

Medr's Global Outlook Roadmap

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Mae'r ddogfen hon hefyd ar gael yn y Gymraeg |

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Foreword

Wales is a country with a huge amount to be proud of. A huge amount to share. Our vibrant culture and rich national identity make us a proud nation, and one that is rightly ambitious in developing connections with the wider world. Nowhere is this more evident than in our tertiary education and research sector, where international collaboration, mobility, and exchange have brought enduring benefits to learners and communities across Wales for many decades.

We as Medr are proud to champion a tertiary education and research sector in Wales that is both inward and outward looking. Not only are our providers anchor institutions in their own localities, ensuring that learners across Wales have access to the very best educational opportunities and contributing to the overall well-being of the people and places closest to them, as well as to the lives of people and partners elsewhere in the world. In turn, this brings shared global benefits - advancing skills, knowledge and innovation that contribute to global well-being and which improve lives.

This Global Outlook Roadmap - which has been shaped through extensive engagement with providers, policymakers, stakeholders and partners across Wales and beyond - marks a significant step forward in our shared ambition to deepen and expand Wales's global connections, setting out a clear, practical framework for supporting international engagement across the breadth of the tertiary education and research in Wales. Through promoting mobility, enabling collaboration, and ensuring that the benefits of international activity are realised at home as well as overseas, this roadmap reflects our ambition to support a resilient, outward-facing, and globally connected system.

The actions set out in the roadmap focus on where Medr can strengthen access to insight and data to inform decision-making; supporting collaboration and partnership-building; and enhancing our capacity to monitor, anticipate, and respond to global developments. Taken together, these activities will help to build stronger partnerships, increase participation in international opportunities, and improve resilience across the sector.

Through broadening horizons for learners, enhancing skills and opportunities for staff, building stronger and more innovative institutions, and the Global Outlook roadmap will deliver lasting economic, social and cultural value for Wales.

This roadmap is therefore both a statement of intent and a commitment to action. It reflects our belief that, by working together with our partners and the wider sector, we can ensure that the tertiary sector continues to play its part in Wales thriving as a globally engaged nation. A Wales that is open, confident, and connected to the opportunities that lie ahead - both at home and further afield.

I would like to thank all those who have contributed to the development of this roadmap, and I look forward to working with you to realise its ambitions over the coming years.

James Owen
Chief Executive

1. Introduction

In Medr's Strategic Plan 2025-30, we set out our values which include 'Dysgu: to learn' encapsulated by our belief that curiosity fuels innovation and helps expand our horizons. But this value, of curiosity and looking outward, is not something new for the tertiary education and research sector. Rather, Welsh providers have a long history of building international links, supporting international exchange, and fostering global partnerships.

Perhaps most tangibly we see this in the way that learners across the world leave their home countries to study in universities in other countries. And just as many people from Wales have chosen to study elsewhere in the world whether that is for weeks or months or even years, Wales has also welcomed learners from across the globe. These learners have enriched our campuses, become part of our communities, and take with them not just a Welsh education, but an understanding and appreciation for Wales. But the international dimension of tertiary education is broader than learner mobility. It can be seen in the ways that staff build connections with people and institutions elsewhere in the world, and in how our education providers seek to exchange ideas and build partnerships across the globe.

These activities directly benefit learners and staff by broadening horizons, strengthening capabilities and helping develop and apply new knowledge. Yet the benefits are also felt throughout Wales: in the way that international learners contribute to their communities, in the economic benefits of export earnings and research partnerships, and through to the long-term strengthening of Wales' reputation and place in the world.

These benefits are why Medr's strategic duty to promote a global outlook, as set out in the Tertiary Education and Research (Wales) Act 2022, matters. It provides a clear and unambiguous steer for Medr to promote opportunities for learner and staff mobility, support international collaboration and partnerships, and to find ways for the benefits of global outlook activities to be realised for the well-being of Wales.

The purpose of this roadmap is to articulate the actions that we will undertake to fulfil our responsibilities under our strategic duty for promoting a global outlook. In doing so, we have also had to consider what a global outlook means across the breadth of the tertiary sector. We have attempted to reflect this breadth in the roadmap. In some cases, global outlook arrangements are historic or well-established, in others there are providers who have perhaps had limited international engagement previously but who want to grow or expand this work. The development of the roadmap has come at a point of increased uncertainty and change in the UK and global environment. The UK's decision to associate with the Erasmus+ programme creates opportunities for Welsh providers, staff and learners... but only if we are in a position to capitalise on those opportunities. And, at the same time, it creates uncertainty over what will happen to mobility programmes that providers have relied on for a number of years.

We have also seen uncertainty from the shifting choices of international learners. International learner numbers in higher education in the UK have been increasingly volatile in recent years, reaching a peak in Wales of c28,700 in 2022/23 before a swift decline to c21,600 in 2024/25. For many providers, international recruitment is a crucial part of their financial sustainability. This example crystallises some of the risks in this area, and ones that we've had to hold in mind as we developed this work.

This context has also led providers to set out different or renewed ambitions in the international space. Through our engagement, we have heard from further and higher education providers with an increasing interest in growing the education provision they deliver overseas. Already in higher education we have seen learner numbers on these types of programmes grow by 21.4% in five years. The UK Government's International Education Strategy (2026) cites the growth of transnational education as one of the key factors that will enable it to reach its inward investment targets. Medr has a role in both supporting sustainable growth in this area while also ensuring our quality and regulatory work maintain Wales' reputation and quality standards.

We have sought to strike a balance: an ambitious roadmap that articulates and expands opportunities across all of Wales' tertiary education sector, but one that also recognises the complex challenges that many of our providers are managing.

To help us find that balance, and to best identify the actions that we should undertake, we have developed this roadmap closely with stakeholders and providers across Wales. This has helped us to crystalise what we want to achieve through the work, in particular our ambitions to enable:

- More providers, including those with limited or no experience, to engage internationally
- Strong and sustainable global partnerships in education
- Better-informed decision-making across the sector
- Increased resilience to global shocks
- The benefits of the above being realised across Wales

What follows are the activities we will deliver to support realising our ambitions and fulfilling our strategic duties. It reflects the work we will continue to do along with the new or enhanced activities that will address gaps or provide support where it is most needed.

Crucially, although at the heart of this roadmap are the activities we will undertake, in doing so we will maintain our focus on ensuring that the particular benefits that a global outlook can offer are felt across Wales: by learners and staff, by providers, and by the communities that we serve.

2. Our approach: boundaries and principles

Medr's aim is to support international engagement by building on its current support for global outlook and focusing on actions which address risks, bridge gaps in provision, enable greater representation and participation of Welsh providers and learners in international activity, and promote the development of knowledge and expertise. The five separate provisions outlined within our strategic duty can be reasonably distilled into three **core objectives** around which Medr's global outlook support will be focused:

- 1) Promoting mobility
- 2) Enabling international collaboration

3) Maximising benefit to Wales

Medr has engaged with a network of stakeholders, sector experts, practitioners, policy makers and senior leaders from across the tertiary education sector to gather their perspectives on how we can respond to these challenges, what else is needed in this area and the role they believe Medr should play in providing solutions.

In determining where to focus its activity, Medr was guided by three principles:

1. **Additionality** – Acting where Medr can add value without duplicating existing provision
2. **Proportionality** – Ensuring activity is appropriate to Medr's role as funder and regulator
3. **System impact** – Developing interventions that recognise the diversity of tertiary education provision in Wales and seek to realise benefits across the sector

Global outlook touches on many of the things that Medr does as a matter of course, whether it's monitoring financial sustainability, finding ways to support providers to grow international research partnerships or ensuring that our approach to assuring the quality of education aligns with international norms.

This roadmap isn't intended to limit or define the totality of what Medr does in this space. It is intended to review, from a fresh perspective what Medr already does, where the gaps might be, and how we can support the sector to do more of the things that will realise benefit.

3. The Roadmap

Our roadmap consists of three thematic areas, informed by the principles set out above. Across these areas, we highlight where existing activity within Medr contributes to our strategic duty for promoting a global outlook, and where that existing activity may be enhanced. We also set out new activities intended to address gaps which Medr is well-positioned to support.

While our existing activities are largely focused in a relatively narrow number of areas, in time this roadmap will enable us to support the full breadth of our providers as we work towards the objectives set out in our strategic duty.

Theme 1: Providing information and insight

Given the uncertainty that providers have to navigate in developing and strengthening their global outlook activity, good information and insight is crucial to inform decision-making.

Action: producing and sharing analysis of data

NEW/ENHANCED

Medr will work with stakeholders to establish priorities for analysis, areas for exploration and gaps in insight and then share information that enables providers to make data-driven decisions that shape their international engagement and strategic planning.

Action: commissioning insight/research by third parties

NEW

Where the sector would benefit from obtaining new or bespoke insights, Medr will explore the potential to commission these resources.

Theme 2: Enabling collaboration

Promoting opportunities for collaboration is a fundamental aspect of our strategic duty. Through our engagement with providers and wider stakeholders, it became clear that this is a complex area with many existing routes and funders for providers to access.

However, our engagement highlighted specific gaps in early-stage engagement with potential international partners. Unlocking these opportunities could help position providers to grow and strengthen partnerships. This theme identifies ways in which Medr will aim to address those gaps.

Action: supporting a small grants programme

NEW

To enable providers to create or develop new links with international partners, Medr will offer grant funding for providers to formalise relationships, identify areas of shared priority, and develop plans for ongoing collaboration. Medr grants would not duplicate funding available through other organisations but would instead enable providers to capitalise on opportunities to collaborate when other funding options aren't available. For example, funds could support:

- a) Institutional Collaboration – to develop international connections of all kinds including sharing of best practice, curriculum development and learner mobility/exchange projects.
- b) Network/Conference attendance – to provide support for delegates from Wales to attend international events which would enable connections with new partner to be made.
- c) Research Connections – to support emerging or new institutional relationships, identify thematic priorities, focus areas and sources of sustainable funding to support international research and innovation partnerships

Action: supporting participation in visits and delegations

NEW

Under this action, Medr will support representatives from Wales' tertiary education sector to engage with delegations and missions: those visiting the UK and those taking

place outside the UK. Medr will work closely with its networks within and outside Wales to identify opportunities for engagement and to encourage incoming visitors to the UK to include Wales in their itineraries. Medr will also support Welsh attendance/engagement at international networking opportunities held elsewhere in the UK.

Action: creating Welsh expert networks

NEW

Medr will support and facilitate cross-sector networks and groups focused on the development of knowledge and sharing of best practice in international education provision. The focus of these networks will be determined in consultation with stakeholders within the sector with the purpose of addressing the needs of providers, with particular attention paid to filling gaps in current support and addressing emerging risks and opportunities.

Action: maintain support for partners

EXISTING

Medr will continue to provide support for partners that help further our aims including:

- Wales Higher Education Brussels (WHEB)
- Wales Innovation Network (WIN)
- Learned Society of Wales (LSW)
- Wales Editor role at The Conversation
- International Science Partnership Fund (ISPF)

Theme 3: Monitoring and horizon scanning

Medr will commit additional resources and add capacity to drive and enhance our activities in this space, primarily coordinated by the Senior Manager, Global Outlook role.

Action: desk-based research and monitoring of policy and developments in global tertiary education.

NEW

Medr will monitor the ongoing and emerging opportunities, challenges and trends within the international education space through desk-based research and horizon scanning. Our *Senior Manager for Global Outlook* will also act as point of connection within Medr, allowing links to be drawn between teams whose work contributes towards – or is impacted by – global outlook priorities.

These insights will shape Medr's internal strategy and priority setting in global outlook activity, recognising that changes and instability overseas can directly impact on Medr's wider responsibilities including the monitoring and reporting of financial sustainability of providers and the support offered for learner well-being.

Where appropriate, insight and updates will also be and shared with our stakeholder network to help providers develop their priorities in this space.

Action: building and strengthening relationships with stakeholder and policy makers.

ENHANCED

Medr will maintain and expand our engagement with key external policymakers, networks, groups and individuals in Wales, the UK and overseas with the aim of guiding decision-making and ensuring the inclusion and representation of Wales' tertiary education sector in current and upcoming international policy, programmes, projects and activities.

Action: monitoring and reporting on financial sustainability

EXISTING

Medr interrogates data and works with providers to understand emerging threats. In the Global Outlook context, Medr works closely with providers understand emerging partnerships, overseas provision arrangements, and analyses international student recruitment data to understand developing risks and what their impact may be.

Action: continue to provide quality-focused regulatory guidance and oversight of education delivered outside of Wales

EXISTING

Medr has a duty to monitor and promote continuous improvement in the quality of tertiary education provided by, or on behalf of, registered or funded providers including provision delivered outside of Wales.

4. The Roadmap – in summary

The following tables demonstrate how the actions defined above intersect with the core objectives set out in the Act, emphasising where each is expected to have the **most significant** impact:

	Core objectives		
	Promoting mobility	Enabling international collaboration	Maximising benefit to Wales
Thematic Area 1: Providing information and insight			
NEW/ENHANCED Producing and sharing analysis of data	X	X	
NEW Commissioning insight/research by third parties			X

	Core objectives		
	Promoting mobility	Enabling international collaboration	Maximising benefit to Wales
Thematic Area 2: Enabling collaboration			
NEW Supporting a Small Grants Programme:	X	X	X
NEW Supporting participation in visits and delegations	X	X	X
NEW Creating Welsh provider/expert networks	X	X	X
Funding support for Wales Higher Education Brussels		X	X
Funding support for Wales Innovation Network		X	X
Funding support for Learned Society of Wales	X	X	X
Funding support for Wales Editor, The Conversation		X	X
ISPF Management	X	X	X

	Core objectives		
	Promoting mobility	Enabling international collaboration	Maximising benefit to Wales
Thematic Area 3: Monitoring & horizon scanning			
NEW/ENHANCED Desk based research and monitoring of policy and developments in global tertiary education			X
NEW/ENHANCED Building and strengthening relationships with key networks		X	X
Funding support for UUKI.		X	X
Monitoring and responding to risks to the financial sustainability of providers routed in international policy and trends			X
Monitoring and responding to risks to the quality of internationally delivered provision (TNE)			X

Taken together, these actions will enable Medr to fulfil the responsibilities of our strategic duty and broaden international engagement across the tertiary sector by:

- Providing more and better insight to improve strategic decision making,
- Offering early-stage partnership support to facilitate more and stronger partnerships, and
- Increasing engagement and connectivity with key stakeholders to enable greater participation and resilience

Leading to:

- Increased mobility
- More collaboration, both internationally and within Wales, and
- Greater long-term benefit to Wales

Medr

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