

About Universities Wales, Global Wales and Study in Wales

1. As a National **Council of Universities UK (UUK)**, Universities Wales represents the **interests of universities in Wales**. Our Governing Council consists of the Vice-Chancellors **of Wales' universities** and the Director of the Open University (OU) in Wales. **Global Wales** is a partnership, in its third year, between us, British Council, Welsh Government and HEFCW. It promotes universities in key overseas markets with a view to building new collaborative ventures, increasing Wales' visibility overseas and attracting further investment. **Study in Wales**, led by us as part of Global Wales, is the branded promotion of Welsh universities and Wales as a study destination for students.
2. We work with British Council to capitalise on opportunities to promote Wales, facilitate inward visits and promote international partnerships. We work with Welsh Government to promote studying in Wales, develop outward missions and other economic development opportunities, and work through the implications of Brexit. **UUK's International Unit (UUKi)** in our parent organisation provides support and in-depth expertise, from country briefings to immigration updates. HEFCW supports the promotion of Welsh higher education's (HE) reputation, and adds value to initiatives such as Study in Wales (eg by providing data).
3. Universities Wales, the universities and HEFCW support the **Welsh Higher Education Brussels (WHEB)** office, co-located in Wales House with Welsh Government and the WLGA. The office supports greater engagement of universities and academics in EU policies and programmes, and is a member of a network of regions with representation in Brussels.

Current activities to sell Wales to the world

4. Global Wales aims to: boost student recruitment and research collaboration through joint outward missions, inward visits and promotional activities; and enhance Wales' reputation as a study destination through Study in Wales. Our approach works best by focusing on what is distinctive about Wales, and on markets and activities where an impact can be made more effectively as 'Wales'. Our priority markets are the USA and Vietnam, although we do pursue collectively key activities in other areas such as India, China, the Middle East and the EU.
5. Study in Wales, representing all nine universities, is used: on brochures and postcards; on our website; on social media (Twitter and Facebook, the latter with 72,500 Likes); on stands at large international HE events in the USA and Europe, and associated international receptions. Study in Wales had access to 9,000 delegates at the National Association of International Educators (NAFSA) conference in the USA in May 2017. We are keen to work with Welsh Government on fitting in Study in Wales with its nation-branding proposals, for the benefit of our universities, HE, our economy and our reputation.

The role of the Welsh Government's overseas offices

6. We have worked with colleagues in Welsh Government offices in the USA on government and HE events. Offices in India and the Middle East have supported us to: increase publicity for studying in Wales; enable inward or outward visits; and establish relationships between universities and potential overseas partners. Crucially, these opportunities are spotted in-country before the connection is made with us.
7. These Government offices will be vital in identifying opportunities post-Brexit, and should be linked with **universities'** overseas offices (for example in China and India). Already well-versed

in making strategic and alumni links, and in recruitment, marketing and business development, these offices can promote Wales-related content and support overseas contracts. Welsh Government overseas offices can also build on relationships with university country specialists and pool information, where appropriate and not commercially-sensitive.

- WHEB has worked on initiatives with Welsh Government's EU office. The office is committed to supporting the European dimension of the Science for Wales Strategy by focusing on priority areas for research, and has provided a service to the Sêr Cymru and National Research Networks initiatives. Serving distinct constituencies, the volume of activities based on co-operation between the Wales House offices is limited.

Universities, internationalisation and economic contribution

- Our universities: deliver highly-skilled graduates who contribute to the Welsh economy; produce excellent research that impacts on the lives of citizens; attract international recognition; drive inclusive economic growth locally, regionally and nationally; and promote equality and health. They make a valuable contribution to a dynamic, outward-facing and competitive Wales and play a central role in strengthening our international trade and diplomatic relationships. Students and their families and friends impact on tourism and trade.

- Our universities are internationally competitive and major economic assets, bringing widespread benefits to individuals, communities and the nation. The total combined impact of Welsh universities and their students on Wales' GVA came to nearly **£2.4 billion - 4.6% of all Wales GVA** - in 2013. Welsh universities bring in



£413 million of export earnings - £218 million international revenue and £195 million in the off-campus expenditure of international students. £89 million of GVA was generated (nearly 22% of the total) and 1,756 jobs created (nearly 23% of the total) by Welsh universities in parts of Wales that do not have a university on their doorstep.

- International students make an enormous academic, cultural and economic contribution to Wales, creating more than 7,600 jobs. Of our 25,605 international students from 145 countries in 2013/14, 5,424 were EU students (4% of the student population). EU students generated £150.3 million for our economy and over 1,400 FTE jobs across the country in 2014/15. The off-campus personal expenditure of students and visitors is equivalent to more than 7% of the spending of all visitors to Wales.
- Welsh Government's stance on immigration is broadly in line with that of UUK and Universities Wales. In November 2016, the First Minister underlined the welcome for overseas students in Wales, noting that the previous UK Government was "mistaken" in its approach to student visas: 'The effect is to cut the numbers of overseas students applying to study in the UK. Not just because of new restrictive laws, but because of the damaging perception that this is not a welcoming environment any longer.' We remain concerned about the perception of UK immigration policy on potential international student applications.
- International students bring a significant, positive and immediate economic benefit, and create valuable and major long-term cultural and economic links between Wales and the world. Universities and international student recruitment have a huge role to play in Wales' future economic growth. We are eager that Welsh Government recognises and measures the export

income contribution of recruiting international students, and continues to work with the UK Government on an immigration policy that supports international student and staff recruitment.

14. Universities are involved in Wales and UK trade missions. Their expertise, and talented academics and graduates, are key in attracting inward investment – from creative industries to clinical research to new technologies. The university-industry links that impact on inward investment contribute to export growth, and attract specialist international conferences.

Wales.Com

15. Study in Wales has a positive relationship with Wales.com, which has involved our universities in an annual campaign, and we look forward to further opportunities afforded by Welsh Government's Digital Gateway Project. Study in Wales would benefit from involvement in nation branding work, and both Welsh Government's portal and the consistency and reach of Study in Wales' messages will benefit from greater digital alignment. We look forward to greater linkages between Wales.com and, for example, tradeandinvest.com through one portal.

International marketing and promotion

16. As research, innovation, public engagement, and excellent education and student experiences all contribute to the success and reputation of HE internationally, universities could play a more central role in the 'story of Wales' sold around the world.
17. Wales is the UK nation with the highest proportion of '**world leading**' research measured by its impact, with almost half of it considered as having a transformational effect on communities and the economy. Much of this can be attributed to international collaborations, which have been crucial to addressing global challenges and raising the profile of Welsh universities as partners of choice in delivering high-quality research with impact. Wales now has its first top 100 university in a prestigious academic ranking of world universities.
18. WHEB supports four groups in Wales to raise awareness of EU funding opportunities and partnership-building with universities across Europe through WHEB's membership of the European Regions Research and Innovation Network. The office and the groups concentrate on the research priority areas of the Science for Wales strategy. Latest Horizon2020 figures show that Wales has captured €76 million in 162 participations since the start of the programme in 2014. HE accounts for 65% of all participations and 77% of the funding received.
19. Universities are cited regularly in the international press for life-changing research outcomes (improving global drug dosage safety or food safety), and are credited for interesting developments (space science and telescopes or the creation of antihydrogen). Our universities have advanced areas as varied as: the prospects of endangered species; seafood sustainability; ways to treat depression; reconstructive surgery; public perceptions of the influence of climate change on Earth's ice masses; responses to community violence; the analysis of political devolution in the UK; and our understanding of both the arts and languages. Universities use increasingly innovative ways to showcase their research to world audiences, including using art and storytelling techniques.
20. Wales now houses the world's first compound semiconductor cluster; universities help to create a vibrant **research and innovation environment**, and provide a highly skilled workforce for companies looking to invest and locate in Wales. Universities can help sell Wales as a business destination through building on their collaborative track record with industry and NGOs in delivering research with real world impact. Participation in international congresses, often with thousands of exhibitors and attendees, helps to increase the university's profile among professionals and influencers; promote the university as a study destination; and

explore collaboration and research opportunities. The Sêr Cymru programme has been an effective marketing tool for Wales and Welsh HE, allowing universities to attract high-profile global and early career researchers.

21. 84% of **students** (National Student Survey 2017) are satisfied with their “excellent education and outstanding student experience” (QAA ‘key findings’). Our 25,000 international students study in a supportive and affordable environment, with bespoke services available (eg study skills provision or visits).
22. Distance learning modules in Welsh history, culture and language, discovering Wales and Welsh and the Hafan portal (providing a snapshot of contemporary Wales’ culture, language, and geography, and showing the Welsh language as a modern and natural part of Welsh culture) are aimed at taking Wales to a wider audience, with potential global reach.
23. Universities compete for students globally, and promote themselves in different ways in their priority markets. Universities have excellent paid-for links in-country (eg with agents or British Council) or attend overseas exchange or recruitment fairs. Universities have also joined Study in Wales at two of the biggest international HE expos (Europe’s EAIE and the USA’s NAFSA). There is a buy-in, commitment and enthusiasm for this joined-up approach, but we recognise that we should also encourage universities to use Study in Wales outside these events.
24. Universities promote on social media, and can target adverts towards markets using agent channels, social media (including Facebook and Instagram), google AdWords and marketing websites. Marketing content can come from marketing rather than recruitment teams, underlining the importance of a broad international view from different university specialists. Wales’ strengths might contrast in different markets: busy, progressive, urban settings can sometimes work better than scenic, rural Wales. Furthermore, the recognition of ‘Wales’ varies across international markets. Setting Wales apart from England, for example, works better in north America, while it is important that we are seen as part of the UK in other markets.
25. We would encourage Visit Wales to support tourism objectives by working with us and our networks to capitalise on visitors associated with universities – from open day visits or conference delegateions, to visits from international friends and family. We are currently discussing with Visit Wales how to use Study in Wales messages in airline-related activity. We would be happy to see access to the Wales brand extended so that Study in Wales could make use of the materials and better align with the Wales brand.

Attracting large international events to Wales

26. Universities have sponsored, hosted, or been otherwise involved with, eg: large sporting events; a popular UK science festival; and specialist international conferences. During sporting events or international summits, universities provide key infrastructure and personnel (eg international students), and collaborate with government, organisations and companies to offer accommodation and host associated events. A WHEB-organised event has led to Wales hosting a 200-delegate European Conference on advancing the societal impact of science.
27. There are further opportunities for Welsh Government to work with relevant agencies to encourage large-scale international HE conferences. There are also opportunities for Wales to offer bespoke and memorable activities for captive audiences around the events.
 - the annual EAIE, Europe’s largest international HE conference, has more than **5,000 delegates over four** days from 90 countries. It has previously taken place in Liverpool (2016), Glasgow (2015) and London (the 1990s).
 - the EuroScience Open Forum attracts more than **4,000 delegates over six days**.

- the British Council's Going Global has up to **1,000 delegates over three days**.

Implications of Brexit

28. For our universities to continue to drive the economy and take advantage of future global opportunities, Wales must be on the front foot to benefit from Brexit outcomes. Welsh Government will need to continue to work with the Westminster Government to prioritise research and innovation in Brexit negotiations and ensure that Welsh and UK universities and other partners can continue their involvement in and contribution to EU research. It will also be important to maintain Welsh Government's presence in Brussels, supporting the work of the likes of WHEB, and making it clear that Wales is open for business. We must continue to attract leading academic talent to Wales and enhance mobility opportunities for staff and students. Global competition for the best talent, including researchers, is tough and our attraction as a destination is more precarious at this uncertain time and post-Brexit.
29. Erasmus+ is a significant programme for student outward mobility, responsible for some 46% of all current mobility of UK students. Maintaining and building on levels of outward mobility will be an important way of growing the skills and experience necessary for the UK to be a global trading nation. This would be a pragmatic and cost-effective move given the expense and bureaucracy involved in setting up an alternative replacement scheme at a national level at this scale. However, continued access to Erasmus+ should be coupled with enhanced investment to grow other international mobility opportunities. From 2014 to 2016, €20.9 million was awarded to 144 projects in Wales, of which nearly €10 million was for HE (35 projects).
30. Regardless of the final EU/UK settlement, it is important that Welsh Government: continues to publicly affirm the value placed on EU students and staff and their contribution to Welsh universities; invests in supporting future international recruitment through promotional activity; and continues to provide reassurances to EU students that they will remain welcome in Wales. We must remain open to well-qualified international students, including EU students and their dependants, whatever the wider agreement on the immigration status of EU nationals. Putting up unnecessary barriers to export earnings would be illogical in a post-Brexit world.
31. We need to consider carefully how we target European markets in future, where EU students might be competing against currently-designated international students for visas. Access to grants and loans; access to Erasmus exchanges; free movement; and the perception of Wales as welcoming to EU students will all play into this. We will have to think differently about how to present ourselves – we will be competing against other English-speaking countries globally instead of being one of the few fully English-speaking options in Europe. Universities UKⁱ provides further detail about the impact of and support to universities post-Brexit.

Lessons to learn from similarly-sized countries

32. Connected Scotlandⁱⁱ is a visible, long-established and joined-up approach (comprising Universities Scotland; and Scotland's British Council, Royal Society, Enterprise Agencies, Funding Council and Government) which "promote[s] sector worldwide as a place to do business, to work and to study and has also set an ambitious target of increasing the sector's export revenue by more than 50 per cent in six years." Many of its objectives are similar to those of Global Wales. The Scottish Government invests £200k a year in the Saltire Scholarship Education. Offered to international students from priority countries, it: promotes Scotland as a learning and science nation, and as a study destination; and showcases its HE offering in international markets. Ireland, meanwhile, works with [Go Overseas](#) on a campaign (measured in terms of economic impact) costing several hundred thousand pounds to promote study opportunities for international students in Ireland through offering scholarships. Study in New Zealand has run a similar campaign.

Closing remarks

33. We should consider making better use of alumni, soft power and Welsh diaspora. More world leaders have qualifications from UK universities than any other country, and individuals such as these, together with internationally-recognised alumni and Study in Wales ambassadors (such as prominent sports stars or actors) could be engaged to promote Wales as a destination of choice for international students. We also need to ensure that the 21st century reflection of 'Wales and the Welsh' around the world is inclusive, representative, appealing, diverse, wide-ranging and modern. We must also ensure that any post-Brexit immigration system continues to support the efforts of universities in attracting talented people who have a legitimate interest in studying, teaching or carrying out research in Wales.
34. Along with trade and tourism, higher education is arguably the most visible manifestation of Wales overseas. University activity and Study in Wales can benefit Wales as a whole. Universities are part of the fabric of our communities. Working with government, industry and others, universities and the Global Wales partners will have a key role in:
- building Wales as a nation;
 - increasing visibility and exports; and
 - affecting a dynamic change in how we all pursue our overseas interests.
35. We look forward to building on our positive relationship with Welsh Government to pursue these goals.

Universities Wales, 1 September 2017

ⁱ www.universitiesuk.ac.uk/policy-and-analysis/brexit/Pages/policies-post-exit.aspx

ⁱⁱ <http://connectedscotland.org/>