

Education: A Great British Export?

A report by Graham Able and Fraser White
WILD ReSEARCH



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Preface

The Rt. Hon Lord Butler of Brockwell
KG, GCB, CVO, PC

The United Kingdom's education sector has a unique and longstanding reputation for excellence. This report has been produced with that as its premise. The report highlights both the major opportunities in one of the UK's greatest export sectors and the threats to future success which it currently faces.

Discussions with several educational leaders, all expressing concern that government announcements and actions could be damaging to their very successful sector, led the authors to initiate this report and engage Wild ReSearch to carry out the necessary research.

Although the Coalition government has placed much emphasis on the need for economic growth and although the potential market continues to grow, this report reveals that, through tightening immigration regulations, the government may restrict a sector that could otherwise grow significantly. Other countries – such as Australia and the United States – are in a strong position to benefit as students consider alternative places to study in comparison with the United Kingdom. The report also highlights the need for a coherent strategy across government departments if the opportunities are to be grasped.

If some of these challenges are not addressed, the authors – based in London and Shanghai respectively – share a concern with many of its contributors that Britain may lose out on opportunities during 2012 and beyond.

A wide range of evidence has here been considered, key figures within the education sector interviewed and the key barriers to growth examined. The report serves to highlight the dangers which this sector faces and offers solutions which should be pursued.

I hope that those reading this report will recognise what is at stake and do all they can to maximise the benefits that our education sector can bring.

Executive Summary

“I want the best and brightest entrepreneurs, scientists and students from around the world to get the red carpet treatment.”

David Cameron, Conservative Party Conference, 5 October 2011

It is vital – never more so than in the current economic climate – to recognise areas of potential growth for the UK and for the government to allow them to develop. This report focuses on education as a critical export industry with excellent scope for growth for the UK.

The value of UK education exports was estimated to be **£14.1 billion** in 2008 – 9. This value is predicted to **grow annually by about 4 per cent** in real terms, so it would be worth about **£21.5 billion in 2020** and **£26.6 billion in 2025** (both in 2008/9 prices). The value of education as an export from the UK needs to be much more fully recognised by the government and a coherent approach across departments and agencies developed. The export value of higher education specifically makes up a large share of this, worth £7.9 billion annually.

Yet there is a real danger today that many international students are given the impression that the UK is closed for business as the Home Office has tightened up student visa policy. It often appears that the Government is seeking short-term political gain rather than focussing on the long term growth plan. The political difficulties surrounding this issue must be acknowledged; the Government is under pressure to deal with a perceived immigration problem. It will be argued, however, that what is at stake in limiting international student numbers is too valuable, so alternative ways of dealing with this political pressure must be found.

Criticism of the government's recent changes to student visa regulations has focussed on the likelihood that they could deter potential and valid students. There are suggestions that a mere consultation on these issues could affect a prospective student's decision to come to the UK. In their recent inquiry into the matter, the Home Affairs Select Committee took issue with a number of the proposed changes, some of which were taken forward regardless. They claimed stricter language requirements would be unhelpful, suggested further research into the entitlements of dependants and advised against scrapping the post-study work route. Others in support of keeping the post study work route, which is due to be closed in April 2012, include the Migration Advisory Committee, the Association of MBAs, the British Medical Association as well as representatives from Imperial College London and the London School of Economics. The Home Affairs Select Committee, Universities UK and the IPPR among others

suggest that students should no longer be classified as migrants as they are only in the country temporarily.

In the face of such opposition, surely the right way forward is for the government to find an alternative approach. It would be wise to learn from the Australian experience. When the Australian government tried to limit student migration due to fear of abuse, applications from foreign students significantly decreased, leading to a loss of AUD 2 billion to the economy. **The Australian government is now relaxing the visa rules to attract these students back.**

There are signs that the **UK's share of the international student market is beginning to decrease**, even though all of its leading competitors, the other Anglophone countries, the USA, Canada and Australia, have retained theirs. With 20 per cent, the **USA has the largest market share.**

The number of international students choosing to study abroad is **increasing**; if the UK can retain its share of the market then clearly this could be a strong area for economic growth. Each student pays **nearly £9,000 excluding accommodation and other living expenses**, as well as **creating jobs** for faculty members and support staff and **sustaining other businesses**. Contrary to public perception, international students **do not take home students' spaces** at university; indeed, they are vital for keeping certain university courses running, especially STEM subjects and post-graduate courses.

This argument is not only an immediate economic one. Firstly, there could be delayed economic effects where those studying in British institutions in this country as well as abroad retain some connection and **reinvest here later in life**. In addition, through educating international students, the UK stands to develop its soft power, to **influence** around the world, as well as spread its values. If in the years to come there is a shift of power away from Anglo-American countries, this influence may be ever more important.

UK students working alongside overseas counterparts also stand to gain. Creating an international environment for study can help UK students develop an **international outlook**. The results of a recent CBI survey suggest this needs improving. It shows that employer satisfaction with UK college/school leavers' foreign language skills is only 23 per cent and with regard to international cultural awareness is 37 per cent.

This is not a call to allow a position where schools and colleges are used to bypass immigration regulations, rather than to educate. Indeed, this would only serve to devalue British education. Instead, it will be proposed that as students only temporarily migrate, they should be classified differently. Rather than attempting to limit an inflow of international students, they should be encouraged. Though claims to this effect are made in government, there is a lack of a coherent strategy. As an area with great potential to expand, the export of education across the sectors, from branch campuses to educational publishers to language colleges should be promoted and assisted. Government departments need to work together to achieve this common goal and the British Council and UK Trade and Investment (UKTI) need to ensure they are doing all they can to support it.

The Export Value of Education (direct and indirect) to the UK Economy

According to a 2007 report produced by the British Council, education and training exports were worth more to the British economy than the financial or automotive industries.¹ The UK Department for Business, Innovation and Skills recently commissioned London Economics to look into the value of education exports to the UK, with slightly more conservative results; the research paper, 'Estimating the Value to the UK of Education Exports' was published in June 2011.² For 2008 – 9 they estimate the value of UK education exports to be £14.1 billion and they suggest a further £9.6 million came into the UK from Foreign Direct Investment in education-related projects. The breakdown of these results can be found in the table adjacent. These figures are comprehensive; they include the income generated from international student tuition fees, education related publishing as well as the fees that examination boards can charge when accrediting degrees overseas, among others.

The report further predicts that this market will grow annually by about 4 per cent in real terms, so the value would be about £21.5 billion in 2020 and £26.6 billion in 2025, both in 2008/9 prices.³ The table on the following page shows a breakdown of the values leading to this prediction.

Value of Education and Training Exports to the UK Economy, 2008/9⁴

Sector	2008/9 (£m)
Higher Education	7,873.50
Tuition fees	2,442.30
Other spending of overseas HE students in the UK	4,344.90
Transnational education (HE)	210.80
Income from research grants and contracts	647.90
Income from licensing intellectual property	46.60
Income from consulting, facilities and equipment	84.90
Income from overseas alumni, international charitable organisations	34.50
Other income from overseas (HE)	61.60
Further Education	1,070.30
Tuition fees	138.60
Other spending of overseas FE students in the UK	867.60
Transnational education (FE)	26.80
Other income from overseas (FE)	37.30
English language training	1,996.20
Tuition fees	879.50
Other spending of overseas ELT students in the UK	1,116.70
Qualification awarding bodies	17.50
Independent primary and secondary school	478.90
Private sector training	1,480.00
Education-related publishing	749.00
Education-related equipment	453.00
Education-related consultancy	"
Education-related broadcasting	24.50
Total value of UK education and training exports	14,143.00
Total value of education-related Foreign Direct Investment	9.60

1 Lenton, P. Global value – The value of UK education and training exports. British Council. 2007

2 Conlon, Dr Gavan, Annabel Litchfield and Greg Sadlier, 'Estimating the Value to the UK of Education Exports', BIS Research Paper No.46, London Economics, June 2011

3 Conlon, Dr Gavan, Annabel Litchfield and Greg Sadlier, 'Estimating the Value to the UK of Education Exports', p.10

4 No data for education related consultancy has been entered due to the danger of double counting

Predicted Value of Education Related Exports to the UK Economy, 2010-2025 (2008/9 prices)⁵

Sector	2010 (£m)	2015 (£m)	2020 (£m)	2025 (£m)
Higher Education	8,245	10,412	13,220	16,896
Tuition fees	2,557	3,217	4,048	5,093
Other spending of overseas HE students in the UK	4,549	5,723	7,201	9,060
Transnational education (HE)	230	356	550	849
Income from research grants and contracts	661	730	806	889
Income from licensing intellectual property	48	55	64	74
Income from consulting, facilities and equipment	94	159	267	450
Income from overseas alumni, international charitable organisations	37	49	65	86
Other income from overseas (HE)	69	124	221	394
Further Education	1,030	882	755	647
Tuition fees	127	108	92	78
Other spending of overseas FE students in the UK	840	714	607	516
Transnational education (FE)	26	25	23	21
Other income from overseas (FE)	37	35	34	33
English language training	2,060	2,411	2,823	3,304
Tuition fees	908	1,062	1,244	1,456
Other spending of overseas ELT students in the UK	1,152	1,349	1,579	1,849
Qualification awarding bodies	18	19	20	22
Independent primary and secondary school	514	735	1,050	1,501
Private sector training	1,517	1,716	1,941	2,197
Education-related publishing	768	869	983	1,112
Education-related equipment	507	567	716	871
Education-related consultancy	"	"	"	"
Education-related broadcasting	25	25	25	24
Total value of UK education and training exports	14,684	17,636	21,533	26,575

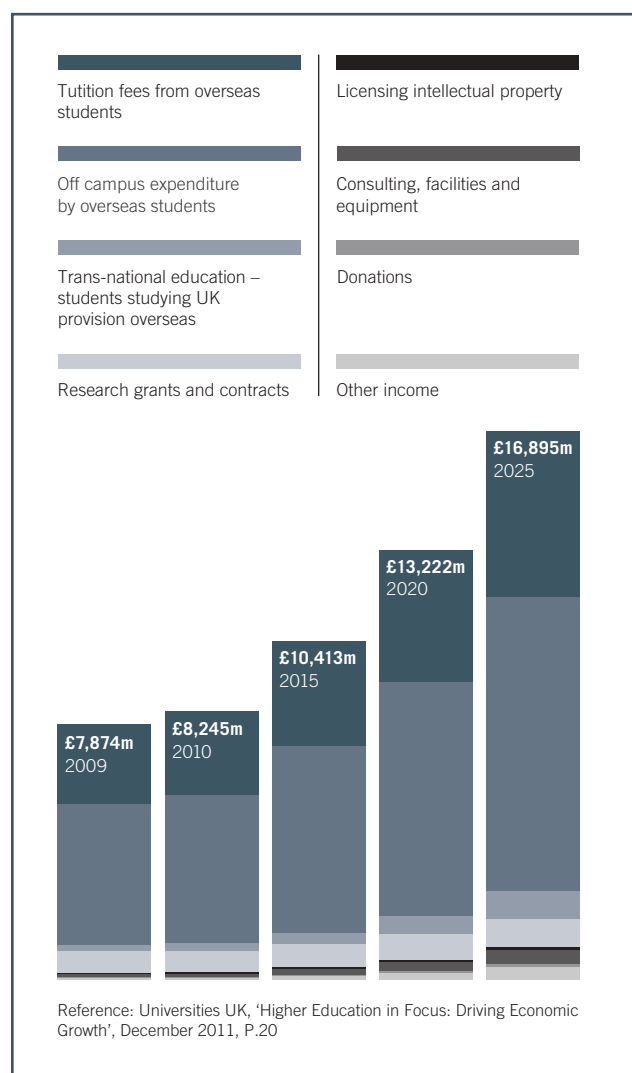
⁵ No data for education related consultancy has been entered due to the danger of double counting

Higher Education

“Higher education is unquestionably one of the sectors where the UK can point to success on a global scale”.⁶

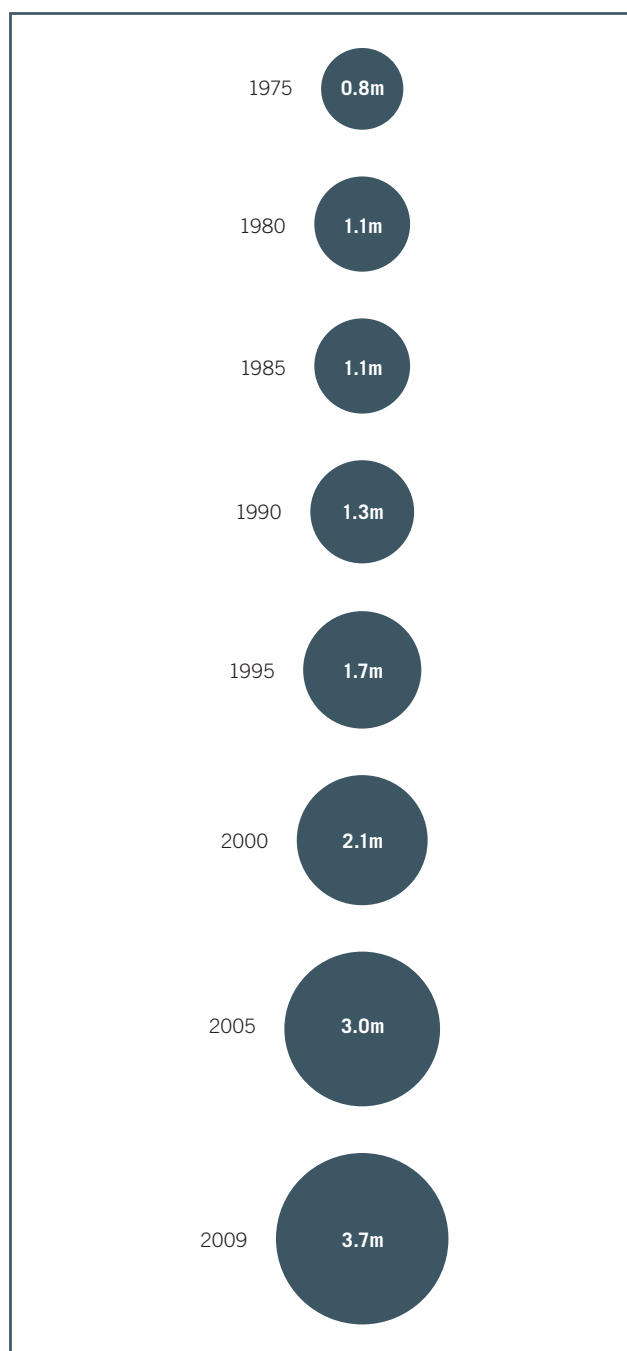
Higher education is the educational sector of highest export value. Following the London Economics data, the value of international Higher Education in the UK in 2008–9 was £7.9 billion and is set to grow to nearly £17 billion by 2025. The chart below, taken from a Universities UK report, shows how each of the revenue streams contribute to this growth.

Export Earnings for the UK Economy from Higher Education 2008/9 prices



In support of this prediction, the following bubble chart demonstrates the rate of growth of international students up until 2009. Studies suggest that numbers of those studying outside their home countries are set to grow further.⁷

International Students Worldwide, Selected Years⁸



A McKinsey report states that **“Higher Education is a fast-growing global market where the UK has strong position and market share”**.⁹

If this market share is maintained, it would continue to make a significant contribution to the UK economy as each student pays nearly £9,000 in tuition fees plus accommodation and other living expenses. They also create jobs for faculty members and support staff, as well as sustaining a number of other businesses within the vicinity of the university.¹⁰

⁶ Foreword by Dr Wendy Piatt and Professor Michael Arthur to 'The economic impact of research conducted in Russell Group Universities', Russell Group papers, Issue 1, 2010

⁷ Mc Kinsey & Company, 'From austerity to prosperity: Seven priorities for the long term', November 2010, p.50

⁸ Institute for International Education, Project Atlas: Trends and Global Data, 2011

⁹ Mc Kinsey & Company, 'From austerity to prosperity: Seven priorities for the long term', p.50

¹⁰ House of Commons Home Affairs Committee, 'Student Visas', Seventh Report of Session 2010 – 11, Volume 1, The Stationery Office Limited, London, HC773, p.8

There is a view that foreign students take much sought after places at universities, meaning that home students lose out. In their report on student visas, the Home Affairs Select Committee said this was a myth and that, in fact, quite the opposite is true.

“International students ... pay more than UK students for their courses and, in effect, subsidise the educational system in the UK – under current arrangements the average fee for a non EEA student was £8,600 in comparison to £2,200 for an EEA student and the Independent Migration Advisory Committee found that international students contribute 37% of the total university income from fees. Most universities are educational charities and therefore any surplus in income is usually invested in improving facilities and increasing the size or pay of the work force.”¹¹

As part of this enquiry, Sir Steve Smith warned the Committee in February 2011 that international students have a very significant impact on the local economy, and if numbers were cut, thousands of jobs could be lost; Professor Edward Acton, Vice-Chancellor of the University of East Anglia, agreed.¹²

International students were also vital in keeping the universities themselves going, the committee heard. Simeon Underwood, Academic Registrar of the London School of Economics, stated that 51 per cent of students at LSE were international, and that they provided £65 million in fee income. At Imperial College London, international students made up 29 per cent of students and 62 per cent of the fee income, Professor Dave Wark FRS told the committee. He claimed that it would be devastating to Imperial College if they were lost.¹³

The following points were made at a Centre on Migration, Policy and Society (COMPAS) briefing on the possible impacts of a cap on overseas students in the UK, and they highlight just how significant the industry is here, and how it contributes to the wider economy.

- “The non-EU student off campus spend was equivalent to 14% of all spending by overseas visitors to the UK in 2007”
- Non-EU students generated over 69,540 jobs in the UK, some 25,000 directly in the Universities and the remainder outside the universities in the wider economy
- Over £28k of output is generated in the UK by each non-EU student
- A contribution to UK GDP of over £15k is made by each non EU student
- For every 10 non-EU students, 3 full time equivalent jobs are generated in the UK”¹⁴

11 House of Commons Home Affairs Committee, ‘Student Visas’, p.8

12 Home Affairs committee meeting, 01/02/11

13 Home Affairs committee meeting, 01/02/11

14 Kelly, Ursula. ‘What could be the impacts of a cap on overseas higher education students?’, COMPAS Breakfast Briefing summary, October 2010

A Historical Perspective

by Dr Graham Stewart

History shows there is little room for complacency about the appeal of the United Kingdom to international students. It is tempting to imagine that this attraction stretches back centuries as a consequence of the age old renown of the country’s most venerable institutions and a comparatively long tradition of freedom of thought and relative academic liberty. Even long before such freedoms were acknowledged, indeed as early as the thirteenth century, students from across Christendom were coming to Oxford and in the fifteenth century St Andrews University attracted students from those European states that – in common with Scotland - supported the Avignon rather than the Roman papacy. At the beginning of the sixteenth century, the Dutch-born humanist, Erasmus, famously continued his studies at Cambridge. But the belief that British history justifies a sense of national entitlement to educating foreigners is mistaken.

The political and theological consequences of the Reformation proved highly disruptive to the former intellectual exchange and Britain was thereafter far from being Europe’s foremost destination for travelling scholars. Indeed, it was not until Oxford and Cambridge dropped the last of their restrictions to non-Anglicans in 1871 that England’s oldest universities re-emerged as attractive study options for those from beyond the realm.

By then, it was Germany that was the pre-eminent educator of foreign students. One reason was the clear superiority of its foremost universities as research institutions rather than merely centres of instruction. It was during the first half of the nineteenth century that German universities pioneered the greater driver of international student research, the modern PhD. British universities did not get round to offering comparable research doctorates until 1917 and it was not until after the Second World War that they offered PhD opportunities in significant quantities. Britain’s backwardness in this respect had deleterious consequences for her attractiveness to international study. By 1900, 7.6 per cent of Germany’s student population came from abroad.¹ Particularly telling was the fact that Americans frequently eschewed the advantage of commencing or continuing their studies in a country that was also English-speaking in favour of immersing themselves in the German higher education system (the best aspects of which they subsequently adopted for what became their own leading research universities). At the eve of the First World War, 22 per cent of students at Göttingen University were American.²

In comparison, the numbers of American students attending British institutions at that time was still trivial, though the attractiveness of Oxford was becoming more evident thanks to the creation of the prestigious Rhodes Scholarships for American, British colonial and German students in 1902. But in

1 Ben Wildavsky, *The Great Brain Race, How Global Universities Are Reshaping the World*, Princeton, 2010, p. 19

2 Ibid., p. 20.

the meantime, British universities had established one genuinely valuable market from the Indian subcontinent. The catalyst was the Government's introduction of the rule that made a British university degree a mandatory requirement for all positions in the Indian Civil Service. About fifty Indians graduated from Oxford between 1871 and 1891, among them Cornelia Sorabji who became India's first female lawyer and a campaigner for women's education in the sub-continent.

Cambridge proved even more of a draw. There were around one hundred Indian students in Cambridge when Jawaharlal Nehru arrived at Trinity College in 1907. By 1926, there were over a thousand Indian full-time students in Britain and the reputation of the leading research universities remains a strong pull to Indians and Pakistanis still, despite independence. Indeed, for 41 of India's 65 years as an independent state, she has been governed by prime ministers educated at Oxford or Cambridge, or in the case of the current incumbent, Dr Manmohan Singh, at both.

Independent Schools

The 2011 Independent Schools Council (ISC) census showed that there were 24,554 non-British pupils (those whose parents live overseas) at ISC schools, which was a 5.5 per cent increase on the previous year. This number is largely made up of students whose parents live in Hong Kong or China (37.8 per cent). Though the number of non-British pupils only makes up 4.8 per cent of the ISC pupil population, it is important to remember that these students are much more likely to be boarders, and so the fees they generate will be of a higher proportion. Indeed, there are some schools where two thirds of the boarders are international.¹⁵

The international intake of many independent schools, or in some cases the ability to sell their brand overseas, is crucial to their profitability and thereby allows them to continue to offer subsidised places to less well-off British children.

Overseas parents choose to send their children to the UK, at least in part, because of the standard of education they receive here. British independent schools are ranked among the best in the world by the Organisation for Economic Co-operation and Development (OECD).¹⁶

Transnational Education

Transnational education exists where the awarding body is located in a different country to the student. This could take the form of distance learning or an institution setting up overseas. Where a university does this it is known as a branch campus. The number of branch campuses being set up is increasing rapidly.

"Since September 2006, the number of international branch campuses in the world have increased by 43 per cent, to 162...Seventy-eight campuses, the equivalent of 48 per cent of all current international branch campuses, have been set up by US institutions. The United States is followed by Australia (14 campuses), the United Kingdom (13), and France and India (11 campuses, each)."¹⁷

Most of these campuses are in the United Arab Emirates, after these, the highest number is found in China, then Singapore and Qatar. UK institutions that have set up abroad include The University of Nottingham in China and Middlesex University in Dubai.

15 The Independent, 'Independent schools are wise to look overseas', Thursday, 6 May 2010

16 The Independent, 'Independent schools are wise to look overseas', Thursday, 6 May 2010

17 Becker, Rosa. 'International Branch Campuses: New Trends and Directions', International Higher Education, vol 58, Winter 2010, p.4

With technological advances, the way that education can be provided is changing. This means that distance learning is on the rise, as it can now make greater use of online tools and developments in software. The challenge will be how to maintain the strong UK brand in this environment.

Indirect Effects of International Students to the UK

The benefits of international students to the UK go beyond the short-term financial. Future global influence will be determined by links that are formed now. Where someone has received a British education, be it in the UK or elsewhere, they will be more attuned to certain customs, are likely to have a better knowledge of the history of the UK and be more sympathetic to the concerns of the nation. The Home Affairs Select Committee report on Student Visas points out that,

“The benefit to the UK from international students continues when they return to their home countries. Many of the respondents ... suggested that the UK gained significant ‘soft power’ – international influence – through the goodwill generated among international students who had studied in the UK.”¹⁸

In the appendix to their report, the committee list figures in influential positions overseas who have studied in the UK. These include Aung San Suu Kyi, Burmese politician, Sir Yang Ti-Liang, former Chief Justice of Hong Kong and Michèle Flournoy, until recently US Under Secretary of Defense.¹⁹

As well as promoting British interests abroad, the British economy may also benefit in the long-term. Those with links to the UK are more likely to continue to use British brands or have business connections here later in life. Though these effects are difficult to measure, they must not be ignored. The global landscape is rapidly changing. In order that the interests of the UK are not side-lined, international connections must be fostered. This can be done through education.

Cultural and Educational Value for UK Students

The value of being part of an international and cosmopolitan community when studying at school or university is ever more important. Universities have been aware of this value for a while and schools are becoming increasingly so. A recent venture, Avenues: The World School, has plans to create over 20 interconnected schools across five continents, where fluency in two languages is expected by graduation; the first

school opens in New York in 2012. It may be that this kind of global education is the future. Through welcoming international students to the UK, the country can give younger people a better sense of other cultures, which will be useful for their development. A great deal of peer-led learning also takes place at universities and the more international students, the broader the scope of this will be.

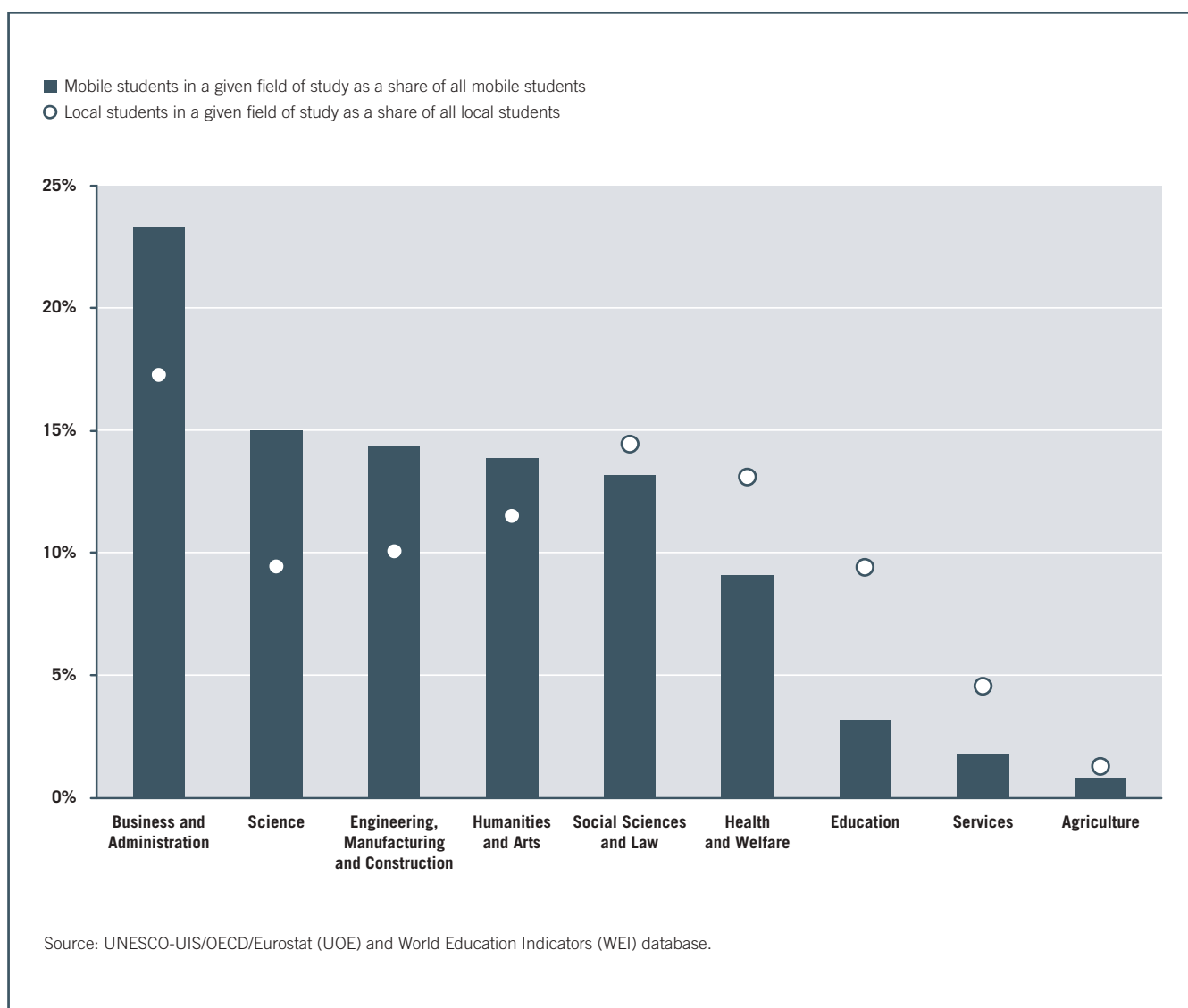
Whichever field a student wants to go into, an international outlook or ability to speak foreign languages will offer benefits. According to the latest CBI Education and Skills survey,²⁰ employer satisfaction with college/school leavers’ foreign language skills was 23 per cent with just 1 per cent being ‘very satisfied’. Employer satisfaction with college/school leavers’ international cultural awareness was 37 per cent with just 1 per cent very satisfied. These levels are higher for graduates; employer satisfaction with foreign language skills is 36 per cent with 4 per cent very satisfied. 50 per cent of employers were satisfied with their graduate employees’ international cultural awareness, and 6 per cent very satisfied.

The level of satisfaction found in these categories is inadequate and is likely to hold the UK back in a global marketplace. The extent to which young people are exposed to other cultures and languages can only help to develop the skills discussed here.

In addition to these benefits, there are certain sectors which rely upon an intake of international students to continue. The STEM subjects, (science, technology, engineering and mathematics) are reliant on foreign students as there are insufficient numbers of home students wanting to take them. Professor Edward Acton, Vice-Chancellor of the University of East Anglia suggests that post-graduate courses are even more frequently supported in this way.²¹ Professor Dave Wark FRS, of Imperial College London has told the Home Affairs Select Committee that if the number of international students were limited, it would lead to a reduction in the quality of the courses offered in the UK. However, though they are often discussed, it is not just the STEM subjects that are affected by numbers of international students. Of the departments at Imperial College, it is actually businesses and humanities which have the highest number of foreign students.²² As discussed above, it does not follow that the gap left would be filled by UK citizens. The graph on the next page compares the subjects chosen by students who study in their own countries with those who choose to go abroad.

18 House of Commons Home Affairs Select Committee, ‘Student Visas’, p.9
19 House of Commons Home Affairs Select Committee, ‘Student Visas’, p.94

20 The Confederation of British Industry, ‘Building for growth: business priorities for education and skills’, CBI Education and Skills survey 2011, May 2011, p22
21 Professor Edward Acton, Vice-Chancellor of University of East Anglia, Home Affairs committee meeting, 01/02/11
22 Professor Dave Wark FRS, Imperial College London, Home Affairs committee meeting, 01/02/11



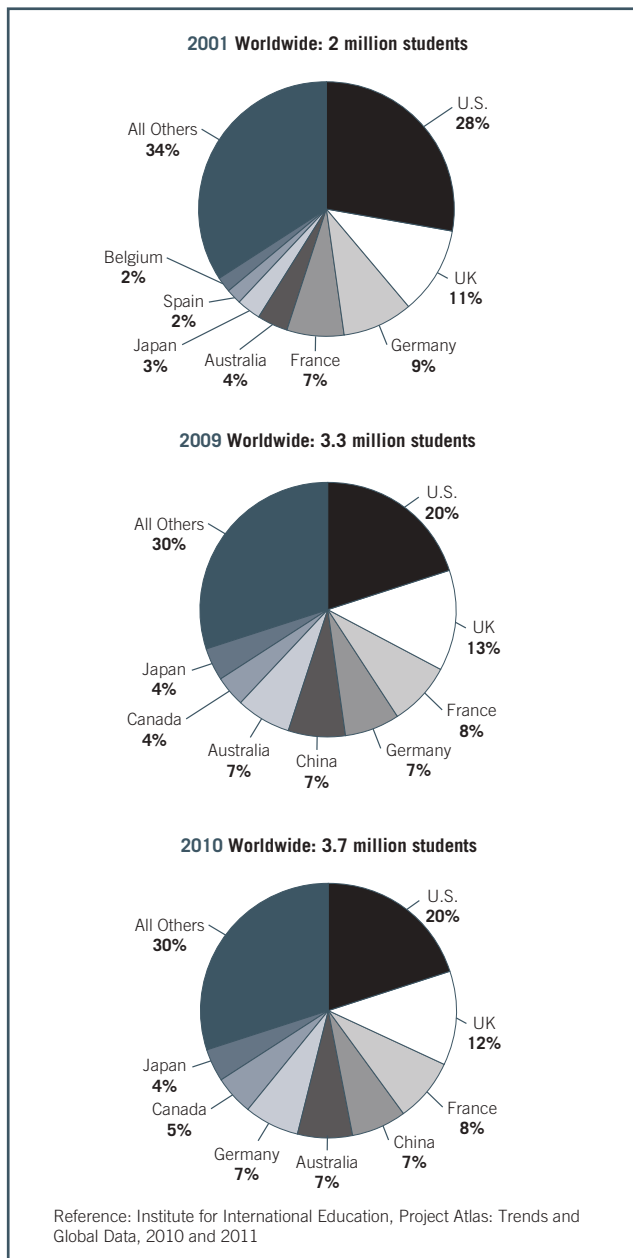
The graph reveals that the number of students who choose to go abroad to study business is high, with 25 per cent of international students taking the subject. In business, students need to be trained to work in a global market, so having a range of cultures on the course or experiencing another country can help develop the students into more successful business leaders. UK students studying business here will benefit from working alongside peers from around the world, as it will expose them to a range of perspectives and help train them in working alongside those from other cultures. The UK is well placed to take advantage of the intake of international students that business schools can bring, as it has a strong reputation in this field. London Business School tops the global rankings for the MBA and there are seven other British institutions in the top fifty.²⁴

²³ Unesco Institute for Statistics, 'Global Education Digest 2009: Comparing Educational Statistics Across the World', 2009

²⁴ Global MBA Rankings 2011, <http://rankings.ft.com/businessschoolrankings/global-mba-rankings-2011>

International Competitors

In the international student marketplace, countries must compete to attract individuals from around the world. To stay ahead, Britain must position itself as a more appealing destination than other countries. There are two levels to this. Firstly, the educational bodies must themselves be of a high standard and act competitively to gain applicants. In addition to this, the respective government must use the tools it has to encourage an influx of international students. Other factors that may affect an international student's decision are perceived safety and cultural possibilities.



As the pie charts on this page show, the USA has the largest market share of the international student market, though it weakened between 2001 and 2009 as other countries increased their share. In this time, China emerged as a competitor and others, such as Australia and Canada, bolstered their position. The UK increased its share by 2 per cent between 2001 and 2009, which as the number of students studying abroad increased by more than a million over this time means that it has managed to accommodate a much larger number of students. However, the latest figures show that Britain's share dropped in 2010 to 12 per cent, where the other top eight countries managed to retain theirs, and Canada expanded its share to 5 per cent. A Universities UK's report, 'Driving Economic Growth' claims, **"The UK's market position is in danger ... as other countries focus more heavily on international recruitment."**²⁵ This decreased market share in 2010 for the UK is worrying and potential reasons for it will be analysed below.

The reasons why the USA has such a large share also need to be addressed if the UK is to become a stronger competitor. It has been claimed that, **"a focus on multi-disciplinary study, active student participation, joint faculty student research and the promotion of innovation and creativity at the undergraduate level are things that make U.S. undergraduate study appealing."**²⁶ Seven of the top ten universities in the Times Higher Education rankings are located in America.

Quality

The UK has a strong reputation for quality education. It not only has three universities in the top ten as ranked by Times Higher Education (Oxford, Cambridge and Imperial), but 32 in the top 200 universities worldwide.²⁷

The quality of research produced also very much exceeds almost any comparable country by size; it is world class and the institutions are highly productive. A recent Thompson Reuters report draws out the data to support this, as follows,

"The UK spends 4% of the world's Gross Expenditure on R&D on 6% of the world's researchers who are authors on 8% of the world's research articles and reviews. These papers attract 11% of the world's citations and so create 14% of the world's highly cited output. Those exceptional articles include 17% of the world's research papers with more than 500 citations and 20% of those with more than 1000 citations. Its average research impact now surpasses that of the USA."²⁸

25 Universities UK, 'Higher Education in Focus: Driving Economic Growth', December 2011

26 Ide, William. 'China Passes India as Biggest Source of Foreign Students in US', Voice of America, 15 November 2010.

27 Times Higher Education, The World University Rankings, 2011-2012

28 Adams, Jonathan. 'Global Research Report: United Kingdom', Thompson Reuters, October 2011

According to the Russell Group, the UK has one of the strongest research bases in the world in terms of quality and productivity.²⁹ Their report 'The economic impact of research conducted at Russell Group universities' highlights the value of this research. They claim,

"Significant economic impact is derived from the commercialisation of research in a range of different subjects and disciplines, as well as multidisciplinary research. Moreover, professional knowledge transfer staff and processes within universities are critical in ensuring that research results in maximum benefit to the economy. This is an area in which universities have invested significantly in recent years, with good results."

In order to compete with institutions from around the world, UK schools and colleges must retain their high quality. It therefore must be ensured that international students are not seen by them simply as a fast track to profit. If the quality is not there, in a short time, neither will the students. If the UK is given a bad reputation around the world by poor quality or bogus colleges then the whole of the British education system will be damaged. So, it is clear that these bogus schools and colleges should not be able to continue and as the Home Affairs Select Committee put it in their report, there has been "considerable progress" towards getting rid of them.³⁰ The Minister for Universities and Science, David Willetts claimed,

"...That picture of a kind of PO Box with absolutely no education activity going on, or a single room above a fish and chip shop as the bogus college, I think the effective action by the UK Border Agency has made great progress in eliminating those."³¹

The first cycle of inspections of private further education colleges and language schools since responsibility has been handed to The Independent Schools Inspectorate is underway and due to be completed by December 2012. It seems that at the time of the consultation on student visas there had already been good progress on eliminating bogus colleges, which is very important, but suggests that there was no need for additional steps to be made. If even those within government agreed that the problem of bogus colleges was being dealt with, then it would appear that the decision to tighten rules further was not solely motivated by a desire to tackle this problem.

29 The Russell Group, 'The economic impact of research conducted in Russell Group Universities', Russell Group papers, Issue 1, 2010

30 House of Commons Home Affairs Committee, 'Student Visas', p.4

31 House of Commons Home Affairs Committee, 'Student Visas', p.4

Student Visas

The Home Office must appreciate the sensitivity around these issues, and the potential repercussions that headline grabbing over immigration control can have. Perceptions can have very real effects. A Home Office press release on 2nd November was headed, **"Student Visa Clampdown: New rules and a clampdown on abuse of the student visa system mean nearly 500 colleges will no longer be able to bring new international students to the UK to study."**³² This was then reported in the media by organisations, such as the BBC,³³ which will be read around the globe. This does not give out a welcoming message. Though it may be that this 'clampdown' has closed down bogus operations, which is important, it must be ensured that unintended consequences do not negate any benefits.

A survey across eleven countries was carried out by the Institute of International Education (IIE) with the US Department of State's Bureau of Educational and Cultural Affairs and Education USA between 2009 and 2010 which received over 9,000 valid responses.³⁴ The results of the survey suggest that **"over two-thirds (69%) of respondents worldwide felt that the United States welcomes international students, as compared with 42 per cent for Canada, 34 per cent for Australia, and 33 per cent for the United Kingdom."** This figure is worrying for the UK. It can be hard to assess what makes a country welcoming or not.

A British Council programme, The Prime Minister's Initiative (PMI2), described by their website as **"a five-year strategy which aims to secure the UK's position as a leader in international education and sustain the growth of UK international education delivered in the UK and overseas"**, has recently come to a close. The evaluation report found that, **"The key to continuing to attract non-EU students appears to lie with reassuring them they are welcome (and not only for their fees) by providing additional support and information, both prior to, and during study in the UK. For example, social integration seemed to be occasionally problematic, as according to the surveys, only 44% of respondents met many UK students, and 65% wished they had met more UK students."**³⁵

It is significant that at the time of the IIE survey, less than a quarter of respondents felt that the UK had 'difficult or complex' visa procedures³⁶ (compared with 49 per cent in the USA), and it was despite this that the UK was seen as unwelcoming. Since this survey was carried out, the UK has put out a consultation on proposed changes to students visas (December 2010) and following this, adjusted the system (April 2011). Following this consultation and subsequent changes, it is likely that the UK is felt to be even less welcoming to international students.

32 Home Office, 'New rules and a clampdown on abuse of the student visa system mean nearly 500 colleges will no longer be able to bring new international students to the UK to study', 2 November 2011

33 Casciani, D. 'Colleges lose licences in immigration crackdown', BBC online, 2 November 2011

34 The eleven countries were Vietnam, India, Mexico, Thailand, Hong Kong, Brazil, Germany, Turkey, the United Kingdom, Nigeria and South Africa

35 British Council, 'Prime Minister's Initiative for International Education Phase 2 (PMI2): Final Evaluation Report', April 2011

36 Chow, Patricia. 'What International Students Think about US Higher Education', International Higher Education, vol 65, Fall 2011, p.11

The following table outlines the key proposals in the December 2010 Home Office consultation on student visas and the main points of change.

	Consultation proposal ³⁵	Taking effect ³⁶
Highly Trusted Sponsors	To only allow Highly Trusted Sponsors to offer below-degree level courses through the Tier 4 route (the category for adult student migrants), except where under 6 months, when it would fall under the student visitor route.	All sponsors must receive Highly Trusted Status by April 2012.
Language requirements	All Tier 4 applicants including degree-level and English language students to be tested to show that they have an upper intermediate level of English.	Degree-level students must demonstrate an upper-intermediate level of English Language. For lower than degree-level courses, an intermediate level will suffice. However, there will be an allowance for 'truly exceptional' students. In addition, UKBA officers will be able to refuse a migrant on arrival who requires an interpreter.
Continuing to study	Students wanting to continue studying in the UK after the completion of one course would have to prove they are progressing to a higher level and may have to leave the UK to reapply.	The sponsor would have to vouch for academic progression if it was not apparent.
Post-study work route	Close the post-study work route.	The post-study work route will be closed from April 2012.
Working rights	To put limitations on working while studying, such as only allowing students to work on-campus during weekdays.	University students will still be able to work up to 20 hours per week, those at publicly funded Further Education colleges will be able to work 10 hours per week.
Dependants	Only students studying for more than twelve months would be allowed to bring dependants and these dependants would not automatically have the right to work, but only if they qualified in their own right.	Only post-graduate students on a course longer than 12 months would be entitled to bring a dependant. The dependants would be able to work.
Streamlining		Streamlined process for low-risk applicants.

In early 2011, whilst the consultation was out, the Home Affairs Select Committee set up an inquiry into Student Visas, the conclusions of which were published in March 2011. During this inquiry they heard (among others) from the LSE, Universities UK, the British Council, Migration Watch UK and the NUS, as well as from ministers from the Department for Business Innovation and Skills, the Foreign and Commonwealth Office and the Home Office. The resulting report was critical of a number of the proposals. Among other suggestions, they claimed stricter language requirements would not be helpful, suggested further research into the entitlements of dependants and advised against scrapping the post-study work route.

In support of their strong recommendation that the Government did not increase the language requirements for those students coming to study in the UK, the committee made the point that Universities would not accept anyone that they did not think had good enough language skills to complete the course. They also said it was difficult for students to reach these requirements if they did not live in English-speaking countries, or where they came from countries with different methods of teaching.³⁹

Tony Milns, CEO of English UK, which deals with the English language education sector, told the committee he was concerned about the proposal that international students should have an upper intermediate level of English (known as B2). He explained that this was equivalent to a high grade

at A Level. Many students with the lower level of A2-B1, equivalent to GCSE standard, came to the UK to improve their language skills and therefore, Mr Milns said, a higher level of requirement was not sensible. Elizabeth McLaren, Manager of Accreditation Services at the British Council agreed with this point.⁴⁰ Ultimately, the higher intermediate level will not be required for the lower than degree-level courses, but will be for degree-level. The intermediate level will be necessary for the lower course.

A survey of over 5,000 international students conducted in October 2011 by the UK Council for International Student Affairs found that 10 per cent of students were affected by the changes to the language requirements.⁴¹ 5 per cent had to re-sit a test to get a higher score and 4 per cent had to take a different test as UKBA did not recognise the test which the institution originally accepted. This reveals the problems being caused for a large number of international students who had already been accepted by UK institutions.

The post-study work visa is another disputed issue. In one of the evidence sessions, Sir Steve Smith warned that getting rid of the post-study work visa would damage the university sector. There was no evidence that those students who stayed on took local jobs, as their skills were likely to be more specific than those available in the UK, he insisted.⁴² In support of this view, Simeon Underwood, Academic Registrar of the London School

37 Home Office, UK Border Agency, 'The Student Immigration System: A Consultation', December 2010.

38 Home Office, UK Border Agency, 'Summary of the New Student Policy'

39 House of Commons Home Affairs Committee, 'Student Visas', p.16

40 Home Affairs committee meeting, 01/02/11

41 UKCISA, 'The UKCISA Tier 4 student survey 2011', December 2011

42 Home Affairs committee meeting, 01/02/11

of Economics said the withdrawal of the post-study work visa would lead to a decrease in postgraduate applications from overseas.⁴³ A 2009 report by the Independent Migration Advisory Committee (MAC) has also argued to keep the post-study work option open, as closing it could reduce international applications and there was no evidence that these students displace British students.⁴⁴ Deloitte responded the following to the MAC's call for evidence,

"To limit or restrict the post-study route in the UK may have an adverse effect on where students choose to study in future. This may in turn have economic repercussions for our universities and colleges of higher education as well as narrowing the pool of available talent for UK employers."⁴⁵

There are certain courses where it was found the post-study work route was of even greater significance. Mr Underwood, as well as Professor Dave Wark FRS of Imperial College London both agreed that the post-study work route was integral to the MBA course.⁴⁶ The Association of MBAs demonstrated its support for the post study work route by posting an open letter in *The Times* and *The House* magazine. It stated,

"we disagree profoundly with the proposal that all overseas students, regardless of level or course of study, should lose the opportunity to apply to work in the UK and instead be required to leave as soon as they complete their programme. If implemented, these plans would have a serious impact both on the competitiveness, finances and reputation of UK business schools but also on the wider economy."⁴⁷

This letter was signed by forty representatives of business schools, including London Business School and Saïd Business School.

As well as business courses, medicine will also be adversely affected by the removal of the post-study work route as there is a significant post-study work requirement prior to final qualification. In their response to the consultation on student visas, the British Medical Association (BMA) warned that it could lead international students to study elsewhere, which in turn would lead to a decline in medical schools' income and result in an inferior education therein. The plans could even adversely affect healthcare provision in the NHS as non-EEA students have been included in workforce plans.⁴⁸ The BMA claim,

"The BMA is concerned that closure of the Tier 1 Post Study Work Route will result in the NHS losing out on the benefits from its significant financial investment in doctors' training and that NHS service delivery will be compromised due to a shortfall of speciality trainees".

As the Australian example, opposite, demonstrates, where visa systems are tightened up, there is likely to be a decline in student visa applications. There is a concern that even discussing potential changes, even ones which are designed to only effect bogus visa applications, may have a negative effect. Perceptions can be very damaging. In countries such as China, where government consultations do not happen in the same way as in the UK, the view may have been taken that the suggestions put forward in the consultation were certain to be put in place. A survey taken between January and February 2011 showed that visa issues were worrying students wanting to come to the UK more than previously.⁴⁹

Abbey College Cambridge, an independent Sixth Form college with a high international intake, has seen a decrease of 28 per cent in applications from Chinese students in the past year. The Principal, Julian Davies, links this decline to the visa consultation and subsequent changes. He claims that, although these changes would not have actually affected the potential applicants in question, a perception was given that it would, which put students and their parents off coming to the UK. He points out that there has been no other kind of decline at the college in terms of academic results or facilities that could explain the changes. Three key factors are cited as the cause; uncertainty over the situation of the Tier 4 regulations, the loss of the right to post-study work after university study and the coinciding easing of the student visa restrictions in the USA.⁵⁰

The pharmaceuticals industry is one where it is important to attract the best researchers from around the world. Sir Paul Nurse, President of the Royal Society and Chief Executive of the Francis Crick Institute, warned that, **"The problem we have (with immigration) is probably with perception. By clamping down on immigration, out there in the rest of the world, the UK is seen as not welcoming scientists who can carry out innovation...Another issue is that we must not make these immigration rules so bureaucratic and so complicated that people won't come to work here."**⁵¹

Relaxing or simplifying UK rules for student visas is, therefore, a key way that the Government could help develop the education industry. As Professor Dave Wark FRS has said, it is wrong to classify students as immigrants; instead, they should be seen as customers or colleagues.⁵² There is very little downside to encouraging more students into the UK and

43 Home Affairs committee meeting, 01/02/11

44 Migration Advisory Committee, 'Analysis of the Points Based System: Tier1', December 2009

45 Migration Advisory Committee, 'Analysis of the Points Based System: Tier1', p.124

46 Home Affairs committee meeting, 01/02/11

47 The Association of MBAs, Open letter signed by UK Business Schools, *The House Magazine*, 7th February 2011, p.18

48 British Medical Association, BMA response to Home Affairs Committee inquiry into the proposed restrictions on tier 4 migration, January 2011

49 British Council, 'Prime Minister's Initiative for International Education Phase 2 (PMI2): Final Evaluation Report', April 2011

50 Davies, Julian, *Analysis of Chinese student numbers at Abbey College Cambridge 2009-11*, 14th October 2011

51 Sir Paul Nurse talking on the *Today* programme, 5th December 2011

52 Home Affairs committee meeting, 01/02/11

Case Study – Australia

The UK may do well to consider the recent chain of events in Australia. Changes were brought into the immigration system in February 2010, making migration tougher for international students. These came about as a response to abuse of the system which had led to a number of low skilled migrants entering the country. These changes have led to problems for the international education market in Australia. There has subsequently been a decrease in the number of international student applications. This decrease was not limited to the bogus applications or low-skilled migrants that the changes were meant to deter. The restrictions led to confusion among parents in China and Vietnam, from where a large number of students flowed into Australia,¹ which consequently put them off applying. In 2009, half a million international students gave an estimated benefit to the Australian economy of AUD18 billion, this is now reported to have dropped by 2 billion.²

There have been reports that a potentially racially motivated attack on Indian students may have put off international students,³ which will not have helped, though it is largely acknowledged that the turning of the tide is predominantly down to the changes in government policy. In order to reverse this trend away from the country, the Australian government has since responded by relaxing the rules surrounding international students, such as by reducing the level of financial worth that has to be proved by the applicant and having less strict language requirements.⁴

Chris Bowen, the Australian Minister for Immigration and Citizenship, and Chris Evans, the Australian Minister for Tertiary Education, Skills, Jobs and Workplace Relations, commissioned a strategic review that was released in September 2011 into their student visa system, to **“make recommendations for a sustainable program which will balance Australia's economic interests, educational interests and migration interests”**.

The study known as the Knight Review⁵ outlines 41 recommendations to attract more international students. These recommendations include, granting students a two to four year post-study work allowance (depending on the level of study), treating students as low risk immigrants regardless of their country of origin and significantly reducing the financial requirements.⁶

In a statement following the release of this review, Mr Bowen claimed, **“We need to move to a more targeted approach to assessing and responding to immigration risk in the Student Visa program that recognises and rewards high-quality education providers”**.⁷ All the recommendations are to be implemented (though some may be slightly amended) over a period between late 2011 and 2013. On 5th November 2011 some changes were implemented, including reducing the financial requirements for international students and removing some of the language testing requirements.

Universities Australia CEO, Dr Glenn Withers has stated that, **“The changes proposed to visa requirements for students enrolled at Australian universities will help to maintain an internationally competitive international education sector that confirms Australia as an attractive higher education destination over the long term.”**⁸

“Worldwide demand for international education is robust, driven by continuing high economic growth in Asia. The problem is of Australia's own making and is largely government-policy driven,”⁹ Simon Marginson has claimed. The UK must be very careful not to make the same mistake, though there is a fear that part of the damage has already been done. The following trend has been noted by Rod Jones, Chief Executive of Navitas, an international education provider; **“Canada is benefiting from students who are turning away from Australia and the UK because of government changes in visa policy for foreign students.”**¹⁰

There are now fears that as the latest changes to the Australian system take effect, they will be able to attract students away from the UK, where the rules are being tightened. Following a recent survey undertaken by the UK Council for International Student Affairs (UKCISA), Professor Paul Webley, chair of the board of trustees claimed, **“With the announcement by Australia of its new Post-Study Work scheme, it is quite possible that significant numbers will be attracted to go there instead and that the real impact on numbers choosing the UK will only be felt in 2012”**.¹¹ This was after the survey found that over 50 per cent of students reported confusion or difficulty resulting from changes in the rules and that, of the recent changes, the abolition of the Post Study Work (PSW) route was rated as having most negative impact on their decision to study in the UK (in all sectors), followed by changes to the rules on working while studying.¹²

1 Christian, Kim, 'Students flock to Canada Instead of Aus', Australian Associated Press, 2nd August, 2011

2 Maslen, Geoff. 'Australia: Doors open to foreign students', University World News, Issue 191, 2nd October 2011

3 Schwartz, Steven. 'Losing a Grip on the Foreign-Student Market', The Chronicle of Higher Education, January 27th 2011

4 Matchett S (2010) 'Entry requirements lowered' The Australian, 17th December 2010

5 Published on 22nd September 2011

6 Knight, Michael, 'Strategic Review of the Student Visa Program 2011 – Recommendations', Australian Government, September 2011

7 Bowen, Chris and Chris Evans. 'Boost to International Education Sector in Response to Knight Review', 22nd September 2011

8 The Conversation, 'Universities welcome Knight Review of international student visa rules', 22nd September 2011

9 Simon Marginson, International Education in Australia: A Long Way Down, International Higher Education, Winter 2011

10 Ooi, Teresa, 'High Australian dollar, visa rules push foreign students to Canada', The Australian, 2nd August 2011

11 Webley, Paul. Foreword to UKCISA, 'The UKCISA Tier 4 student survey 2011', December 2011, p.2

12 UKCISA, 'The UKCISA Tier 4 student survey 2011', December 2011

numerous benefits. It is therefore important the Government recognises this and ensures the immigration system in the UK does not act as a deterrent.

The Home Affairs Select Committee report on Student Visas concludes with the suggestion that students should no longer be classified as migrants, as according to the committee, they are not.

“Although the UN requires students to be included in migration figures, we are not persuaded that students are

in fact migrants. Only if a student or former student seeks settlement – or the length of time they have spent in the country is excessive – should their status in the UK be regarded as that of a migrant rather than a student visitor. This is not to soften the approach to reducing immigration numbers but to recognise that not all students remain permanently, that those who do make a significant contribution to the economy, and that students who come to this country benefit us economically – through the payment of fees and wider spending – as well as

contributing significantly to strengthening and enhancing Britain's place in the world.”⁵³

This idea was also put forward by Universities UK in their response to the Government consultation, they claimed,

“UK universities cannot support the Government's objective to reduce international student numbers as it is based on a classification of students as migrants that is not appropriate given their temporary status in the UK. Students do not come to the UK to live or to work but to study. They have to support themselves without recourse to public funds.”⁵⁴

The IPPR take a similar view,

“Many of the changes proposed seem to be motivated primarily by the government's objective of reducing net immigration to the UK. The fact that the proposals would have the effect of damaging the recruitment of legitimate international students may be entirely deliberate. It is likely that reducing legitimate student immigration would in fact do little to reduce total net migration, and would impose significant economic (and wider) costs on the UK.”⁵⁵

It seems that the UN definition of students as migrants is flawed, as even though they are often here for over a year, they are usually not intent on settling or becoming dependent upon the state. Instead, they temporarily contribute to it.

Cost

In the IIE survey mentioned above, another key point that emerged was that the UK was seen as an expensive place to study. Over half of the respondents thought the UK had expensive tuition fees, though this was less than the USA where 60 per cent felt tuition fees were expensive.⁵⁶ With regard to the cost of living, the UK was seen as expensive by the highest number of respondents, 54 per cent.⁵⁷ It is likely that smaller countries benefit from the often prohibitive costs of studying in the UK and the USA.

“The fact that many of the European countries such as Norway, Germany and Finland offer tuition-free education to native and international students, make them a destination of choice.”⁵⁸

As tuition fees are increased for home students in the UK, it is possible that UK universities could feel an extra sting from

UK students travelling abroad to study,⁵⁹ especially as more universities across the EU are offering more English taught courses. They may want to become more internationally competitive to compensate for this.

Type of Course

The nature of a degree or other educational programmes will vary from country to country and it is important to ensure that students are not encouraged outside the UK for this reason. It is the norm in the US to study a range of subjects at the start of a degree course, then specialise later. With regard to secondary schooling, there are suggestions that those coming to the UK from elsewhere in Europe would be drawn to institutions offering the International Baccalaureate as well as the usual A-levels.⁶⁰

Language

Anglophone countries, of course, have language as an advantage. It is seen as a barrier in many other countries. According to the IIE survey, Japan was by far the most affected in this respect, followed by Germany and France.

53 House of Commons Home Affairs Committee, 'Student Visas', p.40

54 Universities UK, 'Universities UK response to 'The student immigration system – a consultation'', February 2011, p.16

55 Mulley, Sarah and Alice Sachrajda, 'Student migration in the UK', Institute for Public Policy Research, February 2011, p.3

56 Chow, Patricia. 'What International Students Think about US Higher Education', p.11

57 Chow, Patricia. 'What International Students Think about US Higher Education', p.11

58 The New India Express, 'US, UK no longer top educational destinations', 8th August 2011

59 Paton, Graeme. 'More British students vying for American universities', The Telegraph, 5th October 2011

60 The Independent, 'Independent schools are wise to look overseas', Thursday, 6 May 2010

Understanding Demand – What Emerging Nations Require

As market growth is so vital in emerging nations, we will also seek to address the international education trends developing within them, with a particular focus on China.

China

According to UKTI, **“The Chinese government is investing heavily in education and employability, and there is a potentially huge education market in China.”**⁶¹ They point to an increase in demand for education and training in English, business and management and corporate training, among other areas. China is also one of the top five transnational education markets (where a degree is awarded in a different country to where it is studied), along with Singapore, Malaysia, India and Hong Kong.⁶² The ability for Chinese parents to afford to send their children to study abroad is also increasing. It is therefore important that the reputation of British education in China is protected if the benefits are to be felt in the UK. Over half a million Chinese students go abroad for higher education study. As the pie chart on this page demonstrates, of these students, more go to the USA than any other country. In order for the UK to retain its position as one of the top destinations for Chinese students, it must do all it can to welcome Chinese students, and to offer a top quality education. It is for this reason that the student visa issue, as discussed above, is so important. China is such a large market, and one that appears to still be increasing. It should not be taken for granted that students will come to the UK, as with the case of Australia, also discussed above, preferences can change.

In Asia there is a worrying trend developing. The trend, noted by those within the education sector in China, is that the aspirations of Chinese students in particular is to gain entry to a top US school or University, with the Ivy League colleges being regarded most highly. The impact for the UK economy is not only the loss of direct school or university fees but possibly more critically the indirect loss of future business for the UK. Foreign students who have been to a UK university will more readily consider UK products and services when they become business leaders in the future. As the power of the

global economy shifts toward Asia, and to China in particular, the future loss of potential business to the UK economy if we do not attract Asian students to the UK could be enormous.

Destination of Students Leaving China for Higher Education Study, 2009

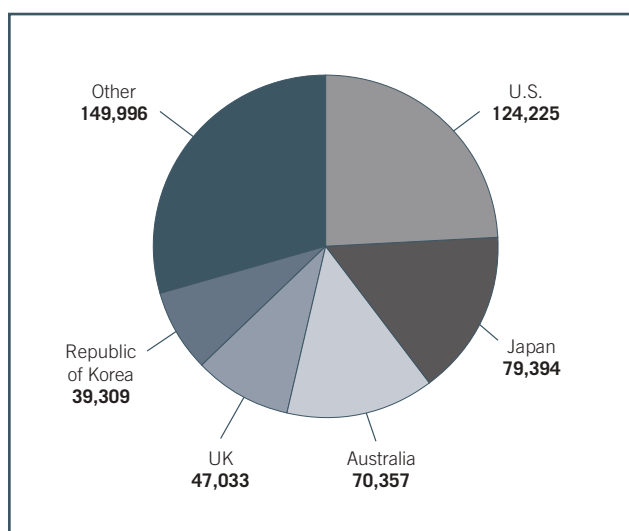


Diagram Author's own, based on data from UNESCO Institute for Statistics⁶³

In order to provide an up to date view of opinion within China, Dulwich College Management conducted a survey of secondary school age students in China and their parents for this report, completed in November 2011. Surveys were sent to eight middle schools in first-tier cities such as Shanghai, Beijing, Suzhou, and Zhuhai. 428 completed surveys were received.

The results show a real thirst for studying abroad at university level; only 15.3 per cent of parents and 11.7 per cent of students indicated that they had never considered studying abroad. The USA remained the destination of choice, with 54.1 per cent of parents and 44.3 per cent of students choosing it as destination of choice for university study and 50.9 per cent of parents and 44.3 per cent of students indicated it as their top choice for high school. The UK was the second most popular destination country for both high school and university education, followed by Canada and Australia in the parents' responses and Singapore in the students'.

The most stated reason for selecting a country for study was quality of education. However, the results also revealed that student visa availability did have some effect on which country was selected for study. When asked how changes to the UK visa system affected Chinese parents' and students' plans to study there, 42.7 per cent of parents indicated that they would choose other countries and 22 per cent of parents were not sure and needed more detailed information about the change in policy. Results of the student survey were

61 UK Trade and Investment, 'Education and Skills Opportunities in China', September 2010

62 Lenton, P. 'Global value - The value of UK education and training exports'. British Council. 2007, p.14

63 UNESCO Institute for Statistics, 'Top five destinations for mobile students and outward mobility ratio'

similar. Space was given for further comment and the USA was mentioned several times as an alternative.

When asked if, as a result of the recent visa policy change, the removal of the opportunity to work in the UK for two years post-graduation would make them less inclined to consider the UK for university education, 52.8 per cent of parents and 48.7 per cent of students said it would. Again, the US was mentioned as the alternative to the UK multiple times. These results suggest that if the UK visa system continues to be obstructive, Chinese students could reject the UK for the USA in future.

Demand for foreign education providers within China itself is also high.

“In the past decade, the Chinese government has largely embraced the entrance of foreign providers. The Education Act of 1995 officially encouraged foreign higher education ventures...Between 1998 and 2005, total undergraduate enrolment in Chinese higher education increased from 3.41 million to 15.62 million.”⁶⁴

An opportunity therefore exists for British education providers within China. Andrew Halper, head of the China Business Group at Eversheds LLP confirms this. He claims,

“I think that there is greater receptivity in China at the official level to international cooperation in education. The whole scene has changed. It is much more open now than it was.”⁶⁵

The University of Nottingham took advantage of this opening up and set up a campus in Ningbo, China. Such development is not something that a UK institution can do without a great deal of careful planning. Dr Helms, an international higher education consultant from Washington D.C. warns of the **“regulatory, cultural and logistical challenges”**⁶⁶ of setting up an overseas institution in China. Ian Gow, Pro Vice-Chancellor of the University of the West of England and founding Provost of the University of Nottingham, Ningbo, China, warns of a failure to properly recognise the motivations of the Chinese government. With reference to Chinese institutions, he has claimed, “UK institutions are rushing to partner with China but the risks are very considerable. They are capable of gaining more from the partnerships than we are if we do not do our homework properly and negotiate a win-win situation”.⁶⁷ Others have warned of the

problems of finding staff who can teach in English at a high level.⁶⁸ However, if the UK fails to get on top of these issues, it is likely to be left behind in the global competition and miss a chance to capitalise on an already strong reputation for excellence in education.

India

In 2011, there were an estimated 270,000 Indians studying overseas each year.⁶⁹ In India, as in China, the ability to afford overseas fees is improving. It has also been reported that the number of higher education providers in India is expanding without sufficient consideration of quality.⁷⁰ There are no Indian universities in the Times Higher Education ranks of the top 200 universities worldwide.⁷¹ This lack of appropriate institutions within India motivates those in the country to consider education abroad. It is estimated that Indian students account for 14 per cent of all foreign students in the UK, so they make up a significant section of the market. Nevertheless, as latest UNESCO figures from 2009 show (see chart below), the majority of students from India go to the USA to study higher education.

Destination of students leaving India for Higher Education study, 2009

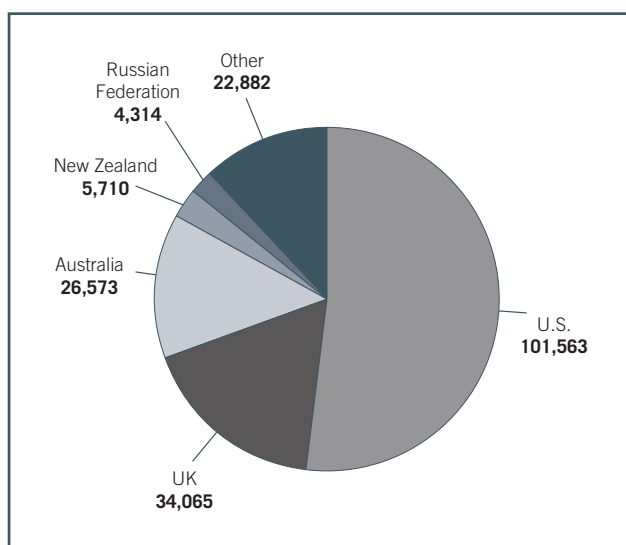


Diagram Author's own, based on data from UNESCO Institute for Statistics⁷²

There is a greater desire for higher education as well as other forms of education and training developing within India.⁷³ Only a small proportion of the population in India will have access to higher education. The Indian Government aims to increase

64 Helms, Robin Matross, 'Transnational Education in China: Key Challenges, Critical Issues, and Strategies for Success', Observatory on Borderless Higher Education, May 2008, p.3

65 Fazackerley, A. and Worthington, P. (eds.) (2007) British Universities in China: The Reality Beyond the Rhetoric, p.14

66 Helms, Robin Matross, 'Transnational Education in China: Key Challenges, Critical Issues, and Strategies for Success', Observatory on Borderless Higher Education, May 2008, p.3

67 Fazackerley, A. and Worthington, P. (eds.), British Universities in China: The Reality Beyond the Rhetoric, 2007, p.7

68 Fazackerley, A. and Worthington, P. (eds.), British Universities in China: The Reality Beyond the Rhetoric, p.8

69 http://articles.timesofindia.indiatimes.com/2011-09-05/education/30115490_1qs-world-university-rankings-asian-universities-higher-education

70 Choudah, Rahul, 'Drivers of Mobility of Chinese and Indian Students', International Higher Education, Winter 2011

71 Times Higher Education, The World University Rankings, 2011-2012

72 UNESCO Institute for Statistics, 'Top five destinations for mobile students and outward mobility ratio'

73 Chandrasekhar, C.P. and Jayati Ghosh, 'Higher Education and Expectations', Business Line, The Hindu, 6th September 2011

the Gross Enrolment Ratio (GER) from 12 per cent, as it was in 2007, to 30 per cent in 2020.⁷⁴

UK providers therefore have an opportunity to build upon partnerships already formed, for example in the UK-India Education and Research Initiative (UKIERI)⁷⁵ and to provide the education that increasing numbers of Indians are seeking. The UKTI claim that, “the quality of higher education is adversely affected by shortage of faculty and poor infrastructure”; they argue that therefore, “this gap in the provision of education offers ... opportunities for education providers from the UK”.⁷⁶ However, as discussed in detail above, the UK must remain an attractive option compared with its competitors. It has been reported that India’s higher education secretary has met with the British High Commissioner to express concerns over recent changes to the UK’s student visa rules.⁷⁷ The UK must ensure that these concerns are alleviated.

The UK already has some presence in the education system in India through partnerships and similar set ups. It was reported in 2010 that there were 83 collaborations between educational institutions in India and the UK, and 79 between those in India and the USA.⁷⁸ However, with regard to the UK establishing education institutions in India, under current legislation, it is not possible for foreign providers to offer overseas degree programmes in India. However, the ‘Foreign Education Providers’ Bill is currently going through Parliament there. This sets out guidelines under which campuses can be set up and degree programmes offered by foreign providers in India.

Brazil

Unlike China and India, the UK is not one of the top five destinations for students leaving Brazil to study higher education abroad. It is likely that language and location play a role in this. However, the UKTI reports a major shift in the corporate culture in Brazil; they claim that companies there now increasingly require staff to have English language skills. The British system of vocational education including NVQs is gaining ground there. The UKTI suggest there are opportunities for corporate training, educational IT products, green technologies for schools, distance learning and MBAs.⁷⁹

Destination of students leaving Brazil for Higher Education study, 2009

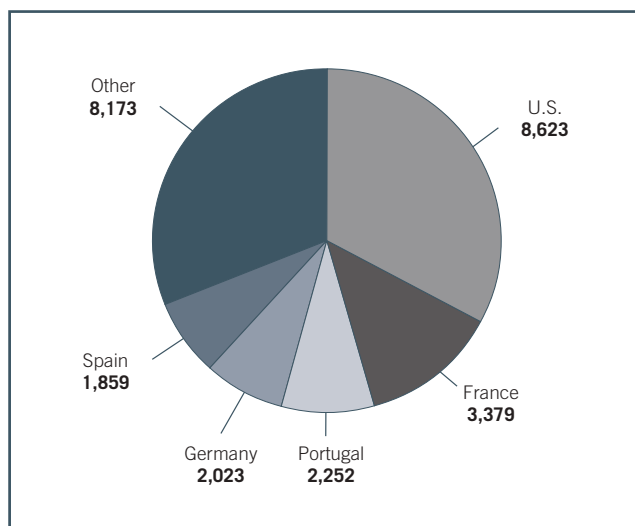


Diagram Author's own, based on data from UNESCO Institute for Statistics⁸⁰

⁷⁴ UKTI briefing – Education and Training Sector Briefing for India, p.1

⁷⁵ British High Commission, *Knowledge First. UK and India: Partners in Education*, 2011

⁷⁶ UKTI briefing – Education and Training Sector Briefing for India, p.1

⁷⁷ The Times of India, ‘Student visa curbs spark fury in UK’, 28th February 2011

⁷⁸ Business Standard, ‘Foreign Education Bill finally gets Cabinet nod’, 16th March 2010

⁷⁹ UK Trade and Investment, ‘Education and Skills Opportunities in Brazil’, June 2010

⁸⁰ UNESCO Institute for Statistics, ‘Top five destinations for mobile students and outward mobility ratio’

Conclusions

Historically, the UK has held a strong position within the international education market and it is clear that this remains the case today. Furthermore, it is an expanding market. This report has demonstrated the breadth and depth of education as a British export and the huge potential which remains to be exploited at all levels by both well established and newly emerging institutions.

The importance, therefore, of maintaining – and enhancing – this position is paramount. As demonstrated, the student visa issue needs to be sorted out. It is unwise to have such strong restrictions placed upon those we seek to encourage into the country. Alongside this, reputation management is of great importance; it must be ensured that the strong British brand of world class education is maintained. Any dilution of the standard of education will be noted by international students and trade will be taken elsewhere. The British Council needs to take a stronger lead on these issues as competition becomes ever-fiercer in future.

Long-term growth must not be sacrificed for the short-term political gains of government departments. There needs to be a consistent approach across government to help promote and develop education from British providers. The Department for Business, Innovation and Skills, the Department for Education, the Home Office, the Foreign and Commonwealth Office and UK Trade and Industry should develop a strategy to attract international students as well as promote British educational institutions overseas.

Recommendations

1. The UK government should reassess the full impact of all policies related to the export of education to ensure the potential for economic growth is optimal. The key departments here are BIS, DfE, FCO, the Home Office and UKTI
2. Make the visa process easier for valid international students
 - i. Retain the post-study work visa
 - ii. The Government should produce additional statistics showing separately the number of students entering the country as well as permanent migration. This would be more transparent as any reduction in student numbers does not represent a reduction in permanent migration. This would then ensure that the pressure to curb immigration does not result in a clampdown on international students
 - iii. Ensure the application process for international students is as straightforward as possible
 - iv. Leave it to highly trusted institutions to decide on language requirements
 - v. Ensure that bogus institutions receive the strongest penalties
3. The Government should facilitate the formation of an All Party Parliamentary Group for International Education Providers
 - i. Education providers need to have a voice and receive the focus they deserve
 - ii. In addition to forming an APPG, it would be beneficial to form an association of education providers, perhaps along the model of The Association of Private Sector Colleges and Universities (APSCU) in the USA.
4. Maintain and foster British reputation overseas. Ensure the UKTI and the British Council are doing all they can to help British institutions to develop their education-related products or services overseas and to encourage international students to the UK

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About Wild ReSearch

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Our first publication, by Edward Wild and Neil Carmichael MP, was entitled 'Who Governs the Governors? School Governance in the Twenty-First Century'. Following the launch, an All Party Parliamentary Group on Education Governance and Leadership was formed.

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