

Medr's Global Outlook roadmap: Background, context and approach

July 2026



1. Context and the role of Medr

Medr's Global Outlook roadmap has been developed at a critical juncture in education both in the national and international context. In Wales and the UK, policy, funding and regulatory changes have altered the landscape and context in which tertiary education is delivered.

New avenues through which Wales and the UK can access and engage with programmes which support internationalisation – such as the UK reassociating with the Erasmus+ programme – create substantial opportunities. At the same time, there is uncertainty over the future of other mobility programmes and a need to ensure that the progress made toward increasing the inclusivity and diversity of learners engaging in mobility that was enabled through those programmes is not lost.

Such uncertainty and volatility present a unique challenge to learners and providers, particularly those providers for whom international engagement is mission-critical and fundamental to their financial sustainability.

It is also important to recognise the wider value which international activity with global partners can create for learners, providers and the wider community:

- Mobility and international collaboration projects support the enhancement of the **skills and capability of learners and staff**. Exposure to new environments, experiences and pedagogies encourage the development of new knowledge, abilities, approaches and intercultural competencies that have both personal and professional value.
- A global outlook also **contextualises and enriches teaching and learning**, especially in fields of study with an international focus such as modern languages, geography, politics and business by providing “real life” experiences and the chance to work with international peers.
- The unique skills, knowledge and expertise of providers' international staff, students and partners can be utilised to **address local issues** through the delivery of community engagement and civic mission programmes. This can be as simple as an international student tutoring local learners of their native language, or as far-reaching as providers working with international partners to tackle larger societal issues.
- International partnerships position Wales as a credible, outward-facing nation, which has long-term investment and diplomatic value, enhancing Wales' **soft power and reputation** and providing a platform to share Welsh culture.

Many of the programmes that Medr already supports contribute to our strategic duty for global outlook. This roadmap outlines how Medr will expand on its current offering, respond to emerging risks and support providers and learners to gain access to as many opportunities to enable high-quality international engagement as possible by focusing on actions which:

- address gaps in current provision,
- enable greater representation and participation of Welsh providers, learners and researchers in international activities, and

- promote the development and sharing of knowledge and expertise.

Medr recognises that no single organisation has sole ownership of the international agenda in tertiary education, and so we have worked and will continue to work collaboratively with key partners within and outside of Wales to ensure our approach is relevant, adaptable and focused on ensuring the best possible outcomes.

2. Medr's Statutory Duties

The Tertiary Education and Research (TER) Act (2022) outlines 11 strategic duties for which Medr is responsible, one of which is to **promote a Global Outlook**.

As part of this duty, Medr must promote:

- Opportunities in tertiary education for persons ordinarily resident in Wales to study or teach elsewhere in the world;*
- Opportunities to study or teach in tertiary education in Wales for persons ordinarily resident outside Wales;*
- Opportunities for the benefits gained from study and teaching of the kind mentioned in paragraphs (a) and (b) to be used for the economic, social, environmental or cultural well-being of Wales;*
- Collaboration in tertiary education between tertiary education providers in Wales and those elsewhere in the world;*
- Opportunities for persons ordinarily resident in Wales and tertiary education providers in Wales to carry out research and innovation elsewhere in the world.*

Some overlap between these five areas means they can be reasonably distilled in to 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**

Work in the Global Outlook space does not function independently from Medr's other responsibilities and while each strategic duty carries its own specific obligations and expectations, they are interconnected. Activities supported through Medr's approach to Global Outlook will therefore deliver outcomes across the range of our strategic duties and support the Long-Term Ambitions outlined the Strategic Plan (2025-2030)

Strategic Duties (TER Act)	Long-Term Ambitions (Medr Strategic Plan)
• Promoting lifelong learning • Promoting equality of opportunity • Encouraging participation • Promoting continuous improvement • Promoting research and innovation	• Better learner experiences and outcomes • More equitable opportunities • Improved learner engagement and well-being

• Promoting collaboration and coherence • Sustainable and innovative economy • Promoting Welsh medium study • Promoting civic mission • Promoting collaboration between providers and trade unions • Promoting a global outlook	• Greater alignment of knowledge with and skills with the needs of Wales • Growth in the excellence and impact of Welsh research and innovation • More learning in Welsh • Increased participation in tertiary education • More coherent learning pathways
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3. Approach and design

The roadmap is intended to provide a comprehensive overview of the support Medr offers to the tertiary education sector in Wales to promote a Global Outlook. This includes Medr's pre-existing support and new initiatives designed to broaden our offer and encourage greater engagement across the tertiary education sector. It does not define or limit the entirety of Medr's work in the international space. For example, Medr's ongoing assessment and monitoring of international student enrolment numbers informs our statutory responsibility to monitor the financial sustainability of providers in Wales. Similarly, our work monitoring the quality of education delivered by tertiary providers including, in many instances, that delivered overseas is an important element in protecting the interests of learners and ensuring Wales remains a credible study destination and collaborative partner.

While designing the roadmap, Medr has remained mindful of the need to balance the delivery of the three core objectives set out above while not acting in conflict with its role and responsibilities as the funder and regulator of tertiary education. This has been critical in determining which actions are included in the roadmap as well as whether Medr should take a leading or supporting role in their delivery, while ensuring we are sufficiently knowledgeable of the resources offered by other organisations so that Medr's activities complement rather than duplicate opportunity.

Alongside desk research and policy monitoring, engagement with key stakeholders from across the Welsh tertiary education sector and international educational community has been central to the design of the roadmap. Medr has gathered as broad a range of perspectives as possible while acknowledging the time-pressures felt by stakeholders within their day-to-day roles. Therefore, we have taken a combination of approaches including one-to-one conversations and group/roundtable meetings to identify where the pressure points are and to gather feedback on what role stakeholders believe Medr can play in supporting their international priorities.

The following list is not exhaustive but includes some of the organisations from whom Medr has sought guidance and challenge in designing the roadmap:

- British Council
- ColegauCymru – International Projects lead and International Network members
- Learned Society of Wales
- National Training Federation Wales (NTFW)

- National Union of Students Cymru (NUS Cymru)
- Staff from tertiary education providers
- Taith Programme
- Universities UK International (UUKI)
- Universities Wales - Policy, Global Wales and International Network members
- Welsh Local Government Association (WLGA)
- Welsh Government

4. Medr's pre-existing Global Outlook provision

It is important to reflect that while the Global Outlook roadmap itself and some of the actions contained within it are new, Medr already supports the tertiary education and research sector to engage internationally through its pre-existing provision and has supported activity in this space for several years. This support includes:

1) Funding to enable and/or enhance the work of partners:

- Wales Higher Education Brussels (WHEB) – WHEB champions the interests of Welsh universities in Europe, encouraging collaboration between researchers and other potential partners, and strengthening university ties with European organisations and regional partners while keeping Welsh universities updated on European developments and opportunities
- Universities UK International (UUKi) - UUKi promotes opportunities for Welsh universities to participate in international research funding and mobility schemes as part of wider UK engagement; supports HEIs' engagement and insights on key international policy issues such as research security and captures and promotes the benefits of international collaboration.
- Wales Innovation Network (WIN) - A collaborative initiative that brings together all Welsh universities to strengthen research and innovation in Wales. WIN raises the visibility of Welsh universities' research and innovation on a national and international stage, facilitates interdisciplinary collaboration, and makes it easier for Welsh universities to form partnerships and share infrastructure and expertise.
- Learned Society of Wales (LSW) – LSW is Wales' National Academy and draws together the expertise, experience, and connections of its Fellowship to promote and develop Wales' research and innovation community including promoting the global impact of Welsh research. Through collaboration internationally with other academies (including Celtic Academies Alliance) they represent Wales in promoting the contribution of research to society. Alongside this they provide grant funding to support international collaboration (such as, Wales' first Peace Institute). Medr's contribution to the core funding of LSW can be used to supplement the Early Career Travel and Expenses Bursaries scheme, which enable knowledge exchange, enhancing researcher profiles, and expanding professional networks.

- The Wales Editor role at [The Conversation](#) – This role enables Wales-generated research and academic output to reach a large, global audience, enhancing the visibility and reputation of Wales’ providers and academics with potential international partners.
- The [International Science Partnership Fund](#) (ISPF) – Medr administers Wales’ allocation of DSIT funding to eligible HEIs, enabling them to foster global research collaborations in support of overseas development assistance.

2) Quality-focused regulatory guidance and oversight of education delivered outside of Wales

Medr monitors and promotes continuous improvement in the quality of tertiary education provided by, or on behalf of, registered or funded providers.

Our regulatory framework also includes a validation condition which requires providers registered with Medr to ensure that any validation arrangements in place are effective in enabling the provider to satisfy themselves as to the quality of the education under such arrangements.

Student numbers on Welsh transnational education programmes have grown by 21.4% in five years, from 28,795 students in 2019–20, to 34,945 students in 2023–24. The positioning of transnational education as a leading contributor to the UK Government's inward investment growth expectations as set out in the International Education Strategy (2025) indicates that this is an area in which we can expect further growth.

External quality assurance reviews protect the reputation and quality standards of this provision, and for Welsh higher education providers these are carried out by the QAA. They include all higher education provision of an institution, including franchise and transnational provision.

Furthermore, all of Wales’ higher education providers with overseas provision participate in the QAA TNE QE Scheme to promote high-quality educational delivery and governance, protecting Wales’ reputation internationally and reducing the financial and reputational risks that come from poor quality delivery.

Medr’s approach to quality aligns with the standards and guidelines for quality assurance in the European Higher Education Area, supporting the mobility of learners and movement of workers wishing to study, live and work overseas through making the qualifications they hold clear, comparable and recognised outside Wales and the UK.

HESA’s Aggregate Offshore Record collects data on students studying overseas for awards from Welsh higher education providers. Medr monitors this data to help in the assessment of quality of this provision, including learner outcomes.

3) Monitoring and shaping policy

Medr supports the sector to access and respond to the latest developments in international education policy by working with departments and directorates in UK and Welsh Government including (e.g.):

- Home Office (UK)

- Department for Science and Technology (UK/Wales)
- Department for Education (UK/Wales)
- Department of International Trade (UK/Wales)
- International Relations and Trade (Wales)
- Tertiary Education Division (Wales)

These relationships enable Medr to support providers to shape their strategic planning and risk assessment, while providing Medr with a mechanism to get early sight of policy change and shape policymaking through sharing data, analysis and sector intelligence.

4) Monitoring and assessing risk to financial sustainability

As part of the wider regulatory responsibility to monitor the financial sustainability of tertiary providers, Medr interrogates data and works with providers to understand emerging threats and to develop responses. In the Global Outlook context, Medr works closely with providers to understand emerging partnerships and overseas provision arrangements. We assesses international student recruitment data to identify trends and maintain an active dialogue with providers and policymakers to understand where risks are developing (at an institutional, geographically and policy level), what their impact may be and to offer appropriate insight and advisory support to all parties.

The four areas outlined above represent a substantial commitment of resources, however, Medr recognises the need to provide further support which is in keeping with its whole-sector remit. To this end, the roadmap includes several new initiatives and actions which have been developed with ease of access, flexibility and responsiveness in mind so that providers and learners can respond quickly to risks and opportunities as they arise.

5. Establishing thematic priorities and areas of focus

Medr's ambition 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.

Analysis of emerging trends and issues from a Welsh, UK and global perspective highlights the volatility of the global education landscape.

For example, when mobility is considered through the lens of student recruitment, it is well established that international students bring multiple benefits to Wales' institutions who report a more global outlook and culture on campus as part of the student experience, and income from international recruitment is also an important component of the financial sustainability for many providers. However, recent downward trends in international recruitment have seen the number of international students coming to Wales fall from c28,700 in 2022/23 to c21,600 in 2024/25. This presents a substantial

challenge to financial sustainability which Medr will monitor and report on, in line with our wider statutory responsibilities.

A further priority is to ensure Wales is not working from a position of comparative disadvantage compared to other UK nations to ensure our learners and providers are able to make full use of the international opportunities available. To this end Medr has reviewed the models of support and provision offered in Scotland, England and Northern Ireland – and by agencies with a UK-wide remit – with the aim of ensuring that we are offering greater parity of opportunity and resources so that Wales' tertiary education sector can maximise its international engagement.

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.

Naturally, working across the whole of the tertiary sector, with its broad range of providers, learners and contexts makes finding consensus over specific priorities challenging. For example, some respondents have a long-established history of engagement with international programmes, supported by embedded strategic direction and practice. Others, meanwhile, are completely new to this space and require support to begin their international journey.

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

On this basis, Medr identified three cross-cutting **thematic priorities** that respond directly to sector need and align with the statutory Global Outlook objectives:

1. Providing Information and Insight

Improving access to data and analysis to support informed decision-making by providers, learners and policymakers.

2. Enabling Collaboration

Supporting the development of sustainable partnerships, networks and early-stage collaboration across borders and sectors.

3. Monitoring and Horizon Scanning

Utilising Medr's expertise and relationships to strengthen the sector's ability to understand, anticipate and respond to policy, regulatory and geopolitical developments that affect international engagement.

These themes do not operate in isolation from one another. Together, they provide a coherent framework through which Medr can support mobility, collaboration and benefit to Wales, while remaining responsive to an evolving global landscape.

In each thematic area, actions have been designed to address one or several of the core objectives in the Act. The tables below demonstrate how these new actions and Medr's pre-existing provision intersect with the core objectives, 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 and 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

6. Thematic priorities and actions – in detail

The thematic priorities provide an over-arching context from which actions, and interventions have been developed. The following new **actions** are proposed to enhance or be offered **in addition to the pre-existing provision** described above and are not intended to limit or define the entire range of work undertaken by Medr that may have an international dimension.

In keeping with the need to respond with agility to opportunities as they arise, the weighting of resources allocated to these actions will be under regular review to ensure they are meeting the needs of the sector and aligned with emerging risks and opportunities in global education.

To enable the delivery of the actions, and to coordinate the wider support and programmes operating in this space, a full-time post – Senior Manager, Global Outlook – will be created within Medr.

Thematic Area 1: Providing information and insight

Producing and sharing analysis of data

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.

Commissioning insight/research by third parties

Where the sector would benefit from obtaining new or bespoke insights, Medr will coordinate the commissioning of external providers to develop these.

Thematic Area 2: Enabling collaboration.

Supporting a Small Grants Programme:

To enable providers to create or develop new links with international partners, Medr will offer small amounts of grant funding for providers to formalise relationships, identify areas of shared priority, develop plans for ongoing collaboration and sources of funding that would enhance these. Medr grants would not duplicate funding available through other organisations and would instead be available to enable providers to capitalise on opportunities to collaborate where 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

Supporting participation in visits and delegations

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.

Creating Welsh expert networks

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.

Thematic Area 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.

Desk based research and monitoring of policy and developments in global tertiary education.

As part of the day-to-day responsibilities of Medr's *Senior Manager, Global Outlook*, the postholder will monitor the ongoing and emerging opportunities, challenges and trends within the international education space through desk-based research and horizon scanning. They 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 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. Insight and updates will also be shared with our stakeholder network to help providers develop their priorities in this space.

Building and strengthening relationships with stakeholder and policy makers.

The Senior Manager, Global Outlook 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.

7. Ongoing governance and engagement

The Global Outlook roadmap is intended to be a dynamic and evolve over time, and how the resources and activities outlined within it will be weighted and prioritised will be monitored on an ongoing basis with reviews undertaken annually. This will allow Medr to assess risk, map opportunity and allocate resources according to where they are most needed and can make the greatest impact.

The input of stakeholders will be essential in this process and to enable this dialogue, a cross-sectoral global outlook advisory group will be established and meet regularly to share insight, establish priorities and agree approaches.

8. Summary

The roadmap and the actions included within reflect Medr's commitment to delivering on its strategic duty to promote Global Outlook in the context of its wider responsibilities as the funder and regulator.

It is reflective of the complex environment and context in which it will operate and has therefore been designed to balance stability and clarity of intention through identifying three overarching thematic areas, while maintaining the adaptability required to respond to a changing landscape by applying a flexible, needs-based approach to the resources allocated to the supporting actions.

This approach will enable Medr to fulfil its strategic duty by addressing its core global outlook objectives outlined in the TER Act (2022):

- 1) Promoting mobility**
- 2) Enabling international collaboration**
- 3) Maximising benefit to Wales**

The activities in the roadmap 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

Looking ahead, the approach to the ongoing delivery of the Global Outlook roadmap will mirror the process through which it has been designed, by prioritising engagement and collaboration – at home and internationally – and focusing on achieving the best possible outcomes for Wales, its learners and education providers.

Medr

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