Universities UK International

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Global demand for UK postgraduate research degrees

Trends, challenges and opportunities

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Executive summary

International postgraduate research (PGR) students are critical for the UK's R&D capability and the UK's future talent pipeline to support the government's long-term goal of making the UK a science superpower. However, an uncertain operating environment for universities to recruit international PGR students is likely to have a negative impact on universities' ability to maintain the current levels of doctoral students.

This brief research piece draws on Organisation for Economic Co-operation and Development (OECD) and Higher Education Statistics Agency (HESA) data to explore the current state of international students' demand for UK postgraduate research (PGR) degrees in the UK and via UK transnational education overseas to understand trends, opportunities and challenges.

The data shows the following key trends:

1. The UK is losing ground to Germany and Canada in attracting international doctoral students.

2. Both non-EU and EU PGR entrants peaked in 2013–14 and numbers have been volatile since.

3. Non-EU PGR entrants, especially from China, have been driving the UK's overall recruitment performance.

4. Compared to 2017–18, there has been a decline in providers' own funds, overseas government funding and UK Research and Innovation (UKRI) funding as a major source of tuition fees. Students' own funds have grown as a source.

    a. There was a significant increase in the number of self-funded entrants in 2020–21, which is mainly attributed to the growth from China.

    b. Provider own funds is the second most common source of tuition fee funding for non-UK doctoral entrants, with Chinese students making up roughly one quarter.

    c. Overseas government funding as a major source of tuition fees peaked in 2018–19 and has been declining since across most countries, except for Ghana and Egypt.

    d. Funding for tuition fees paid by UKRI has declined across most Research Councils since 2017–18. Only the Engineering and Physical

Sciences Research Council (EPSRC) saw an increase in international doctoral student numbers in 2020–21.

5. Demand for UK transnational education (TNE) postgraduate research degrees has been increasing over the last decade, with over half of these students studying via distance, flexible and distributed learning.

As a result, the report identifies several key actions for the sector and government to support the UK's PGR recruitment:

- Conduct further qualitative research to understand barriers to international PGR student recruitment.
- Clearly articulate the role and value of international PGR students for UK science and innovation.
- Develop a well-funded research ecosystem which allows for flexible resources to support PGR recruitment.
- Develop collaborative approaches and utilise TNE partnerships to build capacity in-country and generate new potential markets.
- Strategically use the UK's trade relationships to set up co-investment programmes.
- Diversify PGR recruitment regarding source countries and course offer (both subject and mode).

A note on methodology

This paper uses two definitions for international research students.

- Postgraduate research (PGR) students: This research piece uses the term postgraduate research (PGR) students in the time series analysis showing trends since 2006–07 and the analysis of subject area demand. In those instances, the analysis is based on the level of study "higher degree (research)", which includes doctorate (incorporating the 'New Route PhD') and master's degrees studied primarily through research. Many students who study for a doctoral qualification will initially be enrolled on a master's course and will transfer to a doctorate course after a year or two.[1] Postgraduate research students in the context of UK TNE includes doctorate and master's degrees studied primarily through research (levels D and L).[1]
- Doctoral students: Doctorates include doctoral degrees obtained/not obtained primarily through research and New Route PhD.[1] Doctoral student data is used in the analysis of major sources of tuition fees.

Introduction

Education, science and research lie at the heart of the government's plans for growth and international engagement. This is evident in the Integrated Review 2021, and the publication of several strategies, such as the International Education Strategy[1], R&D Roadmap[2], Innovation Strategy[3] and R&D people and culture strategy[4]. Collectively, these make the case for utilising the global reach, reputation and influence of the UK university and research base to help drive innovation and sustainable, equitable economic growth.

A key step towards the government's objectives of becoming a science superpower and raising investment in R&D to 2.4% of GDP by 2027 is attracting, developing and retaining people within the research and innovation system to build on the UK's strengths and meet future challenges. It is also vital for the future of business innovation and investment in R&D that there is an ongoing supply of highly skilled people ready and able to build the absorptive capacity to generate a step change in private-sector R&D. A strong pipeline of postgraduate researchers (PGRs) is an especially important part of ensuring the UK has the skills it needs.

As such, international postgraduate research students are essential for the UK's R&D capability and the UK's future talent pipeline. The UK's diverse community of postgraduate research (PGR) students, which makes up the world-leading researchers and innovators of tomorrow, is one of our leading strengths. The UK has been one of the most popular destinations for globally mobile PGR candidates and in 2020–21, 47.8% were non-UK candidates. The introduction of the Graduate route and the extended entitlement to a three-year work visa for international PGR graduates provides an additional incentive for global applicants.

However, there is uncertainty in the operating environment for universities as it relates to attracting international PGR students, which is likely to have a negative impact on universities' ability to maintain the current levels of doctoral students.

- The change in tuition fee status for EU PhD students, the introduction of student visas, loss of financial support and changing perceptions of the UK post-Brexit are expected to negatively impact EU PGR mobility to the UK. The latest HESA data shows that in 2020–21, 3,320 PGR students were from the EU, down from 4,205 in 2016–17.

[1] International Education Strategy: 2021 update - GOV.UK (www.gov.uk)
[2] UK Research and Development Roadmap - GOV.UK (www.gov.uk)
[3] UK Innovation Strategy: leading the future by creating it - GOV.UK (www.gov.uk)
[4] Research and development (R&D) people and culture strategy - GOV.UK (www.gov.uk)

- The uncertainty of the UK's participation in Horizon Europe impacts both access to the prestigious Marie Skłodowska-Curie Action doctoral training networks and PhD students funded through Horizon Europe projects. The number of European Commission-funded doctoral entrants is small and there was a 16% decline in EC-funded doctoral entrants in 2020–21 compared to three years ago.

- While the proportion of UKRI-funded PGR studentships that are open to international applicants was set at 30% from 2021–22, in 2020–21 these studentships supported only 6.7% of international PhD students in the UK. Moreover, these studentships do not cover international PGR fees, which means universities must forgo the higher fees they can usually charge international PGRs.

- Economic downturns, rising inflation levels, exchange rate depreciation, and reduced public spending due to the Covid-19 pandemic are likely to negatively impact self-funded students and overseas governments' spending on financial support for their scholars to train overseas, while funding pressures in the UK impact higher education institutions' ability to offer tuition fee waivers and scholarships. In 2020–21, self-funded doctoral entrants were the main source of growth – their numbers went up by 13.4%, whereas overseas government-funded students and those on institutional tuition fee waivers decreased.

This research piece draws on OECD and HESA data to explore the current state of international students' demand for UK postgraduate research degrees in the UK and via UK transnational education (TNE)[5] to understand trends and opportunities for growth. It identifies five key trends related to the UK's performance compared to its main competitors around the world, international PGR recruitment trends in the UK, top sending countries, subjects of study and major sources of tuition fees. It also looks at the demand for UK postgraduate research degrees delivered overseas.

Three institutional case studies are used for illustration purposes.

Finally, key actions are proposed for the UK higher education sector and government to support the UK's recruitment of international PGR students.

[5] UK transnational education (TNE) refers to UK degree programmes delivered outside of the UK. Further information is available here: What is UK higher education transnational education? (universitiesuk.ac.uk)

Trend 1: The UK is losing ground to Germany and Canada in attracting international doctoral students.

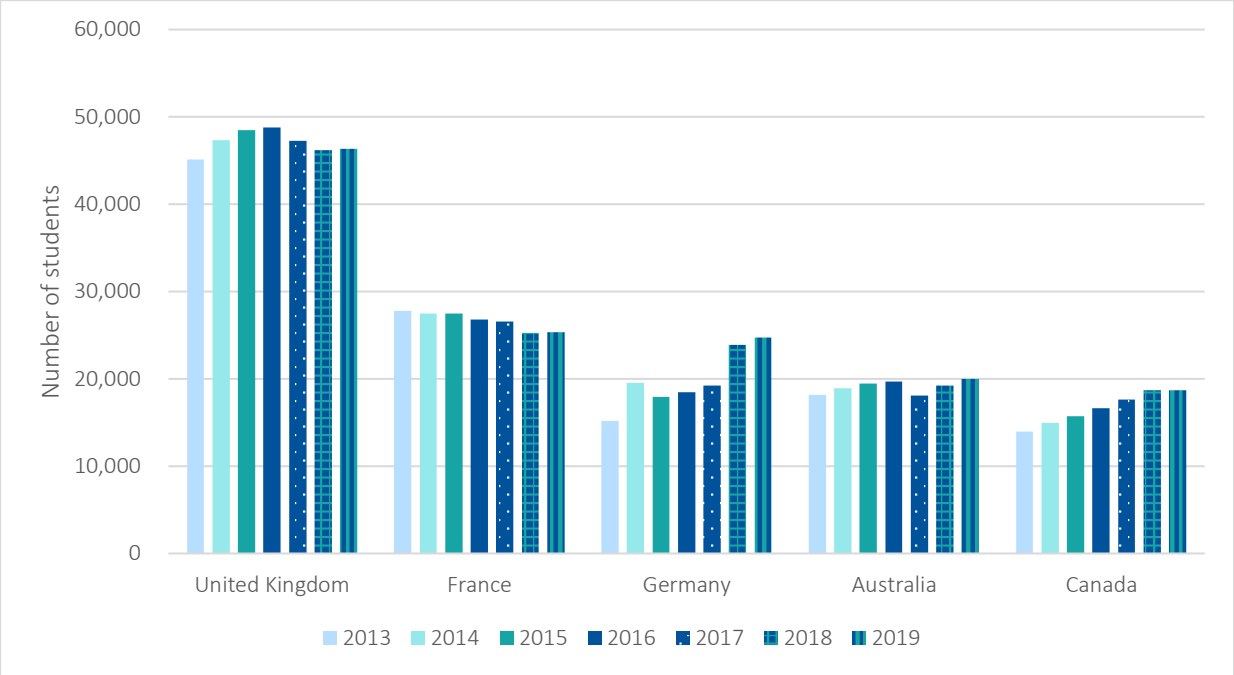
The UK is a popular study destination for doctoral students from around the world. There were almost twice as many international PhD students in the UK as in France, which was ranked after the UK between 2013 and 2019 (Figure 1). While it looks like the UK was the most popular study destination for doctoral students, it is important to note that data for the US was not available when the data analysis was conducted. The US is by far the largest recipient of international students overall and is therefore likely to be the top recipient for international doctoral students.

Inbound international doctoral student numbers in the UK have shown little growth. Numbers peaked in 2016 (48,769 doctoral students) but have since fallen by 5% to 46,310 in 2019. Taking a longer-term perspective, numbers in 2019 are just 2.7% higher than they were in 2013. Germany and Canada, in contrast, have shown strong growth of 62.5% and 33.9%, respectively, compared to 2013.

The drop in absolute PhD student numbers in the UK is also reflected in its market share. Figure 2 shows how the market share of international PhD students in OECD countries changed between 2013 and 2019. Notably, there was a drop in market share in the UK and France – from 21.3% down to 19.4% and from 13.1% to 10.6%, respectively. Germany had the most substantial increase in market share, from 7.2% in 2013 to 11.4% in 2019.

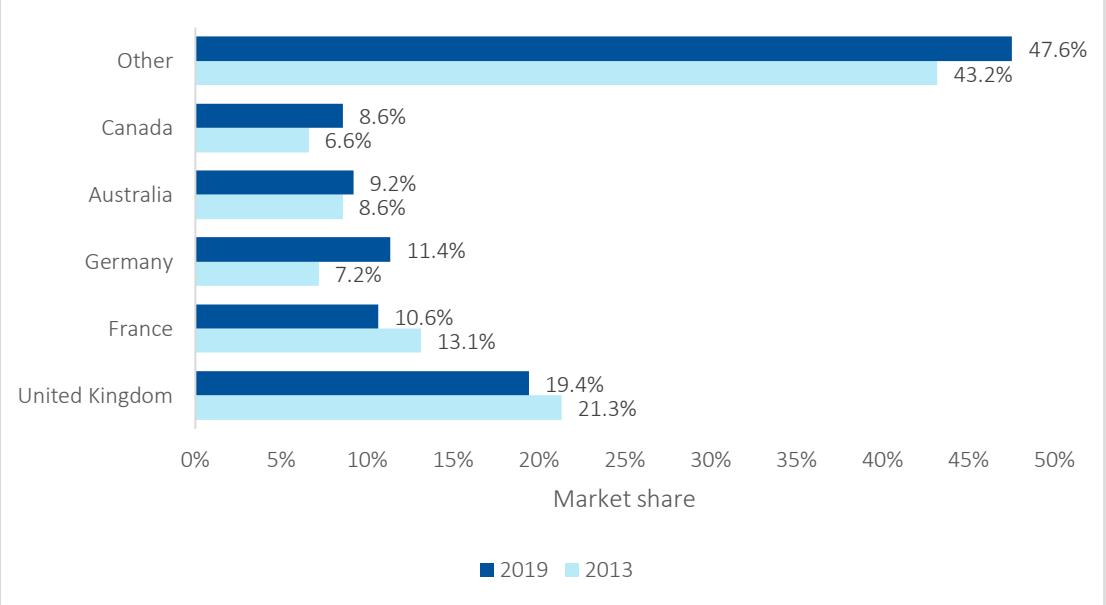
Australia is the UK's main competitor in overall student recruitment; however, its market share of internationally mobile doctoral students was only 9.2% in 2019, up from 8.6% in 2013.

Figure 1: Top 5 global study destinations for PhD students (excluding the US), 2013–2018



Source: OECD.Stat

Figure 2: Changes in the global market share of international doctoral students (excluding the US), 2013 vs 2019



Source: OECD.Stat

Trend 2: Both non-EU and EU PGR entrants peaked in 2013–14 and numbers have been volatile since.

From 2006–07 to 2013–14, international PGR entrants in the UK increased steadily. Numbers dropped visibly for the first time between 2014–15 and 2015–16, and after a short recovery, dropped again in 2019–20 (see Figure 3a).[6]

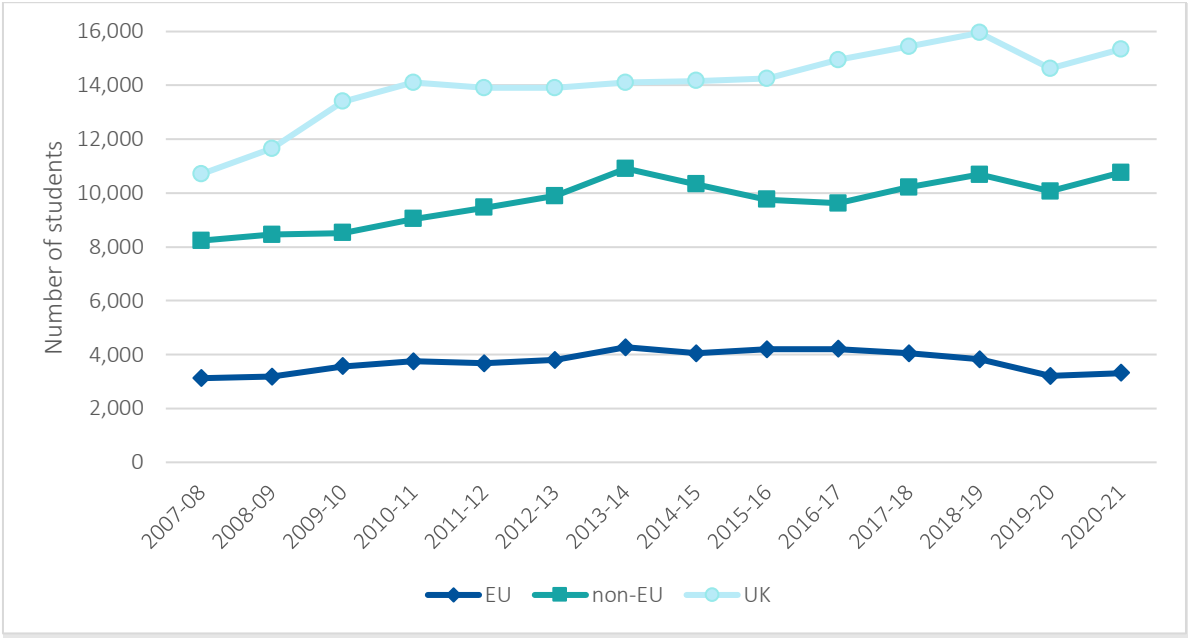
A recovery in the number of PGR entrants took place in 2020–21. In that academic year, there were 14,075 international PGR students in the UK – an increase of 1.8% compared to 2016–17. While substantially below the growth of other levels, this recovery in international PGR numbers is in line with the overall increase in international student numbers in the UK in 2020–21.

The number of EU PGR entrants peaked in 2013–14, when it reached 4,275 students. After that, PGR entrants declined until 2020–21, when a limited recovery took place. The number of EU entrants in 2020–21 was 3,320, a decline of 22.3% compared to the 2013–14 peak.

Non-EU PGR student numbers also peaked in 2013–14, at 10,910 students, and dropped significantly in 2015–16 and 2016–17. The 2020–21 recovery brought non-EU student numbers back up to 10,755 but they remained just below the peak.

[6] Please note that numbers may differ from OECD data analyses as HESA data analyses include full-time students only.

Figure 3a: International PGR entrants in the UK by domicile, 2007–08 to 2020–21

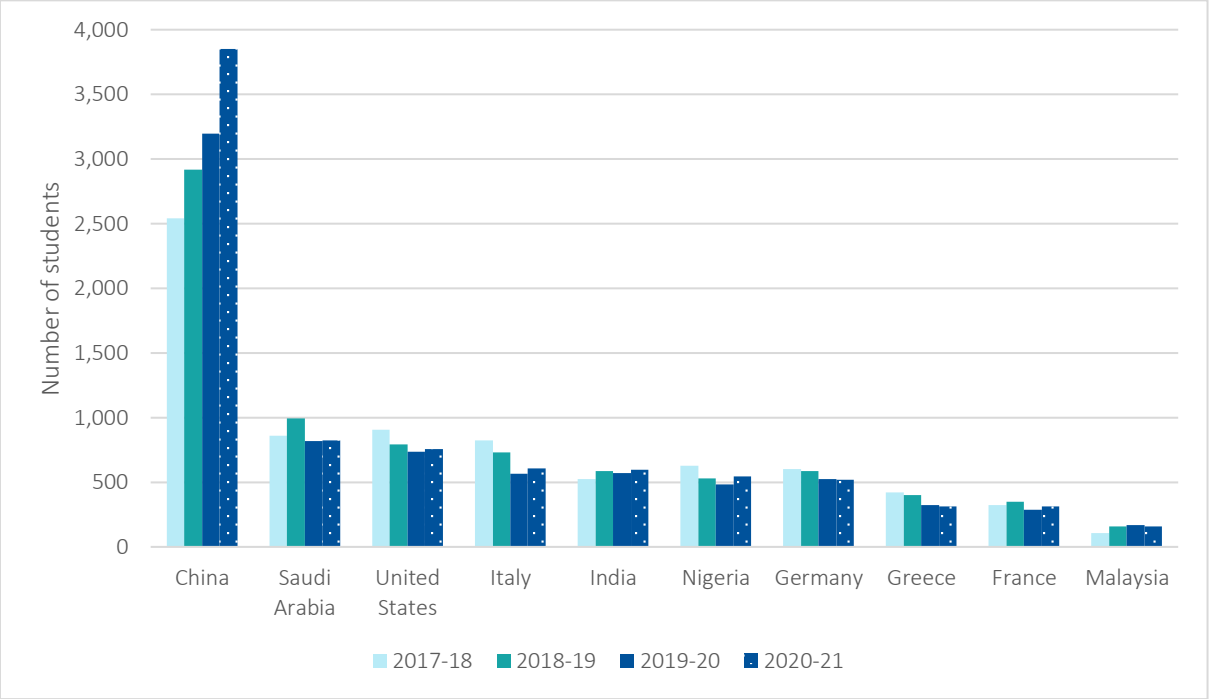


Source: HESA Student record, multiple years

Trend 3: Non-EU PGR entrants, especially from China, have been driving the UK's overall recruitment performance.

Figure 3b shows that China drove most of the growth in non-EU entrants in 2020–21. PGR entrant numbers from China grew by 20.5% between 2019–20 and 2020–21, reaching about 3,800 students. Saudi Arabia was ranked second that year but only sent just over 800 PGR students to the UK. PGR student numbers from Nigeria showed a growth of 12.4%. It is essential to note that except for China and India (ranked fifth) all top source countries for PGR students declined over the studied period.

Figure 3b: Top 10 domiciles of international PGR entrants in the UK, 2017–18 to 2020–21



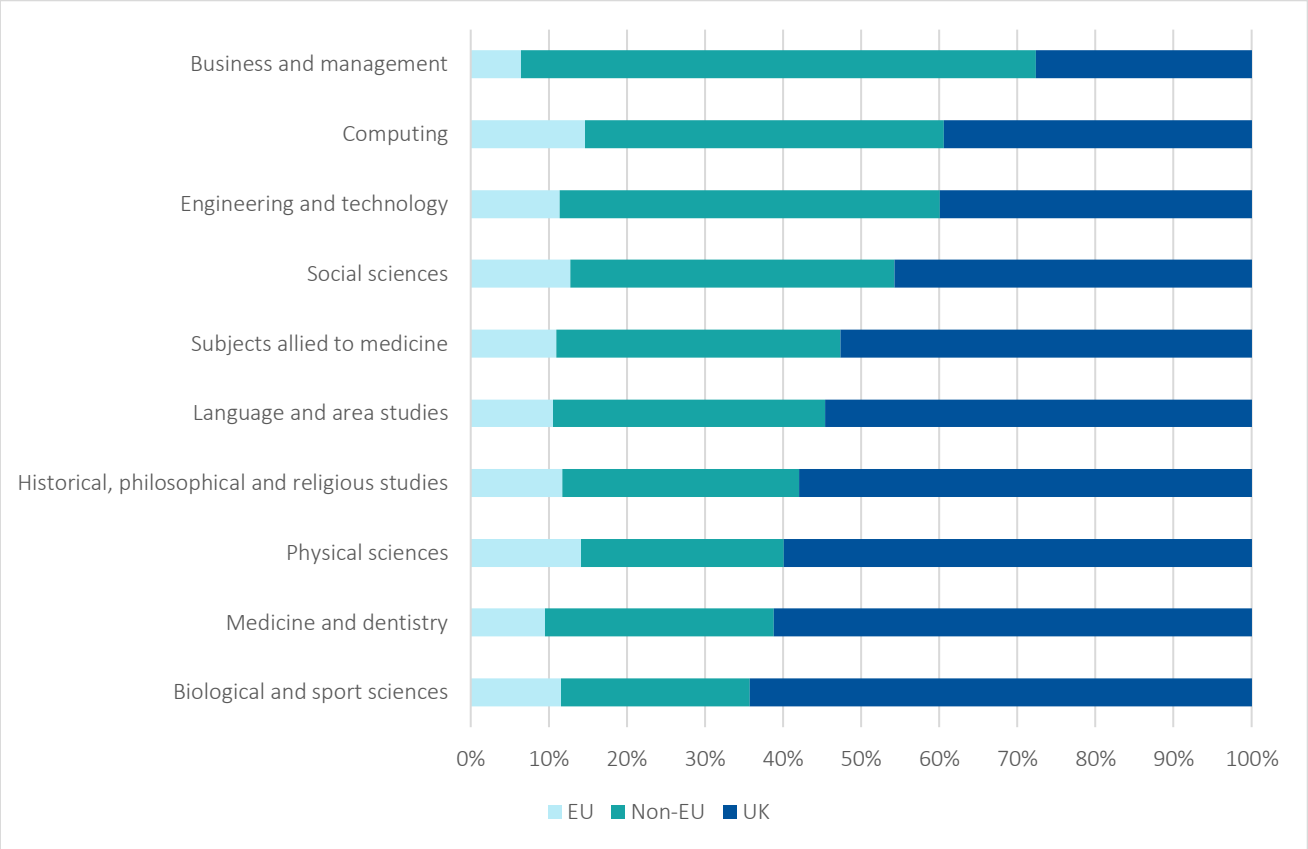
Source: HESA Student record, multiple years

Top subject areas, 2020-21

In 2020–21, the top five subject areas of international PGR entrants included business and management, computing, engineering and technology, social sciences and subjects allied to medicine (see Figure 4).

The top domiciles of students in those subject areas were broadly in line with the overall top domiciles of international PGR students in the UK. For example, within each of the top five subject areas, most international students were from China. This was followed by students from Nigeria and Saudi Arabia for business and management, students from Saudi Arabia and India for computing, and students from India and Nigeria for engineering and technology.

Figure 4: International PGR entrants in the UK by subject area[7], 2020–21



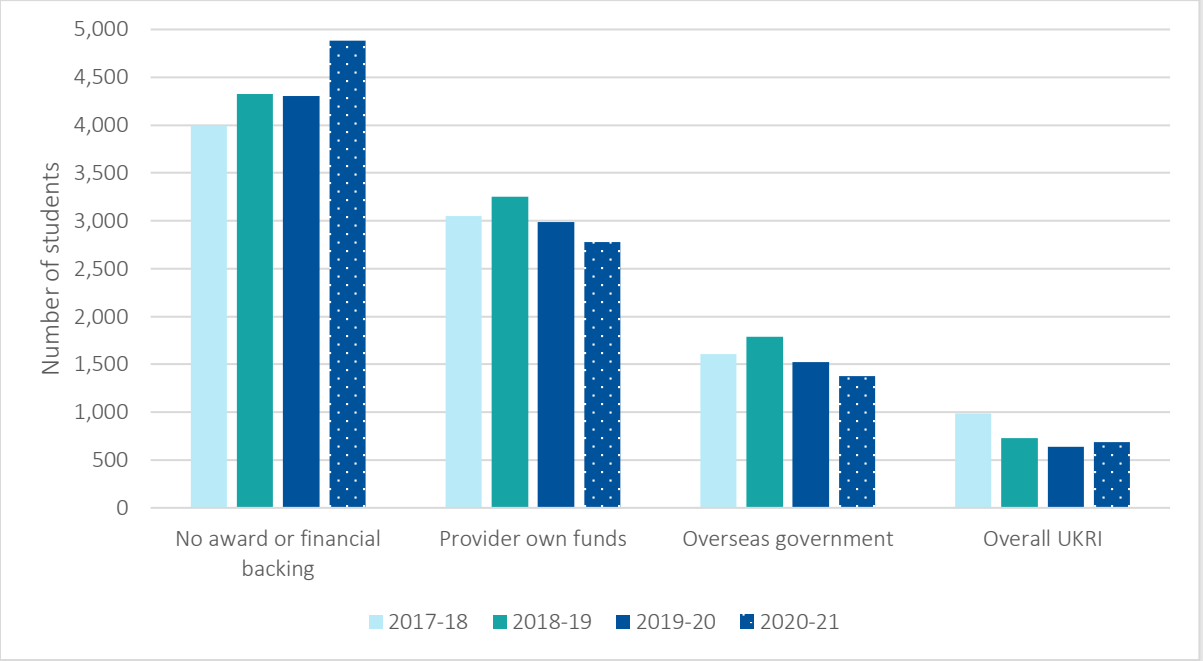
Source: HESA Student record, 2020–21

[7] Subject areas with at least 600 international PGR entrants.

Trend 4: Compared to 2017–18, there has been a decline in providers' own funds, overseas government funding and UKRI funding as a major source of tuition fees. Students' own funds have grown as a source.

The top tuition fee sources of international doctoral students include students' own funds, providers' own funds, overseas government funding and UKRI funding. Except for self-funded students, doctoral entrants whose major source of funding was their provider or overseas government peaked in 2018–19 and have been in decline since then (see Figure 5).

Figure 5: Top three major sources of tuition fees for international doctoral entrants in the UK, 2017–18 to 2020–21



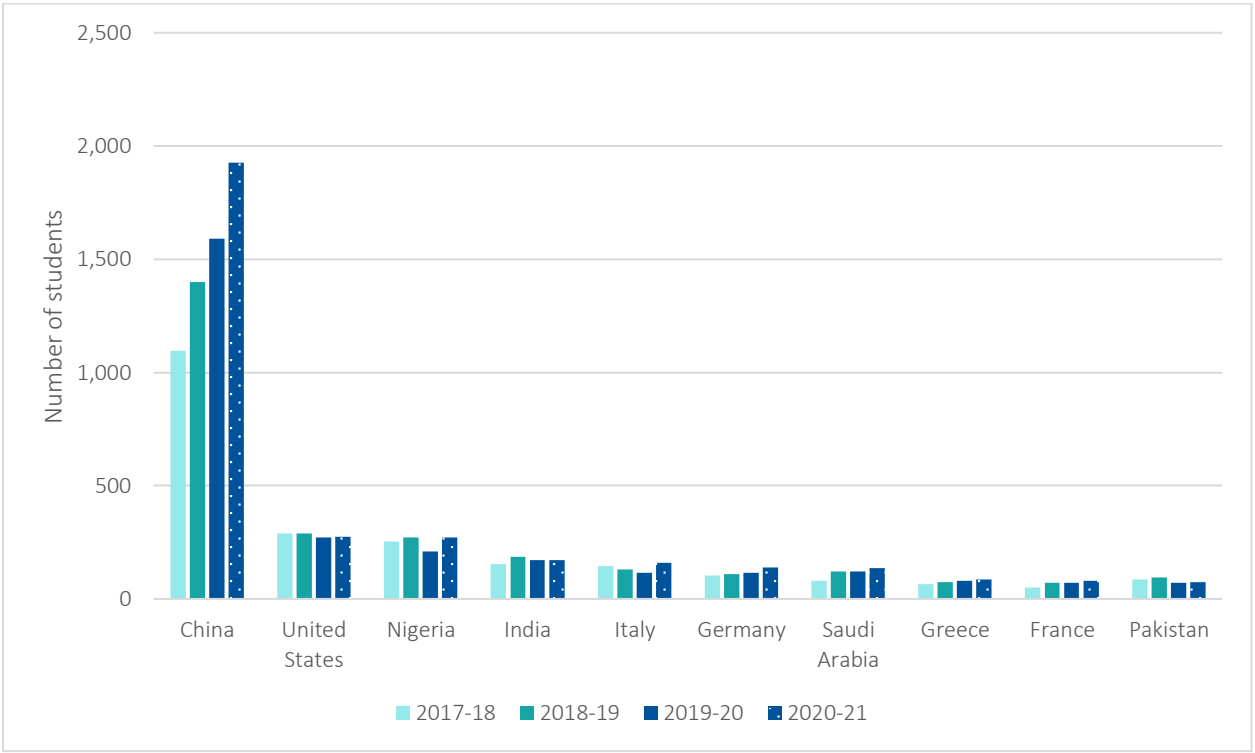
Source: HESA Student record, multiple years

Trend 4.1: There was a significant increase in the number of self-funded entrants in 2020–21, which is mainly attributed to the growth from China.

International doctoral entrants with no award or financial backing represent 39.3% of the overall doctoral population. There was a significant increase in the number of self-funded entrants in 2020–21, which is mainly attributed to the growth in the number of Chinese students. China accounted for 43% of the overall growth in 2020–21. The country's doctoral entrants, as is evident from Figure 6, account for almost 40% of all international PhD entrants in 2020–21. Over the past four years, the growth in self-funded doctorates from China accounted for 68% of the overall non-UK entrants to doctoral programmes.

The US and Nigeria have a similar number of doctoral entrants. There was a recovery in entrants from Nigeria, which made up for the declines in the previous year.

Figure 6: Top domiciles of self-funded international doctoral entrants, 2017–18 to 2020–21



Source: HESA Student record, multiple years

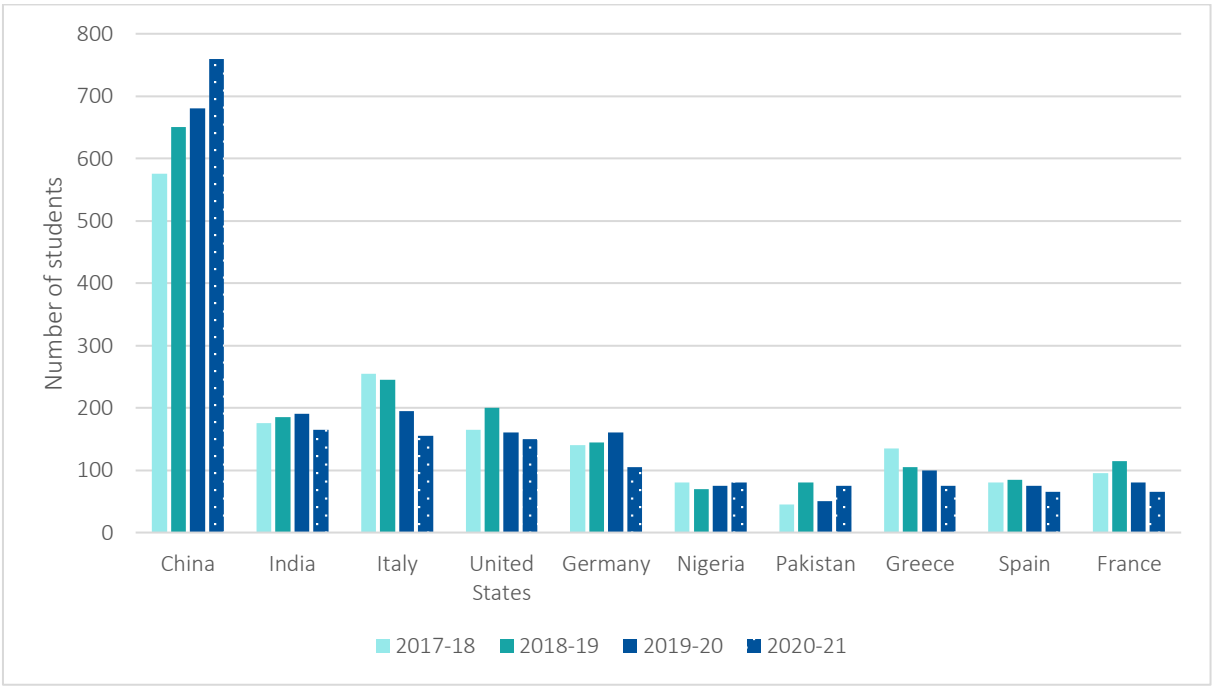
Trend 4.2: Providers' own funds are the second most common source of tuition fee funding for non-UK doctoral entrants, with Chinese students making up roughly one quarter.

Providers' own funds are the second most common source of tuition fee funding for non-UK doctoral entrants. Often, provider awards are required by overseas governments as a condition for their funding. This is illustrated by case studies from the University of Liverpool (case study 1) and the University of Sheffield (case study 2).

Figure 7 shows that China was the only country that experienced significant growth in the number of students funded by the host institution. Just over a quarter of the students funded by their higher education institution in 2020–21 were from China (27%). Some recovery in the numbers was noted among doctoral entrants from Pakistan and Nigeria.

For EU doctoral entrants, Italy and France showed the largest declines in the number of entrants on provider awards.

Figure 7: Top domiciles of provider-funded international doctoral entrants, 2017–18 to 2020–21



Source: HESA Student record, multiple years

Case study 1: University of Liverpool – provider awards for doctoral students

The Materials Innovation Factory (MIF) is one of the UK's leading facilities dedicated to the research and development of advanced materials. It was co-founded by the University of Liverpool and Unilever in 2006 as part of the UK Research Partnerships Investment Fund.

The MIF attracts high-quality applications from PhD students around the world, with funding from a wide range of sources.

In addition, partial scholarships (university-funded fee bursaries) are utilised as matched funding with overseas scholarship providers. For example, a joint scholarship agreement with China Scholarship Council (CSC) enables a number of students to study at PhD level each year.

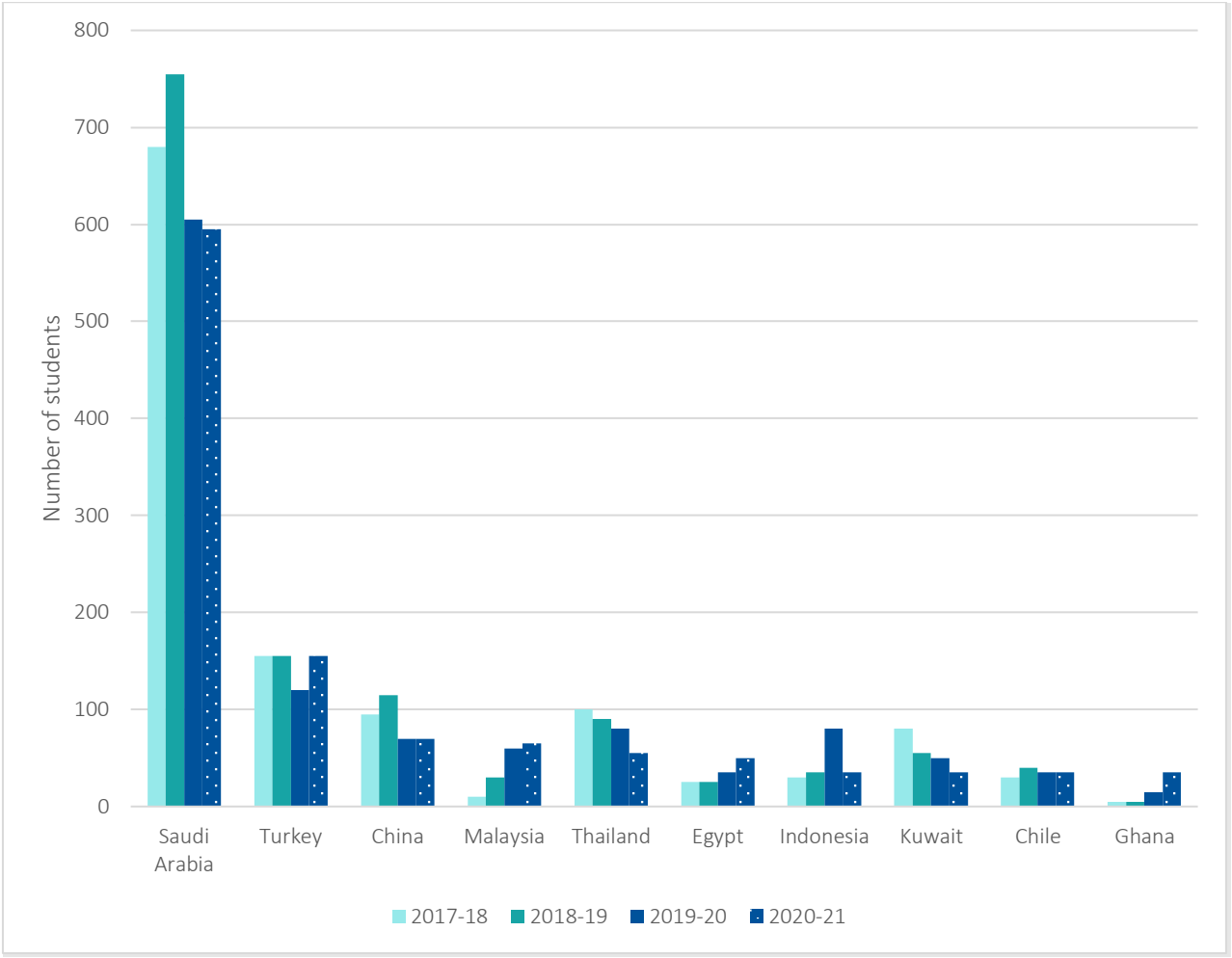
The awards are very competitive and attract the most talented students. In addition to enriching the research culture, the students have made an outstanding contribution, with over half of the cohort publishing as first author in leading international journals. In turn, this also benefits the university in terms of research outcomes, creating new research directions and building new collaborations (for example, with the students' home universities).

More broadly, international PhD students make a significant contribution to research at the University of Liverpool. Combining different awards, topped up by institutional funds, ensures a pipeline of talented students. In addition, collaborative models, including dual PhDs and split-site arrangements, are widely used to enhance engagement across partners and networks.

Trend 4.3: Overseas government funding as a major source of tuition fees peaked in 2018–19 and has been declining since across most countries, except for Ghana and Egypt.

Overseas government funding is the third-largest source of tuition fees for international doctoral students in the UK. Figure 8 shows that since 2018–19, government funding has declined across most countries. The declines were most pronounced in in the number of doctoral entrants from Saudi Arabia. Turkey marked some recovery in the number of government-funded students, whereas Egypt and Ghana grew the numbers of funded scholars, though the growth was from very low levels in the previous years.

Figure 8: Overseas government funding for doctoral entrants, 2017–18 to 2020–21



Source: HESA Student record, multiple years

Case study 2: The University of Sheffield – overseas government-funded doctoral students

In the last five years, the University of Sheffield has been an attractive study destination for PhD students. Between 2017–18 and 2019–20, it has consistently recruited a market share of 10% or more in countries with high proportions of sponsored students such as Saudi Arabia, Turkey, Mexico and Indonesia. Dr Malcolm Butler, Vice-President and Director of Global Engagement at the University of Sheffield, confirms that a targeted approach is key: 'it's been important for us to look at the aims and objectives that a sponsor has and how these align with the university's wider vision and, more specifically, the research and capabilities that we have in a particular area and our links to businesses and industries.'

The university provides partial fee waivers to certain sponsors where there is clear alignment between the aims of the sponsor and the university. These aims are to grow quality PGR applications while diversifying the nations from which they originate and the disciplines onto which they recruit. A very low number full fee waivers for sponsored students contributes to recruiting the most talented PGR students from a specific market. They are implemented to aide reputational development rather than direct recruitment.

Offering partial fee waivers is costly, however. Most PhD fees are set at break-even fee, or even loss-making, so waiving fees exacerbates the cost to the institution. Further, in some limited cases, academic departments are asked to contribute to the waiver. Nonetheless, partial fee waivers are crucial to support the university's strategy of attracting strong researchers and building reputation.

There are a number of engagement strategies that have likely contributed to PGR recruitment from sponsors:

1. The combination of academic excellence, value for money, and the city's natural environment generates reputational advantages communicated via self-organising alumni networks and university offer-holder groups. Giving offer holders the opportunity to connect to both current students and alumni has had a big impact with this type of prospective student.

2. A culture of academic engagement has been of benefit in certain sponsor markets, for example, pockets of joint-supervision PhDs, joint research activity including sabbaticals, and more generally good engagement from supervisors at the point of application.

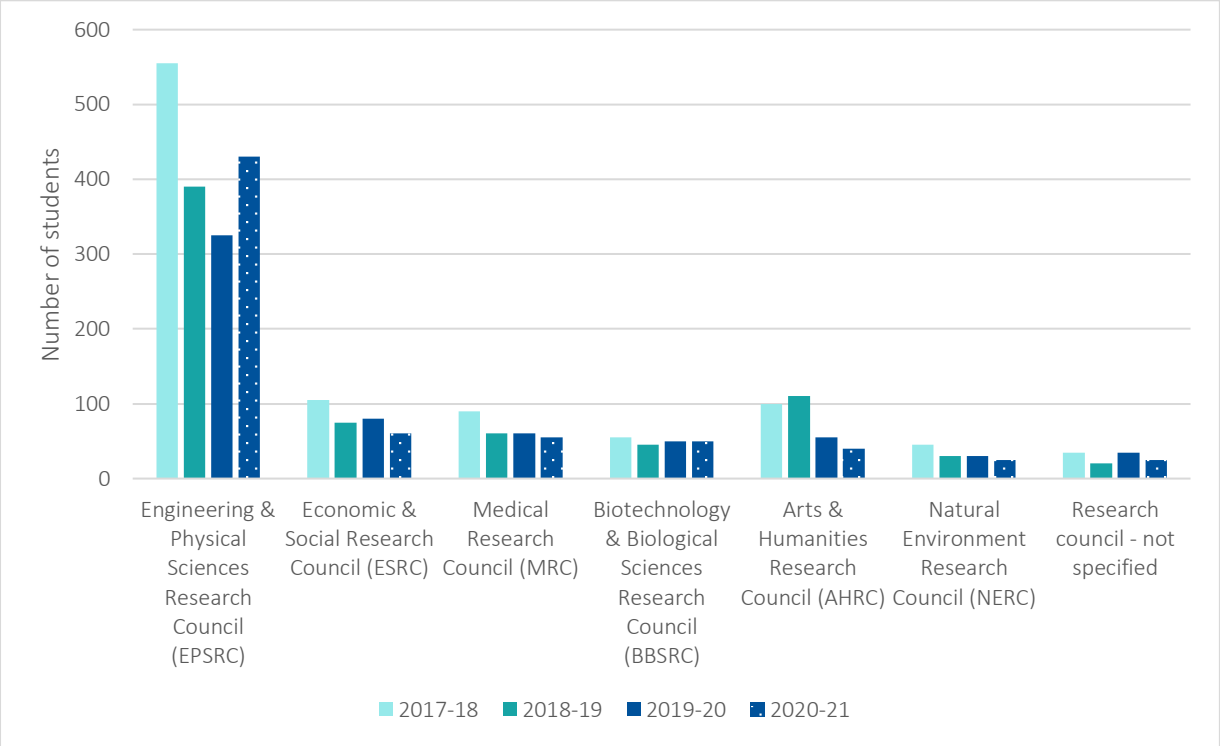
3. An awareness amongst certain sponsors of the close alignment between Sheffield research areas and national workforce needs – for example, the presence of certain niche taught postgraduate modules – has supported recruitment. This is particularly the case in Engineering and Medicine. This alignment is further enhanced by strong industry partnerships.

4. There has been strong operational liaison between Sheffield, the sponsor, and specific agents. A recent example is the funding webinar delivered in a market in which the university has previously recruited the highest proportion of sponsored students. The webinar was given in both English and the local language alongside the agent at one of the market's largest education fair organisers. Dr Butler adds, 'prospective PhD students are often thought of as mature and well-informed – and this is largely true – but they still need transactional and emotional information from their prospective institution to help them make and commit to the decision to study there.'

Trend 4.4: Funding for tuition fees paid by UKRI has declined across most Research Councils since 2017–18. Only the Engineering & Physical Sciences Research Council (EPSRC) saw an increase in international doctoral student numbers in 2020–21.

Following a reduction of 42% in doctoral entrants between 2017–18 and 2019–20 funded by the EPSRC, there was a recovery in their number in 2020–21. However, the declines in doctoral entrants funded by the other Research Councils continued (Figure 9).

Figure 9: Tuition fees paid by UKRI for international doctoral entrants, 2017–18 to 2020–21



Source: HESA Student record, multiple years

Trend 5: Demand for UK TNE postgraduate research degrees has been increasing over the last decade.

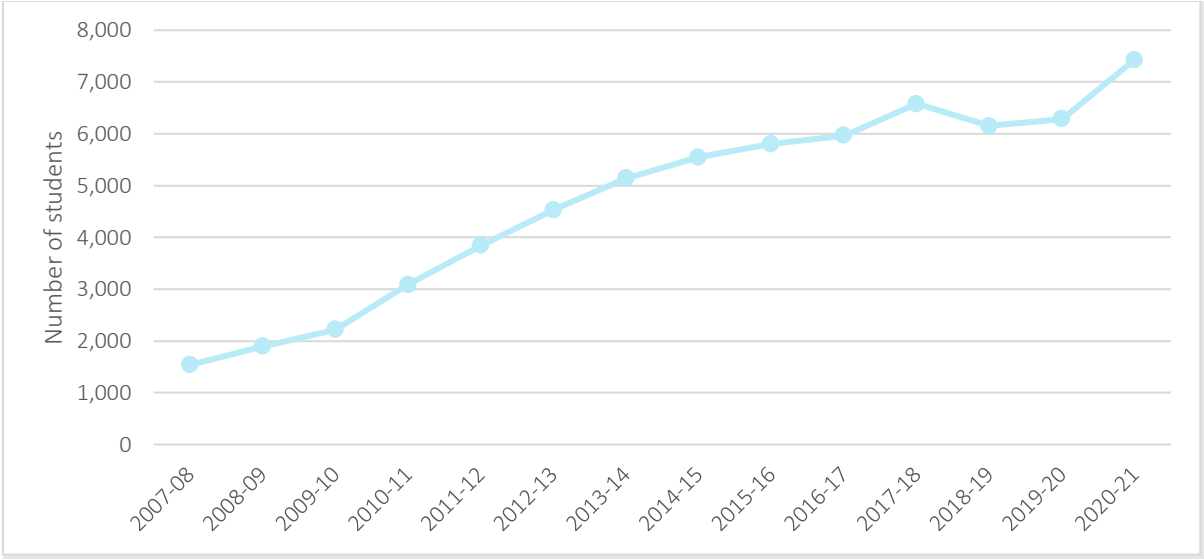
Demand for postgraduate research degrees delivered via UK transnational education (TNE), i.e., outside of the UK, has been increasing over the last decade, reaching its current peak in 2020–21. In that academic year, 510,835 UK TNE students studied overseas, of which 7,430 students (1.5%) were postgraduate research students. This is an 18.1% increase from the previous academic year 2019–20 (see Figure 10).

Figure 11 shows the number and proportion of UK TNE postgraduate research students by type of provision. Postgraduate research students on distance, flexible and distributed learning programmes represent the highest proportion – 55.6%. The number has been relatively stable over the years, and many UK TNE providers train doctoral students online.

Postgraduate research students registered at overseas partner organisations have demonstrated strong growth. However, only a very small number of HEIs are involved in this type of TNE. Overseas partner organisations have the smallest proportion of postgraduate research students – at only 10%.

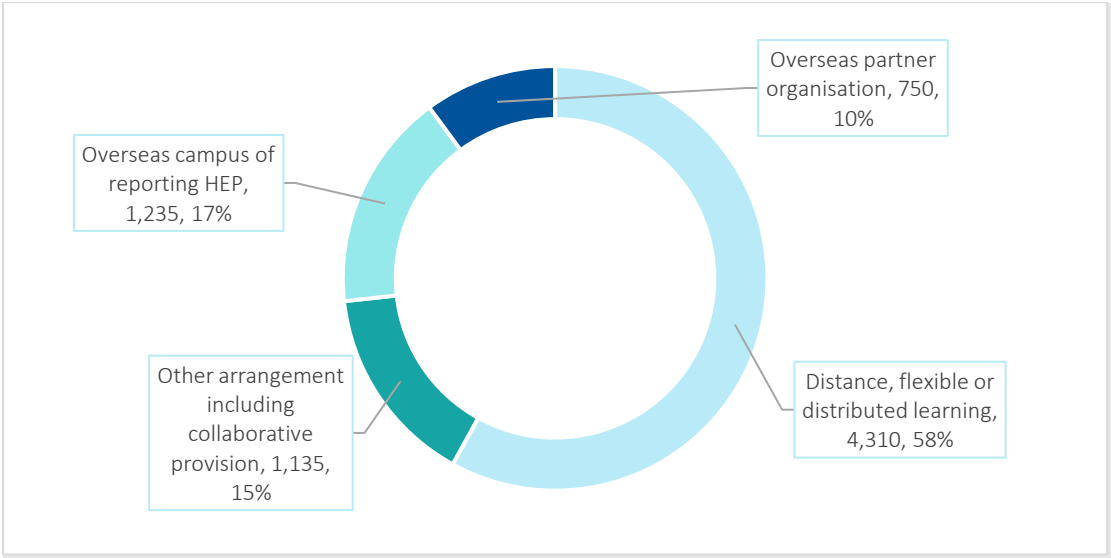
A case study from the University of Reading (case study 3) illustrates the benefits of providing PGR degrees via TNE.

Figure 10: UK TNE students studying for postgraduate research degrees, 2007–08 to 2020–21



Source: HESA Aggregate offshore record, multiple years

Figure 11: UK TNE postgraduate research students by type of provision, 2020–21



Source: HESA Aggregate offshore record, 2020-21

Top host countries for UK TNE postgraduate research students

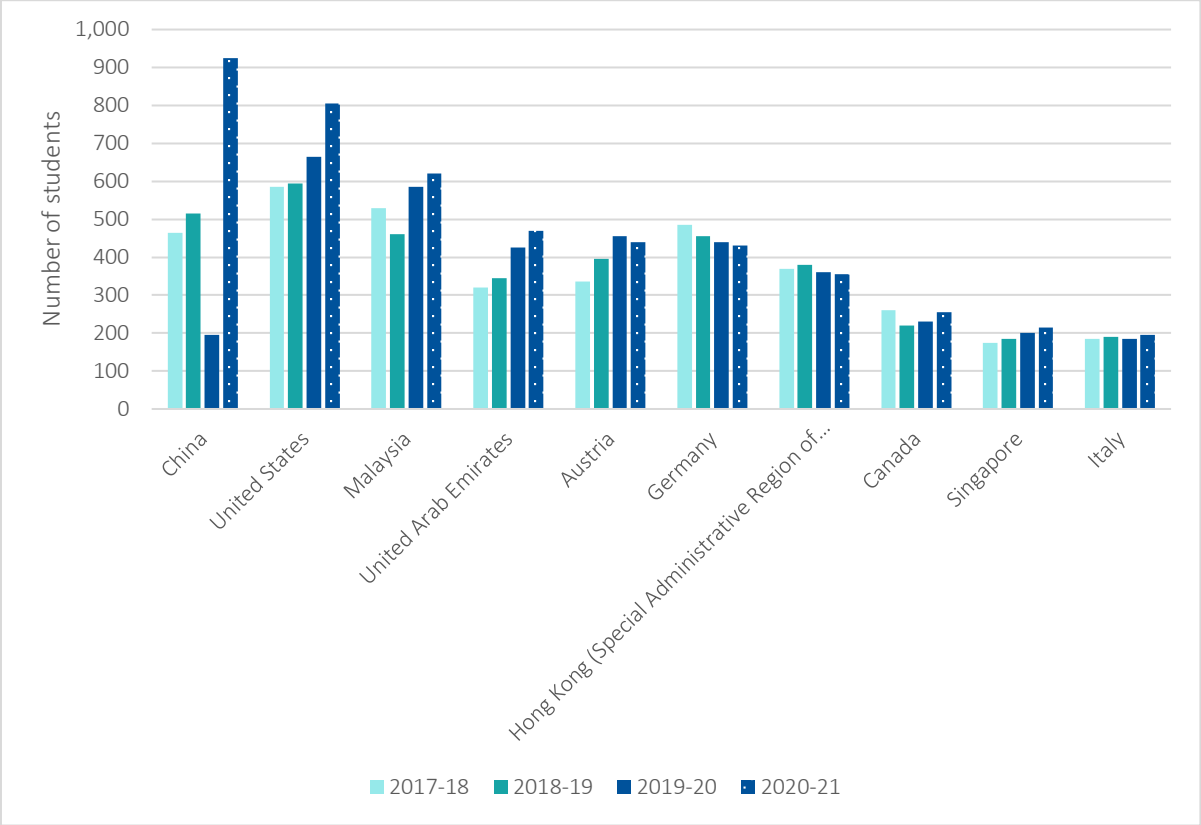
In 2020-21, the top host countries for UK TNE postgraduate research students globally were China, the US and Malaysia. In Europe, the top hosts were Austria, Germany and Italy.

Figure 12 shows the top 10 host countries and territories of UK TNE postgraduate research students. With a few exceptions, most of them are mature higher education systems. In addition, the UK has an established online and distance learning education offer in all the below host countries and territories.

In most countries, TNE postgraduate research student numbers have grown in the last five years. China showed a growth of 98.9% between 2017–18 and 2020–21, while the US, Malaysia, the UAE, Austria and Singapore also showed solid growth.

UK TNE postgraduate research numbers in Germany have notably declined in the last four years – by 11.3%.

Figure 12: Top 10 host countries and territories for UK TNE postgraduate research students, 2017–18 to 2020–21



Source: HESA Aggregate offshore record, multiple years

Case study 3: University of Reading – split-site/double PhD programmes

The University of Reading has developed several split-site/double PhDs, including with institutions in the Philippines, Russia, Australia, France and Italy. They provide numerous benefits to the partner universities, such as capacity-building of academic staff through doctoral study or as a supervisor, contributing to the internationalisation of the institutions, and helping to build research links – in many cases leading to successful research funding bids. They allow us, as a university, to build strong links with international partners, further our research, and attract high-quality students and staff. The University of Reading has won Newton and Erasmus funding following double PhD arrangements and has built long-standing strategic partnerships leading to further collaboration.

For the students, while they are enrolled on challenging programmes, they benefit from the expertise of at least two academics with different perspectives. They have access to two institutions' facilities, including their data sources, and the flexibility of being able to study close to home while helping to solve local issues. This model has enabled us to recruit mid-to-late year academics whose commitments do not allow them to study overseas for their entire degree but are highly qualified and well-motivated. They become the next generation of academics, supervising students, and continuing in their academic career, further strengthening the link between the partners.

Although challenging for academic colleagues due to different regulations and time zones, the links they create with peers around the world allow them to widen their research scope and reach, and access research centres of excellence through their students and co-supervisors. They can create more impact together and combine different expertise and perspectives. This contributes to publications and the international standing of the research. Regional governments keep their PhD students in-country, working to solve urgent local issues such as food security in a rapidly changing climate environment.

Funding is always the biggest overall challenge; we have found scholarship-funded partnerships to be the most successful. The University of Reading is always flexible with discounts where possible, to attract the best partners and students. With the challenges we face in the post-pandemic, post-Brexit world, we see split-site PhDs as an area of growth.

Conclusion and recommendations

This short trend analysis shows that even though the UK is one of the most popular destinations globally for international doctoral students, UK PGR recruitment is in a precarious position. Increased competition from Germany and Canada, the reopening of competitor countries' borders after the pandemic, declines in overseas government funding on PGR tuition fees, the rise in tuition fees for EU applicants, and the growing risk of overreliance on a few sending countries, as well as an uncertain research funding environment in the UK suggest that the modest growth seen in 2020–21 may not be sustained.

However, sustainable growth in international PGR student numbers is crucial to maintain and enhance the UK's R&D capability and develop the UK's future talent pipeline to support the government's objectives of raising R&D investment to 2.4% of GDP by 2027 and making the UK a global hub for innovation by 2035. International PGR recruitment critically supports the seven technology families of UK strength and opportunity and ultimately the government's ambition in making the UK a science superpower.

The explicit recognition of international PGR students through the Graduate route and the extended entitlement to a three-year work visa for international PGR graduates, the R&D people and culture strategy and the new deal for postgraduate research[8] are already good starting points to support UK universities in their recruitment efforts. Yet, more can be done to gain a better understanding of the UK's performance in international PGR recruitment and support this in a targeted manner.

The data suggests six key actions for the sector and government:

1. **Conduct further qualitative research** to better understand the factors that influence PGR students' selection of a study destination. This would help understand the UK's unique selling points for prospective students and inform more targeted and effective recruitment campaigns or activities.

2. **Clearly articulate the role and value of international PGR students for UK science and innovation**, and the value of a UK-based education to those pursuing research-related careers. To support this, additional research on international PGR graduates' outcomes, including their contribution to the UK

[8] New deal for postgraduate research – UKRI

economy through staying in the UK or through collaborations with UK-based researchers after they have completed their degree, would be useful.

3. **Develop a well-funded research ecosystem** in which:

    - institutions continue to have flexible resources to deploy and attract talent (for example, through unhypothecated block grant funding[9] for research)

    - UKRI has resources and funding flexibility to support growth in PGR numbers, including international talent where it is in the UK's long-term interests

    - strategic bilateral funding is used to support the growth in international PGR student numbers, including through blended funding and developing economies.

4. **Develop collaborative approaches and utilise TNE partnerships**, e.g., dual and double PhD programmes, to build capacity in-country and generate new potential markets and cohorts of students for future recruitment.

5. **Strategically use the UK's trade relationships** to set up co-investment programmes that leverage international scholarship funding and create opportunities through free trade agreements (FTAs) and bilateral research funds.

6. **Diversify PGR recruitment regarding source countries and course offer** (both subject and mode) by reducing policy and funding barriers and ensuring the quality and positioning of the UK offer.

A note on data

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[9] Block grant funding not designated for a specific purpose

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