

## Global Wales

### What is Global Wales?

Global Wales takes a **collaborative** approach to international higher and further education. It brings universities and, more recently, colleges together to amplify their profile internationally, supporting the sector to recruit internationally as well as to develop education and research collaboration with overseas partners.

### Objectives:

- **Increase international student numbers** from identified priority markets
- Maintain and **grow international partnerships**
- **Increase the awareness and reputation** of Welsh universities and colleges internationally
- Generate additional **export earnings** for Wales

To achieve these objectives, Global Wales has delivered the following core strands:

- **Study in Wales** – a unified brand strategically aligned with Welsh Government's Brand Cymru Wales to promote Welsh institutions globally through digital marketing campaigns, communications and events.
- **Market development** – funding to support delegations, visits, collaborative recruitment activity, and the development of relationships with partner organisations internationally.
- **Scholarships** – mostly at postgraduate level, delivered directly and in partnership with other scholarship providers.
- **Partnerships funding** – seed funding to support universities and colleges to develop overseas partnerships (research or educational).

### How is Global Wales funded?

Funding for Global Wales 2022-2025 (Global Wales 3) is channelled to Universities Wales from the Welsh Government through the Taith programme. Funding peaked at £2.4M in academic year 2022-2023. The programme is currently operating on a budget of £1.3m to March 2025 with funding due to end in July 2025 as a result of cuts to Taith. Global Wales was previously funded by HEFCW.

### Who runs the programme?

Delivery of the Global Wales 3 programme is managed by Universities Wales. As the accountable legal entity, Universities UK is responsible for overseeing the administration of funds. Universities Wales Committee (Vice Chancellors and Director of the Open University in Wales) operates as the Programme Board with responsibility for the authorisation and sign-off of its operational plans, monitoring and reporting.

### What is the Global Wales Partnership?

Led by Universities Wales with the backing of its membership, the Global Wales partnership was established in 2015. It is an informal partnership of organisations supporting international education in Wales. The founding members were Universities Wales, Welsh Government, British Council Wales and HEFCW. The Global Wales Board is an advisory forum for sharing resources and expertise in support of the partnership's aims and programmes. It also serves as an advisory board for the Global Wales 3 programme, and in that capacity grew in 2022 to include Colleges Wales, reflecting the integration of further education into the programme.

### What has Global Wales achieved?

Since campaigns began in 2019, Study in Wales has delivered 43 destination marketing campaigns across India, USA, Vietnam, France, Germany, Ireland and England. Study in Wales adverts have been **seen 960 million times** by prospective students and influencers with over **11 million clicks to the Study in Wales website** and almost **1.3 million visits to Welsh university web pages**. Research to track the Study in Wales brand has shown that in May 2023, awareness of the brand showed encouraging increases:

Aware of Study in Wales brand	2022	2023
India	16%	62%
USA	9%	37%
Germany	14%	47%
France	14%	30%

In this time, Global Wales has also awarded **165 grants** to seed fund international partnership initiatives enabling a range of collaborative activity from building research networks to capacity building and the scoping of transnational education partnerships.

Since the commencement of Global Wales 3 (2022):

- The project has delivered **181 activities** on behalf of the sector, including events, delegations and inward visits involving over **66,000 external participants**, directly engaging almost **2200 recruitment influencers** –with active participation from the Welsh HE/FE sector **355 times**.
- Strategic relationships have been forged with [Universities Canada](#), [Colleges and Institutes Canada](#), [Ministry for Education and Training, Vietnam](#), and The Higher Education Councils for [Telangana](#) and [Karnataka](#) (India), [T-Hub \(Hyderabad - the world's largest innovation hub\)](#), and [Research Foundation Flanders \(FWO\)](#).
- Global Wales has **twice** been a **finalist at the PIE Awards** for excellence in international education marketing, including for collaborative activity with WG International, FCDO and others to promote the sector in India.
- Global Wales is working with WG in the USA to build a **strategic inward investment proposition** around **semiconductor production** with expected match funding from

[Oak Ridge Associated Universities](#), US Commercial Services and several high profile US universities.

- Around **3,600 international students** have applied for the **95 scholarships** awarded or supported by Global Wales

## Why does it matter?

### 1. International students are vital to a thriving sector and benefit the economy

As well as being crucial to universities culturally and educationally, international students are a critical part of the current funding system, heavily cross-subsidising the teaching of domestic students and research. In contributing financially, international students generate £1.26 billion in exports for the Welsh economy.

Dependency on international student fee income has grown over the years due to several factors:

- **Higher tuition fees** - international students typically pay significantly higher tuition fees than domestic students
- **Unrestricted recruitment** - unlike caps on domestic student numbers, there are no limits on international student recruitment, allowing universities to increase revenue through this channel. Between 2018/19 and 2022/23 the proportion of total income derived by Welsh universities from international student tuition increased from 13% to 17%.
- **Declining domestic funding** - tuition fees per domestic student has decreased in real terms over the past decade. Since 2018/19 the proportion of total income from domestic tuition fees decreased from 40% to 35%.
- **Cross-subsidisation** - income from international students often supports research activities and helps maintain less financially viable but academically important courses

### 2. International recruitment to Wales is highly volatile and falling steeply.

Wales had 28,705 international student enrolments in 2022/23. On the surface, it appears to recruit successfully worldwide, attracting students from over 100 nations and territories. However, these headlines hide significant dependencies. Notably, 53% of international students come from just three countries: India (24%), Nigeria (16%) and China (13%), exposing Welsh institutions to significant risks, including:

- **Geopolitical changes** or global events (like the COVID-19 pandemic) can rapidly affect international student flows
- **Fluctuations in currency values, global commodity prices and other macro-economic factors** that affect international student demand
- **Changes in domestic policy** in relation to immigration

Changes to the immigration system put in place by the previous UK government – notably restricting dependents - have impacted negatively on postgraduate recruitment to the UK (the main source of international students). In addition, a collapse in the Nigerian currency has made a UK education largely unaffordable to this key market. These factors combined have made September 2024 highly challenging for the Welsh sector which is set to lose hundreds of millions in income from this alone.

One clear lesson for the sector is the need to diversify its international student intake as well as to continue to work collaboratively to promote Wales as a study destination. These have been longstanding aims of Global Wales, and areas where it can offer practical support e.g. recently supporting Vice Chancellors by putting in place a summer conversion campaign in India.

### **3. International partnership is key to excellent research and to diversifying income**

Transnational education (TNE) – the provision of Welsh programmes overseas – represents a means of diversifying the international income base. Most Welsh universities and at least one FE college already have experience of this. In fact, in 2022/2023, over 33,000 international students were studying Welsh programmes outside of Wales, enabling them to access our high-quality courses in different locations in partnership with other providers. At present TNE represents only 3% of universities' international income, 82% of which comes from recruiting international students to Wales (the remaining 15% comes from EU/international research grants and contracts).

International collaboration is also key to excellent research. 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 universities remain the most successful Welsh participants receiving three quarters of the funding awarded through the programme so far. Another dimension highlighted by the Welsh Government's report on Welsh research and the UN Sustainable Development Goals (SDGs) 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.

Several challenges threaten Welsh institutions' ability to succeed and innovate going forward. Our inability to access structural funds, the low levels of funding available to support both researcher networking the scoping of transnational education partnerships to name a few. Through building strategic relationships at national or regional level,

Global Wales acts as a broker of international partnerships, and has been able to support early partnership development with seed funding.

#### 4. Global Wales is an established model for cross-sector collaboration

Now approaching its 10<sup>th</sup> year, Global Wales has developed a strong reputation outside of Wales, receiving award nominations and speaking invitations globally - and is the envy of colleagues in other nations of the UK. Having incorporated the FE sector back in 2022, it also has experience of embedding a cross-tertiary approach. Testimonials include:

*“What Global Wales does, a one-Wales approach on behalf of the sector including key partners in Government, institutions, British Council. In other countries it’s far more fragmented – it’s the holistic approach that separates us.”*

*“The Global Wales team provided exceptional support to the (college name), and we are extremely satisfied with their assistance. We feel privileged to work with such a dedicated team that has shown a genuine commitment to supporting our college and facilitating our export endeavours. We have found the delegation to be highly worthwhile, knowledgeable and responsive. It provided valuable insight into North America and a platform and resources to help us navigate the complexities of the region, including market research and networking opportunities”*

*“Having that coordination from Global Wales is excellent. We’ve had inward delegations that have been hosted across universities in Wales and brought people together – the Vice Chancellors from India... coming to (university name) it’s probably unlikely, whereas coming over and having the opportunity to meet all Welsh universities all at once is much more plausible.”*

*“Everything about this tour was valuable. I learned so much about each university and specific programs that we explored in depth. I also really felt a connection to the country of Wales. I’ve spent much time in England and Scotland, and they differ from one another, but I now see how unique Wales is as well. A beautiful country with beautiful people. I have already spoken to two students who I feel would be a good fit at two of the universities in Wales, one that I visited and one that I learned about at the Monday fair.”*