ESAG CORE MEMBER UUKI

Higher Education Sector Action Plan

1. Where the Sub-Sector Is Now Internationally

A. Sub-Sector Distinctive International Offer

UK higher education is one of the country's most successful global sectors and represents a distinctive international offer built on academic excellence, our strength in research, global recognition and appeal, as well as a long-standing reputation for quality. UK universities consistently attract students, researchers, governments, employers and partners from around the world because they combine world-leading teaching and research with strong graduate outcomes, international connectivity, and trusted quality assurance. Higher education is therefore a cornerstone of the UK's soft power, international influence, and education export success.

The UK offers a globally recognised system of autonomous universities operating within robust quality and regulatory frameworks. UK qualifications are widely respected by employers, professional bodies and governments, with a strong reputation for academic rigour, innovation and employability. Research-informed teaching enables students to learn at the forefront of knowledge creation, while universities make significant contributions to scientific discovery, technological innovation, regional growth, healthcare, the creative industries, and public policy.

International students benefit from a diverse and inclusive learning environment. UK universities attract students from more than 200 countries and territories, creating globally connected campuses that help foster intercultural understanding, global networks and lifelong connections. The breadth of provision, from foundation programmes through to doctoral study, enables universities to meet a wide range of learner needs and support talent development across every stage of learning.

The international offer extends well beyond recruitment to the UK. Through transnational education (TNE), UK universities deliver high-quality education to hundreds of thousands of learners overseas through branch campuses, partnership arrangements, online learning and joint programmes. UK TNE is recognised internationally for its scale, quality and diversity – providing opportunities for learners who may not be able to study in the UK while strengthening long-term educational, research and commercial partnerships. Nearly 700,000 students study for UK higher education qualifications outside the UK, demonstrating the global reach of the sector.

Universities also play a critical role in fostering international research collaboration, knowledge exchange, and global mobility. Through partnerships with governments, industry, research organisations, and other educational institutions, universities help address shared global challenges while creating pathways for trade, innovation, and investment. The UK's growing participation in international mobility programmes, including Erasmus+, further strengthens people-to-people connections and contributes to the development of globally skilled graduates.

Taken together, these strengths create a distinctive international offer: globally respected qualifications, world-class teaching and research, extensive international partnerships, strong graduate outcomes, a mature and trusted TNE sector, and an enduring ability to connect education with innovation, diplomacy and economic growth. This combination makes UK higher education uniquely positioned to support the ambitions of the International Education Strategy. The plan is intended to support the full range and diversity of the UK higher education sector, including universities, small and specialist institutions, pathway providers, business schools and other higher education providers.

B. The Current Operating Environment

Higher education remains the dominant contributor to the UK's international education success and is central to delivery of the International Education Strategy (IES). Department for Education (DfE) statistics show that higher education generated approximately £26.6 billion in education exports and transnational education revenue in 2024, accounting for more than 72% of the UK's total education export performance. The overwhelming majority of this value continues to be derived from international students studying in the UK, whose tuition fee payments and living expenditure make a substantial contribution to national and regional economies.

The UK remains one of the world's leading study destinations. More than 685,000 international students were enrolled at UK higher education institutions in 2024/25, drawn by the quality of UK qualifications, strong employability outcomes, research excellence, and the opportunity to study in an international environment. International students also contribute significantly to campus diversity, international understanding, and the UK's global influence through extensive alumni networks.

The recruitment environment has become more challenging in recent years. Following a period of rapid growth supported by previous International Education Strategy activity and the Graduate visa, as well as temporary post-pandemic market effects, demand has moderated. Home Office data indicates a sustained decline in study visa issuances compared with the recent peak, reflecting a combination of market conditions, increased competition from other destinations, economic pressures in key source countries, and policy developments affecting perceptions of the UK's attractiveness. These trends have created financial pressures for many institutions and underline the importance of a coordinated sector-government response to protect the UK's competitiveness and support the IES ambition to reach £40 billion in education exports by 2030. Visa data https://www.gov.uk/government/statistical-data-sets/monthly-entry-clearance-visa-applications-statistics suggests international student recruitment may now be around 20-30% below the peak reached in 2023. While TNE, mobility and research partnerships remain strategically important, current export earnings from these activities are insufficient to offset a decline of this magnitude in onshore international student recruitment.

At the same time, TNE continues to expand and represents one of the most significant growth opportunities for the sector. UK universities now educate nearly 700,000 learners overseas through TNE arrangements across 229 host countries and territories. Participation has increased substantially over recent years with student numbers growing by 36.6% over the past five years. Government estimates suggest that TNE contributes around £840 million annually to education export related earnings (around 3% of total higher education export earnings), while providing a platform for deeper international partnerships, capacity building and progression pathways into broader UK educational engagement.

Global mobility has also become more prominent within the operating environment for UK universities. The inclusion of mobility within the refreshed IES, combined with UK participation in Erasmus+, creates opportunities to expand outward student and staff mobility, strengthen institutional partnerships, and enhance graduate skills and employability. Nevertheless, providers face a period of transition as programmes and delivery models adapt to the new funding and operational arrangements associated with Erasmus+. Any decline in inbound international student recruitment may also affect institutional capacity to support mobility activity which is typically delivered on a low-cost or zero-profit basis.

Overall, the sector enters the latest IES period from a position of considerable strength, characterised by its global reputation, contribution to export value, extensive international partnerships and growing TNE activity. Delivery to 2030 will require a recovery in international student numbers, returning to a secure, stable, and sustainable level over the period, adapting effectively to strengthened compliance expectations, maintaining competitiveness in an increasingly diverse global market, growing TNE sustainably, strengthening mobility participation, and ensuring that international growth continues to support quality, reputation and long-term resilience across the sector. This requires a genuine partnership between universities, sector bodies and government.

C. International Market Access Barriers

Barrier	Market / Region Affected	Impact on International Growth	Evidence / Source	Practical Solution / Mitigation	Link to IES Ambition
Immigration compliance reforms	Global, but with a particular impact on certain recruitment markets.	Reduced diversification and recruitment growth, leading to increased reliance on certain markets.	Home Office study visa data; provider feedback on refusal trends; forthcoming Basic Compliance Assessment changes.	Improved risk intelligence and data sharing between universities and government to help de-risk international recruitment.	Ambition 2/3
Perceptions of UK policy environment and stability	Global	Undermines confidence in the UK's offer and damages competitiveness.	Sector and market feedback, including survey evidence where available, on how policy changes and communications affect perceptions of the UK offer.	Coordinated communications and impact monitoring.	Ambition 2
Regulatory and recognition barriers	Global, but with a particular impact on TNE.	Limits partnership growth, constrains delivery models and can reduce the viability of UK TNE provision	Country regulations, recognition rules, ranking requirements and restrictions on approved modes of delivery	Recognition agreements and guidance. Ricardo Fund activities.	Ambition 1/3
Visa and mobility barriers	Global, but with a particular impact across Europe.	Reduces exchanges, partnership activity and the viability of some zero-profit mobility schemes	Sector mobility evidence, including institution feedback on visa processes, programme participation and partnership viability.	Operational support and bilateral engagement.	Ambition 1
Geopolitical instability	Multiple regions	Disrupts delivery of international education activity, recruitment and partnerships	Sector experience, conflict, travel restrictions and diplomatic tensions	Operational support, diversified portfolios, and contingency planning.	All

2. Future ambition

D. International Ambitions for the Sub-Sector

IES AMBITION	SUB-SECTOR AMBITIONS THAT CONTRIBUTE TO IES
Increase the UK's international standing through education and make the UK the global partner of choice at every stage of learning.	UK universities will help increase our international standing through expanding global partnerships, increasing mobility opportunities, developing sustainable TNE partnerships, and boosting research collaboration.
Continue to sustainably recruit high-quality international students from a diverse range of countries.	UK universities will help stabilise and restore sustainable growth in international student recruitment through responsible international recruitment and continuing to focus on improving market diversification, while also working to enhance perceptions of the UK as a welcoming study destination.
Collectively grow education exports to £40 billion per year by 2030.	UK universities will increase export value through international recruitment, TNE expansion, and global partnerships.

E. International Markets

UK universities are inherently global institutions, operating across a diverse range of international markets through student recruitment, TNE, research collaboration, global mobility, capacity building, and strategic partnerships. As such, there is no single market hierarchy that applies uniformly across the sector. Priorities differ according to institutional mission, subject strengths, partnership models, geographic location and stage of international development. The Higher Education Sector Action Plan therefore recognises the importance of maintaining both a strategic focus and the flexibility to respond to emerging opportunities.

A small number of countries remain critically important across almost all dimensions of international activity. India and China are particularly significant, reflecting their scale, demand for higher education, research capability, economic importance, and long-standing engagement with UK universities. Both countries are major sources of international students, key locations for research collaboration and innovation partnerships, and important partners for TNE and institutional engagement. They therefore remain central to the sector's contribution to all three ambitions of the IES.

Alongside these globally significant markets, universities are pursuing opportunities across a broad range of established and emerging regions. For student recruitment, countries such as Nigeria and Pakistan remain important, while many institutions are investing in diversification across Southeast Asia, the Gulf, Sub-Saharan Africa and Latin America. For TNE, significant opportunities exist in countries identified through the IES and related international engagement activity, including Egypt, Ghana, Greece, Indonesia, Pakistan, Uzbekistan, and Sri Lanka, alongside continuing activity in China and other mature TNE markets.
Europe continues to be strategically important, particularly in relation to student and staff mobility, research partnerships and wider institutional collaboration. The UK's renewed participation in Erasmus+ (alongside association to Horizon Europe) provides further opportunities to deepen engagement across the region and strengthen long-term partnerships.

The sector's approach to international markets must remain evidence-based and responsive. Universities UK International (UUKi) works closely with the British Council, UK Government departments, the International Education Champion and UK diplomatic missions overseas to identify opportunities, monitor market developments, and support coordinated engagement where this adds value. This collaborative approach helps ensure that institutions can respond effectively to changing demand, regulatory developments, geopolitical shifts and emerging strategic opportunities, while maintaining a diverse and resilient international portfolio that contributes to the ambitions of the International Education Strategy.

F. Sub-Sector Actions

#	IES Ambition	Proposed Action	Suggested Lead	Timeline QTR & Year	KPI / Measure	Key Dependencies
1	2	Promote responsible international recruitment practice across the sector.	UUKi BUILA UKCISA	2026-27	Number of international students studying in the UK. International student experience and outcomes. Market participation and diversification. Evidence of UK universities embedding Agent Quality Framework (AQF) actions.	Provider engagement. International agents. UUK / sector capacity.
2	2	Support sector transition to strengthened Basic Compliance Assessment requirements and build compliance capability.	UUKi	2026	BCA outcomes. Number of international students studying in the UK. Market participation and diversification.	Data sharing with UKVI. Home office DFE

#	IES Ambition	Proposed Action	Suggested Lead	Timeline QTR & Year	KPI / Measure	Key Dependencies
3	1	Coordinate UK promotion in priority markets	Sector British Council	2026-30	Campaign reach. Feedback from international partners.	Funding. Clear, coordinated messaging across government and the sector.
4	3	Expand TNE partnerships in growth markets	Universities British Council QAA UK-ENIC BUILA	2026-30	Number of UK TNE students. Number of new UK TNE partnerships. Diversification of partner countries with significant TNE populations. Removal of regulatory and recognition barriers in partner countries.	Recognition frameworks.
5	3	Ensure TNE is high-quality and sustainable	QAA UUKi Jisc	2027	Number of UK universities signed up to the QAA Quality Scheme. Number of UK universities engaging with the TNE Network and other peer-to-peer groups. TNE students and alumni reporting positive experience and outcomes.	Sector buy-in.
6	1	Mobilise Erasmus+ engagement	UUKi British Council	2026-27	Funding uptake. Participant numbers involved in outbound and inbound mobilities.	Programme rules
7	1	Widen participation in mobility opportunities	Universities	2027-30	Number of underrepresented learners undertaking mobilities.	Funding EU programme rules

G. Delivery Enablers

Delivery Enabler	How It Supports Delivery	Who Can Access / Use It	What More Is Needed	Link to IES Ambition
Study UK/GREAT	Promotion	All providers	Coordinated campaigns. Funding	1, 2
Market intelligence / UKVI data	Informs recruitment	Universities	Data sharing	2, 3
Mobility funding (eg. Erasmus+, Turing, and Taith).	Mobility growth	Providers	Capability building	1
Agent Quality Framework (AQF)	Quality recruitment	Providers/agents	Wider adoption and embedding of AQF.	2
TNE networks and guidance	Partnership expansion	Universities	Benchmarking data	1, 3
Ricardo Fund	Partnership expansion	Universities and businesses.	Market insight.	1, 3

H. Delivery Partners

Delivery Partner / Group	Role in Delivery	Actions They Support	Engagement Approach	Dependencies / Risks
UUK Universities Scotland Universities Wales	Sector leadership Devolved promotion campaigns.	All	Overall leadership	Capacity
British Council	Promotion and partnerships.	Recruitment, TNE, Mobility.	Regular coordination	Funding
Professional and representative bodies, including IHE, BUILA, UKCISA and mission groups.	Strategy and delivery	Recruitment, TNE, Mobility.	Regular coordination	Capacity
Universities and other HEPs	Delivery	All	Networks and mission groups.	Financial pressures
UK Government Departments and devolved governments	Policy environment Messaging and promotion Strategy delivery	Recruitment and mobility	ESAG	Alignment with wider policy and regulatory developments.
Regulatory bodies (e.g OfS, Medr, SFC).	Strategy delivery	Recruitment, TNE, Mobility.	Regular coordination	Policy and regulatory changes
HE sector agencies (UCAS, QAA, Jisc, HESA)	Quality and data	Recruitment, TNE and mobility.	Data sharing	Data gaps
Agents and commercial partners.	Delivery	Recruitment and mobility	Regular coordination	Data gaps

I. Progress Reporting to ESAG

KPI / Measure	Reporting Point / Date	What Success Looks Like	Target / Milestone	Evidence Source	Reporting Owner
International enrolments	Annual	Stabilise and return to growth	Increase from 2024/25 baseline.	HESA	UUKi
Market diversification	Annual	Broader mix – sector and institutional	Reduced concentration.	HESA	UUKi
TNE enrolments	Annual	Growth – overall numbers and providers	Increase from 2024/25 baseline.	HESA	UUKi
Export value	Annual	Progress to £40bn	Rising value	DfE statistics	ESAG
Mobility participation	Annual	More students abroad	Growth in participants WP participation.	HESA/Erasmus+	UUKi