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SENATE

Title of paper: Global Strategy Refresh

Main purpose of the paper: For information

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Purpose of the paper

To share with Senate the refreshed aims, objectives, priorities and next steps for implementation.

To briefly consider strengths and weaknesses of a potential portfolio of different modes of global engagement across global growth opportunity regions (China, India, ASEAN, Saudi Arabia).

Relation to strategy and values

The University's Global Strategy was created in 2017/18 and remains live on Sharepoint (for reference). This paper outlines a refreshed approach for 2024-2030, including a set of global growth opportunity areas and activities.

Consultation to date (including any previous committee consideration and its outcome):

UEB (June 2024), Faculty Executive Boards, University Engagement and Place Committee, University Research and Innovation Committee, University Professional Services Leadership Team, plus various other team meetings and working groups.

Global Strategy Refresh

Background and Progress

1. Introduction

Our Global vision and key strategic areas as described in the 2017 Global Strategy[1] remain relevant and appropriate for 2024. Colleagues, however, reported that they did not feel a sense of ownership of the current articulation of the strategy, and it was failing in its intention to facilitate and catalyse activity. This Strategy Refresh therefore seeks to:

- reflect a changing external and internal landscape;
- better align with and support the delivery of the other core University strategies and priorities;
- support a renewed and collaborative drive towards targeted, transformative delivery of our global ambition; and
- more explicitly locate our approach within the frame of both our values-led approach and the need to ensure our financial sustainability.

Consultation for the Refresh, involving students, partners and colleagues from across the University, has taken place over the last 16 months, including via a pivotal Global Strategy Away Day in February 2023.

1. Global Strategy, NU Shape process and the 'Grow Agenda'

Our Global Strategy Refresh embodies the concepts of Place+ and aligns closely with the work of NUShape. Collaboration, internal and external, is key to the Global Strategy Refresh ambition and methodology. Global Strategy priorities align with NUShape planning stage work and will appropriately support the Grow, Develop, Sustain and Energise category topics over the short, medium and long term as they are finalised. International student recruitment – a key priority of NU Shape – is anchored in the Global Strategy.

The UK HE sector faces a critical challenge to deliver growth and achieve financial sustainability. Success in this refresh will bring sustainable, positive impact in key areas (student recruitment, belonging, experience, THE Impact etc.) supported by whole-system and cultural change rather than piecemeal, responsive firefighting of artificially isolated issues.

> *"If UK universities want to succeed in the long-term, then they must engage globally and bake this into their identities and practice in substantiated ways."*
> *Sir Steve Smith, International Education Champion, UK Government*

[1] Newcastle University Global Strategy: Influencing Globally 2017

2. Progress since the previous iteration of the Global Strategy

The most significant progress in our performance since the launch of the Global Strategy in 2017/18 (see full KPI comparison Appendix A) includes:

- our highest number and percentage of international UG and PGT students. PGT growth is partly attributable to global rising trends[2];
- our highest QS, and THE ranks, and our highest THE Impact rank (8th);
- our rank as 3rd in the RG for the percentage of students that are internationally mobile[3];
- a positive reorganisation of our ASEAN operations and;
- a small increase in the proportion of international co-publications.

However, our UG international student growth has been slow (for a range of reasons, including limited new programme development, historic over-reliance on INTO, actions during Covid, and prioritisation of PGT growth over UG). Additionally, our level of international research funding has fallen, and more intervention is needed to support the development of an ambitious global outlook and global culture, both of which are necessary to help us achieve our global-civic aspirations. Some KPIs changed partway through the last strategy period and/or were not originally included. It is important to include indicators pertaining to international students' attainment, employability, and experience in this refreshed iteration.

The increasingly challenging external environment means it is no longer enough to simply maintain our current position or even to make only iterative progress. This Global Strategy refresh seeks to enable the systemic transformation we need to achieve our vision and ensure our future sustainability.

3. Changes in the external environment since the previous iteration of the Global Strategy

The number of international students studying at the higher education level around the world has grown significantly over the last two decades, rising from 2m in 1998 (when UNESCO records began) to 6.4m in 2020. The UK alone hosted a record 680,000 international students in the 2021/22 academic year, up 45 per cent on four years earlier. However, current global political and economic volatility in key markets presents a significant challenge to maintaining and increasing international student numbers. For example, key emerging economies such as China are experiencing a slowdown in economic growth, whilst countries such as Nigeria and Pakistan face unpredictable exchange rate risk.[1] Meanwhile, over four billion people will vote in elections in 2024, with 40 countries facing a possible change of government, including the USA, India, Indonesia, UK, Pakistan, Bangladesh, Taiwan, Mexico, South Africa, and Russia. These countries are the source of ~30% of internationally mobile students, and the destinations for ~40% internationally mobile students.[2]

Within the UK, changes – real and forecast – to immigration policy are damaging the global perception of the UK and jeopardising future global student cohorts. A recent survey of 11,500 international students (prospective and applicant) revealed that the US is now the most desired destination of study, with its high quality of education and good employment opportunities for after graduation scoring most highly. The UK was ranked 3rd, after the US and Australia.[3]

Attitudes are rapidly shifting in relation to what constitutes a quality higher education and how it might be delivered and consumed. The UK HEI sector is a leader in Transnational Education (TNE)

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[2] https://www.oecd-ilibrary.org/sites/17d19cd9-en/index.html?itemId=/content/component/17d19cd9-en and the number of non-EU and EU students studying PGT in UK increased from ~160K in 2017/18 to ~326K in 2021/22 (HESA)

[3] IDP Emerging Futures 5, published May 2024: https://resources.idp-connect.com/ef-5-us

(more than half a million students are enrolled on UK degree programmes overseas) but research intensive UK institutions have been historically under-represented in TNE provision and significant opportunities remain for expansion.[4] Opportunities for in-degree, credit and non-credit bearing, international mobility have been squeezed by the loss of Erasmus+ and the inadequate replacement by Turing funding, whilst student demand now leans towards shorter-term experiences.

Nowcasts of growth for research and development investment by businesses and governments in the OECD area point to a stark slowdown in 2023, after general growth and post-Covid 19 recovery through 2022. The 2022 growth was primarily driven by the USA, Japan and South Korea and by uplifts in business investment. The EU27 saw a mixed picture with, for example, growth in Germany, some growth in France and a decline in Italy. China did not report figures in time for this March 2024 snapshot. In the latest known figures (2022), the USA remains top of the list of leading countries by gross research and development expenditure but is very closely followed by China. They outspend Japan, third on the list, by 4 and 3 times respectively. The UK is 6th after Germany and South Korea.[4]

The UK global research and development HEI funding ecosystem is entering a new period of revival – a window of great opportunity that needs to be fully exploited while it lasts. UK R&D has been severally damaged over the last 4 years by association to Horizon Europe becoming a political football in UK/EU post-Brexit negotiations. Alongside this, global perception of the UK as a partner in research was damaged by cuts to ODA R&D in-flight research project budgets, hesitancy over 'Plan B' measures and difficult messaging regarding 'Trusted Research' and export control. There is a lot of work to do to recover from this and sector momentum and initiatives now exist to support this revival. The sector now has: at least 4 years of access to the myriad and global opportunities offered by association to Horizon Europe; new ODA and non-ODA bilateral funding opportunities via the heavily DSIT-driven, International Science Partnership Fund (ISPF); and previously labelled 'Plan B' measures still being wheeled out such as UKRI standardisation of international co-leads rules.

Appendix C includes a further SWOT analysis of Newcastle's competitive position.

[4] OECD (2024). "OECD Main Science and Technology Indicators. R&D and related highlights in the March 2024 Publication", OECD Directorate for Science, Technology and Innovation.
https://www.oecd.org/sti/msti2024march.pdf

4. Vision

Our global vision remains unchanged - we aim to excel by being an internationally networked and diverse community of students and staff who identify as global citizens, and who can respond to global challenges through the research we undertake and the skills and knowledge we create.

5. Our refreshed Global Aims and Objectives

Based on extensive internal and external consultation, our refreshed Global Strategy contains four key aims which provide the underpinning purpose of our global ambition and empower our community to achieve it. Fulfilling these commitments will require transformative and system change but it will enable us to achieve our strategic aims, foreground our values-led approach ***and*** ensure our financial sustainability. These are:

Educational Experience	We will continuously develop a global learning experience that provides our students with the skills to thrive and act in an interconnected world. We will help our community engage with different global contexts, enabling responsible action for the future
Research and Collaboration	As a community, we will collaborate across and for the world, working in local and global partnership to achieve more collectively than we can alone. We will focus on collaborations that actively help us contribute to social and environmental justice and Sustainable Development Goals
Culture	We will think / feel / act global. We will be self-aware of our global perspectives and motivations and encourage a positive culture shift towards our aspirations.
Storytelling	We will tell our global stories, championing an active in-person and online global presence that appeals to others both internally and externally. We will ensure that our global identity and activity is captured, communicated, recognised and celebrated in effective ways that encourage, inspire and empower us further

The four Global aims will be achieved via three interconnected sets of objectives which are directly aligned with the University's core strategies and business.

6. Systems Thinking

Our Global Strategy is attempting to describe and to improve a complex system with multiple variables, perspectives, and boundaries, which change over time and space and exist within multiple external contexts. Therefore, the decisions we make and the action we take to respond to our identified objectives cannot be reduced to convenient, separate parts without potentially obscuring interconnectivity and feedback loops, both positive and negative, inherent in the system.

Achieving truly transformative progress towards our global ambitions and emerging stronger from current sector-wide challenges requires whole-system change. We need an understanding of how decisions and action in one part of the system might impact behaviour and outputs in another.

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Figure 1: A visual representation of the refreshed Global Strategy, showing aims, perspectives and associated objectives.

7. A Values-led Strategy

We equally value our 'triple bottom line' of people, planet and profit and seek to measure our progress as it relates to the impact we have on our stakeholders (inside and outside the university), our natural environment and the local, national and international economy.

Our Global Strategy is values-led. This means that all decisions and activity undertaken within the Global Strategy must support our core and aspirational values, especially social and environmental justice and equality, diversity and inclusion (see figure 1). We will not take action to achieve our global strategic objectives which unnecessarily contravene these principles and we will actively seek to promote them.

8. Foregrounding Financial Sustainability

All our objectives and actions will also contribute to our financial sustainability. All projects can and will be located along a continuum towards generating or replacing revenue for the University, directly or indirectly, and within a foreseeable timeframe. We will not take action that will compromise the University's financial security.

We will measure ourselves against our progress towards realising our values alongside our contribution to the University's financial sustainability, with the understanding that success in one cannot exist without success in the other.

Implementation and Prioritisation

9. Implementation Table

Domain	**Activity Area** (initial priorities highlighted in pink)	**Initial Actions**
Educational Experience GSIG leads Stuart Edwards and Eleanor Shotton	**International student recruitment:** Market-insight driven portfolio reform to attract a large and diverse global student community. (NUShape)	External market research project underway Reconfiguration of Student Recruitment Strategy Committee to review current programme pipeline Formation of Academic Strategy Oversight Group (ASOG)
	International student experience: International student wellbeing and support service reform (Global Education Experience Programme, GEEP)	Cross-directorate review of GEEP 1.0 Agree priorities and resource implications for GEEP 2.0 (Priority Enabler in NU Shape)
	Global experience for all students: Providing an international curricula, community and culture for our whole student body (GEEP)	Cross-directorate review of GEEP 1.0 Agree priorities and resource implications for GEEP 2.0 (Priority Enabler in NU Shape)
	International education diversification: Targeted expansion of TNE and online provision	New TNE role in Educational Governance to establish process. EB triage of live opportunities including Joint Venture Campus (e.g. Shoolini, India), Joint Education Institute (e.g. Southeast University, China),

		collaborative remote delivery (e.g. Saudi Electronic University, KSA).
	International student mobility and Study Abroad: Enable and promote in-degree international mobility for all students and expand Study Abroad offer.	International Student Mobility Strategic Plan to go to EB Autumn 2024 Targeted regional expansion of fee-paying study abroad take up
Research and Collaboration GSIG leads Joris Veltman (Global Dean, FMS) and Elisa Miles (Deputy Director, International Office)	**International research funding:** Step-change increase in international research funding applications	Horizon Europe reboot - New 12-month post starting in EU&Int Research Funding Team (for 2024/25) and travel grant scheme to launch Re-establish GRO Group
	Research-related international mobility: Expansion of opportunities and exploration of new modalities for research-related mobility	International Visiting Fellows pilot running 2024/25 Horizon Europe Travel Grant Key partner Virtual Seminar series
	Global-civic connectivity in all our places: Collaborate with the NECA on the NE Investment Prospectus and make the most of our tri-campus presence	Contributors to relevant stakeholder groups including NGI and International Newcastle ASEAN Forum to review 'Tri-campus: So What?' opportunities
	Global impact, innovation and investment: A diverse portfolio of partnerships for co-creation of research, attracting investment and real-world uptake	Scope key opportunities in Global Growth Areas e.g. (International Institute for Sustainable Energy (IISE), KSA) Global framing to recent business development review
Culture and Storytelling GSIG leads Chris Whitehead (Global Dean, HASS) and Dimitra Boutsioukis (Head of Global Opportunities)	**Global mindset:** Recognition, rewards and expectations which promote a global mindset and behaviours	Launching Global Awards AY 2024/25
	Global systems and processes: Reform of systems and processes to mainstream global working	Identify key issues and shortlist initial target list of intervention Identification of tri-campus process blockages as part of the ASEAN Strategic plan
	Global storytelling: A tailored global marketing and communications strategy to tell our global stories externally and internally	New post in IO focused on internal and external comms and marketing Identify and utilise new global channels and channel for global stories and global content creation
	Global campus: Creating a global environment across all our campuses and our digital estate through food, flags, languages, images and festivals	Estates Portfolio Board project underway with global embedded in the Strategic Framework for the Estate Cross-directorate review of GEEP 1.0 Agree priorities and resource implications for GEEP 2.0 (Priority Enabler in NU Shape) Language Resource Centre strategy

10. Growth Opportunity Geographies

Supporting, enabling, and encouraging all global activity across our whole community remains an integral part of the Global Strategy. But we do not have the capacity and nor is it feasible or desirable for us to do everything, everywhere, all at once. We must make confident decisions as to the geographic growth opportunity areas best placed to help us achieve our global ambitions.

Implementation will focus on a manageable number of geopolitically important countries with identified opportunities for significant growth across the University cross-cutting strategies, in support of the Grow Agenda and other key initiatives. These countries will particularly support progress in diversifying our international education and in deepening our engagement with global industry and policymakers. Examples of the additionality afforded by this structure includes leadership (Global Special Advisor roles), proactive project management, cross-Faculty and function working, a clear mandate and strategic allocation of resources and time. It is not anticipated that there will be a "one size fits all" approach to each geography, and it is expected that there will be different levels and types of engagement from different parts of the university at different times. ***This categorisation is for internal use only and is commercially and diplomatically sensitive***. See Appendix B for relevant baseline data.

Our Phase 1 (for 2024/25 and 2025/26) Growth Opportunity Geographies are:

- ASEAN – Indonesia, Malaysia and Singapore
- China
- India
- Saudi Arabia

Further exploration will take place in parallel to identify a small number of potential phase 2 areas including Japan, USA and focus countries in Europe and Africa. Other geographical opportunities will continue to be identified and nurtured via our various **Regional Global Incubators** such as the ASEAN Strategic Plan, NCL Europe, Centre for Latin American and Caribbean Studies and the Africa Regional Interest Group.

11. Example Activity Scenarios

This section contains suggested outlines and sequencing of scenarios and opportunities for future global collaboration, mapped against our priority regions. Some are already underway, but others need to be subjected to scrutiny, debate, and analysis via business case in due course. All options included here are plausible, viable models. The following assumptions have been made:

- That there exists an appetite for additional targeted strategic global engagement which has the potential to support the Grow agenda and other longer-term strategic imperatives
- That the University may be amenable to taking proportionate risks, assessing against a risk/return spectrum and over an agreed timescale (some near term, some longer term)
- That the University is open to exploring new models of engagement with global partners that might better meet all sides' objectives

These do not constitute requests (at this stage) but are included to give a sense of potential directions of travel. The detail (including financial) is illustrative but well-informed and based on sector research, past experience, and external insight. This has been included to support future planning and decision making. **Clearly, each initiative would need to be considered on a case-by-case basis, but by presenting a portfolio of global options in this document, we hope to support**

effective decision making with a holistic, global perspective (rather than each opportunity being reviewed in isolation).

It is also important to note that these represent new/different initiatives. Some of this could be built into existing resource (with some reconfiguration of roles/responsibilities), but most would require additional resource (at least colleague time, if not financial) and/or to stop some existing activities. The specifics of this can be considered in due course.

Scenarios
In developing these options, the overarching question is “What options – for what outcomes – might we consider in order to achieve our global education and research objectives?” and “What would this take?”

The figures below give an illustration of likely duration (e.g. it would take a minimum of two years of developmental work towards any new campuses so the earliest point of operation would be at least two years from now etc.) and typology of activities. The succeeding tables give more detail on *some* of these components. Some – such as pathway and articulation agreements to support the recruitment of international students to the UK campus – are universal to all regions and increasingly forming part of international recruitment plans. Whilst unlikely to yield high numbers, there is some potential in this as a recruitment channel, would support NU Shape objectives.

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Global growth opportunity regions – Educational Experience opportunities, showing a range of timescales and types of engagement

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Global growth opportunity regions – Research and Collaboration opportunities, showing a range of timescales and types of engagement

12. Background context on figures above

China:

Scale	Opportunity	Resource implications and timescales	Potential outcomes
Large	Joint Educational Institute (JEI); example of models Kings/SUSTech and others; potential future opportunity with Southeast University (top 15 in China and member of 985 project) on "One Health" (unifying approach to balance the health of people, animal and environment), engineering-medical/life science interdisciplinary educational provision and research. Model for collaboration could be based on establishing a joint institute with a mixture of programmes in the field of engineering, health, biology, sustainability etc. Southeast is also planning their new campus in Nantong city (a focus on marine related educational provision – undersea/water civil engineering, biology, marine engineering etc.); it is possible that Newcastle could be positioned as a preferred partner when this development occurs ***Definition of a JEI – delivery of multiple collaborative programmes (JEPs) at an overseas partner***	Including not limited to: Academic lead to be JEI Vice Dean based in China (or at least regular visits); Dedicated teaching staff for each of the programmes delivered there, PS support etc. Exploration stage – up to 1y; China academic lead and market lead to scope the areas of focus for the JEI and identify key academic schools and leads for further discussion of the JEI. Feasibility studies – business cases, costings, governance, policy Establishing: Project group, incl NCL and Chinese partner, manage details of set up/apply MoE Operation: JEI requires dedicated PS support for the deputy dean to manage the operations of JEI and also education PS to support academic matters in the JEI IO China Team – work closely with Chinese partner to maximise recruitment as well as pathway link to NCL campuses. **9-12 months (at least) of discovery (to mid 2025), followed by 2 years of development and approvals; earliest date of operation could be in AY 26/27, more likely to be later**	All would need to be quantified and assessed but, broadly: • Financial return (modest) • Pedagogic developments (supporting the internationalisation of our approach to teaching and learning) • Reducing reliance on UK pipeline by diversifying delivery locations • Building brand and profile via association/partnership with a leading institution • Research collaboration
Med	Scaling up other forms of TNE – e.g. Joint Educational Programmes (JEP) – such as live TYUT opportunity, but at some scale; could include an articulation to Newcastle option ***Definition of a JEP – delivery of a joint programme at an overseas partner***	TYUT model as an example (approx. estimated costs – likely to be higher): Year 1 cost/income/profit – 100/500/400K GBP Year 4 cost/income/profit – 475K/2M/1.5M GBP Could be multiplied if additional partnerships	Potential outcomes as above, but likely to a lesser degree

		Set up of JEP requires working with Chinese partner to prepare for programme, design, costing and submission. Running the programme requires dedicated PS support and academic colleagues contributing to the teaching of the programmes. IO’s China team would need to work closely with the Chinese partner to maximise recruitment as well pathway link to NCL campuses.	
	Articulation and pathway agreements with a wide range of partner institutions	Typically takes ~100 hours of PS time and ~100 hours of academic time to instate an agreement (process reform needed – possible there could be economy of scale); Aim for an agreed number of new agreements and students/year; international fee discount typically offered of ~20-30%. Worked draft example: 10 new students/year split across five new agreements would involve approximately 200h PS time; 200h academic time; result in a net fee of approx. £19K/student (£190K for ten students) **Could be phased; aim to have five (?) new agreements by summer 2025; to admit students in 26/27**	

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India:

Scale	Opportunity	Resource implications and timescales	Potential outcomes
Large	Joint venture campus (e.g. Shoolini University opportunity, or a physical presence at GIFT City like [Deakin University, Australia)](#) Shoolini opportunity would involve co-investment in a new campus as part of a joint venture between the University and a third party consisting of Shoolini University and Emeritus; would deliver business programmes in first phase	Investment options for Newcastle of between zero and £5M to support campus development; plus, staff time for development (e.g. an academic lead, some UEB time, professional services teams support including IO, Finance, Legal etc); plus, some external insight and expertise (e.g. KPMG due diligence and financial advice) **Two years of development work; earliest date of operation could be 26/27; likely later**	Building brand and profile leading to enhanced recruitment / partnership opportunities Diversifying mode and location of educational delivery Pedagogic development Financial: TBC depending on scale of investment
Med	Increased education/ research collaboration: • New Joint PhDs with strategic partner institutions;	Students would require scholarships for year(s) at NCL – e.g. to reduce fee paid to ~£5K/year, would need scholarship of £20K+/year; joint PhD student number targets TBC; **If funding agreed, could aim to admit first students in 25/26 – probably in India; first year of funding in UK may be 26/27**	Consolidate legacy of GCRF Hubs (IIT Delhi, SPA, etc); strengthen research collaboration (e.g. IISc)
	• Increased outward mobility from NCL-India;	Dependent on scale – e.g. 40 students to India/year - £2,500/student if funded (£100K/year); plus r/s development and stewardship (could be covered within BAU); **Agreements negotiated over 24/25; first students undertake placements in 25/26 onwards**	Student experience Global culture
	• Articulation and pathway programmes with key partners	Start-up resource and return as above (China) **Could be phased; aim to have five (?) new agreements by summer 2025; to admit students in 26/27**	International student recruitment Partnership
	• Career connectivity and industry engagement – critical for future Indian recruitment	Plan, timeline, resources TBC	International student recruitment Student experience

Saudi Arabia:

Scale	Opportunity	Resource implications and timescales	Potential outcomes
Large	Maximising 'investment corridor' opportunity between UK and KSA – focus on clean energy	TBC – various Gulf Strategy Fund awards secured to support scoping of an up to £25M energy centre based between NE UK and KSA	Research collaboration and funding International student recruitment (PhD level)
Med	• Newcastle campus in KSA is unlikely; instead, large-scale collaborative TNE/degree provision, e.g. Saudi Electronic University opportunity (joint or dual degree MSc in Data Eng/AI) • Joint PhDs with strategic partner institutions – e.g. PNU, KAUST, KFUPM, etc. • Fee-paying Study Abroad: develop a tailored Study Abroad offer with which to approach KSA HEIs	Costs - Newcastle colleagues' time – negotiation, management, delivery; some flying faculty needed SEU would involve Head of SENG and MSP; Global Dean SAgE; some PVC time; some IO time; some Educational Governance time Then, some SENG/SMSP academic time as flying faculty; would be offset by income from SEU **Earliest intake could be 2025/26 – likely later** Costs as above – but students likely to be fully funded by KSA gov; cost to university is programme development and relationship management (could be covered within existing resource) **Development throughout 24/25 – first intake could be 25/26** Income - £10K tuition fees/student/semester (student numbers unknown) **Development throughout 24/25 – first intake could be 25/26**	Diversification of educational models – online Financial – fee for NCL brand/time Strengthen research collaboration; international fee income Income and profile raising

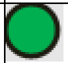
ASEAN

Scale	Opportunity	Resource implications and timescales	Potential outcomes
Large	Singapore: Co-location and development of Punggol digital district	Undertaking research and CPD activities in partnership with business; includes engagement of Newcastle UK colleagues ***NUiS locates to Punggol in September 2024; NEWRIIS timeline is TBC***	Research collaboration Income (level unknown)
Med	Malaysia: CPD delivery with PWC, focus on generative AI and data analytics for delivery to individuals and businesses in Malaysia and Vietnam (scale TBC)	Lifelong Learning Hub supporting process NICD – content providers ASEAN team Costs unknown but expected to be revenue generating (covering costs plus additional) ***Launch in October 2024***	Income Profile and influence Research collaboration
	Malaysia: UTM partnership	To include development of new UTM AI Faculty (at UTM KL campus), leading to potential further collaboration in other areas and modalities	Educational innovation Research collaboration Profile and influence
	Indonesia: Universitas Indonesia – route to influence/ political engagement and opportunity	TBC; already share educational agreements to support pathways and articulations to Newcastle; possibility of expanding to other areas and modalities	As above (UTM)
	SG and MY: new programme development (foundations, degrees and CPD)	Programme development as part of NU Shape process	Educational innovation Income
	New articulation and pathway agreements	As above, but with addition of ASEAN team capacity to support development	Educational innovation Income

13. Coordination and Monitoring

Governance of and responsibility for the delivery of the Global Strategy will sit with University Global Committee, but activity will be coordinated and monitored primarily by the Global Strategy Implementation Group (GSIG) consisting of the Faculty Global Deans, Global Special Advisors (China, India, Indonesia and Saudi Arabia) and other key stakeholders. See Appendix D for suggested KPIs.

Appendix A: Global Council Strategy KPI Report: most recent KPI report compared to performance against KPIs in 2017/18

KPI	Most recent RAG	Supporting Measures *& Targets*	Most recent assessment	Performance in 2017/18
Global Student Mobility		**International UG as % of overall intake.** UG international intake of 1 in 4 (25%) by 2030.	786 new students = 13% 2023/24 (up from 11% in 22/23)	2017/18 685 new students, 12%
		International PGT as % of overall intake. PGT international intake of 2 in 3 (66%) of the overall Newcastle-based cohort by 2025.	2,967 new students = 72% 2023/24 (up from 62% in 22/23)	2017/18 1595 new students, 46%
		Student Mobility total number of students who undertake a period abroad each year. Increase to at least pre-pandemic levels (1,500 students) by 2025	2022/23 701 (figure included in KPI update but see note below) Actual mobility figure in 22/23 was 1,400 mobilities (1100 individual students going abroad). The Planning team did not report all of those due to HESA changing their reporting requirements and providing insufficient guidance to report numbers correctly). These numbers show an increase compared to 2021-22 (when we ranked 3rd within the RG for the % of students going abroad), in line with our efforts to rebuild and increase mobility	2017/18 1158
Global Research Profile		**International research funding.** Increase international research funding to at least 17% of overall research funding & ensure proportionate growth with increase in research intensivity. **Definition:** out of total research income, the amount/% that comes from non-UK based charities, non-UK industry, commerce and public corporations, or any other non-UK.	14.4% 2022/23 (overall level stayed at £17M, same as 21/22) Total research income £119.3million Total international research income £17.2million (£11.3million EU, £5.9million Non-EU)	19% 2017/18 Total research income £109.5million Total international research income £21.2million (£15.3million EU, £5.9million Non-EU)
		International publications. Increase the number/percentage of internationally co-authored papers.	58% 2023 (up from 57.6% in 2022)	51.5% in 2017, 54.9% in 2018
		International research staff. Grow our international (non-UK) research staff to at least 20% of the overall population	32% (T&R) 2022/23 (15% EU, 17% Non-EU)	32% in 2017/18 (18% EU, 14% Non-EU)

<table>
<tr><td rowspan="3">SE Asia Sustainability (added as a KPI in 21/22)</td><td rowspan="3"></td><td>Research Activity (SE Asia). Increase Research outputs and funding opportunities (Research Income / Academic FTE & Research Income / Overall Income)</td><td>Sg – +ve growth in research income.
My – grow staff with research activity</td><td>No comparison possible</td></tr>
<tr><td>Operating Margin (SE Asia). Achieve an operating surplus for Malaysia & Singapore campuses</td><td>+ve EBITDA</td><td>No comparison possible</td></tr>
<tr><td>Student Numbers (SE Asia). Sustainable growth in student numbers at campus locations in SE Asia</td><td>Sg – 10% growth
Singapore 2023/24 809 students
Malaysia 2023/24 725 students</td><td>Singapore, 2017/18: 742 students
Malaysia 2017/18: 823 students</td></tr>
<tr><td colspan="5">Not in current Global Strategy KPIs but either included in first iteration of GS KPIs or important to include for this purpose:</td></tr>
<tr><td rowspan="3">Rankings</td><td rowspan="3">NA</td><td>QS World Ranking</td><td>2024 (published 2023) 110</td><td>2019 (published 2018) =141</td></tr>
<tr><td>Times Higher World University Rankings</td><td>2024 (published 2023) =168</td><td>2019 (published 2018) =171</td></tr>
<tr><td>Times Higher Impact Rankings</td><td>2023 (published 2023) =24</td><td>N/A</td></tr>
<tr><td rowspan="2">International student experience</td><td>NA</td><td>Employability
Graduate Outcomes Survey: data based on responses from non-EU, non-UK, UG and PG leavers, six months after graduating

(Note: most recent published year was from last year, 20/21. Very lagged as the survey is 15 months post-graduation; level of non-UK respondents historically high but have dropped due to HESA prioritising UK students' responses (chasing up responses, whereas non-UK students just receive an email) due to league tables and OfS measures.</td><td>2020/21 data based on 440 responses:
86% in further work or study

67% work (294)
14% further study (61)
5% work and study (23)
9% unemployed (41)</td><td>2017/18 data based on 747 responses:
86% in further work or study

63% work (467)
14% further study (101)
10% work and study (73)
7% unemployed (50)</td></tr>
<tr><td>NA</td><td>NSS</td><td>Methodology changed; cannot make direct comparison</td><td>Overall satisfaction score of 85.9 (2017), non-EU, non-UK respondents</td></tr>
<tr><td></td><td>NA</td><td>International Student Barometer (ISB)</td><td>Withdrew from ISB in 2019/20 (?)</td><td>Autumn 2018 Results (surveyed in 2017/18)
International Student Barometer
<table>
<tr><th></th><th>% Would recommend</th><th>Overall Satisfaction</th><th>Population</th></tr>
<tr><td>Global ISB</td><td>81%</td><td>89%</td><td>194,223</td></tr>
<tr><td>UK ISB</td><td>83%</td><td>90%</td><td>43,428</td></tr>
<tr><td>Newcastle</td><td>87%</td><td>93%</td><td>2,522</td></tr>
</table></td></tr>
<tr><td></td><td>NA</td><td>International Students' Attainment
HESA data
https://public.tableau.com/app/profile/david.kernohan/viz/classificationdomicile/Dashboard1</td><td>Non-EU:
13.7% non-EU students obtained a First Class degree award
49.32% obtained a 2:1</td><td>Non-EU:
11.49% non-EU students obtained a First Class degree award
43.24% obtained a 2:1</td></tr>
</table>

			UK: 30.26% obtained a First Class degree award 51.54% obtained a 2:1	UK: 24.78% obtained a First Class degree award 55.3% obtained a 2:1

Appendix B: Growth Opportunity Geography Data

- Horizon scanning for geopolitical opportunities and risks, funding landscape shifts and potential investment corridors *plus*
- Our current strengths and global activity heatmaps across our various areas of business

International Students

Rank	Country	Int. student proportions
1	China	57.14%
2	India	7.93%
3	Hong Kong	3.43%
4	US	2.50%
5	Indonesia	2.48%
6	Saudi Arabia	2.29%
7	Malaysia	2.27%
8	Kuwait	1.68%
9	Thailand	1.49%
10	Taiwan	1.32%

Alumni

Rank	Country	Proportion of alumni
1	China	29.21%
2	Singapore	7.27%
3	US	4.65%
4	Greece	4.20%
5	Malaysia	3.86%
6	Hong Kong	3.59%
7	India	3.40%
8	Germany	3.12%
9	France	2.51%
10	Spain	1.98%

Publications

Rank	Countries	Proportion of publications
1	US	19.40%
2	France	9.66%
3	Germany	7.60%
4	Spain	6.78%
5	China	5.97%
6	Italy	5.67%
7	Australia	5.05%
8	Netherlands	4.27%
9	Canada	2.96%
10	Sweden	1.92%

Industry and non industry collaboration countries

Rank	Country	Proportion of collab organisations
1	US	10.85%
2	Germany	9.17%
3	Italy	5.43%
4	Netherlands	5.04%
5	Spain	4.91%
6	Australia	4.65%
7	France	4.39%
8	Ireland	4.13%
9	Canada	3.10%
10	Japan	2.84%

Mobilities (incoming and outgoing)

Rank	Country	Mobility proportion
1	Spain	23.90%
2	France	23.34%
3	Germany	13.45%
4	Japan	6.59%
5	China	4.87%
6	Canada	4.74%
7	Netherlands	4.40%
8	Australia	3.84%
9	USA	3.57%
10	Sweden	3.43%

Workforce

Rank	Country	Workforce proportion
1	Malaysia	10.68%
2	China	8.78%
3	India	8.12%
4	Germany	5.78%
5	US	5.19%
6	Italy	4.90%
7	Ireland	4.32%
8	Greece	3.29%
9	Spain	3.22%
10	Poland	3.15%

Appendix C - Competitive position: SWOT (May 2024)

Strengths	Weaknesses
• Rising in global rankings; strength of performance to date in QS International Research Network metric • Consistent rate of co-publications involving an international co-author (rising from 51.X% in 2017 to 58% in 2023) • Third highest sender in UK of outward mobility (HESA data 21-22; NU ranked 3rd for % of outward mobility compared to overall student population within RG) • Global academic staff base (32% non-UK, 2022-23) • Large and growing global alumni network (277K, May 2024) • Many 'explicitly' global assets – campuses, LRC, ECLS, SML, etc. • Colleague and student commitment to core values and to SDGs (perception) • Many ideas and opportunities • Significantly improved focus on priorities through NUShape • The IO team and its leadership • New ASEAN team in place	• Lack of 'spare' cash to invest in new initiatives • Some lack of ambition and perception that global is hard work/not worth it; perceived tension between local and global and what should be prioritised • Historic lack of portfolio development aligned to market demand and external environment • Lack of value placed on global activity – limited formal recognition in e.g. workload allocation, promotions criteria • Some internal systems and processes unsuitable for global collaboration • International students' attainment levels (in 21/22, 30% of UK students obtained a First Class degree; compared to 13.7% non-EU students)[1] • Limited global industry links • Static/declining international research funding awards (EU applications flat at ~£46M/year)[2] and lack of resource to address this[3] • Poor data relating to some aspects of global (e.g. international research funding) • Historic lack of 'telling our global story' – marketing and comms • Lack of diversity in leadership roles • Complexity of internal structures and abundance of strategies/strategic plans
Opportunities	**Threats**
• Potential for greater impact by focusing on smaller number of priorities, geographically and thematically (NU Shape) • Bolder vision for the future, incorporating additional transnational education opportunities • Horizon Europe and its successor • ASEAN campuses • Developing global industry connections to benefit research and student experience (employability) • Working as a city/region on shared international priorities • Reconfiguring professional services to meet the needs of our changing student and staff community • Building a pipeline of more diverse colleagues in leadership roles • Change in UK government • AI	• UK immigration policy (e.g. MAC review of Graduate Route) • Slowing economic growth in China[4] • UK's (and North East's) comparatively low R&D levels[5] • Lack of clear UK Industrial Strategy • Redundant UK International Education Strategy • Future EU Framework Programmes – UK influence and access

APPENDIX D – Potential KPIs for Global Strategy 2024-2030 (subject to review and reduction)

Pledge	KPIs
Educational Experience	International student numbers
	Student international mobility (including Study Abroad)
	Contactable international alumni
	TNE & alternative delivery enrolments and graduates
	International student success (academic attainment and employability)*
	International student surveys (e.g. ISB or QS)*
Research and Collaboration	International research funding applications (industry & non-industry)*
	International research funding awards (industry & non-industry)*
	International staff numbers
	Publications with international co-authorship
	International mobility for research*
	International PGR numbers
Global Culture and Storytelling	Student and staff surveys*
	Participation in global initiatives (LRC training, Global Cafes etc)*
	Reputational Rankings
	Global digital impact*

*Not currently fully captured by standard University reporting