

# Briefing: UK immigration policy impact on Welsh universities

April 2024

## 1. International researchers working in Welsh universities

According to [HESA data for 2022/23](#), 15.5% of the workforce in Welsh universities is from overseas.

The ability to recruit and retain talented academics from across the international research and innovation sector is vital to ensure Wales continues to be at the cutting edge of research and remains globally competitive. This cannot take place in isolation – in order to be world-leading, Welsh universities must operate in a global talent environment, attracting the brightest and best researchers from across the globe. Without the involvement of international academics, our research and innovation activity across Welsh universities would be significantly hindered.

In the latest Research Excellence Framework assessment, [REF 2021](#), Welsh universities led the UK for the proportion of research whose impact is considered internationally excellent or world-leading, with 89% of Welsh research awarded 3 or 4 stars.

According to REF data, Welsh universities are home to 3.9% of the UK's researchers, despite Wales making up 4.7% of the UK population. Based on our comparative size, Wales has a lower proportion of researchers than the wider UK, meaning it is even more important that we are able to draw in talent and expertise from international partners to bolster our research base.

## 2. Impact of changes to the UK immigration system

Changes to the immigration system, including the increase in the general salary threshold, and the review of the Graduate Route, could have a significant impact on Welsh universities' ability to recruit international students and academics.

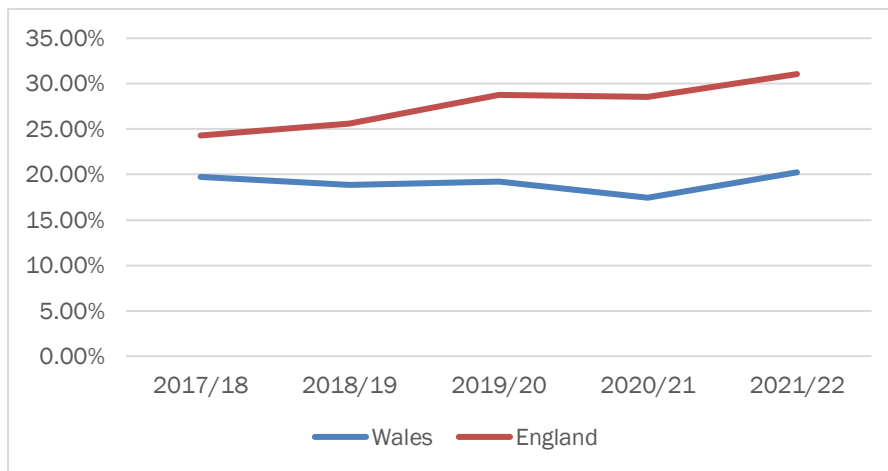
Universities across the UK (including Wales) are already reporting a significant decline in international recruitment. Data shows uncertainty over post-study work opportunities is an important factor in international student decision making, while a recent survey undertaken by UUK suggests that international student numbers are now declining, following a peak in 2022/23. The results, from over 70 universities, reveal a significant decline in enrolments, especially of postgraduate taught students – which were reported to be down by more than 40% in January 2024.

This picture is reinforced by the latest data from Enrolly, a platform used by around 60 universities. It suggests that international student demand for the UK is down significantly on last year, with overall deposits [down by more than a third on the same point in 2023](#).

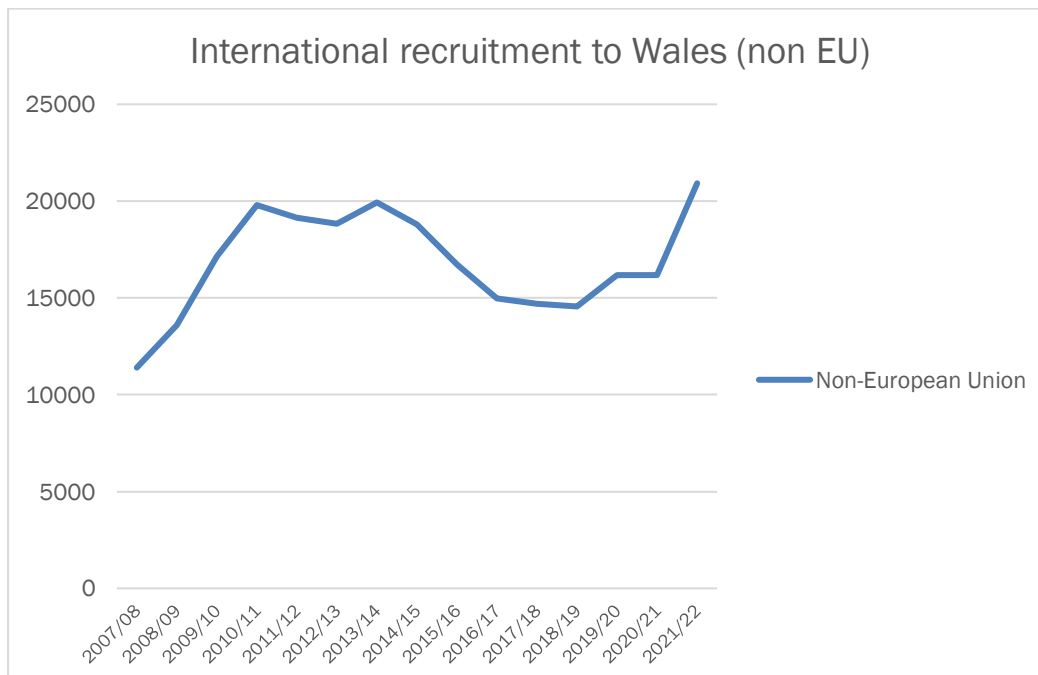
The Graduate Route has enabled universities to significantly diversify their student population.

As the chart below (Figure 1) demonstrates, the impact of any changes to the Graduate Route will be magnified in Wales, as international student growth in Wales has not matched that of the UK, and stagnated after the removal of the Post-Study Work visa in 2012 before increasing again more recently.

*Figure 1: international student enrolments as a % of higher education enrolments in Wales and England*



Source: HESA



The table below (Figure 2) demonstrates a recovery in recruitment from non-EU countries, particularly from Africa and Asia, since the introduction of the Graduate route in 2021. Enrolments had dipped after the post-work study visa was abolished in 2012.

Figure 2. Changes in enrolments in Wales

Domicile (conti..	Academic Year														
	2007/08	2008/09	2009/10	2010/11	2011/12	2012/13	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22
Africa	1,705	2,025	2,340	2,420	2,485	2,535	2,885	2,890	2,515	1,705	1,285	1,110	1,270	1,730	3,185
Asia	7,335	8,680	11,150	13,535	12,660	12,040	12,635	11,210	9,670	9,050	9,410	9,870	11,230	11,020	13,935
Australasia	70	80	90	70	75	80	105	90	85	65	55	65	70	75	75
Middle East	965	1,170	1,685	1,895	1,970	2,190	2,435	2,655	2,765	2,550	2,375	2,095	2,090	1,955	2,045
North America	760	830	845	830	880	955	865	955	860	860	955	805	855	785	1,095
Not known	860	540	370	125	170	55	15	25	5	0	0	0	5	0	10
South America	160	255	365	340	235	180	195	220	135	125	110	105	100	75	75
Grand Total	11,855	13,575	16,850	19,210	18,475	18,035	19,135	18,045	16,035	14,355	14,190	14,055	15,620	15,640	20,415

Source: HESA

The change in **salary thresholds** on the Skilled Worker Route (now £38,700) will also have a disproportionate impact in Wales, where the average graduate starting salary is ~£25,000. Furthermore, in 2020, Universities Wales was a signatory to a [joint position paper developed by Welsh Government](#), which suggested the salary threshold should be capped at £20,000 to avoid restricting opportunities for graduates in some parts of Wales. £38,700 is hugely prohibitive by comparison.

### 3. Continued role of international migration

International migration of students and academics is already a vital component of the higher education and research sector in Wales. It ensures Wales has a role on the world stage, and contributes to our [soft power](#).

International collaboration across research and innovation activity is fundamental in ensuring Welsh universities remain globally competitive. The UK's participation in Horizon Europe enables collaboration with world-leading academics based across Europe.

The latest REF exercise demonstrated the impact of research conducted at Welsh universities with international academics and partners, including [understanding the implications of emotional artificial intelligence](#), [pioneering new ways of tackling bacterial contamination](#), and [developing an ultra-lightweight camera for high-altitude use](#). The Welsh economy and society benefits significantly from research activity undertaken by Welsh universities. Universities in Wales generate [£5bn of output in the Welsh economy every year](#).

Further to this, in increasingly challenging economic circumstances, universities depend upon income from international student income to support teaching for domestic students (inflation means the domestic fee no longer covers the cost of teaching) and to make the delivery of research and innovation projects viable.

Universities are fundamental to the future economic productivity of Wales. More than 400,000 extra graduates will be needed in Wales by 2035 in order to respond to skills gaps and workforce challenges of the future, according to the findings of a [report by UUK](#). By 2035, 95% of *new jobs* in Wales will be at graduate level, with 88% of UK jobs set to be at graduate level. As Welsh universities currently provide around 40,000 graduates

each year, and account for nearly three quarters of the UK graduate workforce in Wales, this means increasing the number of graduates from Welsh universities very significantly. Immigration will have a key role to play in plugging skills shortage vacancies.

#### **4. Impact of Brexit**

Brexit has affected the recruitment of EU citizens to work in our higher education and research sector in a number of ways, including adding to the workload of HR staff processing immigration requirements for a wider range of employees. There are also considerable costs associated with migrating to the UK, including the cost of visas and the NHS surcharge, which are now payable by EU citizens.

Longer term, the issue will be around the attractiveness of the UK as a destination for an academic career when we are outside the EU. For now, our association to Horizon Europe is positive, and we would like to see the UK Government signal its intent to join FP10.

#### **5. Promoting Wales overseas**

The [Global Wales](#) programme is a partnership between Universities Wales, ColegauCymru, Welsh Government, British Council Wales, and the Higher Education Funding Council for Wales. The programme provides a strategic, collaborative approach to international higher education and further education in Wales. Its objectives include increasing the awareness and reputation of Welsh universities and further education colleges in priority markets increasing student numbers from those markets, and maintaining and growing partnerships. The priority markets are North America, India and Vietnam. The programme is funded to the end of July 2025.

As part of the Global Wales programme, the [Study in Wales](#) brand partnership works collaboratively with Study UK to promote Wales as a place to study.