

INTERNATIONALISATION OF HIGHER EDUCATION

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INTERNATIONALISATION AND EXCELLENCE

- INTERNATIONALLY CO-AUTHORED RESEARCH MORE HIGHLY CITED
- INTERNATIONALLY MOBILE RESEARCHERS MORE PRODUCTIVE
- INTERNATIONALLY MOBILE GRADUATES MORE EMPLOYABLE
- IN THE LAST 5 YEARS INTERNATIONAL RESEARCH INCOME HAS INCREASED BY 65%
- INTERNATIONAL MEASURES IN RANKINGS



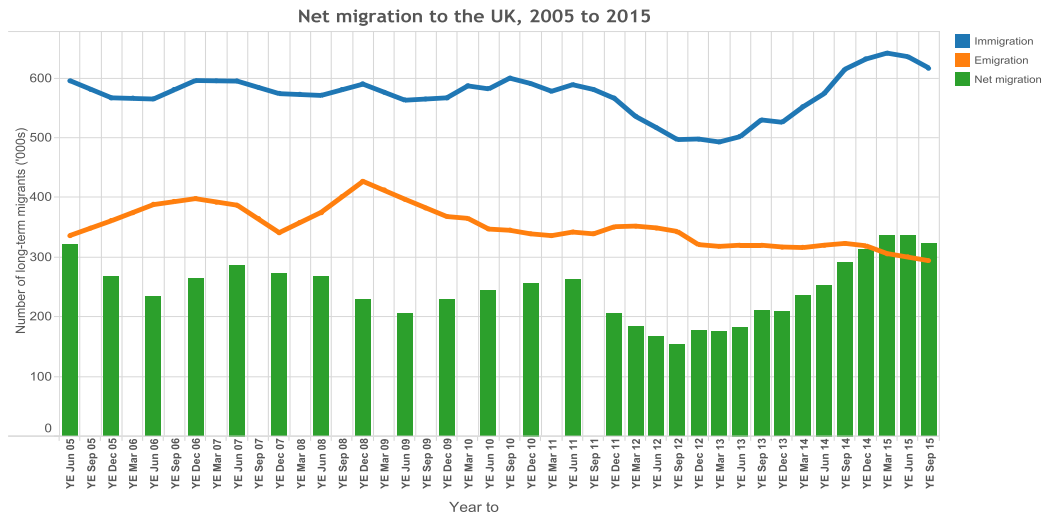
TRENDS: AN OVERVIEW

- **30% GROWTH IN CO-AUTHORED ARTICLES IN THE LAST DECADE**
- **65% INCREASE IN RESEARCH INCOME FROM INTERNATIONAL SOURCES IN LAST 5 YEARS**
- **13% GROWTH IN UK TNE IN THE LAST 2 YEARS**
- **50% INCREASE IN ERASMUS MOBILITY SINCE 2007/8**
- **STAGNATION IN INTERNATIONAL STUDENT NUMBERS IN CONTEXT OF RAPID GROWTH IN**

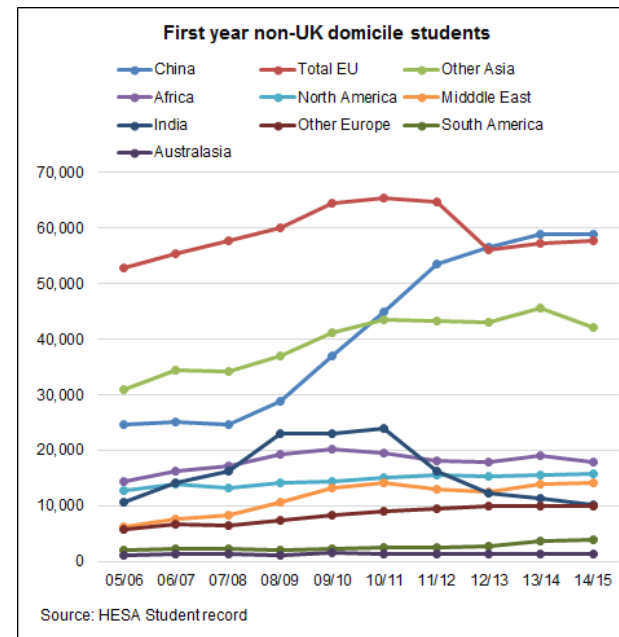
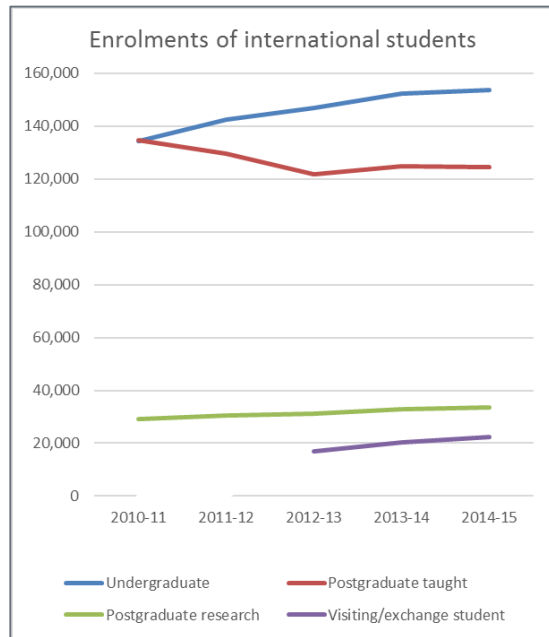
GLOBALLY MOBILE STUDENTS

- **INCREASINGLY FIERCE COMPETITION**
- **DECLINE IN SOME OF UK MAJOR SOURCE COUNTRIES FOR INTERNATIONAL STUDENTS**
- **SLIGHT EROSION OF UK RANKING POSITIONS**
- **SHIFT IN INSTITUTIONAL PRIORITIES: PARTNERSHIPS, MOBILITY, DIVERSIFICATION**

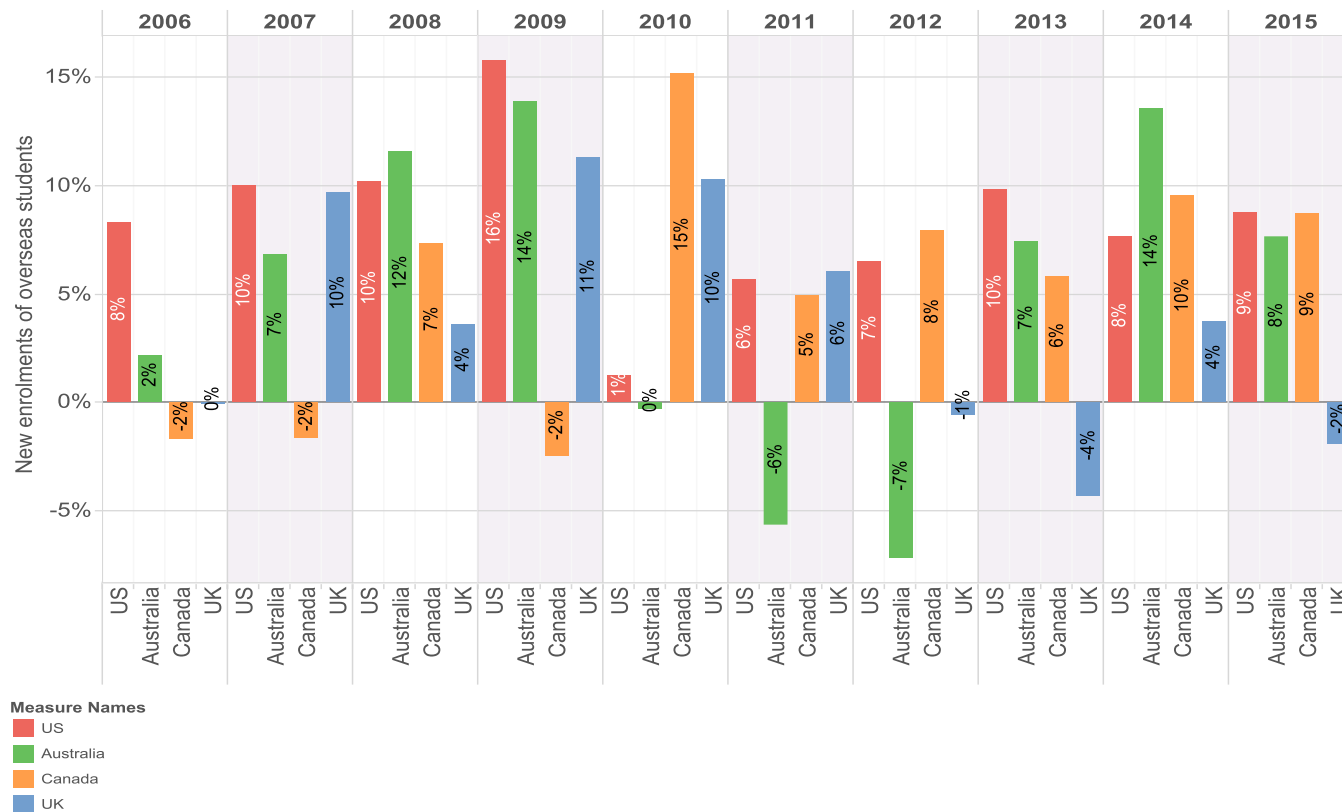
SOME CONTEXT



ENROLMENT TRENDS



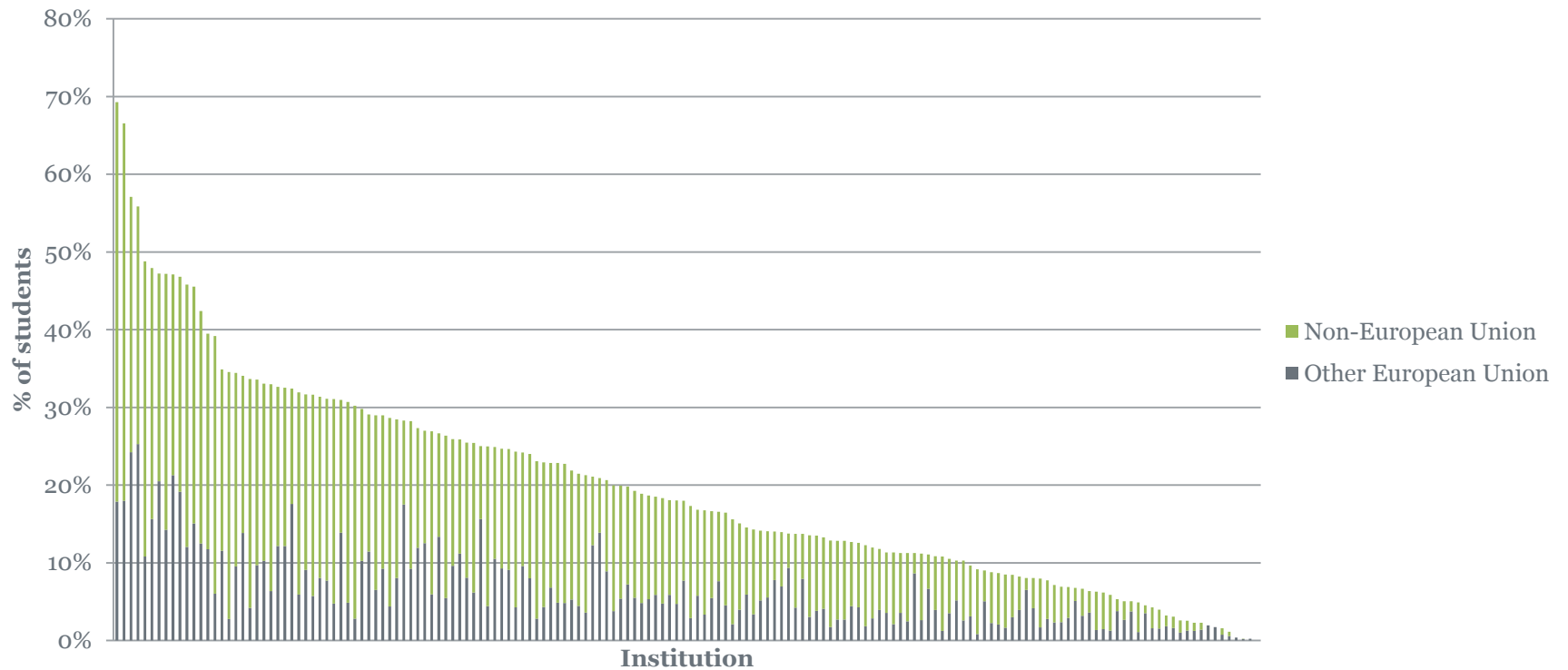
ELSEWHERE...



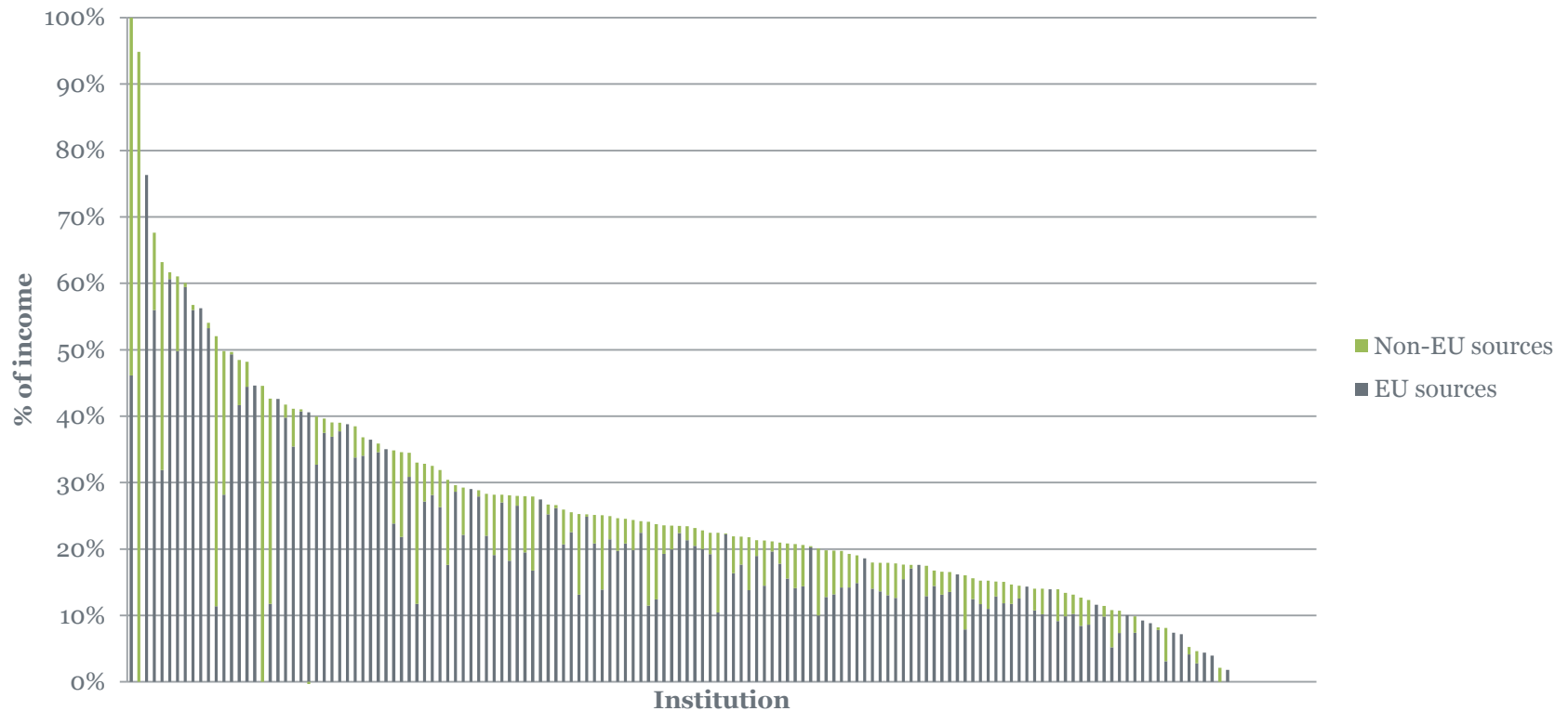
BREXIT

- **2.5% OF THE ENTIRE UK SECTOR'S INCOME CAME VIA EU RESEARCH GRANTS AND CONTRACTS**
- **14% OF ALL RESEARCH GRANTS/CONTRACTS INCOME CAME FROM EU SOURCES, BUT FOR SOME INSTITUTIONS THIS WAS OVER 50%**
- **5.5% OF ALL STUDENTS COME FROM OTHER EU COUNTRIES, BUT THIS IS OVER 20% AT A NUMBER OF SPECIALIST INSTITUTIONS**
- **IN SCOTLAND, 9.5% OF STUDENTS ARE FROM OTHER EU COUNTRIES**
- **16% OF ALL ACADEMIC STAFF ARE OTHER EU NATIONALS, BUT THIS RISES ABOVE 25% IN MORE THAN 10 UNIVERSITIES (MAINLY RESEARCH INTENSIVES)**
- **THERE ARE C.31,000 EU NATIONALS EMPLOYED AS ACADEMIC STAFF ACROSS THE UK IN TOTAL**
- **11% OF ALL STAFF (I.E. THOSE ON ACADEMIC AND NON-ACADEMIC CONTRACTS) ARE OTHER EU NATIONALS; EQUAL TO 43,000 MEMBERS OF STAFF ACROSS THE SECTOR**

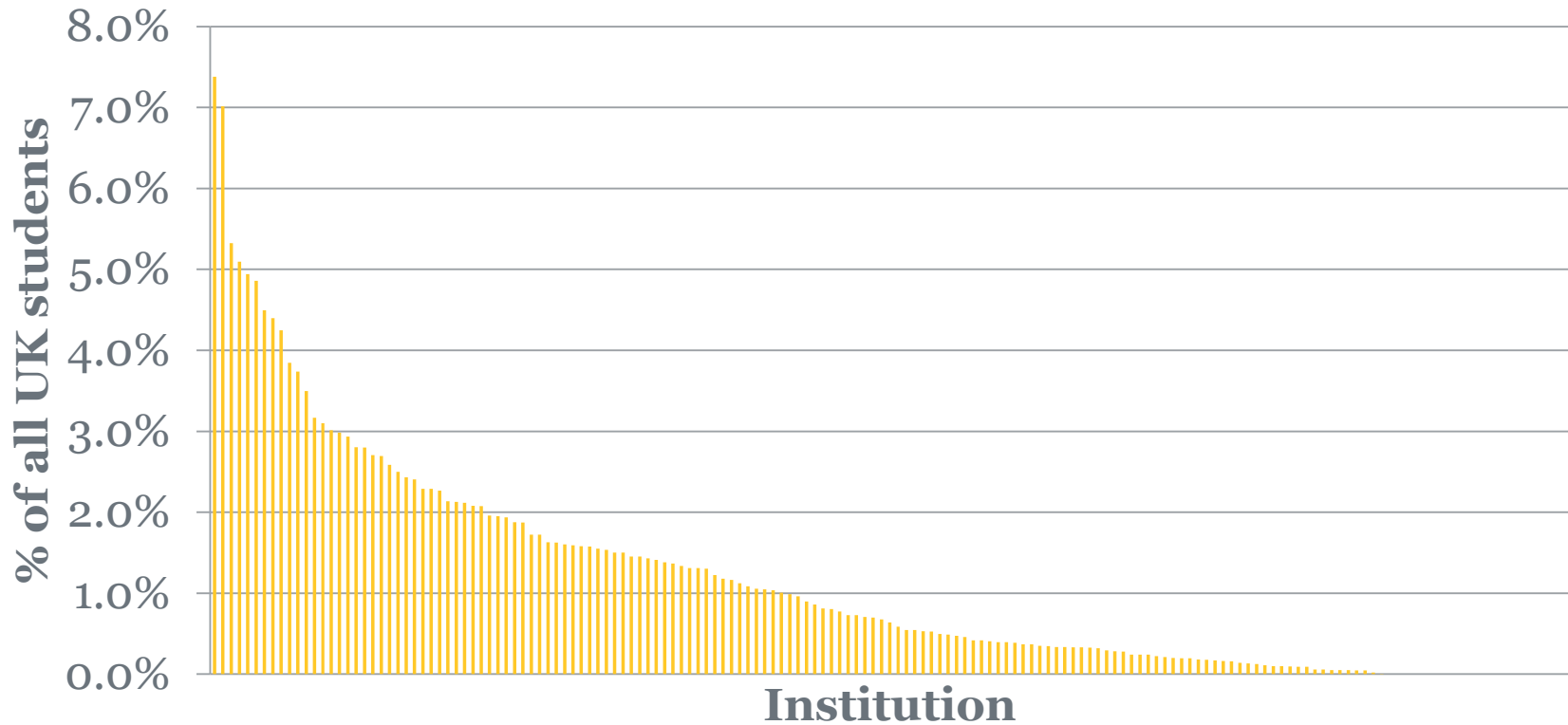
% OF STUDENTS FROM OUTSIDE THE UK



% RESEARCH INCOME FROM NON UK SOURCES



% UK STUDENTS WITH PERIOD OF MOBILITY

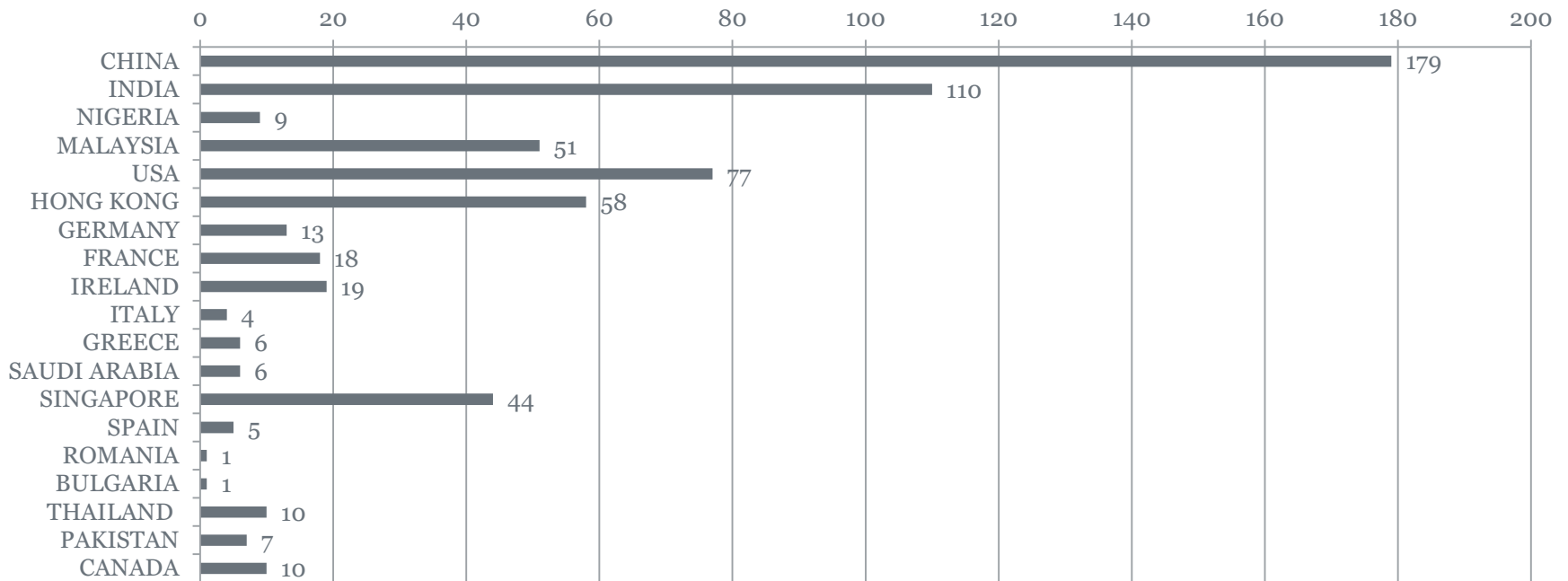


SOME STRATEGY TRENDS

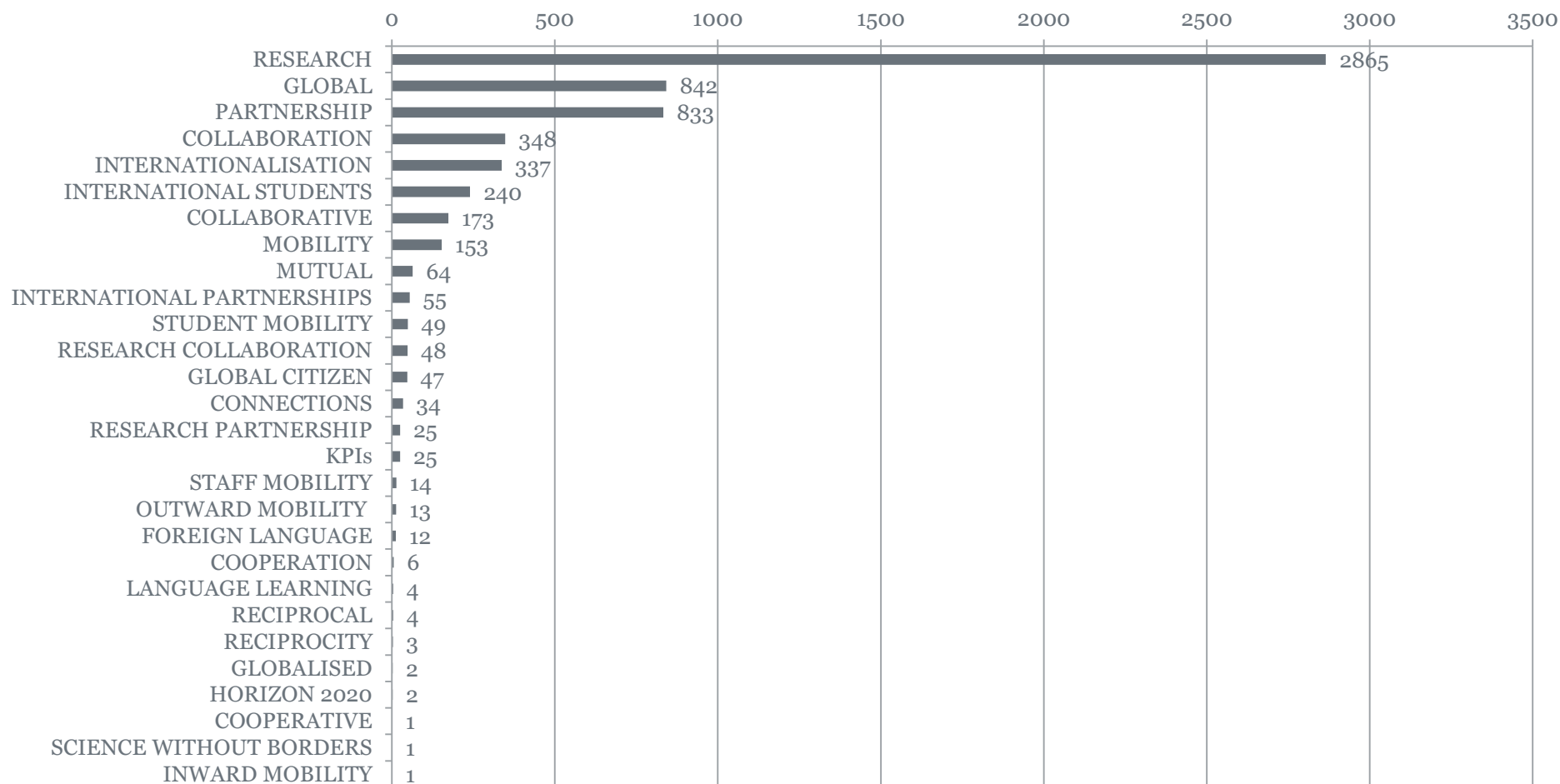
- **STRATEGIC PARTNERSHIPS: DECLUTTERING AND LAYERING**
- **TNE AS A PATHWAY AND AN ALTERNATIVE TO ONSHORE RECRUITMENT**
- **DIVERSIFICATION: MODE AND GEOGRAPHY**
- **UP THE VALUE CHAIN: JOINT AND DUAL DEGREES, JOINT INSTITUTES AND CENTRES**
- **BRANCH CAMPUS FOR RESEARCH**
- **SELF SELECTION – VOLUNTARY DISENGAGEMENT FROM TRADITIONALLY IMPORTANT STUDENT RECRUITMENT MARKETS**
- **INCREASING FOCUS ON OUTWARD STUDENT MOBILITY FOR A RANGE OF REASONS INCLUDING EMPLOYABILITY**
- **STAFF MOBILITY AND INTERNATIONAL BUSINESS COLLABORATION SURPRISINGLY LOW ON THE LIST OF PRIORITIES**

COUNTRY PRIORITIES: ACCORDING TO STRATEGY

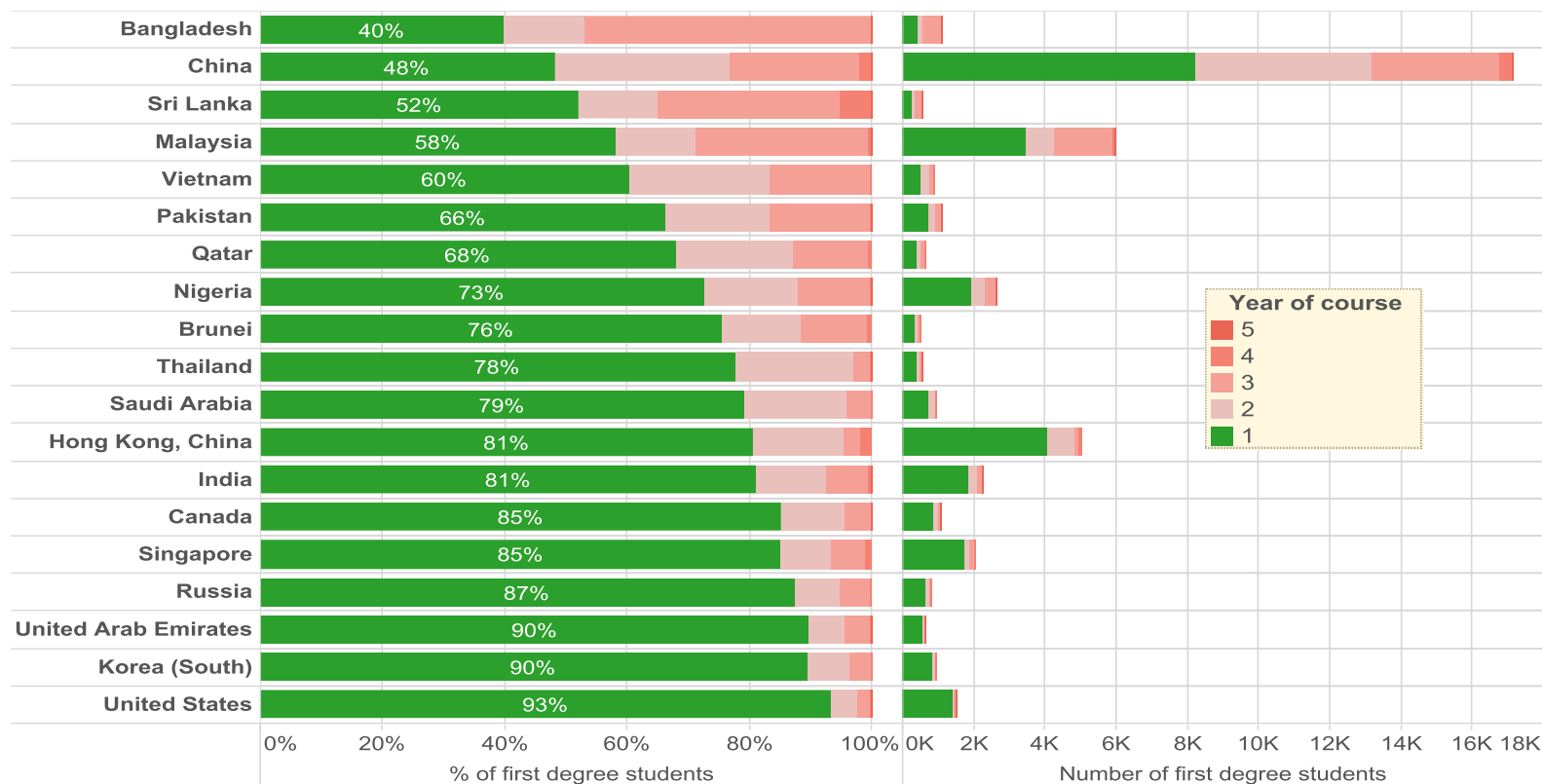
Mentions in HEI Strategy Documents



MENTIONS IN HEI STRATEGY DOCUMENTS



PATHWAYS TO STUDY IN THE UK























TRANSNATIONAL EDUCATION

HEGLOBAL SCALE AND SCOPE REPORT





















- There are only 15 countries where the UK does not offer any HE TNE
- The rate of growth was 13.4% from 12/13 – 14/15 (excluding Oxford Brookes/ACCA BSc in Applied Accounting)
- Top 5 countries for delivery has remained constant since 12/13 but next 5 countries have changed = it's an evolving landscape



COUNTRIES (STUDENTS)

2008/09 Ranking	2012/13 Ranking	2014/15 Ranking	Country
3	 2 1	 1	Malaysia
4	 1 3	 2	China
2	 2	 3	Singapore
21	 17 4	 4	Pakistan
25	 19 6	 5	Nigeria
1	 4 5	 6	Hong Kong
9	 2 11	 4 7	Oman
30	 23 7	 8	Ghana
16	 3 13	 9	Sri Lanka
15	 2 17	 7 10	Egypt

Source: AOR Data.

2008/09 Ranking	2012/13 Ranking	2014/15 Ranking	Country
3	 2 1	 1	Malaysia
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15	 6 9	 3 6	Egypt
16	 6 10	 3 7	Sri Lanka
5	 2 7	 8	Greece
14	 8 6	 3 9	United Arab Emirates
11	 3 14	 4 10	India

Source: AOR Data.

SOME NEW OPPORTUNITIES

- AID STRATEGY
- TRADE POLICY
- INDUSTRIAL STRATEGY
- OIL PRICE
- NEW INITIATIVES: GLOBAL CHALLENGES RESEARCH FUND; NEWTON EXTENSION AND EXPANSION; PROSPERITY FUND; SPHEIR; UKIERI 3; UKCPIE SUCCESSOR PROGRAMME?
- GREAT: STUDY UK DISCOVER YOU
- BRITAIN OPEN TO THE WORLD





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Discover you



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Experience
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LONGER TERM PRIORITIES

- **PROMOTE UK AS A WELCOMING DESTINATION**
- **INTERNATIONAL RESEARCH COLLABORATION AND INVESTMENT**
- **INTERNATIONAL TALENT**
- **PROMOTE GLOBAL OPPORTUNITIES FOR UK STUDENTS AND STAFF THROUGH MOBILITY PROGRAMMES**
- **...A CROSS GOVERNMENT INTERNATIONAL EDUCATION AND RESEARCH STRATEGY**

#WEAREINTERNATIONAL

WITH BRITISH COUNCIL, SUPPORTING UNIVERSITY OF SHEFFIELD'S SECTOR-WIDE CAMPAIGN

- Short film produced and shared at EAIE conference
- Promoted our networks
- Country specific versions
- Events and social media across Europe this autumn.

THANK YOU

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