



NCUK

THE UNIVERSITY CONSORTIUM

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The Power and Impact of Pathways

March 2024

iTHE IC

Academy | Executive | Community

About NCUK: NCUK is a global pathway provider, founded in 1987 by a consortium of universities. NCUK stands out with its unique heritage, born from universities and owned by the Northern Consortium charity, and its mission is to broaden access to world-leading education for aspirational students and support them to succeed at university and beyond. NCUK has supported over 50,000 international students in achieving their dream of studying at university.

www.ncuk.ac.uk

About Nous Group: A leader in higher education with global expertise. A strong higher education sector is essential to the UK's future. Nous is committed to partnering with institutions to solve strategic challenges, drive performance and build capability with our dynamic team of experts. Our offer includes helping universities to articulate and solve complex challenges, develop institutional infrastructure to deliver exceptional outcomes and provide expert guidance on transformation and developing capability.

nousgroup.com

About The IC Global Partnership: The IC Global is a training, development and consultancy company focused on the advancement of professionals, institutions and educational organisations in internationalisation and global engagement. The IC Global offers lifelong and transformative learning for individuals and organisations through training, consultancy, coaching, mentoring, events and bespoke services to The IC Global community, which comprises over 1,600 education professionals from over 75 different countries.

www.theicglobal.com

CONTENT

1. Foreword	3
2. Introduction	4
3. Types and models of private pathway providers	6
4. The need for global higher education	9
4.1 Growing international student demand	
4.2 The prevalence of China and India as the largest dominant international student recruitment countries	
4.3 Ongoing attractiveness of Anglophone countries as study destinations	
4.4 Fluctuations of individual markets' competitiveness due to political and economic events	
4.5 The need for diversification of international student recruitment channels	
5. Benefits to international students	19
5.1 Academically preparing international students	
5.2 Pathway providers provide access routes into higher education	
6. Benefits to universities	23
6.1 Preparing international students and generating value for universities	
7. Benefits to the economy	28
7.1 Supporting the UK to be a top study destination	
7.2 International students bring cultural and economic gains	
8. Benefits to export countries	31
8.1 Transnational and in-country pathway education have a positive international impact	
9. Conclusion	33

FOREWORD BY CHIEF EXECUTIVE OFFICER, STUART SMITH

Those involved in international education understand the positive pedagogical, social and individual benefits that it brings. By internationalising our educational institutions we can bring diversity into lecture theatres and laboratories by ethnicity, nationality, religion and cultural context. That diversity can help us to decolonise our curricula and better cater for the global majority in the education that we offer. Diversity of thought can help higher education deliver creative solutions to the global challenges that we face. And through diversity we can bring individuals together to learn from each other and form personal and professional relationships that will drive economic, cultural and technological developments in the future.

But we need to continue as a sector to work hard to internationalise higher education. We can only drive diversity by recognising and accommodating the diversity of the students that we want to attract, and by providing effective educational pathways for each of them.

NCUK and our parent charity, Northern Consortium, know this as well as anyone. Our first pathway programmes were established by a consortium of universities in 1987 and with the explicit purpose to broaden access to higher education for international students. We were an early entrant into the pathway market and we have a deep and unique perspective on the value of pathway routes. Since then, NCUK has worked with more than 50,000 international students, helping them progress to more than 50 university partners across the top five global study destinations.

Our longevity – and the global industry that's grown with us – is testament to the importance of pathways as a route for students who need further academic or language support, or a bridge between local qualifications and destination countries' education systems. There's also a growing body of evidence that pathway programmes prepare students very well for success at university.



For example, 89% of NCUK's International Year One students go on to graduate from university with a 2:1 or higher, with 46% achieving a first. Pathway providers – as specialists in the learning, teaching and assessment of international students – are often able to pioneer new approaches to academic delivery and student support that are adopted by the sector more widely.

As the market for international and transnational education changes – with the emergence of new study destinations, particularly in Southeast and East Asian markets – traditional (Anglophone) education destinations need to reflect on their offer and consider what differentiates them in a global marketplace.

In partnership with the Nous Group and The IC Global Partnership, NCUK have commissioned '[The Power and Impact of International Pathways to Global Higher Education](#)' report to support that reflection and assessment, and to help the sector explore the trends and challenges it faces.

For those fortunate enough to have travelled, studied or worked internationally, the learning opportunities and intercultural experiences are unforgettable. We need to continue sharing these opportunities with the world, fostering understanding and collaboration, and working towards a more inclusive society.

Pathway programmes play a critical role in this aspiration by providing choice and opportunity to international students, supporting diversification, cultural enhancement, and driving economic growth.

Evidencing the value of pathway education is crucial to ensuring that it can continue to deliver these benefits and transform lives across the global education community.

Stuart Smith,
Chief Executive Officer, NCUK



2. INTRODUCTION

Universities often collaborate with private pathway providers to provide alternative routes to access their programmes. The pathways sector is diverse and offers a variety of study models, offering flexibility to international students, universities, and local education systems.

Pathway programmes typically include:

- **International Foundation Year programmes**, which provide direct access into Level 4, usually at a pre-agreed tariff, regularly benchmarked against the standardised Level 3 tariff.
- **International Year 1 and International Year 2**, whose academic content is often developed in partnership with partner universities matching comparable Level 4 and Level 5 modules to ensure that international students are academically prepared to proceed to the next level. An alternative is in place for UK domestic students through the HNC and HND models, where universities recognise the content and an agreed pass mark to allow students to progress into an advanced year of a degree.
- **Pre-masters programmes** prepare and provide an entry route for international students to enter their chosen postgraduate degree if they achieve the required grades. The programme provides the necessary academic and English language skills to study at the postgraduate Level 7.

Pathway providers are a key recruitment channel for universities to meet their international growth ambitions and to diversify their student population. Universities' aspiration to attract large numbers of international students is due to the significant and evidential social, cultural, and diplomatic value that they bring to the destination countries, as well as the significant revenue contribution they make to universities. However, international student recruitment markets are diverse and often volatile to geo-political and economic events and to policy choices in host countries (1). For example data published by Enroly based on real-time data from their platform, emerging evidence from the January intake of international students to UK universities shows a significant fall from the expected intake in the UK for January 2024 compared to 2023 (2). This fall is driven primarily by major UK international student recruitment markets, India and Nigeria which is also reflected in the September intake numbers showing a -1.43% decline in CAS and Visas issued to Indian students and -21.42% amongst Nigerians, as well as -12.12% from Chinese nationals (3).

It is likely caused by increased international competition from other study destinations, the uncertain political environment in major English-speaking destinations, changes in UK study visa regulations and access to dependent visas. Against this backdrop, pathway providers help universities to diversify the countries and regions where they recruit international students from and to reduce the risks of over-reliance on a small number of target international student recruitment markets.

1. BBC News, Tougher visa rules unveiled in plan to cut migration, 5/12/2023, <https://www.bbc.co.uk/news/uk-politics-67612106>, accessed 12/12/2023

2. Enroly Data Team, Huge fall in international numbers predicted in January as deposits and CAS collapse, 30/11/2023, <https://www.enroly.com/blog/huge-fall-in-international-numbers-predicted-in-january-as-deposits-and-cas-collapse>, accessed 08/12/2023

3. Enroly Data Team, Enroly Intake Report, September 2023, 05/10/23 <https://www.enroly.com/blog/overall-international-student-numbers-rise-amid-a-sharp-fall-in-nigerian-students>



Pathway providers are one of the recruitment channels which universities can use to help mitigate these risks. The international higher education market's importance will not diminish soon, and competition for students will only increase. The pathways sector is diverse and offers a variety of study models, offering flexibility to students, universities, and local education systems.

This report covers private pathway providers, the market they operate in and the benefits they create. *Specifically, it sets out:*

‘Around 4 percent of non-UK applicants in 2020/21 submitted their UCAS application through a foundation provider or UK HEI pathway programme, rising to around 6 per cent of all acceptances. This figure likely underestimates the total trend as many international students transition directly to a linked degree course rather than making an application through the UCAS system.’ (4)



The services and business models which exist in the pathway provider sector.



The significant trends in the Higher Education market that make pathway providers attractive and necessary.



The value of a pathway degree to international students, universities, and the economy of both home and destination economies.

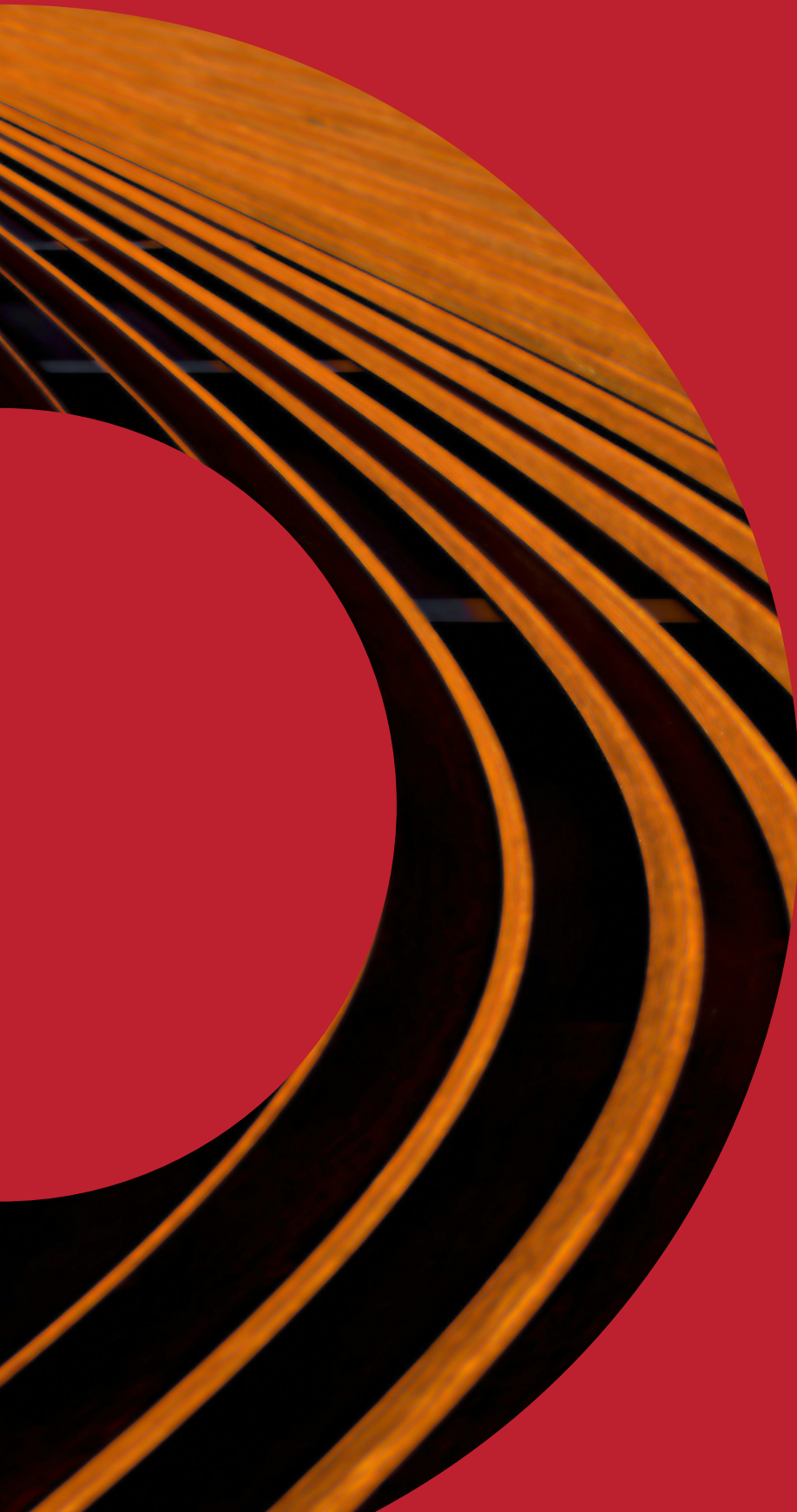
Access to national open source data on the number of students coming through pathway providers doesn't currently exist, making it challenging to understand the size of the pathway sector. The application routes and process contribute to this fragmented collection of data. Due to the lack of data, the growth of specific pathway providers or identifying who is the largest provider is either anecdotal or only available from specific pathway providers directly. Therefore this report draws on insights and data from bespoke datasets specifically from UCAS, publicly available data from HEPI and UKVI, as well as proprietary data from NCUK, insights from Nous Group.

The limited access and lack of data was identified by the British Council 'Pathways and recruitment channels to undergraduate study in the UK' report of June 2023.



‘Gaps in currently available data make it difficult to obtain an accurate picture of the relative scale of each recruitment channel. In particular, international students transferring to UK HEIs via TNE partnerships or through credit recognition or articulation agreements with overseas universities are generally not captured in UCAS application data. Meanwhile, interviews with private pathway providers conducted as part of this research show that the number of international students entering HEIs through these providers is significantly higher than the 5,290 applicants that appear in UCAS statistics in 2021/22, due to direct applications made outside of the UCAS system. Nevertheless, it is possible to gain some insight into trends in recruitment channels by analysing data on undergraduate applicants by UCAS apply centre.’

3. TYPES AND MODELS OF PRIVATE PATHWAY PROVIDERS



3. TYPES AND MODELS OF PRIVATE PATHWAY PROVIDERS

Universities can find a pathway provider that delivers the specific mode of pathway provision and support services they require.

PATHWAY PROVIDERS DELIVER IN-COUNTRY, AT-DESTINATION AND ONLINE

The major differentiating factor between different pathway providers is the channel and mode in which they deliver their educational products to students. There are five distinct modes:

- 1** In-person delivery at a relevant university campus: this is the most common mode in the UK where many UK universities host a pathway provider building on one of their campuses. **Example:** the INTO study centre based at the University of Exeter (5).
- 2** In-person delivery at a pathway provider campus in the destination country: some pathway providers have study centres in the country in which students wish to study that are independent of a university campus. **Example:** Kaplan International College in London (6).
- 3** In-person delivery at a partner university in the source country: foundation programmes offered by destination universities are often delivered via a partnership with an in-market university. **Example:** Queen's University Belfast's partnership with Shenzhen University. (7).
- 4** In-person delivery at a study centre partner of a pathway provider in the source country: not all pathway providers deliver education directly. Some partner with study centres across source countries to deliver pathway programmes designed and assessed by the provider. **Example:** NCUK partners with local centres across East Asia, West Africa and the Middle East and Central Asia.
- 5** Online delivery via the pathway provider learning platform: the expansion of providers into online delivery was accelerated by the COVID-19 pandemic. Now multiple providers offer fully online foundation courses with guaranteed progression to a partner university on successful completion. **Example:** the Study Group Online Foundation Programme (8).

5. <https://www.exeter.ac.uk/study/undergraduate/courses/foundation/>

6. <https://www.kaplanpathways.com/where-to-study/kaplan-international-college-london/>

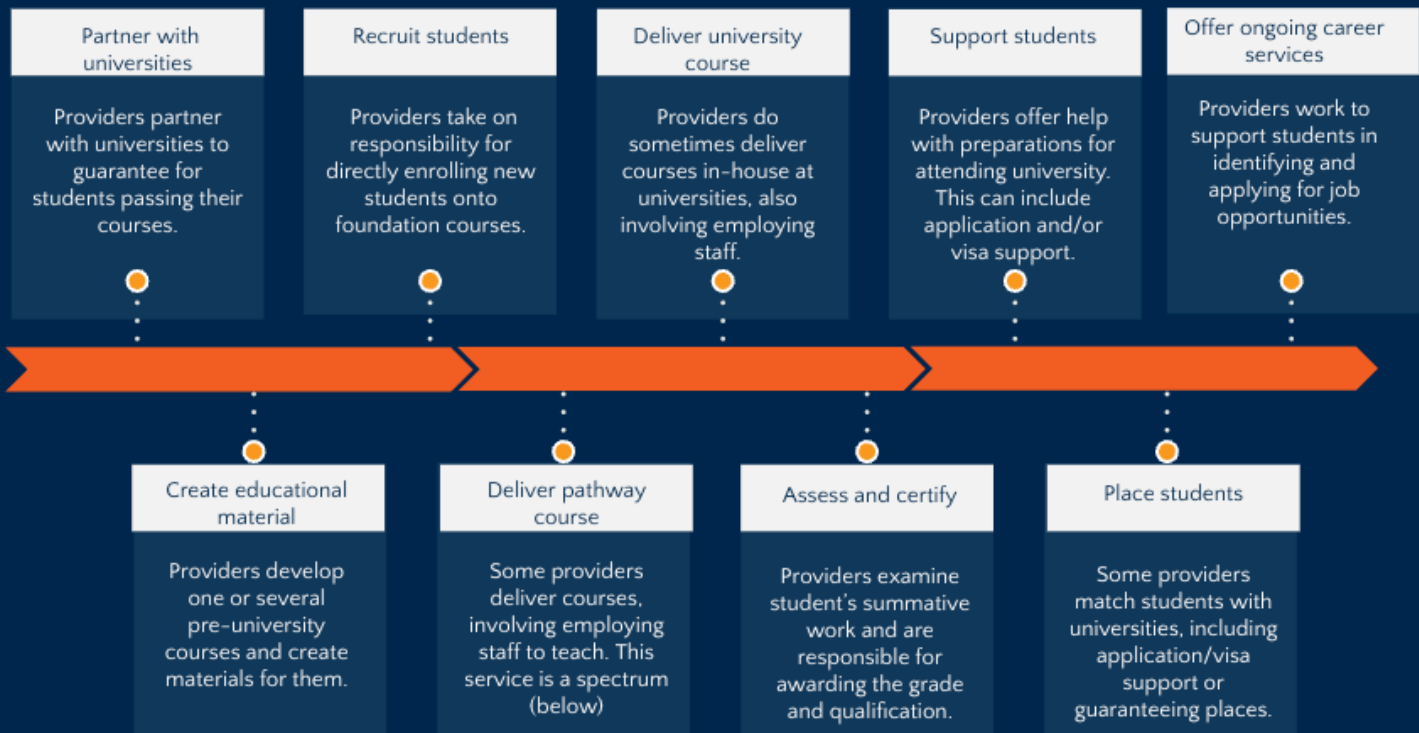
7. <https://www.qub.ac.uk/International/Global-engagement/shenzhen-and-queens/>

8. <https://digital.studygroup.com/programmes/international-foundation-programme>

MARKET IMPACT THROUGH DIFFERENTIATED VALUE CHAIN

Pathway providers deliver services along the value chain shown in Figure 1 below. It is uncommon for pathway providers to not offer some services under each element of the chain, however, the breadth and intensity of services varies across the sector.

Figure 1 | Pathway provider services



The major market private pathway providers across the UK, North America and Australia offer different combinations of services across the value chain. All offer standard services: partner with universities, create educational material, assess and certify qualifications, and support international students. These are pathway providers' current 'core offers', but the offer is adapting over time. 'Support students' is a newer addition to this core set.





4. THE NEED FOR GLOBAL HIGHER EDUCATION

4. THE NEED FOR GLOBAL HIGHER EDUCATION

International students are critical to the higher education sector but universities must navigate the driving trends:

- Large and growing international student demand.
- Dominance of China and India as the largest international student recruitment markets and of China as the largest market for pathway provision.
- Ongoing attractiveness of Anglophone countries (UK, USA, Canada, Australia) as study destinations.
- Fluctuations of individual market competitiveness due to political and economic events.
- Competitive pressure in main recruitment channels.

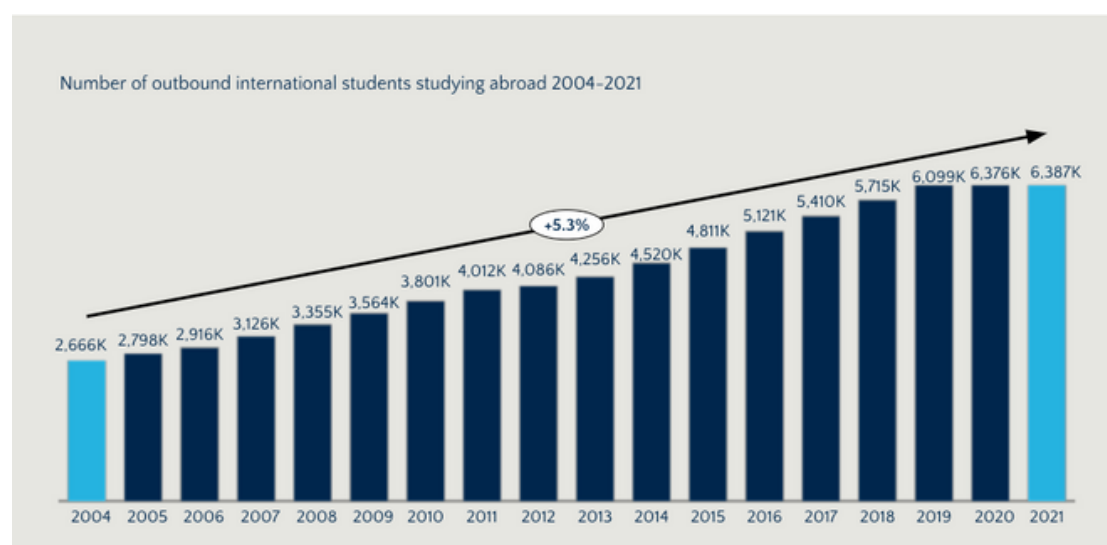
The market for international higher education is large and growing. The broader value of international students motivates universities to recruit globally. It helps universities fulfil their mission to extend access to higher education, exercise global influence through an international alumni network, and enrich their learning community with more diverse ways of thinking. Additionally, providing inclusive education alongside the decolonisation of curricula further enhances the university experience for both domestic and international students studying at university.

The consistency and resilience of this growth, and the historical capacity of international students to pay premium rate fees for education, have been part of the reason that the higher education sectors in the Anglophone countries have oriented themselves around international student recruitment to support and subsidise their research activities, and increasingly in some markets, their education for domestic students.

4.1 GROWING INTERNATIONAL STUDENT DEMAND

The number of international students travelling outside their home country to study abroad at higher education institutions has risen dramatically this millennium, consistently increasing yearly (see Figure 2). Over 6 million international students travelled abroad in 2021, nearly 2.5 times the amount in 2004. There is a notable slowdown in growth in 2021, which is likely an impact of the COVID-19 pandemic.

Figure 2 | Number of outbound international students studying abroad (2004-2021) (9)

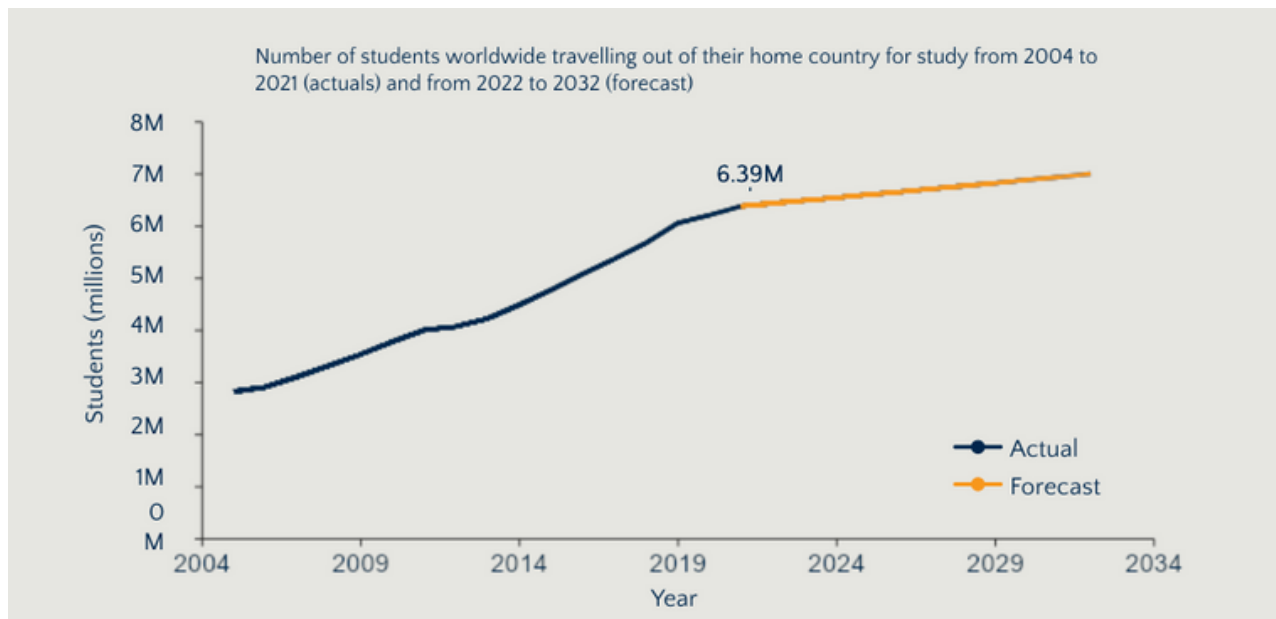


9. Extracted from <http://data.uis.unesco.org/>, UNESCO 14/11/2023

This trend in growth is likely to continue, though it may be slower than pre-pandemic. The British Council has previously found that GDP per capita is the most reliable predictor for student mobility from 2004 to 2019 (10).

GDP per capita is likely to rise by 0.84% per year to 2032, according to OECD GDP Projections (11) and World Bank population projections (12). This would mean over 7m internationally mobile international students by 2032, as shown in Figure 3.

Figure 3 | Number of outbound international students studying abroad (actual and forecast) (13)



4.2 PREVALENCE OF CHINA AND INDIA AS THE DOMINANT INTERNATIONAL STUDENT RECRUITMENT MARKETS AND OF CHINA AS THE DOMINANT PATHWAY MARKET

Outbound international students are primarily from China and India, but other large and growing markets exist. Even in the second significant year of the COVID-19 pandemic, Chinese outbound students made up over 15% of the total share of international students despite the much stricter travel restrictions in China in that period (Figure 4).



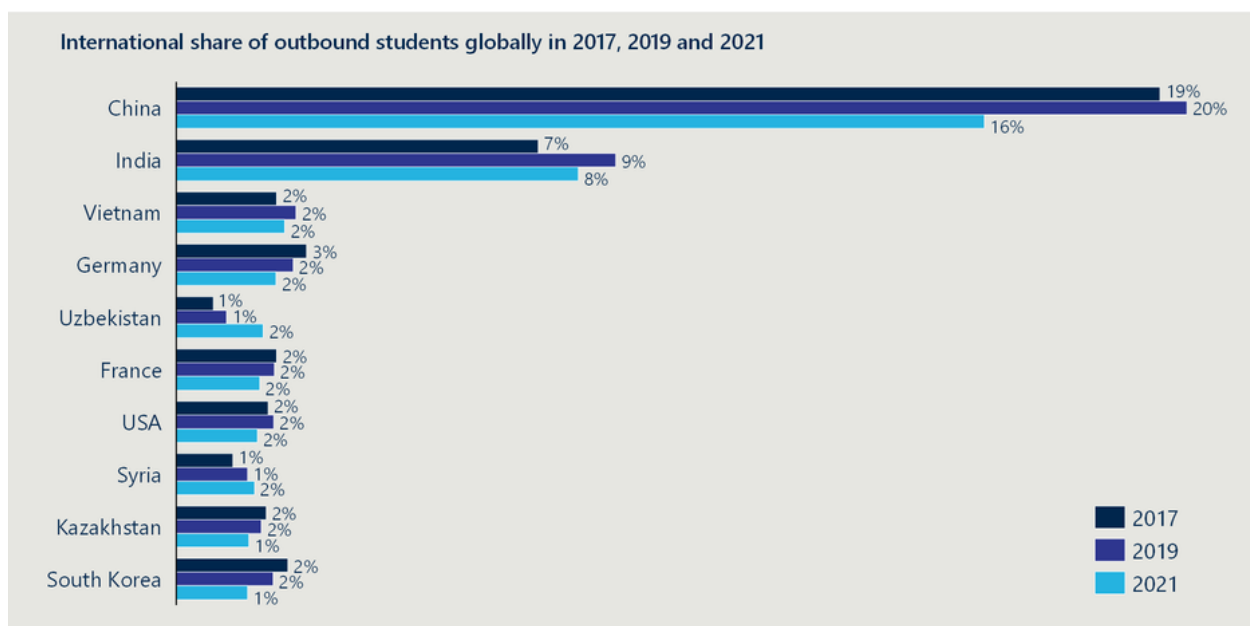
10. Michael Peak, Global demand for international higher education: reflecting on forecasts and tracking policies, 08/2020, <https://www.britishcouncil.org/research-insight/international-higher-education-forecasts-tracking>, accessed 11/12/2023

11. Extracted from <https://data.oecd.org/gdp/real-gdp-long-term-forecast.htm>, OECD 22/11/2023

12. Extracted from <https://databank.worldbank.org/source/population-estimates-and-projections>, The World Bank 22/11/2023

13. Extracted from <http://data.uis.unesco.org/>, UNESCO 14/11/2023

Figure 4 | Top 10 countries for outbound students, 2019 and 2021 (14)



The Chinese and Indian markets are already large and likely to grow over the next ten years, matching substantial rises in GDP for both countries, however, China is a much larger market for pathway provision (Figure 5). India remains an important market for traditional international student recruitment but pathway provision has not found the same scale of market there as it has in China. Pathway providers have instead found market share in many smaller and emerging markets, driving diversity as well as mitigating risk from being over reliant on just a select few recruitment markets.



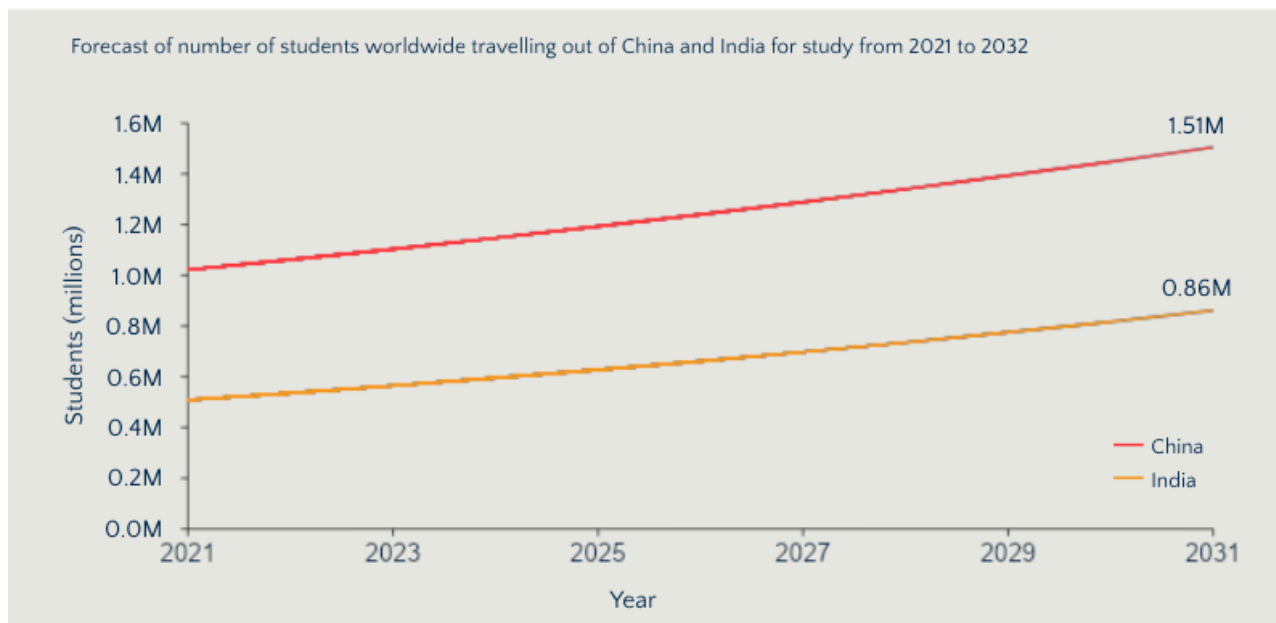
Pathway providers can drive diversity as well as mitigate risk from over reliance on just a select few international student recruitment markets.

Higher education institutions can benefit from pathway providers expanding into emerging markets as well as markets where there are variances between local qualifications and destination entry requirements. There are still significant opportunities in markets such as Vietnam, Saudi Arabia, Egypt, Nigeria, Indonesia and across South America, many of which align to the UK Government's International Education Strategy.

Pathway providers are in a strong position to expand in these areas, bringing local qualifications to destination entry requirements as well as supporting market entry for universities who want to develop international opportunities without being reliant on international student recruitment partners, supporting diversity of their student portfolio.

15. Nous analysis, based on data: Extracted from <http://data.uis.unesco.org/>, UNESCO 22/11/2023, Extracted from <https://data.oecd.org/gdp/real-gdp-long-term-forecast.htm>, OECD 22/11/2023, Extracted from <https://databank.worldbank.org/source/population-estimates-and-projections>, The World Bank 22/11/2023

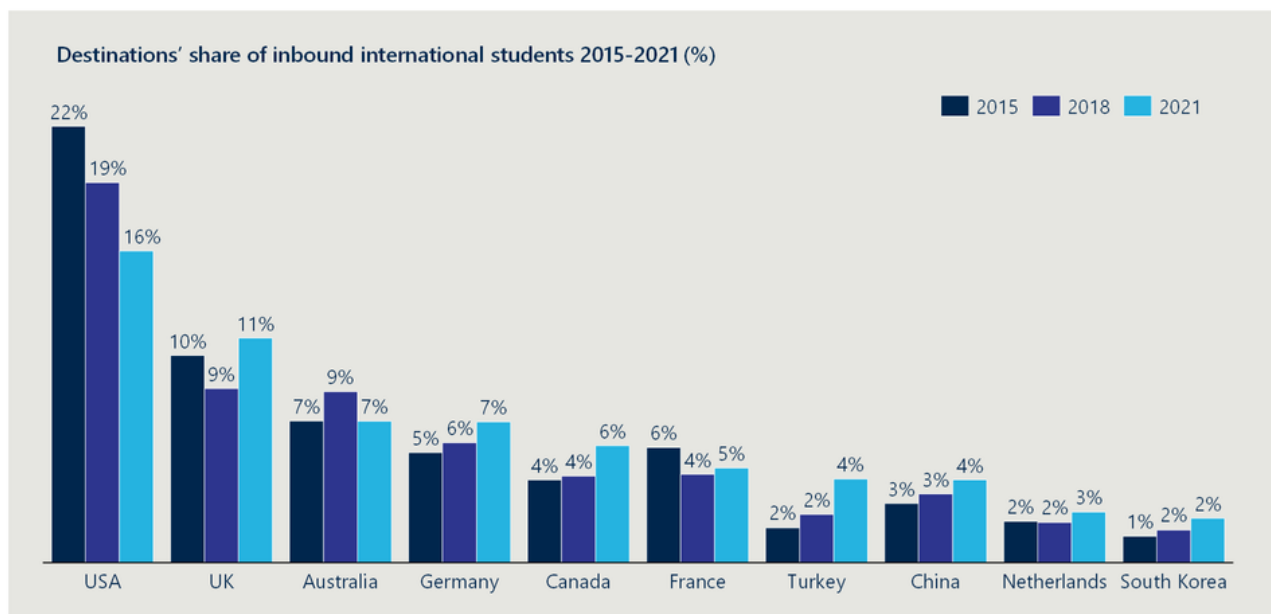
Figure 5 | Forecast of the number of students worldwide travelling out of China and India for study



4.3 ONGOING ATTRACTIVENESS OF ANGLOPHONE COUNTRIES AS STUDY DESTINATIONS

Anglophone countries are traditionally, and remain, popular destinations for international students. As of 2021, 40% of international students travelled to the United States, Canada, UK and Australia (Figure 6). All these countries feature in the top 5 student study destinations.

Figure 6 | Top 10 most prominent international student study destinations (16)

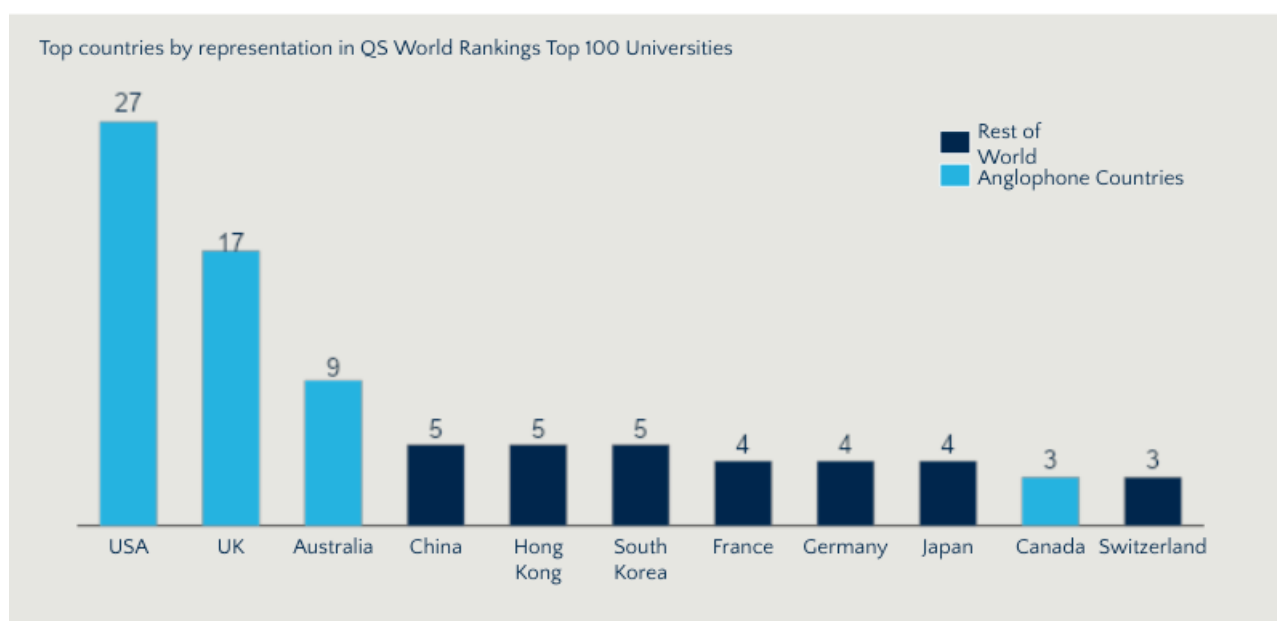


16. Extracted from <http://data.uis.unesco.org/>, UNESCO 14/11/2023

Anglophone countries continue to have a strong reputation in the global Higher Education sector, and this is highlighted by the strong representation of Universities in Anglophone countries in the Top 100 Universities, according to QS 2024. 56 of the top 100 are in the United States, UK, Australia and Canada, with four each in the UK and USA in the top 10.

As Figure 6 shows, although the Anglophone destinations maintain a substantial market share, there is emerging competition in the market from destinations such as Turkey, Central Asia, East Asia and South East Asia, which may, over a more extended period, threaten the traditional strong position of the major destinations including the United States, UK, Australia and Canada. Figure 7 shows an increasing number of universities outside these markets in the World Top 100 rankings, providing higher education excellence in more destinations and delivering more choices for international students.

Figure 7 | Top countries by QS Top 100 Universities 2024 representation (17)



4.4 FLUCTUATIONS OF INDIVIDUAL MARKETS' COMPETITIVENESS DUE TO POLITICAL AND ECONOMIC EVENTS

Overall, the international student market has enjoyed sustained growth and is projected to continue growing. The global university sector is growing increasingly successful at attracting international students, and many universities are beginning to recruit international students from various markets.

However, short-term risks constantly threaten disruption, even for the most prepared universities.

Over the last fifteen years, there have been short-term market fluctuations caused by unexpected events. This has happened in very different contexts and without prior sector knowledge. This has affected different types of universities and demonstrates the impact short-term unforeseen external circumstances can have.

17. Extracted from <https://www.topuniversities.com/world-university-rankings> QS TopUniversities 11/12/2023

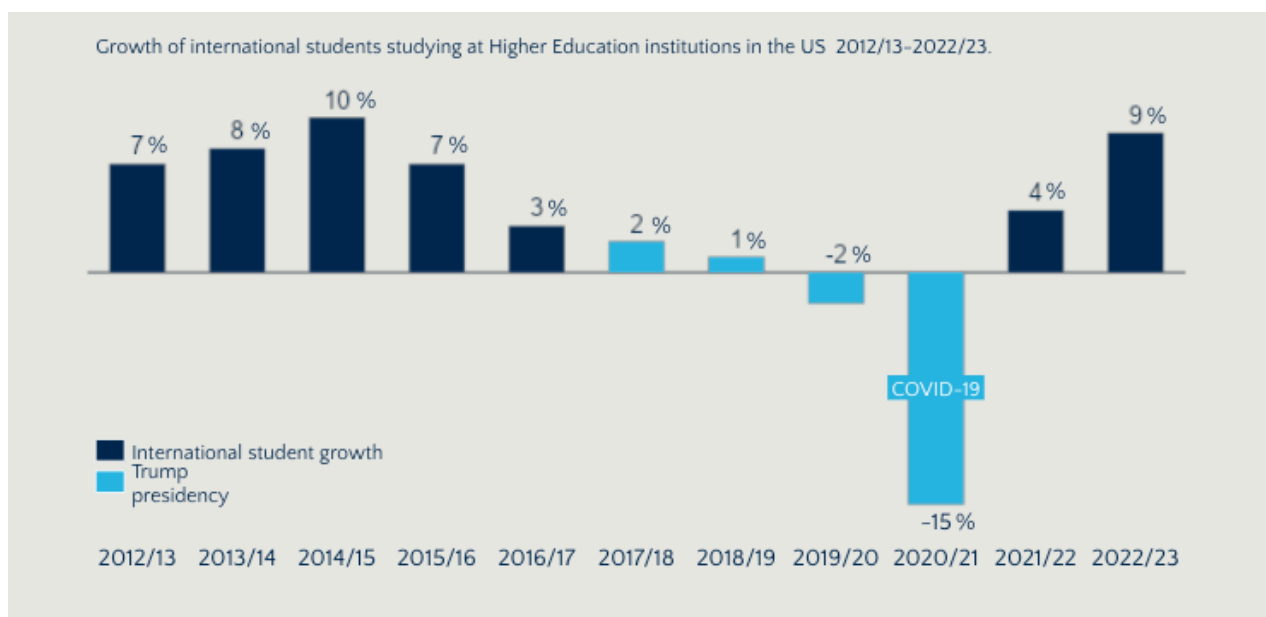
A key example is the downturn in USA inward student flow during the Trump presidency and the COVID-19 pandemic. President Trump's campaign before the 2016 election featured solid anti-immigration sentiments, which continued after he was elected.

From high growth in the first half of the 2010s, the increase in international students studying in the USA significantly slowed after 2016 and began to fall in 2019/20 (Figure 8).

The sharp 15% fall in international students in the year following the pandemic also highlights the immense impact short-term shocks can have. High levels of growth have begun to return post-COVID and with the election of President Biden, demonstrating how responsive the market can be to changes in political circumstances. With the recent Republican and Democrat Primaries in the United States, it's evident that the 2024 General Election will be a Trump-Biden rematch, therefore universities should be aware of the potential impact this may have on their international student recruitment and demand curves dependent on the outcome in November 2024.

UNITED STATES

Figure 8 | Growth of International Students studying at HE Institutions in the US 2012/13 - 2022/23 (18)



18. The Fall 2022 Snapshot on International Student Enrollment, <https://www.iie.org/publications/fall-2022-snapshot-on-international-student-enrollment/>, accessed 11/1/2023

Crimes against Indian students drove growth away from Australia

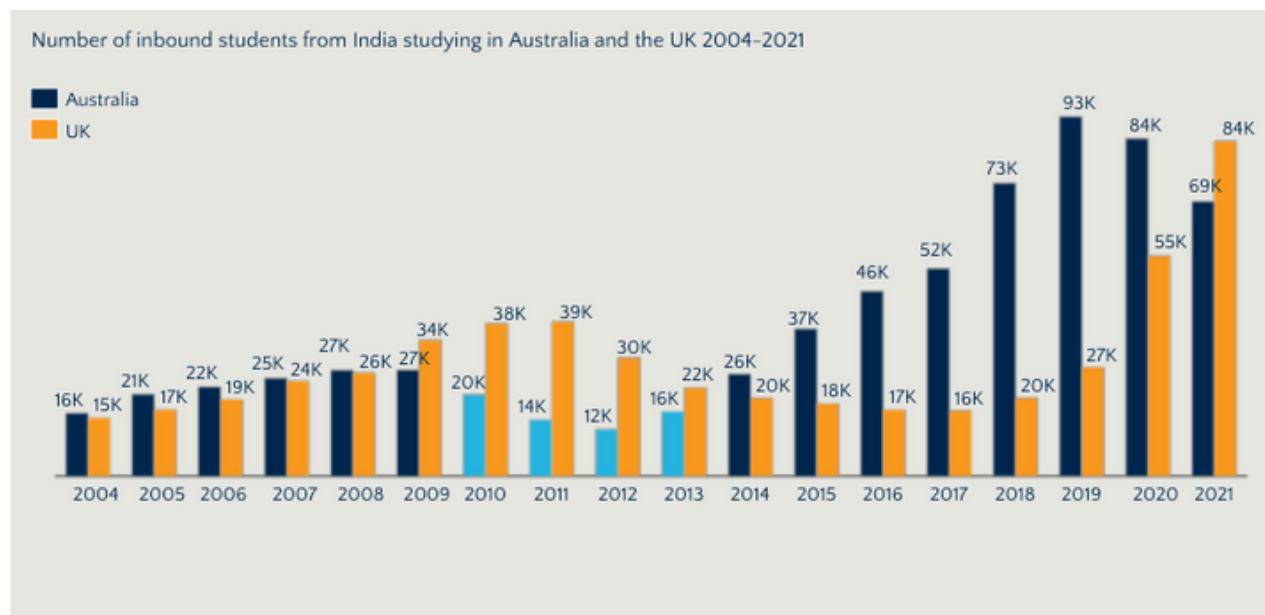
Across 2009 and early 2010, there were several high-profile protests by Indian citizens working or studying in Australia against violence and crime against Indians. The demonstrations attracted significant media attention in Australia and India and the involvement of several leading government officials across both countries.

In the immediate aftermath, the number of outgoing Indian students travelling to Australia significantly fell, from 27k in 2009 to as low as 12k in 2021 (Figure 9). Simultaneously, the number of Indian students travelling to the UK grew, highlighting that the demand for international education remained high even though Australia was perceived as less attractive. As the media attention fell away, the number of Indian students in Australia has significantly increased, returning to previous levels by 2015 and continuing to multiply.

As with the Trump presidency, this highlights the significant impact of short-term political events on student numbers and the extent to which universities' international student recruitment is impacted by external events over which they have no control.

INDIA

Figure 9 | Number of inbound students from India studying in Australia and the UK 2004-2021 (19)

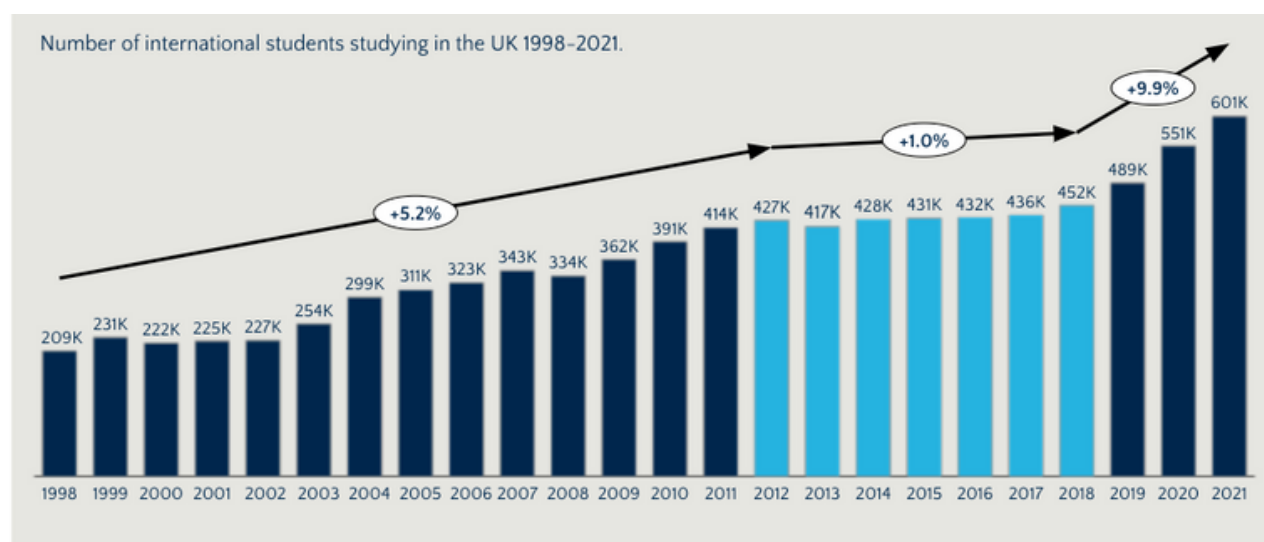


The UK experienced significantly high growth in its international student numbers from 2002 to 2011 (Figure 10). In 2012, the UK government removed the post-study work visa for university international students, making the UK less attractive for international students. This significantly hindered the ability of UK universities to recruit international students, demonstrated by the relative flatlining of the growth of international student numbers. In contrast, the global development of the market was strong.

This change was then reversed in 2019. Since then, the UK's international student market has returned to experiencing significant growth, even during the Covid-19 pandemic. The near flatlining of international student numbers during the removal of the post-study work visa highlights the considerable impact government policy can have on individual countries' intake of international student numbers. Although the data has shown growth in recent years, with the removal of dependants from certain student visas and a review of the graduate visa (20), there is a risk of history repeating itself.

UNITED KINGDOM

Figure 10 | International students studying in the UK 1998-2021 (21)



It is clear unforeseen external circumstances can come quickly and unexpectedly, and affect institutions across entire countries, regardless of how good they are at recruiting international students.

20. <https://www.bbc.co.uk/news/uk-politics-67623131>

21. Extracted from <http://data.uis.unesco.org/>, UNESCO 14/11/2023

4.5 THE NEED FOR DIVERSIFICATION OF INTERNATIONAL STUDENT RECRUITMENT CHANNELS

Universities are aware of the risk of being overexposed to a single market. Still, the sheer scale of India and China as student markets makes a certain level of dependence unavoidable. Beyond diversifying into different countries, diversifying channels across countries can help universities mitigate this, and pathway providers are one option to achieve this.

In a recent article in Times Higher Education, former Conservative MP and Higher Education Minister, Chris Skidmore stated “Four years ago 70 per cent of students came from 17 countries, but now 70 per cent come from just seven countries – we are losing that diversity, which is another challenge.”

Pathway providers operating in-country can provide a strong pipeline of international students from a diverse range of countries, supporting universities to reduce over reliance on specific markets. This helps universities to reach international students from new markets where they have not been historically active and to protect themselves against fluctuations resulting from events affecting particular countries that impact on the international student demand.

“

Four years ago 70 per cent of students came from 17 countries, but now 70 per cent come from just seven countries – we are losing that diversity, which is another challenge.”



5. BENEFITS TO INTERNATIONAL STUDENTS



5. BENEFITS TO INTERNATIONAL STUDENTS

Pathways provide a route for international students who need further academic or language support, or a bridge between local qualifications and destination countries' education systems. They are essential to standardising international education. Pathway providers offer international students who have the means and capability to succeed at university the skills, access and broader administrative support to arrive on-campus equipped for success.

5.1 ACADEMICALLY PREPARING INTERNATIONAL STUDENTS

Pathway programmes are essential to standardising international education, providing international students with a well-rounded foundation for success in future academic studies in destinations such as the UK, Australia, New Zealand, Canada, and the United States. Pathway programmes aim to uplift standards for entry requirements for international students who would not normally be able to meet such requirements obtained in their home countries.

Because of the variation across countries in qualifications obtained before full degree study, aspiring international students from regions like Sub-saharan Africa or Latin America would normally need to top-up their qualifications for entry by enrolling in a Pathway programme, unlike most students in China, USA, or Singapore where UK/US/Australia/Canada equivalent qualifications are commonly available. By concentrating on academic preparation, skill development, and continuous quality assurance, these programmes ensure that international students are not just ready for university but are prepared to thrive and excel in higher education.



CASE STUDY: NCUK pathways and student success

NCUK supports students of all abilities and ensures that no matter the individual student's skills and aspirations, NCUK can help them achieve their ultimate university ambitions. NCUK's programmes have enabled its international students to receive over 10,000 university offers, with 87% of international students securing placements at their first or second-choice universities.



NCUK works with its university partners to develop their academic content. The organisation also works with its university partners to set clear and transparent entry requirements for its students, to ensure they have the best chance of preparing for and succeeding at university.

This approach delivers results. 2021/22 data shows:

- 81% of IFY Programme international students passed the qualification, with 35% achieving AAA.
- 87% of International Year One Programme international students passed, with 16% achieving an overall distinction.

NCUK pathways set international students up for future success at university. 2020/21 graduate data shows:

- 70% of IFY international students achieved a 2:1 or higher.
- 89% of International Year One international students achieved a 2:1 or higher.
- 78% of NCUK IY1 students also completed the NCUK IFY.

“

NCUK were founded from an alliance of UK universities driven by shared aspirations to widen access and embrace the benefits of international education for all involved. As a result of this long established, close working relationship, we trust NCUK and know that they are well positioned to understand international students and universities, delivering high quality pathway provision with robust academic integrity.”

Dr Malcolm Butler

Vice-President and Director of Global Engagement,
University of Sheffield

“

I first came in for NCUK International Foundation Year and my experience was brilliant and therefore decided to do another year, the International Year One. Additional to this was to save up some money and spend a bit more of time closer to home”

Danial Haider Tabassum (Pakistan)

Completed International Foundation Year a
and International Year One in Pakistan
BENg (Hons) Electrical and Electronics,
The University of Manchester

5.2 PATHWAY PROVIDERS CREATE ACCESS ROUTES INTO HIGHER EDUCATION.

Pathway providers are the route for many international students to progress to Higher Education overseas. They can be an alternative route for international students who seek further academic support, a bridge between local qualifications and universally accepted qualifications, or a way to improve the academic performance of a student who has not performed as well as they had hoped in their high school qualifications – widening access to higher education for more international students around the world.

Pathway providers embed English language tuition in their programmes with the dual purpose of ensuring that students have the academic English ability and skills to succeed on their studies (and to meet universities' entry requirements), and are able to navigate day to day life in an English-speaking country (and meet any applicable immigration requirements). It ensures international students are adequately prepared to meet all requirements of the course they progress on to. This support is critical for their ongoing academic studies in an anglophone country. It ensures universities can rely on pathway students to get visa approval and that the international students are academically prepared to succeed in their chosen university programme.



Pathway providers widen access to higher education for more international students around the world

However, this is not all that pathway providers offer. Further services provided for international students across the sector include:

- Enrolment and placement support, including visa services, support with applications and counselling on where to apply for university studies.
- Pastoral and academic support, including during the student's study at their subsequent university.
- Support finding student accommodation and helping international students with the complexity of letting contracts and guarantors.
- Guidance in understanding the differences between local education systems and international study destinations, including the skills they will need to develop to succeed.
- Pre-arrival guidance ensures that international students know what they need to prepare for and pack ahead of going abroad, including guidance on going to their destination for the first time.



6. BENEFITS TO UNIVERSITIES



6. BENEFITS TO UNIVERSITIES

Pathway provision provides both student revenue to universities and confidence in the stability of that income over the length of the student's course compared to students recruited through direct channels. Pathway education is also critical in supporting diversification in higher education.

6.1 PREPARING INTERNATIONAL STUDENTS AND GENERATING VALUE FOR UNIVERSITIES

Pathway providers generate significant value for their university partners and the economies of the major recruiting countries given its role in the growth of international students. In the 2021/22 academic year, across the whole UK sector, first-year international students generated a net impact of £37.4 billion (22) on the UK economy throughout their studies, according to a 2023 report by the Higher Education Policy Institute. Universities reap a significant amount of this directly, but the benefits of pathway providers go beyond direct revenue growth.



Pathway providers generate significant value for universities and the recruiting countries economies

Pathway providers offer the following holistic benefits to universities, including:



Academic preparedness of international students: Pathway providers allow international students to study academic content alongside critical academic English content and academic study skills, meaning they are often more prepared for university.




Cultural preparedness: Students arriving in a new study destination, experience both the obvious culture shock of adapting to a new set of public norms and behaviours and the secondary culture shock of a new educational environment and academic expectations. Pathway providers that deliver education in-country teach international prospective students how to learn in the type of university environment they are working towards even before an international student arrives in the country. Providers who teach in the UK can provide a more tailored experience to support international students making the transition from their home country for the first time.

22. HEPI, The benefits and costs of international higher education students to the UK economy, May 2023, <https://www.hepi.ac.uk/wp-content/uploads/2023/05/Summary-Report-Benefits-and-costs-of-international-students.pdf>



Student recruitment reliance and diversity: Different pathway providers have strengths in different student recruitment markets, and many are expanding their presence outside the traditional China, Southeast Asia, and Indian markets. Typically, a given university agrees with a pathway provider to provide and guarantee an agreed number of international students from various countries. The university can scale up and down the number of international students from different countries they receive from the providers. While this will vary year to year and is limited by the size of the student pool in those countries and the provider's ability to recruit, it is a reliable stream. It does not require the university to invest in in-country activity to engage with various agents. Pathway providers can also effectively estimate how many students they will be able to qualify for universities a year ahead of the start of the academic year.



English language development: English language proficiency is critical for international students' success at universities in Anglophone countries, and compliance with visa and immigration legislation set by the receiving countries. Pathway international students strive to achieve an advanced level of English to enable them to prepare for their university experience. These skills enable international students to access, critically evaluate, and write relevant English-language academic material, bridging the gap between their previous education and university studies and supporting them to integrate within their new university community. The English language preparation described in the 'Benefits to Students' section also benefits universities. Students are more likely to complete their degree, engage in classes and ensure universities are not penalised by regulators on visa approval rates.



Regulation, quality assurance and continuous improvement, the hallmark of a reliable intake: Quality assurance processes serve a dual purpose in programme delivery and development. They ensure that pathway providers teaching meets strict academic standards and establish a culture of continuous improvement. Additionally, in the case of pathway providers who work with study centres or other partners to deliver their programmes, local delivery partners can develop and expand the academic capacity of their offer concurrently.

Although not universal, depending on their offer and the markets they operate in, pathway providers may be regulated by destination-based or international student recruitment market regulators to ensure quality and relevant licensing to operate. QAA also guides providers in setting the standards for course design, development and delivery (23). These cover defining standards and criteria often benchmarked against international standards. The programme must meet through design, assessment methods, learning outcomes, and regular reviews and feedback loops involving all stakeholders to ensure transparency and clear information available to learners and educators. This way, the programme remains dynamic and responsive to the evolving landscape of international education and careers that, ultimately, international students will be entering post-graduation from university.

The quality of delivery plays a significant role in the effectiveness of pathway programmes and the benefits they bring to universities, delivery partners and international students. Accreditation processes, regular audits, and a commitment to continuous improvement at the delivery level ensure that the programme meets the required standards and consistently seeks to exceed them.

CASE STUDY: NCUK's in-country delivery model

NCUK's pathway offer is informed by trends in students' interests and aspirations. Its qualifications are taught at over 120 schools, colleges and universities in over 40 countries. This means NCUK students can choose to study closer to home initially, if they wish. This could be advantageous to students considering the multiple political and economic factors – such as cost of living – that are currently driving changing student demand.



NCUK's pathway offer also enables the organisation to deliver a diverse body of high-quality students to its university partners, supporting their partners' diversification efforts - a key goal in the UK Government's International Education Strategy. Many of NCUK's partner schools have diverse student bodies themselves and, in 2023, NCUK placed students from 77 different nationalities with its university partners.

“

NCUK's approach is student-led, empowers student choice and their pathway qualifications are delivered in-country, all over the world. The options presented by NCUK are strong and cater to changing student demands, positioning them well to assist universities with diversification goals.”

Dr Anthony Manning

Dean for Global and Lifelong Learning, University of Kent

“

I didn't feel ready to go abroad, so opting for NCUK's foundation program in my own country was a perfect fit for me. It boosted my confidence to study abroad later on and NCUK has played a significant role in equipping me with the skills and opportunities to pursue my ambitions successfully.”

Phu Pyae Kyi Thar (Myanmar)

International Foundation Year in Myanmar

BSc Economics with Finance at The University of Sheffield.



7. BENEFITS TO THE ECONOMY

7. BENEFITS TO THE ECONOMY

International students continue to contribute significant economic and cultural value to their host countries while they study.

7.1 SUPPORTING THE UK TO BE A TOP STUDY DESTINATION

In the 22/23 academic year, international pathway students have demonstrated their potential to access and thrive in prestigious educational settings, contributing significantly to the UK economy.

This access to world-leading quality education is not just a success for the international students; it plays a critical role in fuelling economic development, innovation, science, engineering, and more. Pathway providers and the universities they place international students at are crucial elements in this ecosystem, opening doors for international students to universities that are catalysts for personal and professional development and, subsequently, for the individual destination's socio-economic progress and prosperity.

Despite the present rhetoric and policies linked to migration and student visas, the UK has high aspirations for attracting a diverse group of international students, which is one of the objectives of the International Education Strategy (IES) championed by Sir Steve Smith. The IES aims to increase international HE students to 600,000 per year and increase education exports to £35b per year by 2030.

However, the landscape is dynamic and competitive, with the UK being subject to market changes and competition from other study destinations. 49% of international students surveyed by IDP Connect in their January 2024 report *The Voice of the International Student* pulse survey is “reconsidering or unsure of their plans to study” in the UK due to the changing policy environment (24) - higher compared to those considering to study in Australia or Canada. Market fluctuations come from geopolitical events, visa policy changes, and, most notably, the impact of the COVID-19 pandemic. In the UK, the government's 2021 introduction of the post-study Graduate Route Visa has enhanced the UK's attractiveness to international students. However, with recent changes, media rhetoric and ministerial announcements, the positive impact of this policy may quickly be undone or lead to a regression of attractiveness. Other destinations, including Canada and Australia, are also refining their immigration policies and outward communications positively and negatively, leading to a further increase in multi-destination considerations by international students.



24. IDP Education, Annual Report, 2023, https://investors.idp.com/FormBuilder/_Resource/_module/vIAiEHYL20-_RjeIIPzkYA/IDP_Annual_Report_FY23.pdf

7.2 INTERNATIONAL STUDENTS BRING CULTURAL AND ECONOMIC GAINS

It is critical for countries that receive international students to integrate those international students into both the university and local communities. They contribute significantly academically and bring economic benefits and cultural enrichment.

A small but significant part of the £37.4b impact of international students to the economy, from the HEPI report referenced above, are undeniably from students via pathway programmes. The cohort represents an estimated 6% of all undergraduate acceptances according to the British Council in 2023 - which would equate to approximately £830m to the economy (25).

A large share of international students has substantial long-term benefits for all English-speaking university destinations, not only in terms of immediate economic gains but also through the rich cultural exchange and the fostering of global networks that support the UK's position in the international community.

The pathway model is a robust mechanism for academic and cultural preparation, ensuring that international students are equipped to excel and contribute meaningfully upon arriving in the UK.

Case study: NCUK's contribution to the UK economy

NCUK has played a pivotal role in strengthening the economic landscape of the higher education sector over the past five years. Between the academic years of 2017-18 and 2021-22, NCUK has generated substantial revenue for its university partners, amounting to a significant estimated £125 million in tuition fees.



NCUK provided over 7,000 international students to overseas universities between 2017/18 and 2021/22. This steady flow of international students ensures a dynamic and diverse educational environment. It promotes the sustainability of the universities' financial models, which is critical for their long-term operational stability and academic offerings.

NCUK's graduates have contributed an estimated £670m to the UK economy. This shows the significant contribution pathway providers make to their receiving markets.

26. Higher Education Policy Institute (HEPI) 2023 figure estimates an average contribution of £96,000 to the economy per student over their post-university career. Across from the cohorts of 2017-18 to 2021-22, 7,263 students are progressing to university in the United Kingdom.

8. BENEFITS TO EXPORT COUNTRIES



8. BENEFITS TO EXPORT COUNTRIES

In-country pathway provision sets an internationally recognised standard for education and supports local economies with investment in facilities, staff and technology.

8.1 TRANSNATIONAL AND IN-COUNTRY PATHWAY EDUCATION HAVE A POSITIVE INTERNATIONAL IMPACT

Transnational Education (TNE) and in-country delivery effectively address the unequal distribution of educational resources. In-country programmes often serve as a benchmark qualification for local universities, raising the bar and creating a multiplier effect that resonates throughout the education sector. This can lead to improvements in local universities' infrastructure and academic offerings, enhancing their attractiveness and competitiveness, as they must continue to meet accreditation standards to maintain the delivery licence for foreign qualifications.

The resultant uplift in the local educational landscape is further strengthened by investments in faculty development and new learning technologies, which collectively contribute to a dynamic and progressive educational environment outside the in-country programmes, creating a better educational environment for all students.



In-country pathway programme delivery enriches the local education sector by bringing international perspectives into the classroom, fostering an educational culture receptive to global trends and cultural diversity. This integration of international curricula within the local context not only broadens international students' worldviews but also instils in them a deeper appreciation of their own cultural identities within the global narrative and brings together learners from across the world on digital platforms, forging opportunities for international collaboration and networking, a genuinely global classroom.

In-country delivery creates a more robust and responsive education system by embedding international-quality education within local institutions. It empowers international students to compete globally while nurturing the intellectual and professional capital necessary for national advancement. The strategic importance of in-country delivery lies in its dual role: as a facilitator of individual academic achievement and a builder of national educational capacity.

9. CONCLUSION

Pathway provision expands the diverse pool of students who can study overseas, broadening access and providing a route for students who need further academic or language support, or a bridge between local qualifications and destination countries' education systems.

Pathway programmes are essential to standardising international education, providing international students with a well-rounded foundation for success in future academic studies. By concentrating on academic preparation, skill development, and continuous quality assurance, pathways improve student preparedness and chances of successfully completing their studies.

Supporting diversification in international higher education, a key goal in the UK Government's International Education Strategy, is aided by pathway education and NCUK's unique in-country pathway offer is a strong example of this.

The overall international higher education market in the UK alone generated approximately £37.4bn in 2021/22, of which pathway provision accounted for at least £830m. Pathways give universities an additional stable channel of recruitment which they can trust, and drive significant economic benefit.

It is unlikely that the currently volatile international market will become more predictable and stable over the next decade. Geo-political instability, shifting demographics and economic headwinds will continue to cause challenges for the sector. Pathway providers can play a role for universities in the UK, Australia and North America - they can be a point of stability and hedge against the unavoidable risk institutions take in relying on income from education exports.



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