

WGIR08 Universities Wales

Senedd Cymru | Welsh Parliament

[Pwyllgor Diwylliant, Cyfathrebu, y Gymraeg, Chwaraeon, a Chysylltiadau Rhyngwladol](#) | [Culture, Communications, Welsh Language, Sport, and International Relations Committee](#)

[Strategaeth Ryngwladol Llywodraeth Cymru](#) | [Welsh Government's International Strategy](#)

Ymateb gan: Prifysgolion Cymru | Evidence from: Universities Wales

About Universities Wales

Universities Wales represents the interests of universities in Wales and is a National Council of Universities UK. Universities Wales' membership encompasses the Vice Chancellors of all the universities in Wales, and the Director of the Open University in Wales. Our mission is to support a university education system which transforms lives through the work Welsh universities do with the people and places of Wales and the wider world. Universities Wales welcomes the opportunity to respond to the Committee's consultation.

Key messages

The very existence of a strategy is important as it outlines Wales' ambitions and values, including being an outward looking and a globally responsible nation.

The loss of access to almost all EU programmes has been extremely challenging for universities. It has been helpful to have a focus on Europe in the strategy to enable continued engagement with key partners.

Universities generated £1.26 billion in exports for the Welsh economy in 2022/23 through their international work which encompasses research and education collaborations with thousands of partners around the world. Using their vast networks and alumni, universities are well placed to support a future international strategy and raise Wales' profile in key countries and regions.

The higher education sector should be included as formal delivery partner for the next stage of the international strategy. This would enable effective collaboration to sustain and grow a major export business for Wales that also delivers cultural and education benefits.

Recent changes to the immigration system have had a severe negative impact on international recruitment. For the sector in Wales, we estimate the decline in income from international students to be approximately £70-80m. As the Global Wales programme comes to an end, it is vital that the Welsh Government continues to provide support for the Study in Wales brand and wider collaborative activity to enable Wales to deliver on the vision outlined in the strategy of being an outward looking and globally responsible nation.

1. What is your relationship, if any, to the International Strategy?

There are two aspects to the relationship. Firstly, Universities Wales represents the interests of the 9 higher education institutions in Wales. Universities are among the most international organisations in Wales and are connected to thousands of people around the world through networks and partnerships built on research and education collaborations. Through their international work universities generated £1.26 billion in exports for the Welsh economy in 2022/23¹. These significant export earnings are largely generated by international student recruitment to our universities with 28,705 international students at Welsh universities in 2022/23. In addition, over 33,000 international students were studying Welsh degrees outside Wales through transnational education (TNE) enabling them to access our high-quality programmes in different locations in partnership with other providers. There are also over 2,300 international academic staff in our universities contributing their knowledge and expertise and enriching our teaching and research.

International collaboration is also key to excellent research. In the Horizon 2020 EU research and innovation programme which ran from 2014-2020 Welsh organisations² were involved in 392 projects with over 6,000 organisations based in 81 countries with a value of €153m. Welsh universities represent two-thirds of these participations. Participation in the Horizon Europe research and innovation programme which runs from 2021-27 has been limited due to the delayed association to the programme by the UK but Welsh universities³ remain the most

¹ London Economics (2024). 'The impact of the higher education sector on the UK economy'

² <https://www.gov.wales/horizon-2020-wales-final-report#:~:text=Final%20report%20on%20the%20success%20of%20organisations%20that%20have%20received>

³ <https://www.gov.wales/sites/default/files/publications/2024-09/wales-in-horizon-europe-2021-to-2023.pdf#:~:text=Wales%20has%20had%20a%2013%20success%20rate%20overall%20so%20far>

successful Welsh participants receiving three quarters of the funding awarded through the programme so far. In Horizon Europe Wales has been involved in collaborations with 53 different countries involving over 1,000 collaborative links from 106 projects worth £42.8m. Another dimension highlighted by the Welsh Government's report on Welsh research and the UN Sustainable Development Goals (SDGs)⁴ is the significant contribution made by researchers based in Wales to the SDGs. The citation impact for SDG-related research for Wales was 130% above world average. A critical factor in Wales's success is the extent to which researchers collaborate extensively across borders and sectors. Welsh research showed the highest impact for those areas where Welsh researchers worked collaboratively with others, regardless of geographies and sectors, demonstrating the productive outcome of years of international networking.

Welsh universities work directly with Welsh Government overseas offices to explore new partnerships, support inward investment and promote Wales and its institutions internationally. Through their vast networks and alumni, universities are well placed to support a future international strategy and raise Wales' profile in key countries and regions.

The second aspect of the relationship with the International Strategy relates to the Global Wales programme⁵. Universities Wales manages Global Wales which takes a collaborative approach to international higher and further education. It brings universities and more recently colleges together to amplify their profile internationally, supporting international recruitment as well as developing education and research collaborations with overseas partners. The programme includes:

- Study in Wales – a unified brand which is part of Welsh Government's Brand Cymru Wales, promoting Welsh institutions globally through digital marketing campaigns, communications, events and alumni engagement.
- Market Development – market research, study tours to improve the understanding of recruitment agents/counsellors, collaborative presence at fairs and events, delegations, visits, and the development of relationships and agreements with partner organisations internationally.

⁴ <https://www.gov.wales/wales-research-performance-uk-and-global-comparators#:~:text=Wales%20research%20performance%20with%20UK%20and%20global%20comparators.%20How%20Welsh>

⁵ <https://uniswales.ac.uk/our-work/global-wales>

- Scholarships – established a flagship Global Wales Postgraduate Scholarship programme and brokered Welsh-badged opportunities within the Chevening, Fulbright and Gilman scholarship schemes.
- Partnerships funding – seed funding to support universities and colleges to develop overseas partnership (research or transnational education).

The collaborative nature of the programme involves working in partnership with Welsh Government colleagues in Wales and overseas to deliver on a range of shared objectives, including to increase the number of international students coming to study in Wales, grow the number of international partnerships and increase awareness of Wales as a quality study destination and increase education exports. This work supports the delivery of the Welsh Government's international strategy which aims to raise Wales' profile, grow Wales economy through increased exports and inward investment and to establish Wales as a globally responsible nation.

Despite this clear alignment in interests, the important relationship between universities and government and the highly international nature of our universities, neither Universities Wales nor Global Wales has a formal relationship with the Welsh Government International Strategy and Universities Wales/Global Wales have not been leveraged as official delivery partners. Coordination activity has taken place informally and through the mechanism of the Global Wales partnership – within which there is Welsh Government representation. This contrasts with the position of other sector bodies e.g. cultural or youth organisations which have been identified as delivery partners for the International Strategy.

2. What are your views on the Welsh Government's International Strategy – what's worked well and any areas for improvement?

What has worked well

The very existence of a strategy is important as it outlines Wales' ambitions and values in this area including being an outward looking and a globally responsible nation. The focus on priority countries and regions has been helpful with the emphasis on Europe particularly beneficial in the context of Brexit and negative perceptions of the UK in recent years. The strategy mentions the role of education and research in 'People' section, while the 'Products' section highlights the value of international students in export earnings.

Welsh Government support for education exports and the development of global networks in HE/FE has come through the Cabinet Secretary for Education's funding of the Global Wales programme 2022-2025. This has enabled Universities Wales to work collaboratively with Welsh Government officials to deliver on relevant aspects of the international strategy. However, funding for Global Wales is due to end in July 2025. This will mean an end to campaigns promoting Wales as a study destination (the primary driver of education exports) and no future capacity to support the sector to build strategic relationships such as those developed by universities and colleges in Welsh Government priority countries and regions (India, USA, Canada, Flanders). While universities will continue to access and support Welsh Government overseas on an ad hoc basis, the capacity of the sector to work with Welsh Government in support of any future international strategy will be severely restricted as a result.

The focus provided by the Strategy on key industries/areas such as cyber security, semi-conductors and creative industries supports clear messaging about Wales' offer to the world. The identification and focus on priority countries and regions has allowed for mutually beneficial working and successful collaboration in places where universities and Welsh Government interests align (India, USA, Canada, Flanders). For example, Flanders is a priority region and also a leading research region with highly successful universities. Global Wales and the Flanders Research Agency (FWO) have developed a partnership incentivising Welsh participation in the FWO Scientific Research Network programme that runs global research networks with the aim of positioning Welsh researchers for future EU and other research funding opportunities.

The annual 'Wales in' country campaigns have proved to be an effective mechanism for Welsh sectors and organisations including universities to collaborate and gain value from if they also share a focus on that priority country. 2024 is 'Wales in India' and to highlight current links and build new connections with partners in India, a Global Wales-led delegation of 4 senior representatives from four FE Colleges took part in a skills-focused mission to Karnataka and Telangana States. The delegation engaged with key bodies, industry and institutions relating to electric vehicles, health and green technology, state government, start-up incubators, training organisations and the British Deputy High Commission. As part of the Wales in India celebrations, delegates also attended Welsh Government's St David's Day event in Bangalore.

Welsh Government offices internationally have been helpful in supporting promotion of the Taith scheme which has provided a very tangible demonstration of Wales' commitment to international exchange and partnership. However, their

ability to continue to highlight this opportunity will depend on whether the programme is extended beyond 2026.

Areas for improvement

It would be logical and lead to greater coherency in working if the sector was included as a formal delivery partner for the Strategy. The Strategy should ensure that the value of international HE as a leading export and economic contributor for Wales is recognised through use of relevant data and this value is positioned appropriately within Wales' international activities.

International student recruitment to universities accounts for the vast majority of education exports generated by the sector. However, recent changes to the immigration system put in place by the previous UK government – notably restricting dependents – have had a severe negative impact on postgraduate recruitment to the UK, the main source of international students. This has been exacerbated by a collapse in the Nigerian currency – a market which last year accounted for 16% of international students in Wales. These factors combined have made September 2024 highly challenging for the Welsh sector which has seen a drop of 40-50%⁶ in international enrolments this year and is set to lose £70-80 million in income from this alone. With global competition increasing, continued Welsh Government investment in the Study in Wales brand and wider collaborative activity supporting recruitment is key if we are to maintain this important area of export activity.

The diaspora strategy including alumni needs to be reinvigorated to help raise Wales' profile globally with recognition of the value of universities' work in this area. Alumni have their primary relationship with the university they attended and this primary relationship needs to be supported as part of any wider strategy.

Feedback from universities suggests that the capacity of Welsh Government international offices needs to be increased to facilitate more collaboration with the sector, potentially by having dedicated Welsh Government officials for education/research and innovation.

The Strategy should be reviewed annually with action plans that are KPI driven.

⁶ Enrolly, an ed-tech platform which works with 5 of the 8 internationally recruiting universities in Wales has reported a drop of 51% in international recruitment to those institutions relative to September 2023. While the average across all universities in Wales is likely to be slightly lower, this data demonstrates the severity of the impact on Welsh universities.

3. What are your views on the Welsh Government's priority international relationships for 2022-25?

The Strategy has been particularly helpful in relation to its focus on Europe which has allowed strong messaging about Wales continuing to be part of Europe and seeking to maintain its European relationships despite the difficulties and uncertainties in the wider EU-UK relationship over the last period. The focus on Europe makes sense for universities as our European partners are our closest partners and with whom we have some of the oldest connections.

From a university perspective there are many longstanding relationships with partners across Europe that have been supported, in part, by EU programmes such as the research and innovation framework programmes, Structural Funds, Erasmus, Interreg and Creative Europe. The loss of access to almost all EU programmes has been extremely challenging and it has been helpful to have high-level Welsh Government support for continued engagement with key partners across Europe. In addition, the development of Agile Cymru as an initiative to try to sustain relationships with key EU partners and in key geographical areas such as the Irish Sea has been helpful for universities trying to manage the loss of significant funding and collaborative programmes. However, Agile has very limited funding and the wider landscape supporting international networking is fragmented and onerous to navigate.

Where there is alignment between the geographical priorities of the International Strategy and those of universities it has been helpful to have the Strategy as a framework for activity. The focus on Ireland and the high-level political engagement through the Shared Statement and Action Plan is helpful for universities as many connections were supported through the Ireland Wales Interreg programme and Ireland is a highly successful and influential Member State within the EU research and innovation programmes in recent decades. Agile Cymru funding has enabled some partnerships to continue and to explore opportunities for further collaboration. The relationship with Flanders is important as it is a high performing research region with significant regional autonomy in research strategy and funding. There are a number of connections between universities in Wales and those in Flanders with recent connections encouraged by the partnership between Global Wales and the Flanders Research Agency (FWO) to incentivise Welsh research participation in its Scientific Research Network programme supporting global research networking.

In other priority regions such as Basque Country and Baden-Wurttemberg there are some research and education connections but not yet the more systemic approach that has been possible in Flanders and Ireland due to their research autonomy. It is important to recognise that not all Welsh Government priority countries and regions do/will align with the connections and interests of universities.

There is strong alignment between university sector interests in places such as China, India, the Middle East and the USA and the interests of the Welsh Government as outlined in the International Strategy which is helpful. For example, through Global Wales, Welsh universities are working with Welsh Government in the USA to build a strategic inward investment proposition around semiconductor production with expected match funding from Oak Ridge Associated Universities⁷, US Commercial Services and several high profile US universities. This demonstrates the value of collaborative working when successful.

It would be helpful for more information to be shared by the Welsh Government on the activities developed and undertaken with priority countries and regions. The Strategy outlines some of the reasons for why particular countries and regions were chosen as priorities for the Strategy, including cultural links, shared values and common economic and social interests but there was limited consultation on the selection of those territories with relevant sectors and additional priority places have been added in recent years without reference to research and education interests.

The report of this Committee's Inquiry on Wales – Ireland relations in October 2023 made a number of recommendations for the Welsh Government in relation to sharing information on activities with Ireland with stakeholders, increasing the visibility of the work with Ireland and producing an annual report on Wales-Ireland relations. These are recommendations that could be made in relation to the other priority countries and regions with which the Welsh Government engages.

4. What are your views on the availability of information on the Welsh Government's international activities and delivery of the strategy?

As mentioned in Question 3, more information would be welcome. It would be particularly helpful to have shared resources such as slides or films available for

⁷ <https://www.orau.org/about/index.html>

sectors to use to introduce the International Strategy and Wales' approach to international engagement to international audiences as part of sector visits and events. It would allow sector representatives to provide a wider Wales narrative and context for their work.

It is unclear whether the regular monitoring of international activity linked to the Strategy including two meetings a year for stakeholders/relevant organisations has been maintained – these may be reserved for delivery partners only. Broader collaboration and communication via inter-sector engagement would be welcome.

However, on specific activities, the Cymru Wales brand and Tîm Cymru has been extremely successful, especially with sports events where sporting diplomacy has been effective to transcend and benefit other sectors.

One particularly successful example was Global Wales' initiative to deploy the Study in Wales brand by sponsoring the Wales team in the Men's Hockey World Cup in early 2023, which evolved into a much greater programme of activity that significantly impacted Global Wales' aims in India. Study in Wales association with hockey was a huge driver to lever multiple objectives, both soft power and quantitative goals, with very positive associations for the further and higher education sectors in Wales. It went on to be shortlisted for an international marketing award.

On the back of Global Wales activities, the Welsh Government deepened their involvement at the World Cup with a roundtable event on future technology; engagement with the India rugby team, trade commission activities and a Welsh Government reception. Global Wales are also now a key member of the Welsh Government's Wales in India 2024 stakeholder team.

This work also contributed to wider UK - India Government relations with the British Deputy High Commission team for Kolkata offering support including attendance and speeches at the Study in Wales events; hosting a roundtable breakfast and showcasing a Week of Wales to strengthen UK-Odisha links during the Hockey World Cup.

5. In your view, what information on the Welsh Government's international activities should be in the public domain?

It would be useful if there was regular information shared by the Welsh Government on its international activities, both those undertaken by Ministers and

officials based in Wales and those led by the network of international offices. The reports provided to this Committee by the Welsh Government in international visits/ meetings is limited in scope and retrospective which does not enable relevant sectors in Wales to support or contribute to these activities in a systematic way.

The Welsh Government overseas offices have limited online presence, some use social media to share information but there is little readily accessible information on the work of the offices and no office web presence. There is an overseas office remit document and an annual report on the work of the overseas offices, the latest available one is from 2021-22. The role of the overseas offices in working with universities on education and research issues is not clearly articulated in a number of locations.

This is in contrast to the more accessible information on the work of the Scottish Government's international offices and those of the Northern Ireland Executive offices in Brussels and Washington, D.C where information is provided on the work of the offices and links to relevant government strategies and interests. Looking more widely, the international offices of Flanders and Baden-Wurttemberg provide clear information on the interests of their governments' in working internationally in key areas including education and research.

6. What are your views on how the Welsh Government's international activity is resourced?

The current economic environment is challenging for all organisations and sectors. To maximise the impact of our work and the contribution that our sector can make to Wales we need to ensure there is an inclusive and collaborative Team Wales approach which builds on the connections we have and recognises the value we can bring to a wide range of areas. Involving the HE sector as a key delivery partner in the International Strategy would be a very useful step forward and enable us to work effectively together with Welsh Government in Wales and around the world.

Our universities are facing financial challenges as is Welsh Government and the prioritisation of limited resources is essential. However, international engagement is a fundamental part of universities' work and an outward focus remains one of the clear aims of the Welsh Government so it is important to find a collaborative approach linking both of these strands that enables Wales to benefit from all the opportunities offered by working internationally.

International engagement is not an activity for the short-term, it carries risks and requires long-term commitment and investment to deliver the significant and wide-ranging benefits it brings economically, culturally and educationally. These benefits are sometimes overlooked but should be recognised and tracked to ensure their value is understood. Reducing funding and withdrawing from activities with international partners is problematic and undermines the hard work that has been undertaken by partners in Wales and around the world to build relationships and develop joint initiatives.

The planned end of funding for Global Wales and the reduction in Taith funding and its uncertain future post 2026 will undermine the achievements of the last few years in delivering an increased range of international connections, partnerships and students for our universities and for Wales. Universities will continue their international engagement but this work will not benefit from the overarching narrative and support provided by a collaborative national approach that has enabled the positioning of Wales as a responsible partner for research and education in recent years.

7. What priorities and priority relationships would you like to see included in the Welsh Government's approach to international relations beyond 2025?

The International Strategy is a useful approach to Wales' international work and sets out a vision for Wales as an outward facing nation. However, reducing or terminating those financial instruments that provide the capacity to deliver on the objectives of the Strategy in raising Wales' profile internationally, growing exports and being a globally responsible nation is short-sighted and will severely limit the opportunities that international activities can bring to Wales.

A much greater focus on support for exporting services would reflect the significant contribution of the higher education sector to export activities. The Welsh Government Action Plan on exports is very goods focused and does not acknowledge the significant contribution of universities through educational exports, contributing £1.26 billion in 2022/23. Universities are often perceived as part of 'soft power' work but their economic contribution is extremely significant and their role as internationally connected businesses and major exporters should be fully recognised.

It is important that there is long term investment in international work as it is not an area for short-term activity. There are significant risks of reputational damage for Wales if investment is withdrawn and this is likely to happen to Wales next

year with the end of Global Wales funding which will end the promotion of Wales as a study destination and end collaborative work in the USA, Canada, India and Vietnam. These are all places where Wales has been promoting itself as a responsible and collaborative partner but this image will be damaged by this change in approach by the Welsh Government.

Reviewing the International Strategy and building in agility and responding to opportunities is important but this needs to be matched by a thorough impact assessment of withdrawing from existing priorities.

The previous International Strategy outlined its objectives for the next five years. It would be useful in the refresh being undertaken by the Welsh Government to understand how well these objectives have been met, to reflect on these objectives and to offer a view on the next steps for the Welsh Government's international work. It will also be useful to consider the geographical priorities and how each of the priority areas have worked. Some places may have offered a range of opportunities but others may have been more limited. In relation to the higher education sector, it may be useful to consider the context for the priority regions and countries as some may have the autonomy to partner in education and research whereas others are more limited in their competences.

Involving the higher education sector as a partner in the delivery of the Strategy in its next phase would enable effective collaboration to sustain and grow a major export business for Wales that also delivers cultural and education benefits throughout Wales.

8. Are there any other matters you would like to draw to the Committee's attention regarding the Welsh Government's international relations?

Medr, Wales' new Commission for Tertiary Education and Research, has the promotion of a global outlook as one of its strategic duties and offers an opportunity to develop a future approach to international education in Wales. Universities Wales is currently delivering a project, funded by Medr, which will set out some recommendations as to how this strategic duty is taken forward. The work is being guided by sector consultation and an expert panel drawn from Wales, the UK and internationally and is due to conclude its work in early 2025. Universities Wales would be glad to engage with the Committee as part of this work.

It may be useful for the Committee to consider how the International Strategy aligns with other Welsh Government strategies including the Innovation Strategy

published in February 2023. Universities are extensively involved in both international and innovation work and there may be connections between those two areas that could be explored further.

Sêr Cymru was a programme 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 in Wales. Over £100m funding was provided by Welsh Government, HEFCW, Welsh universities and EU programmes which supported over 475 research posts at different levels in universities which generated over £180m in research grant income to Wales. 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 on these plans and consultation and there is a danger of a lack of further investment in this area undermining the previous investments made by partners. This scenario echoes the likely problems that the ending of Global Wales and its collaborative approach will cause.
