



Department
for Education



Department for
International Trade

International Education Strategy: 2021 update

Supporting recovery, driving growth



 **EDUCATION
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Foreword

Joint foreword from the Secretary of State for Education and the Secretary of State for International Trade

Since publishing the International Education Strategy in 2019, the global landscape has been impacted on a scale that could not have been anticipated. The coronavirus (COVID-19) pandemic has posed significant challenges for the education sector in the UK and its international operations. The pandemic has also changed the way that education is delivered across the globe.

This update to the 2019 International Education Strategy sets out the UK government's response to the challenges and opportunities the past year has brought for the education sector. The coronavirus pandemic has tested us all. The UK government reiterates its commitment to support UK education more strongly than ever. The original principles and ambitions of the International Education Strategy have never been more relevant.

The UK boasts a world-class education offer, a global reputation and a significant presence in international markets. This promising foundation has been strengthened by our response to the challenges posed by the pandemic. The UK government has supported the sector to enable it to maintain its world leading reputation for quality by providing financial assistance, securing visa flexibilities and by bolstering support for international students in the UK. The education sector, from individual members of staff to the largest representative bodies, have met the challenges of the pandemic head on. Each and every part of the UK's education sector has gone above and beyond to handle the rapidly changing situation and demonstrated innovation and resilience.

In these unprecedented times, the internationalisation of education is vital. It will support the recovery and growth of this sector as well as help realise the many economic benefits that education exports bring to the UK. The networks created help the UK forge lasting relationships with countries around the world and

strengthen our Global Britain agenda.

The UK has agreed a deal with the European Union (EU), which is based on friendly cooperation between sovereign equals, centred on free trade and inspired by our shared history and values. Our new independent trade policy will be used to deliver more opportunities for education providers and strengthen our global leadership in the sector.

Tens of thousands of students will be able to undertake study and work placements across the world through the new Turing scheme. The scheme will be backed by over £100 million, providing funding for around 35,000 students in universities, colleges and schools to go on placements overseas, starting in September 2021, and we expect to see similar numbers of students coming to the UK in return. This scheme, in many ways, should be seen as the embodiment of our Global Britain ambitions.

Despite the global pandemic, we have made great strides in fulfilling the ambitions set out in the original International Education Strategy. In June 2020, we were delighted to announce Sir Steve Smith as the government's International Education Champion. Sir Steve's passion, wealth of experience and expertise in the education sector made him the ideal candidate and he is already making a positive difference.

In 2020, the new student immigration route was launched, which has streamlined the immigration process for international students. The new route brings a number of benefits, such as providing greater scope for international students to switch into other routes from inside the UK. The Graduate route, due to be launched in summer 2021, will allow eligible students to stay in the UK to work, or look for work, for 2 years (3 years if studying at PhD level) after they have completed a degree in the UK. It is a world-class student immigration offer supporting our world leading education sector. In response to the ongoing coronavirus pandemic, the government has prioritised safety and flexibility, ensuring that international students have been able to start, or resume, courses in the confidence that they will not be penalised for

events outside their control. Our universities have done an excellent job in providing extraordinary pastoral support for those international students we host in this country, enhancing this country's reputation.

The UK government is proud to support the whole of the sector, including independent schools, early years providers, EdTech and English language teaching, in addition to higher education. We believe the UK education sector is more than the sum of its parts and that's why the International Education Strategy was published in 2019 and why the government and the sector continue to work together to drive its recommendations.

At the heart of this update, we are reaffirming our commitment to the ambitions of the 2019 strategy to increase the value of our education exports to £35 billion per year and the number of international students hosted in the UK to at least 600,000 per year. We reaffirm our ambition to achieve both by

2030. This update will set out how the government will support the sector's journey from recovery to sustainable growth.

Crucially, we are going beyond the original strategy and are setting out new ways in which growth can be promoted. One example is our work with teacher training providers to establish a new international teaching qualification, 'International Qualified Teacher Status'. This will be based on our world-renowned teacher training standards and methods, and is intended to be achievable in schools around the world.

The ingenuity, ambition, and excellence of UK exporters will continue to see the education sector flourish but the government has a role to play to support wherever we can. And we will.

This update is just the next step in taking our shared ambitions forward and we promise to ensure that the UK government fulfils its responsibilities in doing so.



The Rt Hon Gavin Williamson CBE MP
Secretary of State
for Education



The Rt Hon Elizabeth Truss MP
Secretary of State for
International Trade and
President of the Board
of Trade and Minister for
Women and Equalities

Foreword

Foreword from Professor Sir Steve Smith, HMG International Education Champion

It is with absolute delight that I pen this foreword to the International Education Strategy 2021 update. In the original 2019 International Education Strategy, the UK government committed to appoint an International Education Champion, whose role it would be to spearhead overseas activity for UK education and address international barriers to trade. Last summer, I was honoured to be offered this role and I heartily accepted.

My task is clear: to champion UK education overseas. Over the next few years, I will therefore be working closely with the sector, government colleagues and the UK's devolved administrations to showcase our first-in-class education offer to overseas partners, consumers and investors. I will work closely with overseas governments and officials to deepen government-to-government partnerships, helping to open new international opportunities for the sector and working to resolve market access barriers in priority markets.

In doing so, I will represent the entirety of the UK – Scotland, Wales, Northern Ireland and England each have a unique landscape for trade and investment in education and I will work closely with the respective governments of each nation to champion these offers and to raise the profile of UK education across the board.

Coronavirus has presented challenges in every aspect of global society. In many respects, education has been a particular and tangible casualty of the pandemic. During the pandemic, education provision throughout the world, at all levels, has been put on hold and delivery modes altered. The effects of this will be longstanding and will have a very human impact on skills, on equality and an economic impact on productivity and income. I write this, not to paint a

bleak picture, but to put forward a wider context, in which I believe that UK education has much to offer the rest of the world. This is also the case as the UK establishes new trading relationships with our key global partners, having transitioned out of the EU.

You will read in this update examples of the innovation and agility of the UK's education sector and the steps business and organisations have taken to respond to the pandemic. The rapidity with which education suppliers reworked their delivery models and transitioned to online provision was, and continues to be, outstanding. This update also sets out the extensive support that the government put in place to support the sector and commits to further action, to support UK education from recovery to sustainable growth.

I am overwhelmed by the quality and enthusiasm of all parts of the UK education sector. Despite these difficult times, I am absolutely convinced that there is huge potential for us to grow our international education activity. I can assure you that I will passionately support every part of the sector's ambitions and will work tirelessly to advance its interests.

I hope you enjoy reading this update to the International Education Strategy. I hope it leaves you with a clear impression of the brilliance of UK education, our shared commitment to supporting its growth, and an unequivocal sense of all it has to offer the world, now more than ever.



Professor Sir Steve Smith
HMG International
Education Champion

Steve Smith

EXECUTIVE SUMMARY

The UK is recognised across the world for its high-quality education and research. Education exports make an important contribution to the UK economy as well as helping us build global relationships. With international competition increasing, we must take steps to preserve the UK's world leading position.

That is why the government published the International Education Strategy: global potential, global growth in March 2019. This strategy set out 2 key ambitions to achieve by 2030:

- to increase education exports to £35 billion per year
- to increase the numbers of international higher education students studying in the UK to 600,000 per year

Since we published the International Education Strategy, the global context has changed in many ways. The UK has now agreed a deal with the European Union, and leaving the EU means we can use our newly independent trade policy to establish new trading relationships with global partners.

The coronavirus pandemic has also had a significant effect in the UK and around the world. This has strengthened the case for international co-operation and shown how important it is that we support the recovery and sustainable growth of international education and education exports.

This update outlines the progress made since we published the International Education Strategy. It also considers the steps we need to take to support the sector to recover and grow sustainably.

The government remains committed to achieving the 2 original headline ambitions of the International Education Strategy, despite the effects of the pandemic. We will work across government, the devolved administrations, the UK education sector and through our international relationships, to achieve this.

Progress since 2019

Good progress has been made since the publication of the International Education Strategy in 2019. A number of priorities have been delivered, including:

- the appointment of the International Education Champion, Sir Steve Smith, in June 2020.

- the introduction of a new Graduate route for international students. This will provide a period of 2 years for undergraduate or master's students (3 years if studying at PhD level) to stay in the UK to work, or look for work, after they have completed their degree in the UK.
- the introduction of a new points-based immigration route, with Student and Child routes. These streamline the immigration process and improve the application process for international students.
- a new international education scheme, the Turing Scheme, which will start in September 2021. This will provide funding for around 35,000 students in universities, colleges and schools to go on placements overseas.

We have also taken important steps to support the education sector during the coronavirus pandemic. Education providers and the wider education sector have worked hard to support international students. UK government support has included:

- putting in place measures to support international students, including providing student hardship funding and introducing immigration flexibilities to support students who cannot meet immigration requirements, as a result of coronavirus
- communications, guidance and messaging to support students and providers
- providing opportunities to promote trade virtually

Supporting recovery and growth

There are many challenges facing the education sector at present. We have considered the steps needed to support progress against the 2 key ambitions of the International Education Strategy, during and beyond the global pandemic.

We are also committed to making sure that growth in these key areas is sustainable over the longer term. For example, we will support the sector to widen the range of countries and regions from which international students are recruited.

This update proposes several areas where we can help increase the value of education exports and international student numbers:

- **The International Education Champion:** this update sets out the priority countries and regions in which the International Education Champion, Sir Steve Smith, will focus his activity. Sir Steve's immediate priorities are India, Indonesia, Saudi Arabia, Vietnam and Nigeria. His role will focus on growing export opportunities in these countries. Other important regional markets for the International Education Champion will include: Brazil, Mexico, Pakistan, Europe, China and Hong Kong. The government will also work with Sir Steve and the British Council to identify and resolve barriers which prevent the recognition of online and blended (a combination of offline and online) learning internationally.
- **Building lasting global partnerships:** there is an important role for the government to facilitate partnerships across the world, including in the Champion's priority countries, but also beyond these. This includes Europe, the Indo-Pacific region, Sub-Saharan Africa and Central Asia. Our new Turing scheme will also help ensure we improve mobility between UK students and all regions of the world.
- **Enhancing the international student experience from application to employment:** the government will work with sector bodies such as the Universities and Colleges Admissions Service (UCAS), the UK Council for International Student Affairs (UKCISA), the Office for Students (OfS), Universities UK International (UUKi) and the Confederation of British Industry on areas such as:
 - the student application process for international students
 - graduate outcomes and employability

- the academic experience of international students
- alternative student finance

- **A new international teaching qualification, 'International Qualified Teacher Status' (iQTS):** the UK government will work with teacher training providers to establish a new teaching qualification that will provide an opportunity for teachers around the world to train to world respected domestic standards.
- **Increase export opportunities for UK chartered professional bodies and UK special educational needs and disabilities (SEND) providers:** DIT will support UK chartered professional bodies and SEND providers to find opportunities to increase their education exports.

With these additional actions, added to those set out in the original strategy, the government will work with the UK education sector to move from recovery to sustainable growth.

In March 2019, the government published the International Education Strategy: global potential, global growth. This strategy set out the government's aim to drive international ambition across the UK education sector and champion the breadth of its international offer. It set out 2 key ambitions to achieve by 2030: to increase education exports to £35 billion per year and to increase the numbers of international higher education students studying in the UK to 600,000 per year.

This update to the International Education Strategy is timely, not least because the UK has now agreed a deal with the EU which is based on friendly cooperation between sovereign equals. Centred on free trade and inspired by our shared history and values, this has established a new trading environment from 1 January 2021.

The global landscape has also shifted in ways we could not have foreseen in March 2019. The coronavirus pandemic has brought about significant and profound challenges for the education sector in the UK and countries around the world, demonstrating the need to prioritise the sustainability of our education exports.

The impact of the pandemic has served to bolster the case for international co-operation and partnership. Not only do education exports support the recovery of the UK economy, they also have far-reaching benefits beyond. Education partnerships help forge international relationships, strengthen the UK's soft power and foster opportunities for collaboration and knowledge exchange. Student mobility in both directions, with its substantial soft power, economic and cultural benefits, is a vital component.

The UK remains in a competitive position on the world stage and an attractive option for international students. The 2020 Soft Power Ranking, published by the Higher Education Policy Institute (HEPI), found that over 1 in 4 countries around the world have a Head of State and/or a Head of Government educated in the UK. This places the UK second to the US in the

rankings (58 countries). We have a world-class education system, which we are committed to maintaining and strengthening, as also indicated in the government's recent interim response to the Post-18 Review of Education and Funding in England. Nonetheless, the UK is facing increasing levels of competition in international student recruitment and in the provision of transnational education (TNE). We must do more to promote both the benefits of studying in the UK and the quality of the UK's education system overseas. And we must do more to promote the full spectrum of the UK's education exports, from Education Technology (EdTech) to English language training (ELT) to professional examinations.

To meet the demands of a rapidly expanding global teacher training market, we will also create a new international teaching qualification, iQTS. This new qualification will provide further opportunities for organisations to export teacher training based on the worldwide recognised quality and reputation of our domestic approach.

At the same time as driving growth in international student recruitment overall, it is also essential that recruitment is from a diversified base, in order to remain sustainable in the long term.

The purpose of this update is not to replace the International Education Strategy, but to reflect on the steps needed to achieve the ambitions it set out within a changing global context. Accordingly, the government is restating its original commitment to increase the number of international higher education students coming to the UK and to increase the value of education exports. Crucially, the government is directing its efforts at paving the way for the sector to move from recovery into sustainable growth.

1. A changing global context

1.1 Supporting a global education agenda

The government's approach to international education is rooted in a desire to build lasting and positive relationships around the world and establish the UK's global position as a partner of choice. It is paramount that the government continues to develop the UK's soft power globally and supports the UK education sector to build its expertise. Encouraging the sector to export its products and services is key to this approach.

It is for this reason that the International Education Strategy championed a 'whole-of-government'



approach to ensure effective join-up in international education activity across government. This has been facilitated through structures put in place by the Department for Education (DfE) and the Department for International Trade (DIT) to support the implementation of the 2019 International Education Strategy. These include the enhanced Education Sector Advisory Group, chaired by DfE and DIT ministers, with representation from the sector, and a cross-government, UK-wide committee, chaired by government officials. This has helped facilitate collaborative progress on international education across government.

1.1.1 International education across the UK government

Overseas development and diplomacy

The new Foreign, Commonwealth and Development Office (FCDO) will unite development and diplomacy into one department, which brings together the best of the UK's international efforts. This will demonstrate the UK acting as a force for good in the world and will support the full range of our world leading assets, including academia, science and research.

The UK is committed to its world-class aid programme, which remains at the heart of our foreign policy. The UK has one of the largest development budgets in the world, and world-beating development expertise and partnerships. In 2018, the UK government spent £979 million of Official Development Assistance (ODA) on education.

The FCDO's objectives will be shaped by the outcome of the Integrated Review. This Integrated Review is the biggest review of foreign, defence and development policy since the Cold War.

Research and Development

Research, science and innovation are central to global prosperity, sustainability, security and development, and key to our economic fortunes. The coronavirus pandemic has demonstrated that high-quality research is increasingly a global endeavour. That is reflected in the UK government's Research and Development (R&D) Roadmap, published in July 2020. As part of the Trade and Cooperation Agreement

(TCA) agreed with the European Union, the UK will participate in the next EU R&D funding programme, Horizon Europe, subject to the finalisation of the programme regulations by the EU. As part of the Roadmap, the government has set up an Office for Talent, which will take a new and proactive approach to attracting and retaining the most promising global science, research and innovation talent to the UK.

1.1.2 Devolved Administrations and international education

As set out in the 2019 International Education Strategy, education is a devolved policy area and therefore fully the responsibility of the Scottish, Welsh and Northern Irish governments. This strategy therefore represents UK government policy and not that of the Devolved Administrations. However, the governments of Scotland, Wales and Northern Ireland are key partners in ensuring that the International Education Strategy holds relevance for the whole of the UK, and they have been consulted and engaged in its development. The breadth of work being undertaken on international education by the devolved administrations reflects the common ambition and purpose to increase international student numbers and education exports.

The Northern Ireland Executive works closely with partners and stakeholders to promote Northern Ireland as a destination of choice for international students and to support its education institutions in realising their international strategies and ambitions.

The Scottish Government's international aims, ambitions and strategic objectives for Scotland,

across all areas, including research and higher education, are set out within its overarching International Framework. Underpinning activity includes its ongoing membership of 'Connected Scotland', a strategic sectoral partnership formed to promote Scottish universities internationally. Connected Scotland's work is also linked into the successful Scottish multi-sectoral marketing and promotional campaign 'Scotland is Now' and its continuing programme of phased overseas activity. Scotland's Saltire Scholarships continue to be the flagship scholarship offer of the Scottish Government to international students. However, 2020 also saw new ministerial commitments to exploring additional scholarship programmes for international students.

The Welsh Government's International Strategy, published in 2020, commits to working with education institutions to increase the number of international students in Wales. The Welsh Government is a partner in Global Wales which promotes Wales' world-class higher education sector internationally and provides strategic support to universities in a small number of target markets, namely Vietnam, the USA and India. Initiated and led by the sector via Universities Wales, project partners also include British Council Wales and the Higher Education Funding Council for Wales (HEFCW). Global Wales activity ranges from marketing and recruitment to research and partnerships and funds a number of scholarships, including some prestigious awards in partnership with the Chevening, Gilman and Fulbright Scholarships. More broadly, Wales' international education activity is based on open policy dialogue and sharing best practice through a system-to-system approach.



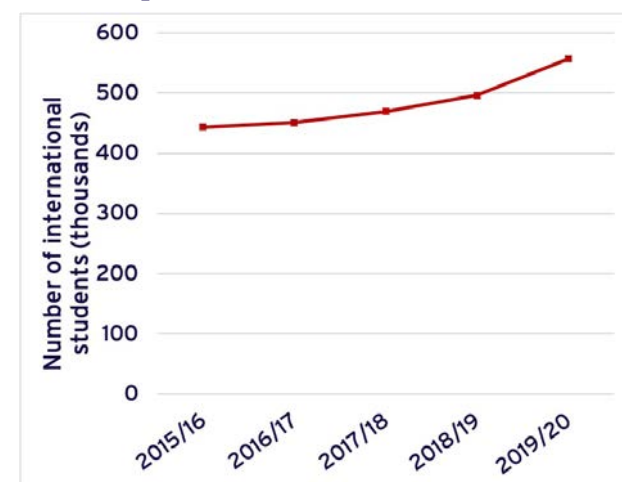
1.2 The value of the education sector's international activity

The UK has long been recognised across the world for the quality of its education and research, and education exports play a vital role in supporting the UK economy. International education enhances the UK's soft power, through promoting its reputation, developing people-to-people links and government-to-government partnerships. It also attracts foreign nationals to learn within and from the UK education system.

The education sector has valuable expertise. This makes the UK a desirable partner for international collaboration and well-placed to engage on the world stage. This includes working with our international partners to develop a coronavirus vaccine and to provide innovative solutions to the challenges the pandemic has created for mobility and other forms of educational and scientific collaboration.

However, as set out in the 2019 International Education Strategy, we must work to preserve the UK's market share and the sustainability of our international student recruitment through a suitably diverse market base, in the face of increasing global competition. The effects of coronavirus have strengthened the case for targeted interventions at a government and sector level, to support recovery and promote sustainable growth.

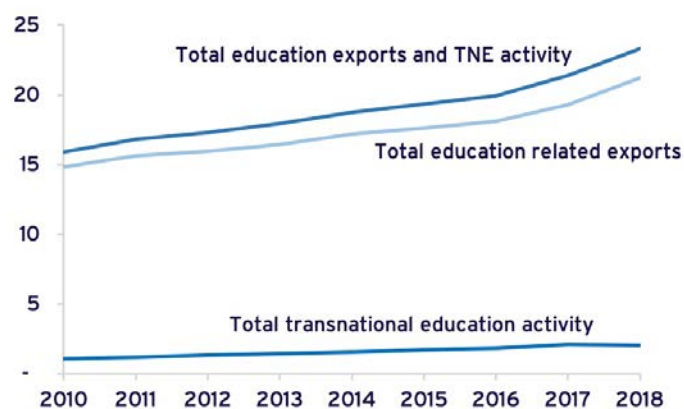
Figure 1: Non-UK domiciled students in UK higher education providers



Source: Higher Education Statistics Agency (HESA)

1 HESA, 2021, 'HE student enrolments by domicile 2015/16 to 2019/20'
 2 Source www.englishuk.com/facts-figures#contribution

Figure 2: UK revenue from education related exports and transnational education activity (£billions and current prices)



Source: DfE, 2020, UK Revenue from Education Related Exports and Transnational Education Activity in 2018

Growth figures pre-dating the coronavirus pandemic tell a positive story. Figure 1 shows growth in non-UK domiciled higher education students studying at UK providers, between 2015/16 and 2019/20. Numbers remain relatively constant between 2015/16 and 2016/17 and rise more steeply between 2017/18 and 2019/20. In the 2019 to 2020 academic year, the UK hosted around 560,000 international students. This was an increase of around 12% since 2019/20,¹ the largest of the decade and driven partly by a large increase in Chinese and Indian students. The total number of students from India more than doubled from 27,505 in 2018/19 to 55,465 in 2019/20.

Beyond higher education, English UK estimate that English language students generate around £1.4 billion in export earnings for the UK each year.² An array of businesses from FTSE 100 companies to small or medium-sized enterprises (SMEs), in the skills, qualifications, and educational technology (EdTech) sectors are also crucial contributors.

Overall, education exports data for 2018 show that between 2010 and 2016, revenue gained from

education exports rose at a consistent pace each year, from a base of just under £16 billion in 2010. This pace increased between 2016 and 2017. In 2017, education related exports and TNE activity were above £20 billion for the first time, reaching £21.4 billion, and increased again in 2018 to £23.3 billion. Since 2010, the estimated value of education related exports and TNE activity has risen by 46.7% in current prices³.

Although this data from 2018 is the most recently available, it pre-dates the launch of the International Education Strategy, and the policy reforms contained within it. An increasingly competitive global environment, in addition to the present vastly changed global context, mean that maintaining this upwards trajectory has required, and will continue to require, significant and concerted efforts across the UK government and the education sector.

Maintaining and increasing the value of education exports brings economic benefit at national and regional levels. For example, a 2018 report by HEPI and Kaplan estimated the total net economic benefit from international students starting their studies in the UK in the 2015 to 2016 academic year to be £20.3 billion.⁴ International students contribute significantly to the 'levelling up agenda' too. The report also concluded that international students support regional growth benefiting almost every

parliamentary constituency in the UK. They calculated that international students contribute an average of £31.3 million of economic benefit to the UK economy per parliamentary constituency - equivalent to £310 per member of the resident population.⁵

However, the benefits to the UK of hosting international students go far beyond the immediate impact of tuition fees and local spending in university towns. Through teaching students across the world, and forging close relationships with institutions and governments, we increase trust in the UK overseas. People who trust the UK are roughly twice as likely to want to engage with it in future (including in business),⁶ and the global success of the UK's cultural and educational sectors is core to the country's international attractiveness.⁷

In terms of measuring education exports, it is important that the government maintains its focus on improving education exports data. This was set out in Action 9 of the 2019 International Education Strategy, in order to give a clearer picture of the size and trajectory of education exports each year. The government will improve the accuracy and coverage of this data and will work closely with the sector to plan and undertake these improvements.

3 DfE, 2020, UK Revenue from Education Related Exports and Transnational Education Activity in 2018
 4 The Higher Education Policy Institute and Kaplan Pathways, 2018, The costs and benefits of international students by parliamentary constituency
 5 Ibid
 6 British Council, 2018, The Value of Trust
 7 British Council, 2018, Soft Power Superpowers



1.3 International Education Strategy 2019: progress update

Since the publication of the International Education Strategy in 2019 we have made considerable progress. We have successfully delivered many of the planned actions and, in some areas, exceeded what we set out to do (further detail in Annex A). This progress has accompanied a range of additional support packages for specific sub-sectors, which are set out in more detail in section 3.

The International Education Champion

In June 2020, the Secretaries of State for Education and International Trade appointed Professor Sir Steve Smith as the International Education Champion. The Champion was appointed to help grow international opportunities for UK education. He will help to connect the sector with overseas opportunities and help overcome international trade barriers.

Since his appointment, Sir Steve has been supporting the sector and the government virtually until it is safe to travel overseas. He has engaged widely across the sector and with the devolved administrations. DfE and DIT, the wider UK government and the British Council will support Sir Steve's activities in priority countries and regions.

Action 1 (2021)

The International Education Champion's immediate priority countries are: India, Indonesia, Saudi Arabia, Vietnam and Nigeria. These priorities reflect where there is significant potential for growth and where the Champion could both open up opportunities and address barriers to that potential. Other important regional markets for the International Education Champion will include Brazil, Mexico, Pakistan, Europe, China and Hong Kong.

This work will focus on increasing education exports, diversifying the recruitment base for international students, and addressing market access barriers, such as mutual recognition of online and blended (a combination of offline and online) education provision. Sir Steve's activity will complement relevant government ministerial

visits and HM Trade Envoy promotional work.

A competitive immigration offer

The UK's immigration offer for international students was an important element of the 2019 International Education Strategy and underpins how we can communicate the attractiveness of the UK's offer to a diverse international student market. The UK government has taken a number of steps to further improve this immigration offer.



A new Graduate route will be launched in summer 2021. This route will provide a period of 2 years for undergraduate or master's students to stay in the UK to work, or look for work, after they have completed their degree in the UK. International doctoral graduates will be able to stay in the UK for 3 years after they have completed their studies in order to contribute to the UK economy.

Distance/blended learning is permitted throughout the 2020 to 2021 academic year. The government has confirmed that international students studying by distance/blended learning will remain eligible to apply for the Graduate route provided they arrive in the UK to complete one term's face-to-face learning. More detail on

this concession can be found on gov.uk.⁸

The new points-based immigration system, which includes new Student and Child Student routes, has streamlined the immigration process and improved the application process for international students. The Student route, which improves on the previous Tier 4 route, extends the window in which prospective students can make immigration applications from outside the UK, removes study time limits at postgraduate level and allows students at all levels to apply for further leave as a student or to move into another immigration route from within the UK. It retains the core tenets of the Tier 4 route which are: sponsorship at a licensed provider, demonstration of English language ability and the ability of the student to support themselves in the UK. However, the new Student route is simpler and more streamlined for sponsoring institutions and their students, ensuring we remain competitive in a changing global market. Changes to the student migration system have been developed through extensive engagement with the sector and take into account the recommendations made in the Law Commission's report on the simplification of the immigration rules.

Study of up to 6 months in the UK is now permitted under the standard visit route through which most visitors and tourists will come to the UK. The 6 to 11 month short-term English language study route remains in place, allowing English language students to come to the UK without sponsorship.

The cumulative impact of these changes means that the UK will have one of the most attractive and competitive student migration regimes of any country in the world.

Free Trade Agreements (FTAs)

Having left the EU, the government has the ability to set its own trading agenda with its key international partners. Consequently, teams from both DfE and DIT have engaged extensively with the key stakeholders to determine how ongoing and future FTAs, as well as wider trade policy, could benefit the sector. These negotiations are opportunities to enhance the UK's international role, improve market access and deepen co-operation arrangements in education.

To date, DIT has agreed trade deals with 63 countries,

as well as with the EU, accounting for £897 billion of UK bilateral trade. Throughout 2021, we will be adding to these deals, and negotiations are already underway with the US, Australia and New Zealand.

Action 2 (2021)

The Department for International Trade and the Department for Education will promote education in future FTAs and ensure the sector's views are represented.

Internationalisation and outward mobility

The International Education Strategy set out the importance of global mobility and exchange in forging international partnerships. Cultural exchange helps build important business, political and diplomatic bridges around the world. Supporting internationalisation, including opportunities for study and training abroad, helps us to create a new generation of internationally mobile people who can succeed in an increasingly global marketplace.

International experiences enrich the education and personal development of UK students and break down barriers to social mobility.

In support of these ambitions, the government has announced the introduction of a new international educational scheme with a genuinely global reach. The Turing scheme will be backed by £110 million, providing funding for around 35,000 students in universities, colleges and schools to go on placements overseas, starting in September 2021.

The new scheme will also seek to widen participation in international mobilities, including students from disadvantaged backgrounds and areas which did not previously have many students benefiting from Erasmus+.

The scheme will provide similar opportunities for students to study and work abroad as the Erasmus+ programme, but will be genuinely global and deliver enhanced value for money for taxpayers.

The Turing scheme will have grant rates which are broadly similar to the levels under the Erasmus+ programme and individual support grants aligned with the cost of living in

⁸ Home Office, 2020, Coronavirus (COVID-19): Student sponsors, migrants and short-term students

the destination country, as well as providing additional support for disadvantaged and SEND students across higher education (HE), further education (FE), Technical and Vocational Education and Training (TVET), and schools.

Schools, FE/TVET and HE providers from across the UK will be able to apply for funding through the Turing scheme's online application service. Their applications will be assessed to ensure they are facilitating high quality mobility opportunities, widening participation and offering career building opportunities that will give participants the hard and soft skills sought by employers, whilst providing socially and culturally enriching experiences for their participants. We expect tuition fees to be waived for Turing scheme participants, consistent with the arrangements for Erasmus+.

The UK is a world leading destination for study and research, with 4 universities in the world's top 10 and 18 in the top 100, hosting more foreign students than any other European country. The UK will have considerable appeal as a destination and partner in international exchanges. The Turing scheme will provide funding for outward going students and will enable schools, colleges and universities to build reciprocal relationships on a truly global basis with incoming students' costs covered by their own governments or institutions.

To support transition to the new scheme, the existing Erasmus+ delivery partner will deliver the Turing scheme. This consortium, comprising the British Council and Ecorys, has managed the Erasmus+ programme as the UK's National Agency for a number of years.

The Turing scheme website⁹ (www.turing-scheme.org.uk) contains the detailed information on the scheme. A call for bids will open in March 2021. UK providers should review the information and speak to potential overseas partners ahead of making their application.

Under the Withdrawal Agreement negotiated with the EU, the UK will continue to participate fully in the current (2014 to 2020) Erasmus+ and European Solidarity Corps (ESC) programmes. This means that the projects successfully bid for during the current programmes will continue to receive EU funding for the full duration of the project, including those where funding runs beyond 2020 and the end of the transition period.

1.4 Responding to the coronavirus pandemic

The coronavirus pandemic has profoundly impacted how education across the world is delivered and experienced. Many education providers temporarily closed or moved towards online delivery. Travel restrictions have impacted international students' access to education, and potential reductions in exports risk significant financial implications for the UK's education institutions.

In the UK, the government has, hand in hand with the sector, taken action to mitigate the worst effects of the pandemic and will further assess how best to navigate its consequences. The education sector rapidly and innovatively rose to the challenge, acting in the best interests of students to protect both their health and education. Many education exports, from ELT to curriculum development and examinations, have been successfully transitioned online. UK universities began the 2020 to 2021 academic year from a default position of blended models of provision, involving a mix of online and in-person learning to reduce physical contact. They continue to adapt delivery, including delivering learning through a mixture of remote and in-person delivery, where appropriate, in accordance with the latest public health guidance to ensure student safety.

Work to ensure that online learning is truly innovative and delivers high-quality outcomes is ongoing across the sector. For higher education in England, in addition to monitoring by the OfS to ensure provision remains high-quality, this includes a review into digital teaching and learning. This review, led by Sir Michael Barber, the outgoing chair of the OfS, is due to be published in late February 2021. It will consider how universities and other higher education providers can continue to deliver high-quality digital teaching and learning. It will explore the use of digital technology to deliver remote teaching and learning during the pandemic, build on the lessons learned, and explore opportunities that digital teaching and learning offers English higher education in the medium to longer-term.

Case Study

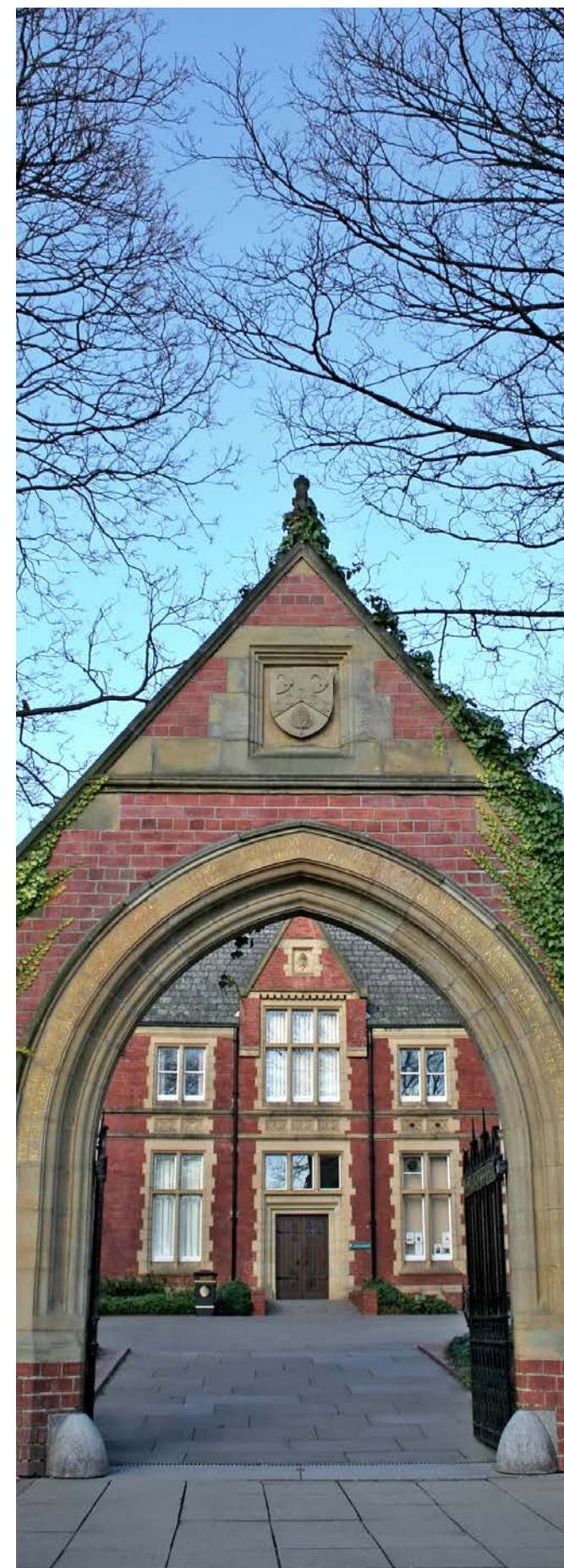
The University of Leeds

The University of Leeds, with 38,000 students and 9,200 staff, moved quickly to online provision as a result of the pandemic in March 2020. This included lecture, seminar and tutorial delivery, and academic and pastoral support for students.

In preparation for the 2020 to 2021 academic session, the university created a set of delivery principles centred on an active learning approach for its students, in order to deliver a high-quality, research-based education. This will be delivered through a hybrid learning approach.

Along with pre-prepared teaching materials and activities, teaching staff will be supporting students' learning, using virtual classroom technologies in timetabled sessions. This will enable students in Leeds and those studying remotely to engage in synchronous classroom-style learning.

The University of Leeds has also used their expertise in online learning to collaborate with FutureLearn and the Institute for Coding to create a suite of online courses to support digital skills across the country. These courses, co-created with a number of university partners, saw over 400,000 learners from around the world as of June 2020. They are now included in the Skills Toolkit, the government's new online platform offering free digital courses to help people build their skills, progress in work and boost their job prospects.





Case Study

Sedbergh School and its Chinese partnership

In February 2020, the Headmaster of Sedbergh School and the Principal of its partner school, Rong Qiao Sedbergh School (RQSS) utilised their partnership. They worked incredibly closely in order to mitigate the impact on their students of the escalating cases of coronavirus. When the Principal of RQSS became the pathfinder for Sedbergh's online teaching, Sedbergh offered support through procuring the best of British EdTech from Century Tech, enabling the school to maintain high standards of education.

A multi-disciplinary Coronavirus Taskforce was assembled to consider scenarios and establish links with schools in South East Asia. Sedbergh made an early decision to prepare for online learning and spent 3 weeks training staff and stress-testing systems before the UK government closure of schools on 23 March 2020. By then Sedbergh had established a pattern of regular communication with parents, including briefings about the closedown process and provision for pupils who could not travel immediately. The result was that school recommenced with an online whole-school assembly at 8:05 on 25 March 2020, followed by lessons and afternoon sports. With small adjustments, Sedbergh did not miss a single day of school and its attendance rate averaged 96%. Pupils received regular tutorials, pastoral support and a range of daily challenges.



Case Study

UK EdTech companies and their collaboration with the Mexican Ministry of Education

At the start of the coronavirus pandemic, the Ministry of Education in Mexico launched the 'Aprende en Casa' (Learning at home) project, creating a platform to provide students of all ages across the country with key resources for home study. Three UK EdTech companies, Little Bridge, Mangahigh and Twig Education, worked with the Mexican government to provide their world-class services to the children using this platform.

English Language Learning company Little Bridge designed bespoke English lessons for students aged 6-12 years. The lessons were based on Little Bridge's award-winning English Language Learning content and gave children in Mexico free access to the company's global community of young learners, or 'DigiPals'. The project received considerable acclaim locally and the Minister of Education publicly expressed his gratitude for the solidarity and creativity of this response to a national crisis.

Mangahigh, a game-based maths platform, supported governments with 100% free access to its platform during school closures. In Latin America, Mangahigh supported Mexico, Peru, Colombia and São Paulo. In Mexico, through its support for the 'Aprende en Casa' platform, Mangahigh has had over 1350 registrations. It has received excellent feedback from teachers, who say that their students feel less stressed by distance learning when playing Mangahigh games.

Twig Education worked alongside the Mexican government to provide students and teachers with free access to STEM content, such as their award-winning science videos, instructional materials, lesson plans, independent study packs and online readers in Spanish, through the Aprende en Casa platform. More than 11,000 users accessed the company's 'Twig', 'Tigtag' and 'Tigtag Junior' platforms. Twig's films were broadcast on national television as part of the globally known initiative, TV Educativa. Twig is also collaborating with Ministries of Education in Colombia, Uruguay, Peru, Guatemala and Spain, offering access to STEM resources, contributing to improve science literacy globally.

Little Bridge, Mangahigh and Twig Education demonstrated the UK's strengths in the EdTech sector and the role it has to play in global education throughout the coronavirus pandemic and beyond.

Supporting existing international students

The government took steps to encourage as many students as possible to choose the UK as their study destination for the 2020 to 2021 academic year and beyond. We have also consistently taken action to support international students already studying in the UK.

For international students already studying with a UK provider, the government quickly put measures in place to ensure that they were not negatively impacted if unable to comply with certain immigration rules, as a result of coronavirus. This included publishing and regularly updating bespoke guidance. Other mitigations included allowing international students to undertake distance learning, allowing all sponsored students to

make in-country applications regardless of their type of sponsor, and increasing the ability of higher education providers to self-assess English language ability.

In addition to government support, the sector has responded admirably to the challenge, ensuring those international students who remain in the UK are taken care of and have continued access to accommodation and essential services.

The Minister for Universities worked closely with the OfS to ensure that providers in England were able to draw upon existing funding, to provide hardship funds to support all students (including international) impacted by the pandemic. As a result, for the academic year 2020-2021, higher education providers are able to draw on £256 million of Student Premium funding towards

student hardship funds, including the purchase of IT equipment and mental health support, as well as to support providers' access and participation plans. In addition, the government made up to £20 million of hardship funding available in December 2020 to help students, including international students, impacted by the pandemic. This was followed by an announcement of a further £50 million of student hardship funding on 2 February 2021.

The Scottish Government announced in January 2021 £30 million of additional funding to both support students suffering hardship and institutions for lost revenue as a result of pressures arising from accommodation costs. This announcement builds on the £37 million package of support the Scottish Government has already provided to support students during the pandemic.

Similarly, in Wales, the Welsh Government provided an additional £50 million in the 2020 to 2021 academic year to support students, including international students, in terms of mental health, wellbeing and hardship.

The UK government will continue to review guidance and regulations, in order to support international students and student recruitment as a result of coronavirus. This includes consideration of further immigration concessions if required.

Communicating the UK's offer

The government has been clear that our world-leading universities, which thrive on being global institutions, will always be open to international students. DfE and DIT have worked closely with FCDO diplomatic missions, other government departments and the UK education sector to reassure prospective international students in higher education, pathway providers to higher education, boarding schools, and those studying English language courses that the UK offers a world-class education and remains a safe and tolerant place to study. The Study UK campaign, which markets the UK as a study destination, and is co-funded by DIT and the British Council, invested £1 million in a tactical campaign across 16 key markets to further support this objective and to ensure that this



messaging reaches students from a diverse range of markets.

This campaign has responded to the opportunities afforded by a shift to online recruitment, to extend its global reach. Alongside the campaign, British Council teams across key UK recruitment markets are developing online platforms with customised digital solutions. These platforms are enabling UK universities to contact students across Europe, South Asia and East Asia and this complements global Study UK messaging to prospective international students.

DfE has also supported UUKi to produce guidance for the sector on supporting international students through their arrival to the UK, including specific support on self-isolation requirements, where necessary. UUKi also launched their #WeAreTogether campaign to showcase the ways universities are helping fight against the coronavirus pandemic and maintaining a welcoming and inclusive global community.

DfE, DIT and FCDO will continue to support the sector in the communication of a coordinated, UK-wide message to prospective international students.

Promoting trade opportunities

The coronavirus pandemic has significantly impacted

the ability of the government to use established mechanisms for trade promotion and prevented attendance at tradeshows, as well as the organisation of face-to-face trade missions. At the same time, the government has successfully adapted and developed new ways of promoting trade opportunities. As part of the 'Education is GREAT' campaign, DIT has developed a virtual programme to support the global recovery of the education sector's international activity. This has included virtual trade missions for the independent schools, higher education and EdTech sectors, as well as UK chartered bodies, with further missions planned across the education sector. This virtual campaign utilises support from DIT staff around the world, International Trade Advisers (ITAs) based in the UK, our Export Champions, International Export Finance Executives (IEFEs) and the International Education Champion. This ensures we continue to support the UK's exporting potential and connect it with demand around the world.

International engagement has been an essential mechanism to face the challenges posed by the coronavirus pandemic. The British Council will continue to have an important role to play in supporting the UK's international education offer and will continue to work closely with the governments of Northern Ireland, Scotland and Wales.

2. From recovery to growth: building on the International Education Strategy



In the face of the many challenges confronting the education sector, we must look to support the longer-term trajectory towards our 2030 ambitions.

We remain committed to the ambition to increase the value of our education exports to £35 billion per year, and to increase the number of international higher education students hosted in the UK to 600,000 per year, both by 2030. Achieving these ambitions will require an average annual growth rate of around 4% in education exports revenue and around 2% in international student numbers.

Whilst we recognise that the coronavirus pandemic presents significant challenges to international recruitment and mobility and to our exports more broadly, we will aim to recover and maintain the necessary average annual growth, wherever possible. We will use these growth rates to track and drive progress against the strategy's core ambitions.

The impetus for preserving and growing market share remains unchanged. The growth of international

student numbers is dependent on diversifying source markets so that this growth continues long into the future. The global environment remains competitive and the unprecedented consequences of the coronavirus pandemic have reinforced the case for international engagement and co-operation. Cross-border collaboration and partnership will be key to progress. Whether in the fields of vaccine development, shared research or engagement at a government-to-government level, the UK has a key role to play.

There are several ways we intend to build on the International Education Strategy to drive growth in this changing global context.

2.1 Diversifying international student recruitment

To drive international student recruitment, it is essential to ensure that this recruitment is sustainable. A diverse market base is key to this. There is a need for institutions to diversify their intake of international students and broaden the regions from which they recruit. It is also important that we maintain the momentum in already established regional markets, including Europe, as we enter our new trading relationship with the EU. The government has taken steps to create the necessary building blocks by improving the immigration regime, strengthening promotion of the UK's education offer through the Study UK campaign and through its appointment of the International Education Champion.

Furthermore, the government supports diverse pathways into UK education and UK pathway providers help international students to improve their English language or study skills before attending a UK university. They also offer foundation courses, which often lead to direct degree-level entry upon completion. Pathway providers can increase access to UK higher education and assist with transition to higher education.

To support our approach to global outreach and support diversification of international student recruitment, Home Office communications will continue to work internationally in both major and high potential student markets. This will highlight the major positive policy changes (such as the Graduate route) and operational information (such as Student visa application guidance). The Home Office also published tailored communications for EU students, including a UK points-based immigration system: EU student information guide to raise awareness of the end of free movement, the introduction of the new points-based immigration system and what this will mean for EU students applying to study in the UK.

2.2 Enhancing the international student experience

It is essential that when students come to the UK, they feel supported to engage in study and the wider student experience. Ensuring the health, safety and wellbeing of all students during the coronavirus pandemic, including international students, remains a priority.

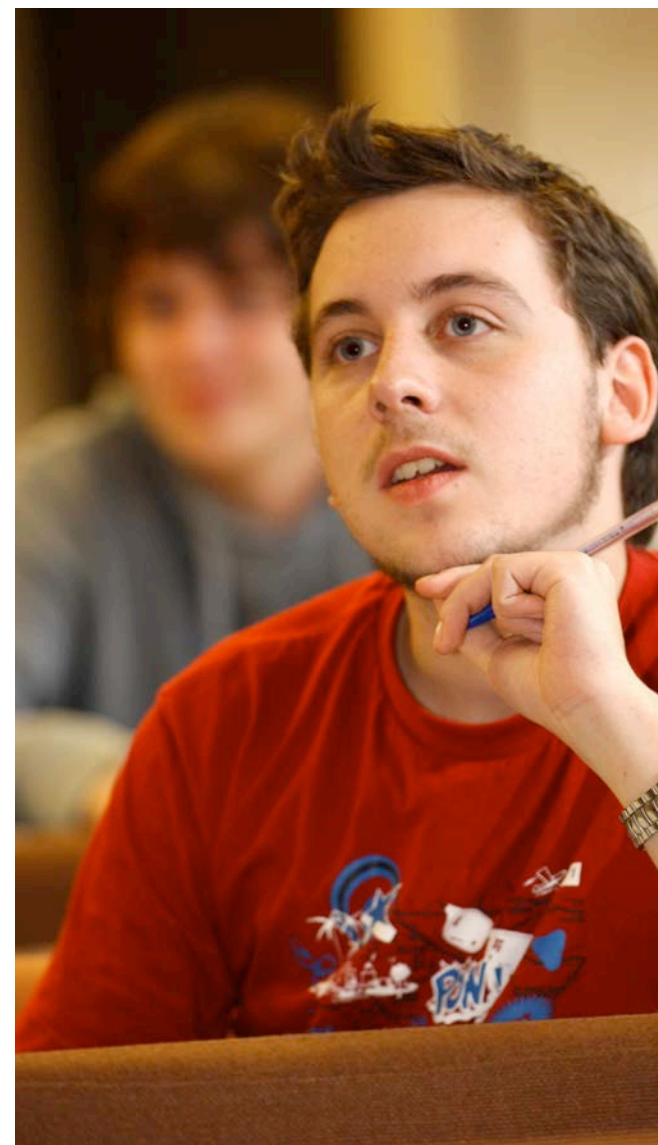
Central to the UK's globally competitive offer to international students is our commitment to delivering a world-class student experience, from academic and research excellence through to student inclusion on-campus. This begins with their application to study in the UK and extends to graduation and beyond, including their prospects for employment.



Applying to study in the UK

The new Student route, which launched on 5 October 2020, has significantly strengthened the UK's competitive immigration offer to international students. The changes to the requirements for short-term study will also make it easier for students, by permitting those studying for less than 6 months to do so as a visitor, without the need to obtain a specific short-term Student visa.

Beyond this, we want to streamline the journey of international students, from application to graduation and beyond. We will also consider how digital systems can provide better user experiences for international students applying under the immigration system, and we will work with the Universities and Colleges Admissions Service (UCAS) on this.



Action 3 (2021)

- The Department for Education will work with the sector and the Universities and Colleges Admissions Service to ensure there is clearer, more accessible information for international students wishing to study in the UK. This will include information and advice tailored to students' needs, including links to the immigration system.

Alternative student finance

In addition to the large number of scholarships and bursaries already available, access to alternative student finance on commercial and ethical terms will help UK higher education become more accessible to a wider range of international students. UUKi, working on behalf of the sector, will explore the potential opportunities presented by these innovative products in order to benefit international students and higher education providers.

Action 4 (2021)

- Universities UK International will convene alternative finance providers, sector and student representatives together, in order to raise awareness of the financial options available to international students and how products could be improved to meet demand.

Studying in the UK

International students make an invaluable social, cultural and economic contribution to UK campuses. For this reason, one of our key priorities remains ensuring that all international students are supported and engaged in all aspects of their time spent at UK HE institutions. The strength of the ties which international students make during their time as students can be immensely valuable throughout their lives and future careers. These ties may be a key factor in skilled international graduates choosing to remain in the UK to live and work after completing their studies. International students studying in UK HE also benefit UK students' experiences enormously, not least through the forging of friendships and international connections. As the number of international students accessing UK higher education increases, HE providers will need to develop impactful and innovative activity to support these students to succeed.

Action 5 (2021)

- The Office for Students together with the UK Council for International Student Affairs, will launch a new project that will aim to find ‘what works’ in ensuring international students can integrate and receive a fulfilling academic experience in the UK. It will explore the positive impact international students have on home students, and what longer term lessons can be learnt from their response to the coronavirus pandemic on provider-level delivery and student engagement.

This work will form the foundation of ongoing work and wider student and sector engagement to be undertaken by OfS, UKCISA and DfE to ensure that international student integration on UK campuses continues to be a world leading part of our offer to international students.

Graduate outcomes and employability

International students make a great contribution to the UK and our world-class HE sector, both during and after their studies. There is evidence to suggest that after graduation, international students who remain in the UK are more likely to go into higher paying employment. According to the DfE’s graduate outcomes (LEO)¹⁰ data, EU and non-EU students had median earnings of £27,000 and £28,100, respectively, 3 years after graduation, compared to £23,700 for UK graduates.¹¹ International students can also help to reduce some of the skills shortages in the UK. According to the Migration Advisory Committee 85% of jobs held by international students were in managerial or professional roles. Science and engineering was the dominant occupational group.

If international students choose to remain in the UK after graduation, they also contribute to the economy through taxation. A 2019 report by HEPI found that post-graduation, a single cohort of international students contributed almost £3.2 billion in tax over 10 years.¹²

In 2019, the International Education Strategy

committed to working with UUKi and the wider sector to look at how best to support international students into employment either in the UK or their home countries. In addition to the introduction of the Graduate route, which will expand opportunities for international students to build successful careers in the UK, we have been working closely with the sector to examine graduate outcomes. This has included enhancing the evidence base through a major international graduate outcomes survey with UUKi and the British Universities International Liaison Association (BUILA). As part of their work on the International Education Strategy, UUKi, alongside the Association of Graduate Careers Advisory Services, published a report entitled ‘Supporting International Graduate Employability: Making Good on the Promise’. This contained recommendations for the sector.

Future employability is a key theme in the Study UK campaign, and is a key message in its student-facing advertising. It is also the focus of an accompanying Study UK massive open online course (MOOC), which offers guidance on career decision-making, CVs and interview techniques.

In England the OfS is working with HESA to improve the quality and reliability of Graduate Outcomes (GO) data, relating to international graduates. This will be useful for providers, to inform their strategies to support international student graduates and enhance careers service offerings available to them.

Action 6 (2021)

- UK Council for International Student Affairs will collaborate with the Confederation of British Industry, Universities UK International, and key education and employer groups to support international student employability. This group will build understanding of the UK’s skills needs, international labour markets, and barriers to international graduate employability and share examples of best practice across the sector.

¹⁰ Graduate outcomes (LEO): Employment and earnings outcomes of higher education graduates by subject studied and graduate characteristics

¹¹ This data covers first degree graduates from English HE providers.

¹² The Higher Education Policy Institute, 2019, The UK’s tax revenues from international students post-graduation

2.3 Building lasting global partnerships

In 2019, the International Education Strategy prioritised resources to support educational opportunities in the key geographic regions of China and Hong Kong, the Association of South East Asian Nations (ASEAN) region, the Middle East and North Africa, and Latin America. Using feedback from the sector through the Education Sector Advisory Group and market intelligence from our embassies, High Commissions and global British Council offices, we are constantly evaluating the scale of opportunity and type of activity being undertaken across the world.



This consideration of international opportunities and priorities has shaped the International Education Champion’s programme of activity and his priority countries.

Working at a government-to-government level

There is an important role for the government and for our diplomatic network in facilitating partnerships, including but also reaching beyond the Champion’s priority countries. Each year the UK receives requests from overseas governments to support their education systems. These range from requests for ministerial visits to observe our system in practice, to requests for direct support, consultation and sharing expertise in policy development. The UK government engages overseas governments on issues from joint recognition of qualifications to the promotion of girls’ education. These partnerships build bridges, expand our influence and help to diversify the breadth of markets with which we engage.

Girls’ education is a major development priority for the UK. The FCDO is working to accelerate progress towards getting marginalised girls into schools, staying there and staying safe, and benefitting from quality learning. This will be critical as the international community builds back from the coronavirus pandemic; and we will be working closely with both bilateral donor partners and development partners to encourage greater global ambition, coordination, and investment in girls’ education.

We see huge potential in working closely with our global partners. This helps to grow and increase the sustainability of the UK’s exports and to improve global education systems. For example, DIT and DfE have forged close links with governments in Saudi Arabia, Vietnam and Indonesia. The government continues to develop relationships and education partnerships across the Commonwealth which remains incredibly important given the rich cultural and historical ties that bind the UK and it together. Government ministers engage regularly with their international counterparts, focusing on education system development. DIT has also strengthened its relationship with the Asian Development Bank, in order to support its education projects and encourage wider UK participation.



Further global opportunities

The International Education Champion's priority countries are a key focus for the UK government's education exports agenda. They are complemented by a broader totality of government activity to support education exports. The government continues to explore further emerging opportunities to develop lasting relationships and build the potential for growth.

Europe

The UK has left the European Union but remains in Europe. The UK education sector is working hard to strengthen relationships with European counterparts and build new ones. In the 2019 to 2020 academic year there were 147,800 students from the European Union studying in UK HE providers. These students make a valuable contribution to university life in the UK and this region will remain a priority. Young people from Europe¹³ visit the UK for educational tourism, taking short English language courses and benefiting from new cultural experiences. In 2019, they accounted for over half of the total students at English UK-member ELT centres. We will continue to welcome European students to the UK and to

promote the world-class UK education offer to prospective European students and ensure that they have a positive experience.

Indo Pacific Region

The Indo Pacific is a dynamic region, the economies of which are set to grow considerably by 2030. Substantial trade and investment flows between the UK and the region in both directions. The UK already has one of the largest diplomatic networks in the region. For example, the UK government and British Council co-operate via joint education working groups across ASEAN and China and these groups support our strategic planning. In the past 3 years, education providers from every English region and devolved administration of the UK have delivered commercial programmes in each sub-sector of education to every country in ASEAN.

Building on the UK's well-established educational links with India, DIT has been developing opportunities for the UK education sector in this high-potential market. According to a report by RedSeer, the Indian online education sector is set to be worth almost \$3.5 billion by 2022.¹⁴ The Tradeshow Access Programme (TAP) has supported

attendance at DIDAC India through providing grants to UK providers. We have also already seen notably invigorated interest in UK education from India.

Co-operation with India also includes international research collaboration through the UK-India Education and Research Initiative (UKIERI), a strategic initiative to strengthen education and research across the UK and India and managed by the British Council. UKIERI provides a strong research talent pipeline between the 2 countries, which includes UK students being able to study in India. The programme is in its 15th year and is focusing on promoting research and innovation opportunities. UKIERI is deepening the relationship between academia and industry to find solutions to mutual challenges faced by the UK and India. Seed grants provided to academic and research institutions have resulted in larger, long-term collaborations between the 2 countries.

Sub-Saharan Africa

There is rapid growth and huge potential in Sub-Saharan African countries, particularly Nigeria, Ghana and Kenya. These countries have growing economies, expanding populations and have close links with the UK. This represents a significant emerging opportunity for the UK, particularly for higher education partnerships and education system reform. As these countries' education systems change and grow, we will work to ensure that the UK remains the partner of choice in this region.

Central Asia

Central Asia represents a high potential opportunity. This is particularly true for the ELT, EdTech and TNE sectors and so far, DIT has conducted an in-depth review of opportunities for Uzbekistan. DIT's aim is to provide support for exporters in this region ahead of the planned Uzbek-British Trade and Industry Council, held virtually in February 2021. In December 2020, DIT also worked with the British Educational Suppliers Association (BESA) to help promote UK EdTech in the region, running a virtual trade mission to Kazakhstan, Uzbekistan and Russia. The British Council is also working closely with the Uzbek government to increase opportunities for UK TNE programmes.



System-to-system engagement

DIT, DfE, FCDO and British Council directly engage with overseas governments that are interested in engaging with the UK's education system to support their domestic education system reform. This work is supported by other relevant UK government departments.

The Pakistan-UK Education Gateway Programme, jointly funded, designed and managed by the British Council and the Higher Education Commission of Pakistan, is an example of this system-to-system engagement. The Gateway Programme supports open and distance learning (ODL) policy development and assists the HE sector in Pakistan to develop quality assurance benchmarks with the Quality Assurance Agency. The programme also provides leadership training to senior leaders, with support from Advance HE UK, and supports the development of TNE, alongside a range of other education and research related activities. DIT in Pakistan is fully engaged in the programme and DIT partnered with the British Council to run a virtual mission for UK chartered bodies to Pakistan in the fourth quarter of 2020.

The Strategic Partnerships for Higher Education Innovation and Reform (SPHEIR) programme is funded through the FCDO and managed by a consortium led by the British Council. It is a £45 million grant fund catalysing partnerships between

¹³ Higher Education Statistics Agency, 2021, Higher Education Student Statistics: UK, 2019/20

¹⁴ RedSeer, June 2020, EdTech In India

universities and institutions in the UK and our partner countries to provide system-to-system support. Through 9 partnerships across more than 10 countries, the programme helps to build the capabilities of young people, enabling them to meet labour market needs. These partnerships help to transform HE systems, deliver change on the ground and energise the UK's higher education sector to contribute internationally.



Action 7 (2021)

- The Department for International Trade will lead system-to-system engagement to develop trading partners with whom the UK education sector can engage over the long term. We will work with development banks and donor organisations to develop the sector's contact with these organisations, to ensure it is engaged in opportunities for business.

This system-to-system work will contribute to the diversification and long-term positioning of UK education. Only through comprehensive and strategic engagement with priority international governments can we embed sustainable export opportunities and lasting collaboration.

Exporting UK Excellence in Teacher Training

Global demand for high-quality education has created unprecedented demand for qualified and capable teachers. The UK's methods of teacher training and development are respected around the world. There is a clear opportunity for our providers to meet this growing need.

UK teacher training is already in high demand in over 6,000 British International Schools worldwide. Teacher training providers already offer the International Postgraduate Certificate in Education (iPGCE) and award Qualified Teacher Status (QTS) for experienced teachers, through the assessment only route.

However, there are new and growing opportunities for UK-style training in other types of state and private schools. In addition to substantial markets, such as China, there are growth opportunities in markets with rapidly developing education systems, such as Western and Sub-Saharan Africa and South East Asia.

DfE will work to position the UK's teacher training sector as the first choice for governments and institutions across the world when developing their education systems. To achieve this in an increasingly crowded market, we need to ensure providers have a clear and distinct offer. We will work with teacher training providers to explore the creation of a new international teaching qualification, iQTS, based on

English standards and teacher training methods, that could be achieved in schools globally, subject to consulting with the sector.

The intention is to give teachers around the world the opportunity to train to the high-quality domestic standard and demonstrate their readiness to work in a range of schools worldwide. As well as providing more opportunities for teacher training providers, it will support the spread of high-quality teaching, and provide further opportunities for the UK to build lasting and positive relationships around the world.



Action 8 (2021)

- The Department for Education will work with teacher training providers to establish a new international teaching qualification, 'International Qualified Teacher Status', that will provide an opportunity for teachers around the world to train to world-respected domestic standards. As well as providing more opportunities for teacher training providers, this will support the spread of high-quality teaching, and provide further opportunities for the UK to build lasting and positive relationships around the world.

Initial discussions with the sector have indicated that there is significant demand for a qualification like this. The DfE published a public consultation¹⁵ on proposals for a new international teaching qualification in February 2021, which will run for 12 weeks, to establish the right criteria for this qualification. We will also work with domestic teacher training providers to establish how quickly this can be rolled out to allow them to start marketing this qualification in key global markets.

Market access and supporting the growth of transnational education

Many students access the UK education system directly in their home country. This can include learning in-person on branch campuses and, increasingly, this includes online and blended learning activity. These forms of provision are known as transnational education (TNE). The UK already has a successful TNE offer and the government continues to see this as a key international asset for the education sector, with potential for further growth. The coronavirus pandemic has facilitated a rapid expansion of online learning. We intend to maximise its long-term potential to establish a leading, sustainable market position for the UK. As providers look to innovate, students discover the advantages of online education, and teacher uptake of new technologies increases, it appears likely that the coronavirus pandemic has catalysed online study to become a long-standing feature, central to global education.

¹⁵ DfE Consultation Hub at consult.education.gov.uk



While some market access barriers to transnational online and blended learning around the world have been temporarily lifted, many remain and we will continue to work to secure the recognition of online learning in national qualification frameworks, including through the efforts of the International Education Champion. This includes regions where the government is not currently negotiating FTAs. There is an opportunity for the UK to champion free trade and act to permanently resolve market access barriers to support the longer-term growth of this market.

One of the International Education Champion's key priorities will therefore be to work with the UK government and devolved administrations to achieve these outcomes by identifying and working to resolve barriers. This will involve the British Council, embassies and High Commissions, as well as International Export Finance Executives (IEFEs). The sector's involvement is crucial, both in reporting barriers, and in working with the government to help resolve them.

Action 9 (2021)

- The Department for Education, the Department for International Trade and the International Education Champion will work with the British Council and the sector to address market barriers to the growth of UK education exports. This will help facilitate the expansion of TNE, including online and blended learning models.

Secure international collaborations

Wherever they work, we must continue to ensure that our UK universities, as global institutions, are confident and able to pursue sustainable, secure international partnerships. The UK government is working to help the UK's research and innovation sector get the most out of international scientific collaboration, whilst protecting intellectual property, sensitive research and personal information.

The Centre for Protection of National Infrastructure (CPNI) and the National Cyber Security Centre (NCSC) have jointly published a package of advice called 'Trusted Research'. In addition, the Minister for Universities asked Universities UK, working on behalf of the sector and with government support, to develop a programme of work to increase understanding and awareness of the threat from interference. A key output of this work is the development of guidelines, which were published on 15 October 2020.¹⁶ Managing the risks to our research and upholding our values of academic freedom and freedom of speech in our higher education sector is critical to its global reputation for quality. It is important that universities remain security-minded in their approach, seeing our prosperity and security for what they are – mutually reinforcing.

Scholarships and alumni

Scholarships play an important role in making the UK a destination of choice for international students. Furthermore, scholarships support academic exchange

and partnerships and help build a bridge between the UK and a global cohort of future leaders and their home countries. Through scholarships, the UK supports the education of exceptional people from around the world, helping them to reach their potential.

FCDO oversees 3 postgraduate scholarship programmes: Chevening, Marshall, and the Commonwealth Scholarship Commission. Though each has separate objectives and geographical focus, together they cover more than 160 countries and territories, showcasing British values such as democracy, diversity, and transparency. These complement a range of scholarship opportunities for international students, also offered by universities and charitable trusts.

DfE provides full or partial funding for 8 international scholarship programmes. These include:

- US-UK Fulbright Commission
- Commonwealth Scholarships
- Higher Education Scholarships for Palestinians (HESPAL) (run by the British Council)
- English Language Assistants (ELA) programme (run by the British Council)
- Queen Elizabeth Commonwealth Scholarships

- Study China
- UK-German Connection
- UK-India Education and Research Initiative

Alumni include senior decision-makers in areas such as government, politics, civil society, religious institutions, the judiciary, the military, academia, journalism and business. There is evidence which demonstrates the value that alumni bring to the UK. In UUKi's 'International Graduate Outcomes 2019' report, 77% of international graduates say they are more likely to do business with the UK; more than 80% would recommend studying in the UK; and 88% would plan visits as tourists. Consequently, the UK government is considering how best to foster life-long engagement of alumni with the UK, with all the benefits that can bring to national prosperity.

Action 10 (2021)

- Following a recommendation in the 2019 Tailored Review of the British Council to take a more structured approach to its alumni activity, the British Council is exploring options for attracting and supporting a global UK alumni network.



16 Universities UK (2020), Managing risks in internationalisation: Security related issues

2.4 Supporting growth of education exports and internationalisation

Marketing the UK's international education offer

Alongside the work of the British Council and StudyUK, we have been working to expand and improve the Education is GREAT trade promotion campaign. This campaign represents the UK's offer of education provision to prospective international students or trade partners in other countries. To promote the full breadth of the UK's education offer, we have produced marketing assets on educational



technology, international schools and skills. There has also been significant activity from programmes such as 'Scotland is Now', 'Global Wales' and 'Invest Northern Ireland'.

We have supported education bids to the GREAT Challenge Fund, and this has supported promotional activity in education-related bids across the world since March 2019, including: China and Hong Kong, Egypt, Brunei, Cambodia, Indonesia, Laos, Myanmar, Philippines, Vietnam, Uzbekistan and Brazil.

Finance for International Growth

The government not only supports, but also directly finances, the international growth of the education sector. This is particularly the case in challenging overseas markets, for long-term and high-value projects, and for small businesses. In 2019 to 2020, UK Export Finance (UKEF) provided £4.4 billion in support for a wide range of UK exports, supporting 339 companies' exports to 69 countries, of which 77% were SMEs. We want to ensure that this support is available across all sectors of the economy, including the education sector.

UKEF's mission is to ensure that no viable UK export fails for lack of finance or insurance and this includes the education sector. However, although UKEF offers a range of crucial products, uptake of these products from the education sector is lower than in many other sectors. We recognise the unique circumstances of the education sector as exporters, and that these circumstances can produce barriers to the sector's access to UKEF products.

Responding to this, we will initiate a campaign to make clear that all of these products are available to any education exporter, however they export, whether this is through international partnerships or selling goods overseas. UKEF's 'Exporters' Edge' campaign has already helped increase awareness within the education sector. We will ensure that UKEF employees have an excellent understanding of the financial needs of the education sector and how it could be using their products.



Action 11 (2021)

- UK Export Finance (UKEF) will tailor its marketing and communications activity for the whole of the education sector, to boost awareness and understanding of the sector's access to UKEF products. The Department for International Trade will also work to promote and ensure an understanding of the UKEF offer across the education sector.

UKEF has expanded its working capital products, launching the Export Development Guarantee (EDG) in July 2020 and the General Export Facility (GEF) in December 2020. The EDG and GEF will both enable UKEF to support a wider range of companies, including within the international education sector.

The GEF is a new guarantee scheme that can be used by eligible exporting firms to access working capital

through their bank with an 80% HM Treasury guarantee. Unlike UKEF's other trade finance schemes, the GEF does not have to be linked to a specific export contract.

New Export Opportunities

Chartered professional bodies

There are significant opportunities to build exports for the UK's chartered professional bodies. DIT has run successful trade missions for chartered bodies to Malaysia, Singapore, Vietnam, Pakistan, China and Hong Kong. During these missions they have formed close partnerships with colleges, universities and domestic professional bodies. We are working closely with leading chartered bodies in the UK to develop their exporting expertise and scope out new markets.

Action 12 (2021)

- The Department for International Trade will scope opportunities for partnership and export for UK chartered professional bodies. DIT will connect overseas demand for chartered status to UK organisations. We will ensure we effectively communicate these opportunities to the sector, and we will run trade missions specifically for chartered professional bodies.

Special educational needs and disabilities

Supporting children and young adults with special educational needs and disabilities has been a priority in UK education for decades. As such, the UK has leading expertise, resources, and professional experience in supporting children with SEND. The UK prioritises equality and has an ambition to enable universal access across the education sector. The UK has particular strengths in empowering the SEND workforce, whole system transformation and SEND-related educational technology.

More and more countries are prioritising SEND, in the context of commitments to UN Sustainable Development Goals. The UK presents a distinctive social model of SEND, compared to certain, more medical models internationally. This represents an opportunity for the UK sector to come together, with the relevant UK government departments to help shape SEND systems across the world.

Action 13 (2021)

- The Department for International Trade will identify high value export opportunities for UK SEND providers. DIT will work with the National Association for Special Educational Needs (NASEN), the UK SEND sector and other government departments to develop an effective and collaborative approach to this work.



3. Summary of international education support by government for education sub-sectors

3.1 Early years

The early years sector is early in its exporting journey. DIT has been working with sector and industry bodies to encourage the sector to internationalise, informing providers around exporting opportunities.

A trade mission to China took place in October 2019, meeting over 50 investors in different Chinese cities. We believe that there is scope to expand the early years export market beyond China and are in the process of identifying potential opportunities in the Middle East. DIT has also supported the early years sector in ASEAN.

However, a large part of the sector remains focussed on domestic activity, and with coronavirus, this focus has only increased. Whilst DIT will continue to work in this area, we expect growth in early years exports to be less than in other sub-sectors in the coming years. On the other hand, colleges and EdTech providers are still exporting their early years training courses and products, even if fewer UK nurseries are established overseas.



Case Study

Opal in China

In 2019, as part of the Exporting is GREAT campaign, DIT ran a schools and early years mission to China.

With support from DIT, Opal Education brokered a new partnership between the Ofsted 'Outstanding' nursery, Charlie Caterpillar's in the West Midlands, and Chinese investor, Chengdu Yinglunkaibei Education Management Limited.

Charlie Caterpillar's and Chengdu Yinglunkaibei agreed to open 3 nurseries in Sichuan Province, with the first opening in November 2019. The nursery is based on the UK government's early years foundation stage (EYFS) model and combines Chinese best practice in early years and childcare education. The centre has a total area of 1,800 square meters, including an outdoor activity area. In addition to early years practitioners and nurses, the centre also has a professional medical team, including paediatricians, nutritionists, and mental health consultants.

Following the DIT schools and early years mission, Opal Education acted as the representative of Charlie Caterpillar's in China, facilitated the delivery of teacher training in China and the UK and assisted localisation of the British curriculum in China.



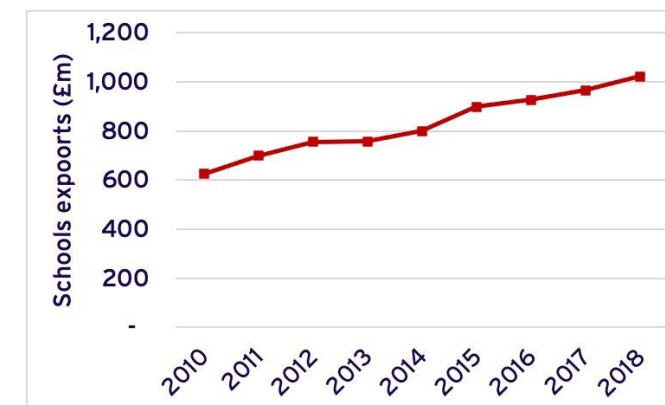
3.2 Independent schools

In the International Education Strategy, DIT committed to support independent schools in accessing international opportunities, connecting providers to investors, and supporting providers through training events. Since March 2019, DIT has run trade missions to Saudi Arabia, Morocco, China, Vietnam, and Cambodia. We also started research on Brazil and Latin America. We quickly adapted to coronavirus by running virtual trade missions to Saudi Arabia and Egypt. Each of these missions included expert webinars and training.

Alongside this export promotion activity, DfE, DIT and the Home Office have been working to promote the quality and safety of our schools, both in the UK and overseas. Since October 2020, all licensed sponsors of international students under 18 are explicitly required to have proper safeguarding arrangements in place for their students, with failure to do so potentially resulting in action against their licence. We will encourage independent schools to have a better understanding of guardianship arrangements and the important role of accreditation bodies, including the British Schools Overseas Scheme. We will learn from those schools that do this well. On 2 December 2020, DfE launched a consultation on the national minimum

standards for boarding and residential special schools.

Figure 3: UK revenue from schools-related exports (£millions and current prices)



Source: DfE, 2020, UK Revenue from Education Related Exports and Transnational Education Activity in 2018

Figure 3 shows how revenue generated from exports from UK independent schools has increased each year since 2010. These exports were worth £630 million in 2010 and had reached £1.0 billion by 2018.



Case Study

Orbital Education in Qatar

In July 2019, Cheshire-based Orbital Education signed a joint venture agreement with the United Development Company (UDC) to open a major international school on the Pearl in Doha, Qatar. The Pearl is one of the largest developments in the Middle East; ultimately expected to become home to 50,000 residents.

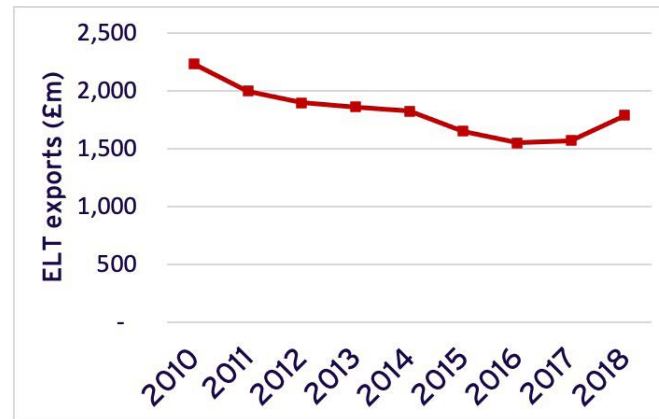
Orbital Education capitalised on a gap in the market by proposing a British-style school for 2,500 students aged 3 to 18 years to the master developer UDC. Orbital Education was well placed to undertake this work since it had recently opened Oryx International School in Doha, a British-style international school exclusively for the children of the families who work for Qatar Airways. Previously, children on the Pearl either had to be home schooled or travel considerable distances to schools on the 'mainland' as there was no local school. UDC readily accepted Orbital's concept as it was clear that it would enhance the company and, more importantly, provide world-class education for the many children on the Pearl. UDC also agreed to the unique joint venture structure put forward by Orbital.

Orbital is currently using its experience to help design the school and to monitor and assist with all aspects of the construction, which is well under way. The school will be called the United School International and has an expected opening date of September 2021.

3.3 English language training

The International Education Strategy recognised the crucial contribution of the English language to the UK's global potential. The ELT sector is one that, because of its reliance on visiting short-term international students, was immediately impacted by the pandemic.

Figure 4: UK revenue from English Language Training (£millions and current prices)



Source: DfE, 2020, UK Revenue from Education Related Exports and Transnational Education Activity in 2018

Figure 4 shows how revenue generated from ELT exports have changed between 2010 and 2018. Overall, revenue generated from ELT exports has decreased from £2.2 billion in 2010 to £1.8 billion in 2018. The rate of decrease was fastest between 2010 and 2012 and between 2014 and 2016. Revenue from ELT began to increase again from 2016 with an increase from £1.6 billion in 2017 to £1.8 billion in 2018.

DIT has worked to increase the involvement of the ELT sector in exporting its services and to increase the sector's exporting expertise. Since March 2019, we have held workshops on average every 6 weeks, providing training on bidding for project work and establishing overseas centres.

These workshops, as well as TAP funding and regular dissemination of opportunities through DIT's ELT Working Group, have ensured the sector is increasingly aware of the need to export beyond international student recruitment, and the benefits of business diversification. However, we recognise that SMEs are often concerned about risk, and will require support from the government.

DIT's global network continues to grow. Through these networks, we have identified ELT opportunities in export campaigns for sectors where English is the primary language. For example, in the oil and gas sector, we have identified opportunities in Oman and Mozambique. We have also identified opportunities in the Chilean mining sector. Further work is planned with export campaigns in the maritime, aviation and construction sectors.

DIT has held further events to build a pipeline of opportunities. This has included working with the British Council on webinars every 6 months to raise awareness of the ELT offer. These webinars have real benefits for the sector. A webinar on the China ELT market was followed by a Chinese ELT delegation to StudyWorld in September 2019. This generated new pipelines for all 10 delegates, with an estimated export value of up to £30 million. It also directly supported UK institutions to catalyse existing activity worth a further £10 million to the UK.

The British Council will work with English UK to maintain the value of its widely recognised and trusted 'Accreditation UK' kitemark for UK ELT providers. This has now been extended to cover online teaching as well.

The government's immigration reforms will also facilitate English language training. Study of up to 6 months in the UK will be permitted under the standard visit route; this is how most visitors and tourists will come to the UK. The 6 to 11 month short-term English language study route will also remain in place, and this will allow English language students to come to the UK without sponsorship.

In addition, the British Council works with DIT and the sector in its programmes and helps to establish the market position of the sector through research, insight and advocacy.



Case Study

NILE in Chile

On an ELT mission to Latin America that DIT led in April 2019, the Norwich Institute for Language Education (NILE) was introduced to representatives of the Chilean Ministry of Education. This led to NILE successfully bidding to host a 4 week teacher-training programme in Norwich for 15 Chilean teachers in the autumn of 2019. The programme provided English teachers who work in state schools in Chile with the skills and knowledge to train other English teachers, conduct observations and give feedback. The course focused on:

- approaches to teacher training and continuing professional development
- methodological development, through workshops and experiential learning
- video-recorded observations and individual feedback, in-service teacher training (INSETT) project design and implementation
- post-course online follow-up for 3 months

The participants were also able to observe language teaching in local Norwich schools, and demonstration lessons from NILE's expert trainers. NILE organised the whole programme to maximise cultural and linguistic immersion, with participants staying with local homestay hosts, and enjoying a wide range of extracurricular excursions and activities. Participants' and ministry feedback was exceptional. The participants have stayed in touch and requested to present the impact of the project to the NILE team via videoconference.

Case Study

English Connects in Sub-Saharan Africa

Jointly funded by the FCDO and British Council and managed by the British Council, English Connects is a programme to connect African youth and the future generation of leaders with the UK through English. It aims to improve the quality of English language teaching and learning, particularly in French and Portuguese-speaking countries in Sub-Saharan Africa, where the British Council is unrepresented. In doing this, English Connects aims to enable young people to increase their potential to study and improve their employability and networks. The programme connects UK ELT providers with targeted countries, showcasing UK expertise, creativity and innovation in education, aiming to build trust and new partnerships. In 2019 to 2020, English Connects directly involved 9 UK ELT providers: Bili, ELT Consultants, FutureLearn, Highdale Consulting, International House London, NILE, Sue Leather Associates, The Consultants-E and TransformELT. English Connects will continue to open up opportunities for the UK ELT sector in 2021.



3.4 Technical and Vocational Education and Training

We know, through conversations with governments and businesses around the world that there is huge international appetite for TVET reform and employer engagement. The UK is seen as an important partner and the level and depth of UK expertise creates clear export opportunities.

In terms of international activity overseas, there is still significant progress to be made in encouraging UK skills organisations to consider taking their offer internationally. Since March 2019, DIT has held over 17 workshops, 24 webinars and 2 roadshows, sharing opportunities with the sector and providing expert market access support and training to skills providers.

Where we have identified international opportunities for the TVET sector, we have provided a range of practical support, as well as encouraging suppliers to talk to UKEF in order to reduce the risk inherent to international work.

As a result of this work, we have seen an increase in engagement from the private sector, and colleges are beginning to take another look at exporting. DIT has begun to play an important role in discussing export strategies with clients, and we are working in partnership with ITAs to tailor offers to fit client needs. We have worked strategically with donor organisations to create opportunities that better fit

UK suppliers and have enabled the supply side to be better equipped to register their interest. Where appropriate, we have brought together suppliers from all parts of the sector to bid on work as consortia, particularly through the UK Skills Partnership. New training materials and sessions have been developed and delivered to ensure government staff are equipped with clearer information about the sector offer from the UK.

The British Council has worked with DIT and UK Skills Partnership members to promote the UK TVET sector and provide practical opportunities for UK organisations. In 2020 the British Council:

- partnered with the Association of Employment and Learning Providers (AELP)
- supported colleges and providers who have sought to develop partnerships in Malaysia, Vietnam, India, South Africa and Ghana
- promoted apprenticeships through its international benchmarking tool
- continued to raise awareness of UK expertise in vocational and technical skills on global platforms

Through collaboration with the UK Skills Partnership

and the development of its strategy, DIT has helped the sector to develop bespoke offers to fit other countries' requirements. We have undertaken work to help the UK TVET sector to be more coherent and consistent in its messaging to overseas partners.

The effects of coronavirus on the sector are difficult to predict but we expect that the sector will seek to improve its own resilience, as well as play a leading role in the UK's economic recovery.

One of the early changes we will make will include permitting international students to apply to study a new course in the UK once they have completed their first course, or to apply under the new Skilled Worker route, regardless of the level of study or the education institution. This will significantly improve on the existing pathways for international students studying at all levels in the UK.

As a learning system, the UK TVET sector continues an ambitious programme of further education and skills reform. These developments build upon ongoing reforms to streamline the technical qualification offer and introduce new, world-class technical qualifications that are underpinned by employer-led standards.

Case Study

Workforce Development Trust / People1st International

Bristol-based Workforce Development Trust / People1st International identified export opportunities through DIT's Education Sector team. DIT helped People1st win exports relating to vocational skills projects on 3 different continents - from South Asia to South America. Working across priority industry sectors, People1st's quality-assured training programmes have already seen over 400 workers upskilled. Its technical and vocational education and training research supports skills development within major infrastructure projects overseas. DIT has provided specialist support that has helped define and sharpen People1st's strategic approach to exporting across the globe. In addition to helping resolve market access issues relating to recognition of qualifications and payments, DIT has helped by providing detailed market insights and showcasing opportunities, enabling People1st to reach further.¹⁷

¹⁷ https://ukskillspartnership.org.uk/case_studies/development-of-a-youth-inclusion-training-centre-at-abdali-mall-for-ebrd/
https://people1st.co.uk/getattachment/International-consultancy/Where-we-work/Case-studies/Training,-productivity-and-performance-lessons-fr/Chile-Case_Study_Summary.pdf?lang=en-GB

3.5 Higher education and transnational education

The higher education sector makes a significant contribution to overall education export figures, with student recruitment playing a key role. The government and the sector have taken important steps to support international student recruitment and the HE sector, which have been covered extensively elsewhere in this update.

The value of HE TNE continues to grow rapidly, reaching a value of £650 million to the UK according to the latest 2018 statistics.¹⁸ Growth in this education sub-sector has been steadily increasing since 2010, when the value was £350 million.

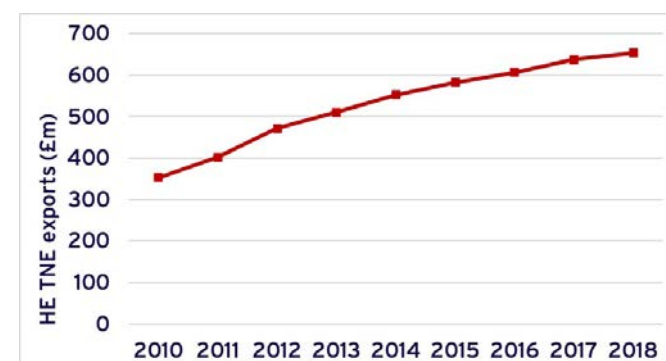
142 HE providers reported students studying through TNE in the academic year 2018 to 2019 academic year.¹⁹ This was more than ever before. There were 432,500 TNE students on UK HE programmes in 2019/20, a 35% decrease on the previous year. This decrease is mostly driven by Oxford Brookes altering their reporting practices. TNE enrolments at English HE providers saw a 7% increase, from 332,390 in 2018/19 to 354,485 in 2019/20, after excluding Oxford Brookes.²⁰

Since March 2019, DfE has run trade missions to Cambodia, Vietnam, and, virtually, to Saudi Arabia. We have formed close partnerships in higher education in Egypt and Morocco, which will allow us to work more easily to resolve regulatory barriers and generate opportunities for the UK. It will also help the development of the higher education sector in these countries.

Through a series of scoping missions, we have gathered information on key markets. In order to do this, we have worked with UUKi and the British Council. This has allowed us to further inform the sector of TNE opportunities. We have presented at major conferences across the UK, and produced country guides on TNE in Saudi Arabia, Europe and Vietnam. A partner-matching event around TNE in the EU, co-developed with UUKi and the British Council, was particularly successful, and we are

looking to expand events of this type in the coming years. The strength of our competitors in TNE means we cannot

Figure 5: UK revenue from HE TNE activities (£millions and current prices)



Source: DfE, 2020, UK Revenue from Education Related Exports and Transnational Education Activity in 2018

Case Study

Coventry University in Morocco

The British Council organised the inaugural meeting of the UK-Morocco Higher Education Commission on 22 January 2020. At this meeting, Coventry University and Superior Institution of Science & Technology (SIST) signed a memorandum of understanding (MOU). This MOU established a partnership between Coventry University and SIST that will provide programmes in teacher training, business and science and technology. SIST will invest £14 million to develop a purpose-built campus in Casablanca to host Coventry University's programmes.

The institutions also agreed to explore opportunities for joint research, teaching and student mobility between the UK and Morocco. Thousands of Moroccan students are expected to benefit from this new partnership.

be complacent, even in markets where the UK has a strong presence. We see diversification, both in subject areas and markets, as key to the long-term success of UK TNE. We know that there is more work to be done to ensure that this diversification happens.

3.6 Education technology

The DfE's strategy for education providers and the technology industry, published in April 2019, re-affirmed the government's commitment to growing exports in EdTech, with an ambition to build the best EdTech ecosystem in the world.

The coronavirus pandemic has posed a huge challenge for the EdTech sector, which has responded with strength, offering services for free to schools in need across the world. We anticipate that, as the use of EdTech in global schools becomes more and more necessary, the sector will continue to grow. The UK therefore has an opportunity to demonstrate that it can be the 'partner of choice' for EdTech internationally. During the pandemic, DfE has helped connect UK EdTech companies to schools overseas that needed additional educational support. Some of these have led to longer-term commercial partnerships as a result of the quality of the products being offered. The ability of UK EdTech companies to develop quickly has been deeply impressive.

The UK is a leader in EdTech, with the fourth largest market globally and has a further global role to play in leadership, development and trusted partnership. The overall effect of the coronavirus pandemic on the sector will have a long-lasting legacy and presents real sectoral opportunity, as the world moves ever faster to increased digitalisation. Both DfE and DIT will continue to proactively identify opportunities in global markets and to support the sector in maximising its supply capabilities to meet this demand.

Our departments have worked with the sector to engage UK and overseas buyers. We have run missions to new markets, such as India, Uzbekistan, Kazakhstan and Russia. We have also conducted in-depth webinars and face-to-face briefings on exporting to various countries including France, Kazakhstan and Indonesia. We have also collaborated



with BESA and its Great British Classroom.

DfE, in partnership with Nesta, ran an innovation fund competition for EdTech companies. This received 224 applications for its £1.4 million grant funding. The competition was aimed at stimulating industry innovation, supporting the development of products, and building the evidence base to ensure technology meets the needs of teachers, lecturers, pupils and students. Nesta and DfE also launched an EdTech research and development programme in autumn 2020 aimed at helping schools and colleges evaluate technology products used to support remote teaching during the coronavirus pandemic and increase the evidence base on 'what works'. All of this work is helping to showcase the UK EdTech offer and build a stronger UK EdTech brand.



¹⁸ Department for Education, 2020 https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/944966/SFR_education_exports_2018_FINAL.pdf

¹⁹ Universities UK International 2020, The Scale of UK higher education transnational education 2018-19

²⁰ HESA, 2021, Higher Education Student Statistics: UK, 2019/20 - Where students come from and go to study

DfE has also launched the EdTech Demonstrator Programme, a network of schools and colleges who exemplify the use of technology, which offers peer support. The EdTech Demonstrator Programme plays a pivotal role in ensuring teachers and leaders understand how and why to embed technology effectively. The programme supports them to make effective decisions that are outcome-driven and to meet the needs of both pupils and staff.

EdTech and investment

Since the publication of the International Education Strategy in 2019, DfE has undertaken work to attract foreign direct investment (FDI) into the UK, focusing initially on the EdTech sector.

At the British Educational Training and Technology Show (BETT Global) in January 2020, DfE launched its investment proposition in EdTech, alongside the FDI@BETT competition. This was designed to mirror similar competitions within the technology and creative sectors in order to encourage investors to choose the UK.

DfE will increase its work with embassy and consular teams in selected key markets, encouraging innovative investors into the UK EdTech sector by promoting its strengths. We will also work with overseas EdTech companies who are seeking to internationalise, grow and expand in the UK. This will not only help generate economic growth and jobs, it will also help to enhance the UK's status as Europe's EdTech market leader.

We will explore using FDI to strengthen other parts of the UK's education sector. This includes undertaking market analysis to identify key opportunities, with a view to positioning the UK as a world leader. We will do this by working with target FDI companies who are seeking to internationalise and expand. We will also continue to enhance the UK's status as Europe's EdTech market leader.

Action 14 (2021)

The Department for International Trade will develop its investment offer and identify opportunities for the education sector, beyond EdTech.

Case Study

Texthelp in the United Arab Emirates (UAE)

Texthelp, based in Antrim in Northern Ireland, is an EdTech company, which has created an award-winning range of innovative software solutions that help educators and students improve literacy, maths and assessment.

In use by over 30 million users, their products range from 'Read&Write', which supports literacy, 'EquatIO', making maths digital and 'WriQ', which delivers automated marking and writing metrics.

Texthelp was a winner of the DfE/Nesta EdTech Innovation fund and was part of an EdTech trade mission to the UAE organised by the DfE Education team. The team introduced them to various stakeholders. These included educational institutions, the Ministry of Education, school groups and educational resource distributors and agents.

As a result, Texthelp was able to secure business in the UAE with many International schools, private schools and Universities in the Gulf Cooperation Council, including the GEMS group of schools and Zayed University in the UAE.

The DfE Education team in the UAE continues to support Texthelp in expanding their global footprint.

Annex A: Summary of actions (2021)

Actions	Timeline
Action 1 (2021): International Education Champion	
The International Education Champion's immediate priority countries are: India, Indonesia, Saudi Arabia, Vietnam and Nigeria. These priorities reflect where there is significant potential for growth and where the Champion could both open up opportunities and address barriers to that potential. Other important regional markets for the International Education Champion will include Brazil, Mexico, Pakistan, Europe, China and Hong Kong.	Review early 2022
Action 2 (2021): free trade agreements	
The Department for International Trade and the Department for Education will promote education in future FTAs and ensure the sector's views are represented.	Review early 2022
Action 3 (2021): streamlined application process for international students	
The Department for Education will work with the sector and the Universities and Colleges Admissions Service to ensure there is clearer, more accessible information for international students wishing to study in the UK. This will include information and advice tailored to students' needs, including links to the immigration system.	Review early 2022
Action 4 (2021): financial options for international students	
Universities UK International will convene alternative finance providers, sector and student representatives together, in order to raise awareness of the financial options available to international students and how products could be improved to meet demand.	Review early 2022
Action 5 (2021): academic experience of international students	
The Office for Students together with the UK Council for International Student Affairs, will launch a new project that will aim to find 'what works' in ensuring international students can integrate and receive a fulfilling academic experience in the UK. It will explore the positive impact international students have on home students, and what longer term lessons can be learnt from their response to the coronavirus pandemic on provider-level delivery and student engagement.	Review early 2022
Action 6 (2021): employability of international students	
The UK Council for International Student Affairs will collaborate with the Confederation of British Industry, Universities UK International, and key education and employer groups to support international student employability. This group will build understanding of the UK's skills needs, international labour markets, and barriers to international graduate employability and share examples of best practice across the sector.	Review early 2022

Actions	Timeline
Action 7 (2021): system-to-system engagement	
The Department for International Trade will lead system-to-system engagement to develop trading partners with whom the UK education sector can engage over the long term. We will work with development banks and donor organisations to develop the sector's contact with these organisations, to ensure it is engaged in opportunities for business.	Review early 2022
Action 8 (2021): International Qualified Teacher Status	
The Department for Education will work with teacher training providers to establish a new international teaching qualification, 'International Qualified Teacher Status', that will provide an opportunity for teachers around the world to train to world-respected domestic standards. As well as providing more opportunities for teacher training providers, this will support the spread of high-quality teaching, and provide further opportunities for the UK to build lasting and positive relationships around the world.	Review early 2022
Action 9 (2021): market barriers	
The Department for Education, the Department for International Trade and the International Education Champion will work with the British Council and the sector to address market barriers to the growth of UK education exports. This will help facilitate the expansion of TNE, including online and blended learning models.	Review early 2022
Action 10 (2021): alumni activity	
Following a recommendation in the 2019 Tailored Review of the British Council to take a more structured approach to its alumni activity, the British Council is exploring options for attracting and supporting a global UK alumni network.	Review early 2022
Action 11 (2021): UK Export Finance offer to the education sector	
UK Export Finance will tailor its marketing and communications activity for the whole of the education sector, to boost awareness and understanding of the sector's access to UKEF products. The Department for International Trade will also work to promote and ensure an understanding of the UKEF offer across the education sector.	Review early 2022
Action 12 (2021): opportunities for UK chartered professional bodies	
The Department for International Trade will scope opportunities for partnership and export for UK chartered professional bodies. DIT will connect overseas demand for chartered status to UK organisations. We will ensure we effectively communicate these opportunities to the sector, and we will run trade missions specifically for chartered professional bodies.	Review early 2022

Actions	Timeline
Action 13 (2021): exporting UK SEND services	
The Department for International Trade will identify high value export opportunities for UK SEND providers. DIT will work with the National Association for Special Educational Needs (NASEN), the UK SEND sector and other government departments to develop an effective and collaborative approach to this work.	Review early 2022
Action 14 (2021): developing investment opportunities in the UK education sector	
The Department for International Trade will develop its investment offer and identify opportunities for the education sector, beyond EdTech.	Review early 2022

Annex B: Progress against the actions of the 2019 International Education Strategy

Actions	Progress
Action 1 (2019): International Education Champion	
The UK government will appoint an International Education Champion in 2019. They will be tasked with opening up international opportunities for the UK sector, connecting the education sector to overseas opportunities, and helping to overcome any challenges and barriers to growth.	Completed June 2020 Professor Sir Steve Smith was appointed on 5 June 2020. He has already engaged extensively across the UK sector and with the devolved administrations to understand and shape his priorities. He will focus on increasing education exports and addressing market access barriers and work in several key markets including India, Indonesia, Saudi Arabia, Vietnam and Nigeria.
Action 2 (2019): Education is GREAT promotion	
The UK government will ensure Education is GREAT promotes the breadth and diversity of the UK education offer more fully to international audiences, from early years through to higher education. We will encourage education bids to the GREAT Challenge Fund for 2019. This £5 million fund supports export activity for the sector across the globe.	Completed spring 2020 DIT has supported education bids to the GREAT Challenge Fund, which has supported at least £178,000 of promotion activity in education-related bids across the world since March 2019. These bids have increased activity in countries including key markets such as China and Hong Kong, Egypt, Brunei, Cambodia, Indonesia, Laos, Myanmar, Philippines, Vietnam and Uzbekistan.

Actions	Progress
Action 3 (2019): visa offer	
<p>The UK government keeps the visa system under review to ensure it remains fit for purpose and that the UK's visa system is world-class. Government will strengthen the UK's visa offer for international higher education students by increasing the post-study leave period and making it easier for students to move into skilled work after graduation.</p>	<p style="text-align: center;">Ongoing, review summer 2021</p> <p>A number of visa concessions (online and distance learning) have been implemented for coronavirus, allowing distance learning whilst social distancing measures are in place, and ensuring students are not penalised for circumstances beyond their control during the pandemic.</p> <p>On 13 July 2020, the government set out details on the UK's points-based system. These new arrangements took effect from 1 January 2021. Irish citizens continue to be able to enter and live in the UK as previously.</p> <p>New Student and Child Student routes, the first of the UK's new points-based immigration system, were launched on 5 October 2020. The new immigration system for students and graduates goes even further than set out in this action and improves on the previous Tier 4 route for international students. The new Student route gives greater flexibility to those applying overseas and streamlines the process for those already in the UK. It provides clearer pathways to international students who want to progress in their studies in the UK and develop their future career prospects. This is further supported by the Graduate route, which permits those who successfully complete a degree at a higher education provider with a track record of compliance, to stay in the UK for two years post-study (three years for PhD graduates). The new Graduate route will launch in summer 2021.</p>
Action 4 (2019): visa customer journey	
<p>The UK government will keep the visa application process for international students under review, with the aim of improving the customer journey both for students and their sponsoring institutions. This will include reviewing processes for conducting interviews to ensure that these are appropriately focussed and to minimise any inconvenience for applicants.</p>	<p style="text-align: center;">Ongoing, review summer 2021</p> <p>See 'progress' for Action 3 (2019).</p>

Actions	Progress
Action 5 (2019): support for international students	
<p>The UK government will work with UUKi and the sector to identify and share good practice on how universities effectively support international students into employment and further study, both here in the UK and when they return to their home nation. We will also work with the sector to enhance the evidence base on international graduate outcomes and to monitor the UK's comparative position with respect to international student recruitment and the international student experience.</p>	<p style="text-align: center;">Completed March 2020</p> <p>In March 2018, DfE published its annual graduate outcomes data using the longitudinal education outcomes (LEO) dataset. This included outcomes for international graduates in the UK labour market. This data can be used by UK HEIs. In July 2019, UUKi published a report, 'International Graduate Outcomes', a study specifically exploring the career outcomes of a large sample of international graduates who studied in the UK.</p>
Action 6 (2019): Education Sector Advisory Group	
<p>The UK government will enhance the Education Sector Advisory Group, co-chaired between the Department for International Trade and the Department for Education, as a partnership between government and the sector to implement this strategy, identify new opportunities and work jointly to identify solutions to challenges. This will be supported by a cross-government, senior official-level International Education Steering Group, jointly chaired by the Department for Education and the Department for International Trade and including representation from the devolved administrations, Home Office, Foreign and Commonwealth Office, Department for International Development and other government departments.</p>	<p style="text-align: center;">Completed spring 2019</p> <p>Since March 2019, the Education Sector Advisory Group, co-chaired by ministers from DfE and DIT, has met 10 times. The cross-government steering committee has met every 2 to 3 months. The implementation group has met every 1 to 2 months.</p>

Actions	Progress
Action 7 (2019): regional prioritisation	
<p>The Department for International Trade will prioritise resources to support educational opportunities in the key geographic regions of China and Hong Kong, the ASEAN region, the Middle East and North Africa, and Latin America. We will review current activity and expand our reach in these geographic areas. We will seek to better understand areas of opportunity in countries where the Department for International Trade's presence is less developed.</p>	<p style="text-align: center;">Completed spring 2020</p> <p>Remits of DIT regional leads were expanded to include new markets, where DIT is now working closely with overseas colleagues and key delivery partners to explore and promote opportunities.</p>
Action 8 (2019): new trading opportunities	
<p>The Department for International Trade's Education Team will work with UK government colleagues overseas to identify new opportunities for the sector and support UK providers in meeting those needs.</p>	<p style="text-align: center;">Completed summer 2019</p> <p>DIT has delivered Developing Sector Knowledge (DSK) sessions for UK government colleagues overseas, which have covered a wide range of priority markets and newer regions. In July 2020, DIT also delivered a specialists' virtual training session and is currently scheduling a virtual DSK, as a result of the coronavirus pandemic.</p>
Action 9 (2019): education exports data	
<p>The UK government will provide a clearer picture of exports activity by improving the accuracy and coverage of education exports data. The Department for Education, in partnership with the Department for International Trade, the sector and other key bodies such as the Office for National Statistics, will work in between each annual data publication to strengthen the methodology, identify a better range of sources, and look for ways to deliver more accurate, up-to-date reporting. Throughout, government will continue to look for ways to develop our picture of the global education market and regional trends, where the data allows, to better inform government and sector priorities.</p>	<p style="text-align: center;">Ongoing, review early 2022</p> <p>DfE analysts have undertaken stakeholder engagement to map out data availability across the education sector and requirements to improve coverage. A roadmap is being developed focusing on short/medium/long term steps to improve data.</p>

Actions	Progress
Action 10 (2019): training and information sessions	
<p>The Department for International Trade will work with relevant sector bodies such as the Early Years Alliance and other industry bodies to deliver a new programme of targeted training and information sessions on international opportunities to existing and interested providers. The sessions will be delivered in multiple formats, such as webinars and presentations at industry conferences. Starting from 2020 there will be at least one webinar every quarter and presentations at a minimum of three conferences each year. Webinars will be hosted on a regional basis given the differences in demand from different parts of the world.</p>	<p style="text-align: center;">Completed spring 2020</p> <p>In 2020, DIT conducted over 20 briefings and showcases, both independently and in partnership with key sector bodies, to both UK and overseas audiences. Further webinars are scheduled for a variety of regions, in partnership with global development banks.</p>
Action 11 (2019): early years market	
<p>The Department for International Trade will encourage the growth of the early years market by sharing more intelligence with the sector about the scale and scope of international opportunities. This will cover opportunities for setting up overseas sites, teacher training and curriculum design for UK providers. We will identify those providers that want to expand their offer to find the best export opportunities for them.</p>	<p style="text-align: center;">Completed spring 2020</p> <p>In October 2019, DIT ran a trade mission to China, meeting over 50 investors in a range of Chinese cities. The majority of the early years sector remains focused on domestic activity, a focus that has increased due to the coronavirus pandemic. DIT will continue its support, but expect growth in early years exports to be less than other sub-sectors in the coming years. Colleges and EdTech providers continue exporting Early Years training courses and products, even if fewer UK nurseries are established overseas.</p>

Actions	Progress
Action 12 (2019): independent schools	
<p>The Department for International Trade will encourage independent schools to access international opportunities, using improved education exports data to identify the top countries where there is the most opportunity for UK schools. We will connect providers with investors and work with key sector bodies to produce guides for schools interested in developing an international presence. This will be supported by face-to-face training events across the UK that promote the benefits of having an international dimension to independent schools.</p>	<p style="text-align: center;">Completed spring 2020</p> <p>Since March 2019, DIT has run trade missions to Saudi Arabia, Morocco, China, Vietnam and Cambodia, started initial research in Brazil and Latin America, as well as adapting rapidly to the coronavirus pandemic and running virtual trade missions to Saudi Arabia and Egypt. Each of these missions were accompanied by in-depth webinars and training, alongside regular training at all the major independent schools' conferences. Alongside this, DfE, DIT and Home Office have been working to promote the quality and safety of schools, both in the UK and overseas. Since October 2020, all licensed sponsors of international students under 18 are explicitly required to have proper safeguarding arrangements in place for their students, with failure to do so potentially resulting in action against their licence.</p>
Action 13 (2019): quality and safety of schools	
<p>The Department for Education, working with the Department for International Trade, will coordinate efforts across government and key sector bodies to promote the quality and safety of our schools, both in the UK and overseas, by advocating the British Schools Overseas Inspection Scheme. We will encourage independent schools to have a better understanding of guardian arrangements, learning from those schools that do this well and the important role of accreditation bodies.</p>	<p style="text-align: center;">Ongoing, review early 2022</p> <p>DfE and DIT have engaged with associations and inspectorates to promote the British Schools Overseas brand. On 2 December 2020, DfE launched a consultation on the national minimum standards for boarding and residential special schools on Citizen Space.²¹</p>
Action 14 (2019): training for ELT providers	
<p>The Department for International Trade will work closely with the ELT sector, providing information to increase their involvement in exporting services and expertise. We will organise workshops to encourage ELT providers to take advantage of export opportunities. We will also provide training on bidding for project work and establishing overseas centres, and logistical planning to support them to do so.</p>	<p style="text-align: center;">Completed spring 2020</p> <p>DIT worked with the British Council on joint webinars every 6 months to raise awareness of the UK ELT offer. Webinars will continue to target key markets and specific opportunities in subsectors of ELT, including English as a Medium of Instruction and English for Specific Purposes.</p>

21 www.gov.uk/government/consultations/standards-for-boarding-schools-and-residential-special-schools

Actions	Progress
Action 15 (2019): ELT sector engagement	
<p>The Department for International Trade will inform the UK ELT sector of global opportunities linked to other industries. We will ensure that ELT providers have the opportunity to take part in a broader range of Department for International Trade-led activity where ELT could play a more prominent role. From 2019, we will hold webinars and workshops in the UK to share sector best practice and identify large-scale international projects run by other UK exporters that require skills and training, which can be supported by language training.</p>	<p style="text-align: center;">Ongoing, review summer 2021</p> <p>DIT held meetings to provide overviews of the ELT sector and share sector expertise. DIT identified large-scale international projects and tenders submitted by exporters in other UK sectors, which required skills and training (including language training). Key sectors that DIT have identified and promoted include: mining, oil and gas and financial services.</p>
Action 16 (2019): promotion of ELT sector	
<p>The Department for International Trade will utilise our exports pipeline database and exploit opportunities overseas to promote the English Language and the UK ELT sector, as valuable contributors to individual and national prosperity. From 2019, the Department for International Trade will host joint webinars with the British Council to raise awareness of the ELT offer for the benefit of the UK education sector.</p>	<p style="text-align: center;">Ongoing, review summer 2021</p> <p>DIT hosted joint webinars with British Council and webinars will continue to move from opportunity promotion to opportunity creation.</p>
Action 17 (2019): support for the skills sector	
<p>The Department for International Trade will encourage a greater proportion of UK skills organisations to consider taking their offer internationally, where there is capacity to do so. We will provide training, support and access to UK Export Finance. From 2019, we will develop formal networks across government to highlight the capabilities of the UK TVET offer and its relevance to skills development across all industrial sectors. We will create and deliver a focused programme of support to the TVET supplier network, promoting the offer available from UK Export Finance.</p>	<p style="text-align: center;">Completed spring 2020</p> <p>Since March 2019, DIT has held over 17 workshops, 24 webinars and 3 roadshows, sharing opportunities with the sector and providing training and support to skills providers in all 4 nations. DIT have presented the UK TVET offer at 4 inbound study tours with overseas ministerial delegations, delivered 3 presentations to government staff to build knowledge and understanding of UK TVET exports, and created video clips to inform overseas stakeholders.</p>

Actions	Progress
Action 18 (2019): promotion of the UK skills offer	
<p>The Department for International Trade and the Department for Education will continue to utilise government-to-government and government-to-industry links overseas to promote the UK skills offer. The Department for International Trade will build on the UK Skills Partnership that brings together the best of the UK skills offer to provide coherent, structured and bespoke solutions to overseas partners. From 2019, the Department for International Trade will deliver knowledge-sharing events for clients and stakeholders, including webinars and briefing documents, to enhance their knowledge and view of the UK TVET sector as a worldwide, world-class operator. From 2020, the Department for International Trade will deliver a series of face-to-face information sessions and materials to increase the number of TVET providers who are registered on donor procurement portals and their level of success.</p>	<p style="text-align: center;">Completed spring 2020</p> <p>The UK Skills Partnership supported the development of promotional materials for a single UK TVET offer. DIT held 8 capability-building workshops across all UK nations with average participation of at least 45 TVET providers. Working with key global partners, DIT has delivered 5 webinars designed to build the skills of UK TVET providers and to raise awareness of donor / aid funding and increase the number of registrations. DIT worked with Ofqual to inform and implement tracking for the international delivery of regulated qualifications and awarding organisation export activity. The first data is to be released in quarter 1, 2021.</p>
Action 19 (2019): value of TNE	
<p>The Department for Education and Department for International Trade will work with the higher education sector and the British Council to identify more accurately the overall value of TNE to the UK economy. We will seek to provide insight into potential markets for both new and existing providers, and to improve the overall evidence base around best practice and impact.</p>	<p style="text-align: center;">Ongoing, review early 2022</p> <p>Promotional events and webinars were held on the global Skills for Prosperity Programme with UK higher education suppliers. DIT highlighted opportunities in new markets including India and Uzbekistan and organised events highlighting opportunities for UK HE TNE providers. DIT undertook outreach with institutions and other regional groups across the UK, including the Midlands Innovation and Midlands Enterprise Universities. As part of ongoing work by DIT and DfE to improve the accuracy and coverage of education exports data, a roadmap is being developed focusing on short/medium/long term steps to improvement, which includes data on TNE.</p>

Actions	Progress
Action 20 (2019): barriers to TNE growth	
<p>The Department for International Trade will support the sector to grow TNE by engaging in dialogue with countries with recognised export potential. We will work to resolve regulatory barriers through international agreements and the work of the International Education Champion. We will work to ensure these agreements include the recognition of UK degrees, including online and blended learning programmes.</p>	<p style="text-align: center;">Ongoing, review early 2022</p> <p>DIT have been involved in supporting TNE growth, particularly in light of the coronavirus pandemic, working with the sector on online higher education and developing messaging for the promotion of online TNE and liaised with ministries overseas in key markets. DIT supported promotion of UK higher education and recognition of UK qualifications through trade dialogues with a number of key partner and emerging markets, including the Brazil JETCO in autumn 2020.</p> <p>UUKi initiated a Task & Finish Group on UK online higher education with recommendations for the university sector, representative bodies and the government. UUKi published a summary of recommendations from this group in January 2021 in a report 'Building the global reputation and delivery of UK transnational online higher education'.</p> <p>DIT and DfE identified priority markets for the International Education Champion and in these markets addressing TNE regulatory barriers will be crucial.</p>
Action 21 (2019): support for TNE	
<p>The Department for International Trade will work with Universities UK international and the British Council to inform the UK sector of global opportunities for TNE through exhibits, webinars and engagement sessions. We will support TNE activity by producing country-specific guides that support targeted partnership development and by actively facilitating partner matching between UK providers and potential international collaborators. These guides, which will be produced for 2020, will focus on countries of particular interest and opportunity for the sector.</p>	<p style="text-align: center;">Completed spring 2020</p> <p>DIT partnered with UUKi and British Council in running a series of scoping missions and gathered crucial information on key markets to further inform the sector of TNE opportunities. DIT presented at major conferences across the UK and produced country guides on TNE in Saudi Arabia; ASEAN; Vietnam and Europe.</p>

Actions	Progress
Action 22 (2019): support for EdTech	
<p>The Department for International Trade will encourage the EdTech and educational supplies sector to engage with buyers both in the UK and overseas. We will provide government leadership where necessary and appropriate. We will run information webinars and face-to-face events and provide information briefings on the EdTech landscape in our key markets, highlighting opportunities for providers.</p>	<p style="text-align: center;">Completed spring 2020</p> <p>DIT ran trade missions, webinars and briefings to India, France, Kazakhstan and Indonesia. DIT collaborated with the British Educational Supplier's Association and its Great British Classroom. DfE, in partnership with Nesta, ran an innovation fund competition for EdTech companies, receiving 224 applications for £1.4 million grant funding. DfE launched the EdTech Demonstrator Programme, a network of schools and colleges exemplifying excellence in their use of technology offering peer-to-peer support.</p>
Action 23 (2019): UK EdTech brand	
<p>The Department for International Trade will work with the sector to continue to showcase the UK EdTech offer and help to build a stronger UK EdTech brand, using initiatives such as the GREAT British Classroom. Working with the sector, we will also utilise innovative multimedia platforms to help providers demonstrate their products to a global audience.</p>	<p style="text-align: center;">Completed spring 2020</p> <p>Roadshows were held, bringing Great British Classrooms technology to English schools. DfE's EdTech Demonstrator Programme supported schools and colleges in using technology more effectively. DIT, in partnership with Nesta, are running an EdTech Research & Development Programme, to support schools and colleges by building a useful evidence base of what works and what does not, as well as supporting EdTech companies to improve their remote learning tools. DIT are continuing to engage with the sector to inform policy thinking, design and delivery.</p>

Annex C: Acknowledgements

Organisations involved in this update

Devolved administrations

- Northern Ireland Executive
- Scottish Government
- Welsh Government

UK government departments, teams and executive non-departmental public bodies

- British Council
- Department for Business, Energy and Industrial Strategy
- Foreign, Commonwealth and Development Office
- HM Treasury
- Home Office
- Ministry of Housing, Communities and Local Government
- National Recognition Information Centre for the United Kingdom
- Northern Powerhouse
- Office for Students
- UK Export Finance

Associations, representative bodies, non-profit organisations

- British Educational Suppliers Association
- British Universities' International Liaison Association
- Confederation of British Industry
- Council of British International Schools
- Early Years Alliance
- English UK
- Fulbright
- Guild HE
- Independent Association of Prep Schools
- Independent Higher Education
- Independent Schools Council
- Jisc
- National Association for Special Educational Needs
- Quality Assurance Agency for Higher Education
- Russell Group
- The Boarding Schools' Association
- The Independent Schools' Bursars Association
- The Universities and Colleges Admissions Service



Department
for Education



Department for
International Trade

Department for Education

The Department for Education is responsible for children's services and education, including early years, schools, higher and further education policy, apprenticeships and wider skills in England.

Department for International Trade

The UK's Department for International Trade (DIT) helps businesses export, drives inward and outward investment, negotiates market access and trade deals, and champions free trade.

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