks.
- Reporting – Medr is empowered to report on the international standing of Welsh tertiary education.



Challenges

Like their counterparts in other countries, Welsh colleges and universities have found the process of rebuilding and developing international activities challenging in the post-pandemic period. Disrupted international travel, extended supply chains, inflationary costs, geopolitical tensions, and rising migration have presented significant challenges. UK policy has been contradictory, simultaneously aiming to grow international student recruitment while enacting measures to reduce net migration, undermining the UK's attractiveness as a study destination.

UK immigration policies, including rising visa costs, restrictions on dependents, and complex application processes, have negatively impacted the ability of colleges and universities to attract international students. The UK has become a less competitive and less appealing student destination compared to other countries with more welcoming approaches to international education. In a global marketplace the UK, and consequently Wales, is at a current disadvantage.

Recent changes to UK immigration policy have led to a sharp decline in the recruitment of international students. International student fees have become increasingly critical to the financial sustainability of universities, as domestic undergraduate fees remain close to frozen and fail to keep pace with inflation. This income has become indispensable for offsetting the shortfalls in funding from teaching domestic students and maintaining wider institutional activities. Financial constraints have also limited the ability of universities to pursue innovation, particularly in the international sphere.



Wales beyond borders

Brexit has had a profound impact on international education and research in the UK, particularly in Wales. It has made it more costly and complex for EU students to study in Wales, leading to a decline in student numbers. Additionally, barriers to collaboration with European partners have emerged, including diminished access to Horizon Europe funding, the loss of Erasmus+ opportunities, and heightened administrative burdens. These changes have disrupted ongoing projects, strained collaborative relationships, and made the UK less appealing as a hub for global talent and innovation. Welsh institutions have particularly felt the loss of the European Regional Development Fund and European Social Fund, leaving significant gaps in research and skills development funding. Together, these factors have reduced the attractiveness of Welsh institutions to EU partners and compromised their leadership in global academic networks.

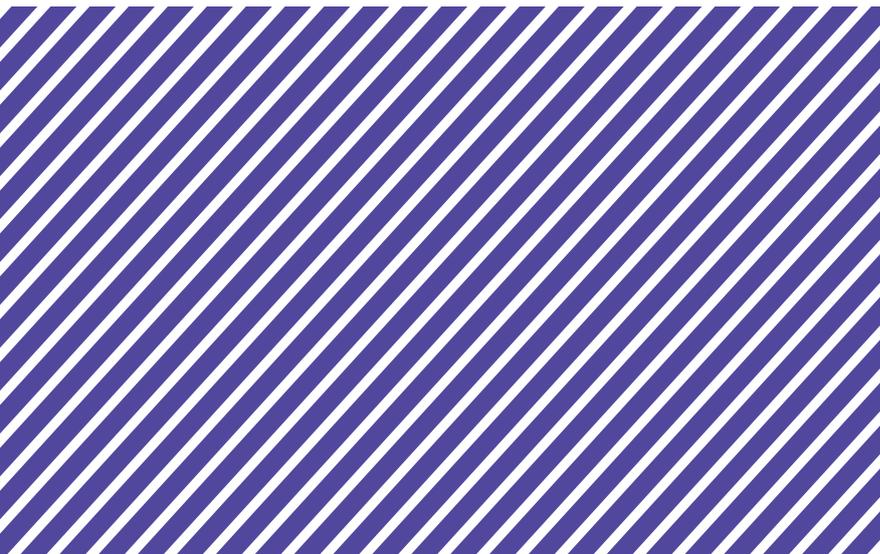
The Welsh Government has helped establish a number of important mechanisms that support the international activities of colleges and universities. However, the increased pressure on public finances has significantly diminished its ability to support these.

Opportunities

Despite the severity and complexity of these challenges, there is reason for cautious optimism. The establishment of Medr, and the strategic duty to promote a Global Outlook, provides a platform for co-ordinated actions and initiatives that strengthen international education and research. The election of a new UK Government in July 2024 presents an opportunity to resolve contradictions in UK policy and to achieve better alignment between UK and Welsh international policies and priorities.

A collaborative approach to international education and research is essential to unlocking Wales's full potential in the global academic and innovation landscape. By fostering close partnerships between the Welsh Government, Medr, and institutions, Wales can develop a unified vision that leverages the strengths of each stakeholder.

The Welsh Government can provide targeted funding, and advocate for Wales in the UK and internationally; Medr can provide strategic co-ordination of Welsh resources and support access to UK initiatives; and institutions can contribute their expertise, global networks, and research capacity. This tripartite collaboration could enable Wales to effectively address global challenges while seizing emerging opportunities.





Part 2 – Building a unified framework for advancing international education and research



1. Strategy

The establishment of Medr brings an exciting opportunity to have strategic oversight and act as a conduit for cross-sector innovative international working.

Wales is conspicuous in not having its own formal strategy for promoting international education and research. This is potentially problematic as it can lead to fragmented approaches in setting priorities, securing their alignment with national goals, and managing funding support. Without a unified strategy, institutions may struggle to align their internationalisation efforts, resulting in inconsistent engagement and missed opportunities for collaboration. Moreover, without a clear framework for accountability, it becomes difficult to assess the outcomes of international efforts or ensure that all stakeholders are working towards common goals. This fragmentation undermines Wales's ability to compete effectively on the global stage and hinders the long-term sustainability of its international education and research initiatives.

Recommendation 1

To deliver on its Global Outlook Strategic Duty, Medr should produce an International Tertiary Education and Research Strategy for Wales and an associated implementation plan.

To ensure it does not encroach upon institutional autonomy, the strategy should be framed as a collaborative framework, rooted in voluntary participation and co-designed with input from institutions. It should take a non-prescriptive, flexible approach, respecting the diversity of institutional missions and providing tools and incentives rather than mandates. By focusing on mutual benefit and Medr's enabling role, the strategy could unite stakeholders around shared goals while allowing institutions to pursue their unique ambitions, ensuring Wales remains competitive on the global stage.

Call to action

- Medr will need to consider specific goals and objectives to support the strategy, including:
- Strategic alignment between institutional global engagement strategies, Welsh Government priorities and Medr's strategic duty.
- Strategic positioning of Welsh institutions in the global market.
- Setting clear metrics to measure success, such as student numbers and export values.
- Value proposition for promoting Wales, for example: quality, value, experience, employment outcomes, and reputation.
- Promoting the competitiveness of Welsh institutions and identifying unique value propositions.
- Promoting innovative approaches to global engagement in teaching and learning.
- Ensuring that institutions identify key performance indicators for evaluating the success of global engagement activities.

While the complete development of a Tertiary International Education and Research Strategy will require a thorough consultative process, certain urgent factors demand immediate attention. For example, Wales needs to ensure that it is well positioned to access initiatives that flow from the UK Government's planned refreshed International Strategy.

Recommendation 2

Wales should have an International Education Champion to provide strategic input into the UK International Education Strategy and be represented at high-level delegations, and Medr should appoint a designated Board member to lead on promoting a Global Outlook.

The UK Government has appointed an International Education Champion and, similarly, the Scottish Government has appointed a Trade and Investment Envoy for International Higher Education. To ensure that Wales is well represented on the international stage, it would therefore be appropriate for there to be a Wales International Education Champion who can, for example, join high-level delegations and contribute to strategic policy. The role will need to be defined, including clear details on its responsibilities within Wales, across the UK, and internationally, as well as the resources required to support the role effectively.

It is important that Medr's strategy provides a high-level framework for supporting and incentivising sustainable and diversified international engagement amongst institutions, enabling them to build clear diversification plans in their international strategies.

Recommendation 3

Medr's strategy should support institutions' diversification plans to help enhance deeper relationships for growth and reduce single partner dependencies in research and innovation, recruitment and/or commercial activity.

To successfully oversee the implementation of a strategy, it is vital that quality data is available. Currently, issues in relation to data make measuring the impact of international initiatives challenging. This relates to a delay in available data for HE (provided by HESA) and an absence of Wales-level international recruitment data for the FE sector. Medr has been empowered to collect data from providers on international activities. It therefore should become a conduit of international education data to help improve outcomes and learner experience.

Recommendation 4

Medr should become a conduit for international education data, it should consider what data is required to better advance its Strategy, and should move to address gaps, notably in relation to the lack of data available to FE.

Call to action

Strategic enablers will be needed to drive and support the successful implementation of the new strategy. Medr should consider:

Initiatives

- Operating national support mechanisms that facilitate destination marketing, country-specific initiatives, international partnerships, collaboration amongst institutions, and market research.
- Influencing the design and operation of Wales-specific initiatives that are outside of its control (for example, Agile Cymru) to ensure that these complement its own mechanisms.
- Advocating for UK-wide funding initiatives to reflect Wales's interests, ensuring Welsh institutions have the necessary capacity and expertise to access these opportunities, and tracking the sector's participation to identify gaps and successes.
- Advising the Welsh Government on the potential for extending the geographical portability of student finance arrangements in order to support reciprocal exchanges of students with non-UK countries and innovative models of delivery.
- Advising the Welsh Government on the case for developing and supporting an advisory service for Wales-based employers interested in employing international students.
- Assessing whether there is an appetite for a collaborative approach to Transnational Education (TNE), leveraging the strengths of different providers.

Regulation and information

- Continuing alignment of higher education quality assurance in Wales with the standards and guidelines for quality assurance in the European Higher Education Area (ESG).
- Gathering or commissioning the collection of a wider and more detailed range of data to support policy development, guide institutional practices, and enable performance monitoring.
- Ensuring that TNE regulatory mechanisms are not overly prescriptive for the purpose of designating an institution as a provider and that any support for international collaboration/networking extends to education partnerships.
- Taking an active role in offering guidance and promoting the sharing of best practices.

2. Trust

The sustainability of international education and research relies heavily on fostering strong, trust-based relationships between countries, between institutions and their partners, and between institutions and their students. This includes ensuring fair and transparent recruitment practices for international students, prioritising their welfare, and providing them with the necessary support to succeed academically and socially.

The actions of colleges and universities in the realm of international education and research have a significant impact on the national reputation of the countries they represent, making it essential that these are guided by ethical and responsible principles. Ethical behaviour extends to research collaborations, where institutions must uphold the principles of integrity, equity, and sustainability, avoiding exploitative partnerships or practices that undermine the well-being of local communities.

By embedding responsibility into their international strategies, institutions not only reinforce their credibility and reputation on the global stage but also contribute to addressing global challenges such as inequality, climate change, and social justice. Ultimately, ethical and responsible engagement ensures that international education and research contribute positively to global progress.

All Welsh universities are signed up to a set of Principles for International Students

Recruitment, which includes adherence to the UK Agent Quality Framework. With the UK Agent Quality Framework applying to all recognised providers of courses to international students across multiple sectors, there is a potential opportunity for the further education sector to engage with this agenda as it looks to expand its international recruitment.

Recommendation 5

Colleges and universities should prioritise the interests of students and wider stakeholders by ensuring their strategies, policies and operational frameworks promote ethical practices, responsible behaviours and sustainable international engagement.

Call to action

At a minimum, institutions should:

- Ensure that a positive student experience is at the heart of their approaches.
- Implement and adhere to the guidance provided by the UK Agent Quality Framework (AQF) to maintain high standards, accountability, and ethical practices among education agents recruiting international students.
- Use the UK's National Protective Security Authority (NPSA) framework to evaluate and mitigate security risks in international research collaborations, safeguarding integrity and sensitive information.
- Sign up to the principles set out in the UKCISA's International Student Charter.
- Assess the need for developing robust diversification plans within their international strategies to address single partner dependencies across research and innovation, recruitment, and commercial activities.
- Regularly review progress against the International Student Recruitment Principles and share best practice. Consideration should be given to reviewing the principles to enable their adoption by internationally recruiting colleges.
- Review the strength of their offer to international students to ensure that it takes appropriate account of academic quality, student support services, affordability, employability outcomes, and cultural experiences.
- Actively monitor the impact of their international activities on local communities, ensuring that local residents benefit from the presence of international students.
- Consider contributing to the Welsh Government's Nation of Sanctuary initiative by offering tailored support for refugees and asylum seekers.
- Take reasonable actions to mitigate the impact of international education and research on carbon emissions.

3. Funding

The tertiary education sector has worked collaboratively, with government support, to grow international partnerships and promote our institutions globally. Over the last decade, the Welsh Government's investment in both Global Wales and Taith has not gone unnoticed internationally and has helped Wales lead the way in the UK. It is vital that this reputation is maintained and enhanced.

The provision of international mobility opportunities for domestic students and staff is a key means of embedding a global outlook within colleges, universities and wider society. Initiatives that support both inward and outward mobility of students and researchers are essential for supporting cultural exchange, knowledge sharing, and mutual understanding. Inward mobility attracts global talent and expertise to enrich academic and research environments, while outward mobility equips Welsh students and researchers with international experience, enhancing their skills, employability, and capacity to contribute to global challenges. Mobility opportunities are particularly impactful for students from underrepresented communities as they provide access to transformative experiences that may otherwise be inaccessible, broadening their horizons and fostering confidence. These opportunities enhance employability by equipping students with global skills, cultural competencies, and networks that help overcome barriers to social mobility and future success.

Investment in Taith since 2022 has positioned Wales as an open and outward-looking nation, generating significant interest internationally. The reciprocal nature of the funding has been key to this, compensating to some extent for the loss of reciprocity enjoyed under Erasmus+. While Taith operates globally, Erasmus+ mobility opportunities are largely focused on European countries. The current Erasmus+ cycle will support mobilities until at least the 2027-28 academic year. Funding support for Taith has been reduced and a decision on its continuation beyond 2026 has yet to be taken. Decisions about the long-term future of Taith should be considered in conjunction with those regarding the UK Turing Scheme and the UK's potential re-engagement with the Erasmus+ programme.

Recommendation 6

The Welsh Government should commit immediately to extending the delivery of Taith funded activity to at least September 2028.

On the surface, Wales appears to recruit successfully worldwide, attracting 28,710 international students in 2022/23, from over 120 nations and territories³. However, these headline statistics hide significant dependencies. Notably, 52% of international students come from just three countries: India (23.5%), Nigeria (16%) and China (13%). Wales has also underperformed in terms of its market share of UK international students (3.8% in 2022/23). Developing stronger and wider international awareness of Wales and Welsh institutions globally, and increasing UK market share, must be top priorities.

Destination marketing plays an increasingly vital role in shaping international student choices by strategically promoting opportunities and enhancing a destination's appeal and competitiveness. Study in Wales has helped promote the offer of Wales's institutions and communicated that offer in a bespoke way to different markets. Through the brand, institutions work collaboratively cross-sector to ensure that the warm welcome on offer in Wales is understood by prospective international students and partners. The closure of Global Wales runs a risk of reducing the profile and reach of institutions in key markets at a particularly challenging time. In taking forward its Global Outlook Strategic Duty, Medr should work with colleges and universities to ensure that Wales has an appropriately funded destination marketing approach that is strategic, clearly understood and effective in communicating Wales's world class tertiary education offer.

Global Wales has also played a prominent role in managing national and regional relationships with sector bodies and funding agencies, enabling colleges and universities to access broader partnerships and funding opportunities. Not only are partnerships an increasingly important recruitment pipeline, but co-ordinated national support is vital to establish first connections, develop and grow sustainable partnerships and to ensure that the appropriate people and plans are in place to crystallise opportunities.

Global Wales's support for partnerships has been instrumental in growing cross-sector collaboration, and helping colleges build meaningful international collaborations, unlocking funding opportunities and expanding their global reach.

As the programme draws to a close, it is vital that action is taken so that this cross-sector partnership work is maintained and strengthened.

³ Where do HE students study? | HESA

Recommendation 7

Destination marketing and international partnership support should be key enablers in Medr's international tertiary education and research strategy.

Through international scholarships, Welsh students have benefited from the opportunity to gain experience from studying abroad and accumulate invaluable knowledge which they have brought back to Wales. With our world-leading research and student life, international students have benefited from scholarships bringing them to Wales where they have forged life-long connections. The promotion of scholarships through Study in Wales has also helped deliver a strong message to international markets that Wales is welcoming to students. Medr will need to consider what scholarship programmes to use in the future to promote and support Wales as the most open and welcoming nation for international students.

A long-term business case for developing destination marketing would need to be premised on identifying a clear value proposition that aligns with the needs of students and institutions, and can be delivered as close to the market as possible.



Call to action

The mechanisms and actions needed to deliver a clear value proposition, include:

- Supporting international scholarships to position Wales as a welcoming nation for international students. Scholarships could be targeted towards Welsh Government priorities, such as skills gaps and women in STEM.
- Branding and promotion, with strong, recognisable campaigns that highlight unique selling points such as the quality of education, affordability, and lifestyle.
- Targeted digital marketing through social media, search engine optimisation, and engaging online platforms.
- Partnerships with reputable education agents in key source markets, supported by training and incentives to ensure effective representation.
- Collaborative partnerships with governments, chambers of commerce, and industries to help create pathways for internships, work placements, and future employment.
- In-country representation, participation in recruitment events, and alumni engagement to leverage past students as ambassadors.
- Offering pathway programmes to ease transition into higher education, streamlined visa processes, and post-study work rights to further enhance the appeal of Studying in Wales.
- Partnerships with education agents in key source markets, supported by training and incentives to ensure effective representation.
- Government-to-government initiatives, such as bilateral agreements and mutual recognition of qualifications, to strengthen ties with partner countries.
- Market segmentation plans to ensure a tailored approach that reflects the different needs of mature, growth, and exploratory markets.
- Determining where the responsibility and resource for delivering each destination market is best placed.

The Sêr Cymru programme was funded by a range of Welsh partners as well as EU Structural Funds and Horizon 2020 to bring scientific talent into research posts in Wales, recognising the need for increased research capacity. Over £100m funding was provided supporting over 475 research posts at different levels in universities, which generated over £180m in research grant income to Wales⁴. The programme ended in June 2023 with plans under development for a next phase and consultation. However, no further information has been provided to the sector and there is a danger of a lack of further investment undermining previous investments.

Recommendation 8

The Welsh Government should consider reviving the Sêr Cymru programme and transferring it to Medr to ensure alignment with the Commission's strategic duty to promote research and innovation.

4. Advocacy

The Welsh Government and Medr can play a crucial role in advocating for Welsh colleges and universities. Within the UK, they could champion the distinct interests of Welsh institutions, ensuring that Wales actively contributes to the development of UK-wide initiatives and maximises the benefits of UK funding opportunities. With the EU, they could work with institutions to rebuild and strengthen collaborative ties by facilitating access to key programmes like Horizon Europe and Erasmus+, while fostering bilateral agreements that support mobility and research partnerships. Beyond the EU, the Welsh Government and Medr could better help institutions expand their global reach by promoting Wales as a leading destination for education and research through diplomatic channels, trade missions, and international networks. They are also well positioned to facilitate partnerships with governments, industry, and institutions in emerging and established markets, offering shared resources, funding incentives, and policy advocacy to create favourable conditions for Welsh institutions to thrive on the global stage.

Over the coming months the UK Government will need to make decisions about other mechanisms that support international education and research, in particular, the UK's future association with Horizon and Erasmus+ and the future of the UK's Turing mobility scheme. The Welsh Government and, where appropriate, Medr should play a proactive part in contributing to UK-level decisions on these matters.

In terms of research, association with the EU Horizon programme is crucial. Early agreement on the UK's full association with the next European framework programme (FP10) is a top priority. Doubts about the UK's participation will undermine research collaborations.

⁴ Sêr Cymru | GOV.WALES

Recommendation 9

Medr, working closely with the sector through Welsh Higher Education Brussels, should engage positively with the development of the next European research framework programme and push for early agreement on the UK's full association.

As previously mentioned, student mobility placements and exchanges provide invaluable opportunities. For disadvantaged students, these programmes can be transformative, offering access to experiences and networks that might otherwise be unavailable, broadening their horizons, and enhancing their employability in a competitive global job market. The Taith scheme has proved a real boon to Wales. However, there are distinct advantages for institutions to be able to access other schemes, including the UK's Turing scheme and the EU's Erasmus+ programme.

Taith, the Turing scheme and Erasmus+ offer distinct approaches to supporting international mobility and exchanges. Taith is uniquely designed to allow two-way mobility. In contrast, Turing focuses primarily on outward mobility, supporting UK students to undertake placements or exchanges abroad but lacks the reciprocal element. Erasmus+ combines both two-way mobility and a broader scope, offering comprehensive support not just for student and staff exchanges but also for collaborative projects in education, training, and youth development across Europe. Unlike Turing, Erasmus+ provides funding for both incoming and outgoing participants, fostering stronger institutional partnerships and more balanced international collaboration. Taith has bridged some, but not all, of the gaps left by the UK's exit from Erasmus+. It is vital that both governments work closely together to ensure that available mobility programmes complement each other for the benefit of the people of Wales and beyond.



Recommendation 10

The Welsh Government should work closely with the UK Government to evaluate the case for UK participation in the next Erasmus+ programme.

Wales's population is projected to experience modest growth over the next 25 years, predominantly as a consequence of net migration. It will also experience an ageing population and decline in the number of children. These demographic shifts have significant implications for the availability of a skilled workforce, potentially requiring strategies to attract and retain skilled workers from other regions or internationally. Wales currently experiences significant skills shortages across various sectors including, engineering and construction, hospitality and tourism, information technology, medical services, nursing and care services, and skilled trades.

While immigration policy is reserved to the UK Government, Devolved Governments have a significant stake in how it is constructed, as it directly impacts their economies, demographics, and public services. The application of universal UK-wide systems often fails to adequately reflect regional and national priorities. This can lead to mismatches between national policy and local needs, such as workforce requirements or population retention strategies.

The Welsh Government's White Paper Brexit and Fair Movement of People advocated for a more flexible and regionally tailored UK immigration policy that aligns with Wales's distinct economic and public service needs. It seeks a system that links migration more closely to employment, supports the recruitment of international students without including them in net migration targets, and provides pathways for skilled migrants essential to key sectors like healthcare, education, and agriculture. Additionally, the Welsh Government has called for a role in shaping migration policy to ensure that it meets the specific demands of Wales's labour market and public service.

In 2016, the previous UK Government established a student visa pilot that operated exclusively in England, without any consultation with the devolved governments⁵. If any future immigration pilots are to be established, it is important that devolved nations are included and consulted.

⁵ The Brexit university challenge: recapturing a civic mission | GOV.WALES

Wales beyond borders

There is precedent for immigration procedures to be varied across the UK. Scotland benefited from the Fresh Talent Initiative, an arrangement that allowed a two-year post-study work visa for graduates of Scottish universities. As salaries vary widely across the UK, consideration should be given to whether international graduates in certain regions or nations could benefit from a longer period to reach the £38,700 Skilled Worker Visa threshold.

The UK Government's Immigration Salary List for applicants for Skilled Worker and Health and Social Care Visa includes occupations that are specific to Scotland and do not apply elsewhere in the UK. Consideration should be given to the UK Government's Immigration Salary Lists being tailored to reflect Wales-specific shortages and setting a more appropriate salary threshold for Wales within the Skilled Worker Visa.

The Welsh Government has identified several occupations experiencing shortages that are particularly relevant to colleges and universities. Incorporating these occupations into a Wales-specific Shortage Occupation List and simplifying the ability of international students to transition from a Student Visa to a Skilled Worker Visa upon graduation could help address critical skills gaps in public services and businesses in Wales.

Consideration should also be given to waiving or reducing the Immigration Health Surcharge and visa application fees for certain categories of international students and staff bound for Welsh institutions.

Recommendation 11

The Welsh Government, working collaboratively with Medr and the sector, should develop proposals for the UK Government to refine the immigration system to better align its operation with the specific needs of Wales.

Call to action

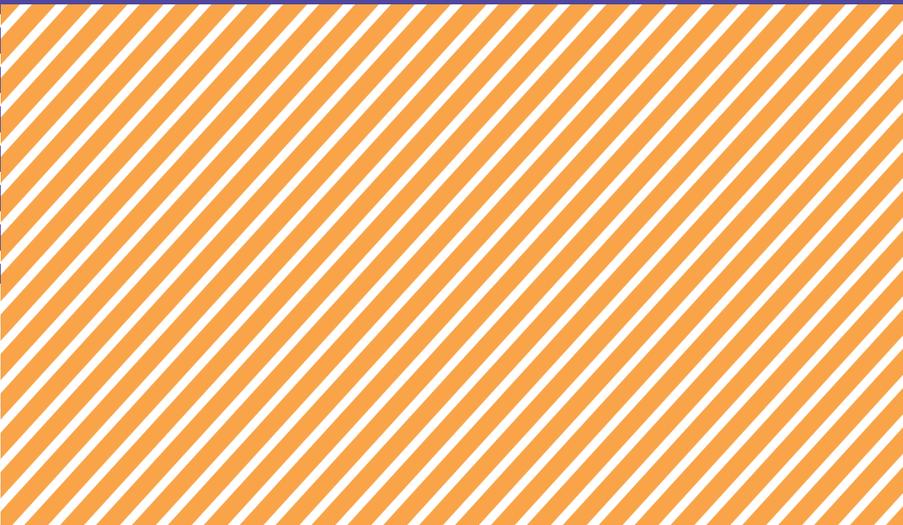
In making the case to the UK Government for an immigration system that better suits the needs of Wales, the Welsh Government could:

- Advocate for the inclusion of Welsh colleges and universities in any UK pilot projects to test changes to the immigration system.
- Consider what Wales-specific vocations should be added to the UK Government's Immigration Salary Occupation List.
- Call for the waiving or reducing of certain charges for international students bound for Welsh institutions.
- Make the case for a more appropriate salary threshold for Wales within the Skilled Worker Visa.
- Propose a Wales Graduate Visa, that would act as a bridge between the existing Graduate Visa and Skilled Worker Visa, providing international graduates in Wales an additional two years to reach the £38,700 threshold.



Part 3 - Conclusions and recommendations

With the world changing at a rapid pace, the role of institutions to look outwards to the wider world has never been more important. Fundamentally, it's about our values – the open, welcoming, tolerant and dynamic country we want to be and the institutions and citizens supporting that.



The report highlights the critical importance of advancing Wales's international education and research to secure economic growth, innovation, and global influence. Despite significant challenges such as Brexit, Wales has unparalleled opportunities to strengthen its global presence through strategic collaboration and targeted investments. By developing a cohesive framework, including the proposed International Tertiary Education and Research Strategy, and leveraging Wales, UK and EU programmes, Wales can reinforce its role as a leader in addressing global challenges. Through ethical and sustainable practices, Wales can ensure its international endeavours reflect its values.

Recommendations

- 1.** To deliver on its Global Outlook Strategic Duty, Medr should produce an International Tertiary Education and Research Strategy for Wales and an associated implementation plan.
- 2.** Wales should have an International Education Champion to provide strategic input into the UK International Education Strategy and be represented at high-level delegations, and Medr should appoint a designated Board member to lead on promoting a Global Outlook.
- 3.** Medr's strategy should support institutions' diversification plans to help enhance deeper relationships for growth and reduce single partner dependencies in research and innovation, recruitment and/or commercial activity.
- 4.** Medr should become a conduit for international education data, it should consider what data is required to better advance its Strategy, and should move to address gaps, notably in relation to the lack of data available to FE.
- 5.** Colleges and universities should prioritise the interests of students and wider stakeholders by ensuring their strategies, policies and operational frameworks promote ethical practices, responsible behaviours and sustainable international engagement.
- 6.** The Welsh Government should commit immediately to extending the delivery of Taith funded activity to at least September 2028.
- 7.** Destination marketing and international partnership support should be key enablers in Medr's international tertiary education and research strategy.
- 8.** The Welsh Government should consider reviving the Sêr Cymru programme and transferring it to Medr to ensure alignment with the Commission's strategic duty to promote research and innovation.
- 9.** Medr, working closely with the sector through Welsh Higher Education Brussels, should engage positively with the development of the next European research framework programme and push for early agreement on the UK's full association.
- 10.** The Welsh Government should work closely with the UK Government to evaluate the case for UK participation in the next Erasmus+ programme.
- 11.** The Welsh Government, working collaboratively with Medr and the sector, should develop proposals for the UK Government to refine the immigration system to better align its operation with the specific needs of Wales.

Annex

Expert panel

The expert panel consisted of experts based in Wales, the UK, and internationally.

Andrew Cornish, Chair, Colleges Wales International Group

Anne Marie Graham, Chief Executive, UK Council for International Student Affairs (UKCISA)

Catriona McCarthy, Chair, British Universities International Liaison Association (BUILA)

Chris Whelan, Director, Universities New Zealand

Des Cutchey, Head of International, The Universities and Colleges Admissions Service (UCAS)

Dewi Knight, Director, PolicyWISE

Diana Beech, Chief Executive, London Higher

Elin Burns, Foreign Commonwealth and Development Office (FCDO)

Emily Palmer, Secretary General, Una Europa

Frances Wood, International Director, UK Research and Innovation (UKRI)

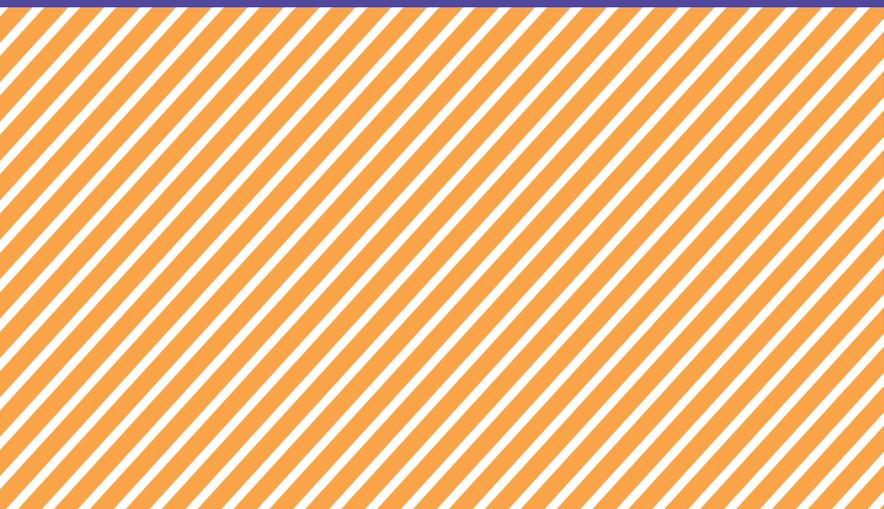
Maddalaine Ansell, Director Education, British Council

Mary Kent, Chief Technical Advisor, International Labour Organisation (ILO)

Rachael Langford, President and Vice-Chancellor, Cardiff Metropolitan University

Rachel MacSween, Director of Partnerships and Stakeholder Engagement, IDP Connect

Suzanna Tomassi, HE Specialist, Department for Business and Trade (DBT)



Interviews

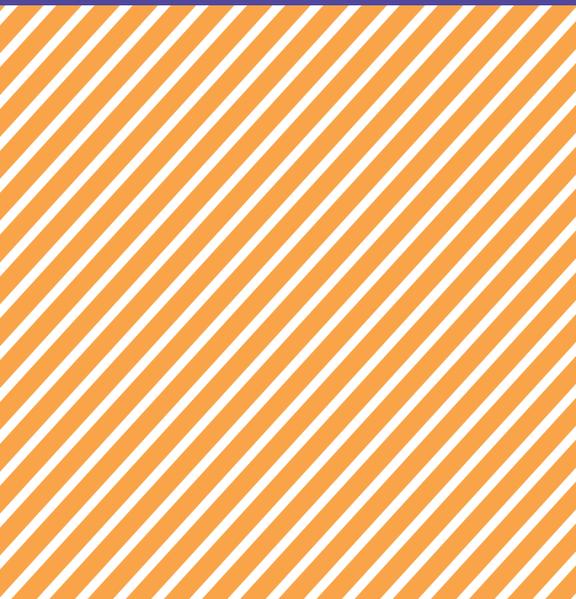
The following people were informally interviewed:

Damien Vialle, Attaché for Higher Education (French Embassy)
 The Right Honourable Lord David Willetts
 Holly Thomas, Quality and Enhancement Specialist, SWNI, QAA
 James Pitman, Managing Director, UK & Europe, Study Group
 Jane Rexworthy, Chair, UK Skills Partnership
 The Right Honourable Lord Jo Johnson
 Kathryn O’Loan, Director, SWNI, Nations & Europe, QAA
 Kevin McStravock, Lead Policy Officer, Nations & Europe, QAA
 Lewis Dean, Head of Wales Innovation Network
 Mareike Wahlers, Head of International Affairs, German Rectors’ Conference
 Michael Ryan, Head of International, Science Foundation Ireland
 Patrick Nedellec, Counsellor for Science and Technology (French Embassy)
 Paul Lovegrove, CEO UP Europe, Navitas
 Ruth Cocks, Director, British Council Wales
 Roger King, Fellow International Artificial Intelligence Industry Alliance (AIIA)
 Susana Galván, Executive Director, Taith
 Tim O’Brien, Senior Vice President, IntoGlobal
 Virginia Macchiavello, Associate Vice President, Centennial College, Canada

Group consultations

The following sector groups were consulted:

Colegau Cymru International Group
 Colegau Cymru Principals’ Forum
 Global Wales Board
 Universities Wales Committee
 Universities Wales International Network



Universities Wales
One Central Square
Cardiff, CF10 1FS
029 2044 8020
info@uniswales.ac.uk
uniswales.ac.uk

