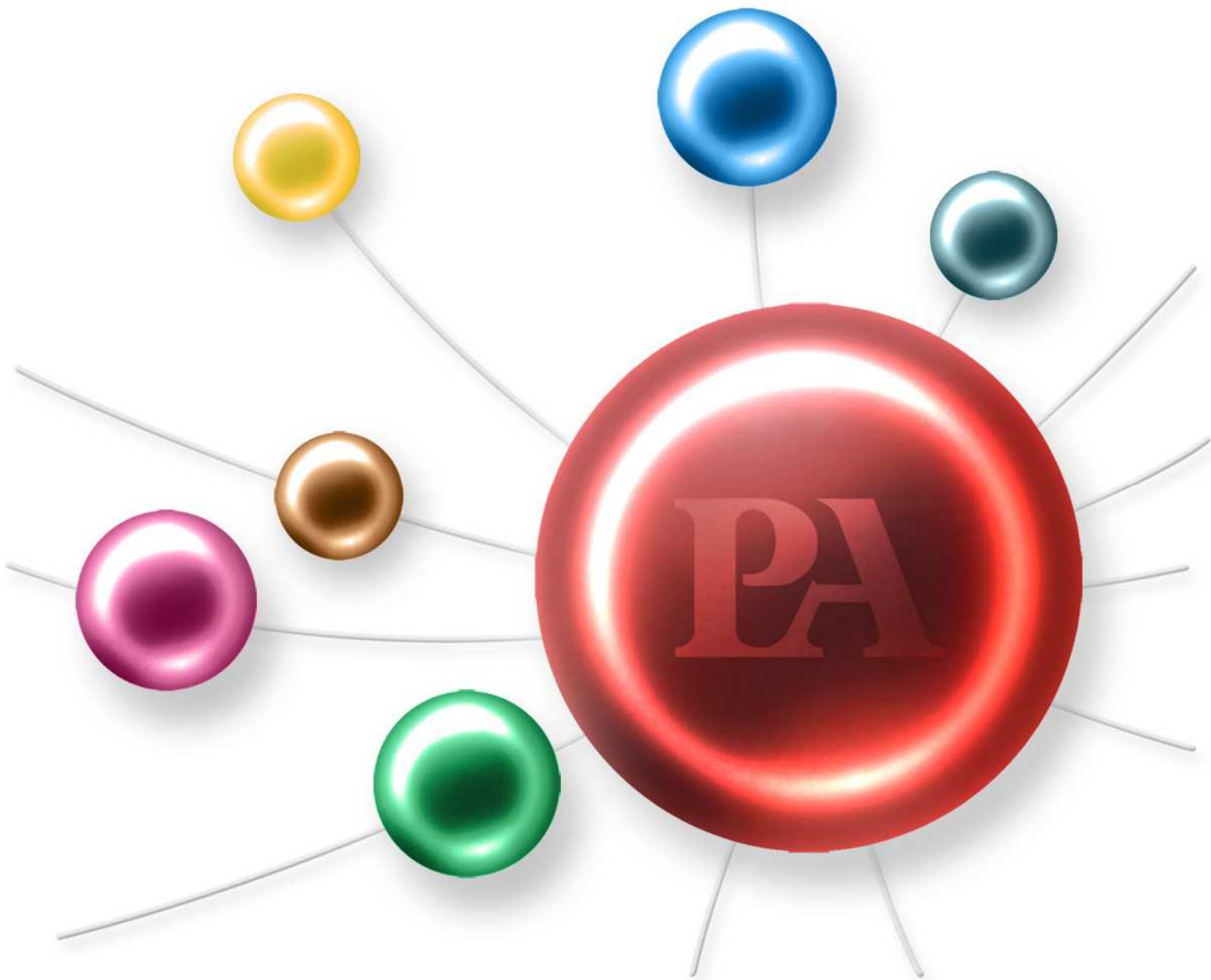


Study London

The Economic Impact of International
Students to London's Economy: A
Quantitative Perspective

Final Report

May 2011



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Executive Summary

This report presents the findings of the assessment of the impact of international students to London's economy in the academic year 2009/2010. A significant proportion of students attending London's higher education institutions are from outside the UK, and we provide both quantitative and qualitative analysis on how this links to tangible economic benefits for the city.

There is a substantial international student base in London...

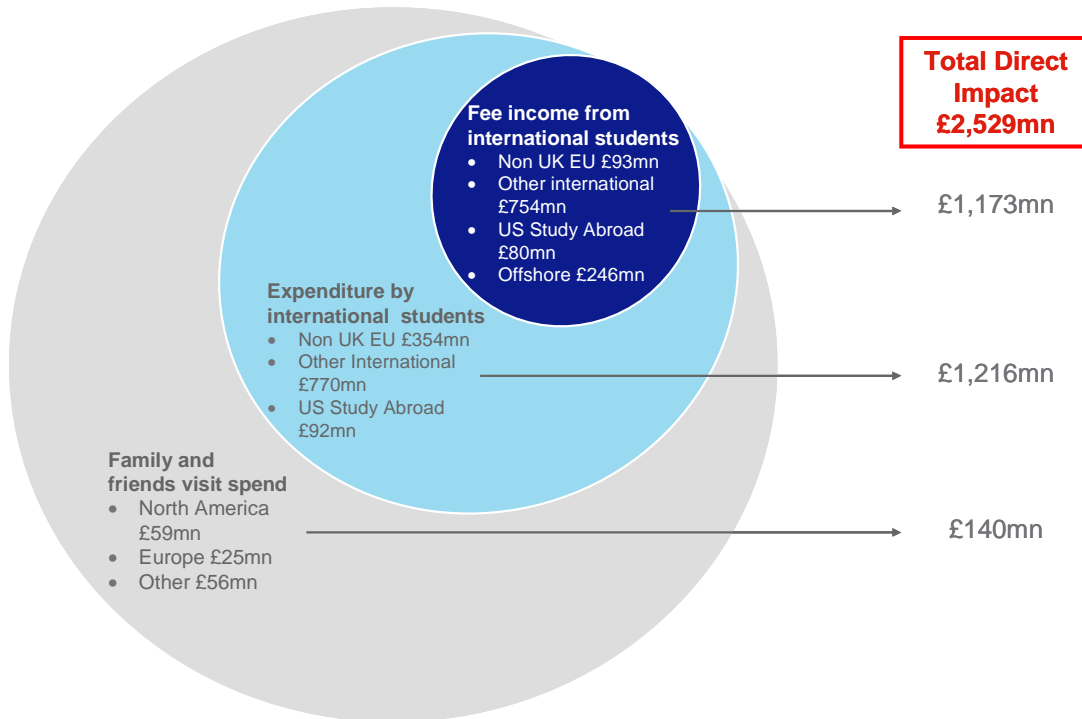
London is probably the most important global higher education hub in the world, with a diverse base of institutions attracting a significant base of students to study in the capital. In addition to its 43 HEFCE funded bodies headquartered in the capital, there are 148 other institutions providing degrees and specialist postgraduate qualifications in London. This includes a number of overseas institutions with both exchange initiatives and standalone operations, private colleges and even a growing trend of UK regional universities from outside London establishing internationally focused campuses in the city. In addition to this, there are also a further 234 Tier 4 accredited private providers of Level 7 higher education in London, with most focused on the overseas student market.

This substantial institutional base provides a platform for generation of a substantial student base in London. In 2009/10, there was a total of 104,800 international students at HEFCE institutions, with 31% from the EU and 69% from elsewhere (with the key sources of demand from India, China and the US). There were also 16,731 students taking part on American study abroad programmes. Validating the student base at other institutions is difficult as they are not obliged to divulge these statistics. However, based on information provided by a sample of circa 10 institutions, the study has been able to ascertain that 10,000 overseas students are attending other institutions. Figures from the UK Border Agency show that 17,000 student visas were issued for Tier 4 accredited provision and it is likely that the majority of these students pursued such opportunities in London.

In many institutions international students account for over 40% of the total student base in London and a strong international focus is now a pivotal component of the business model for the higher education sector in London. This builds on the many attributes which drive student demand for higher education in the capital, including the global reputations of the leading institutions, the diverse portfolio of specialist provision which is available, the multi-cultural environment, local culture and amenities, potential business and employment opportunities, accessibility and cost effectiveness of courses.

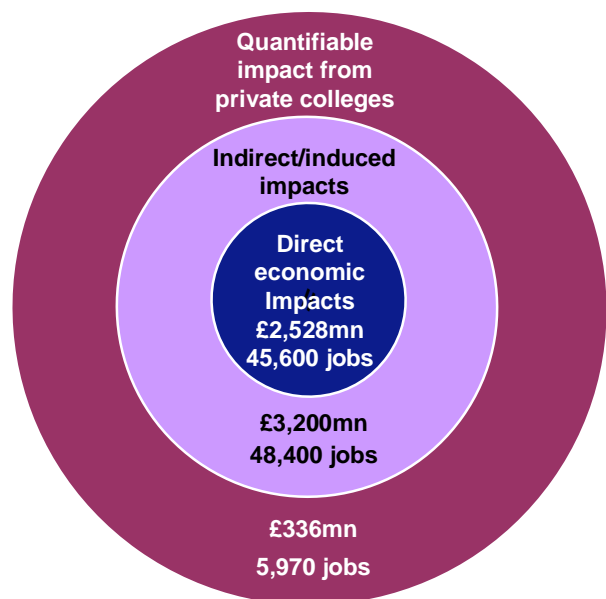
...this generates a direct economic dividend from fees, subsistence and visit spend...

An international student base brings three core aspects of economic impact to a location: the fees the student pays; the subsistence spend in the wider economy; and the additional expenditure from visits to the student by family and friends. Using a robust impact assessment methodology comparable with previous studies, it is estimated that the direct impact is £2.5billion, as set out in the diagram below.



This represents an increase in the direct economic impact of international students in London of 68% since 2005/06 (as measured by a previous study by Oxford Economics). However this figure only represents part of the overall impact, with further quantifiable aspects including:

- Indirect and induced impacts of £3,200mn as a result of multiplier effects, based on the established University of Strathclyde methodology for measuring UK university impact.
- Employment impacts of 45,600 as a result of the direct expenditure and a further 48,400 as a result of indirect or induced effects.
- In addition to this, from the sample of private colleges from which we were able to ascertain student numbers, applying the same methodology as above generates a further £336mn of economic impact and 5,970 jobs.



Taking this analysis together, our overall estimate of the quantifiable impact from international students at HEFCE funded institutions in London is **£5.7 billion** and **94,000 jobs**. Including the estimate from the sample of private colleges increases the overall impact to £6 billion and 100,000 jobs.

...there are also many other less tangible economic impacts...

Although more difficult to measure, there are also many other wider economic impacts which should be taken into account when considering the dividend from international students in London. The evidence set out in this report demonstrates the existence of:

- Impacts from other higher education institutions where exact international student figures could not be established (evidence from the institutional profile, student visa data and returns from a sample of private colleges suggest that this additional impact may lie at around 10% of the total).
- Impacts from improved international performance and reputation, with internationalization of the student base linked to the ability to attract research funding, overseas investment and establishment of strategic partnerships with leading institutions overseas.
- Impacts from human capital development, with the international student base providing an important source of skilled labour for City employers upon graduation and many notable examples of alumni making significant contributions to economy and society as a result of their studies.
- Impacts from the commercialization of research undertaken by international students in London institutions, which has resulted in spin-out and start-up enterprises realizing benefits in terms of investment, turnover and employment.

...with clear evidence of the importance of international students to London's current and future economic prosperity

The economic impacts of international students in London go far beyond the directly measured economic impact of £2.5 billion or the overall impact estimated at £6 billion. Therefore it is important that these are recognized as the minimum impacts from the international student base in 2009/10. They nevertheless confirm a significant dividend from this source and underline its importance to the wider economy of London.

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1 Introduction and methodology

A significant proportion of students attending London's higher education institutions are from outside the UK, a characteristic which delivers significant economic dividend for the capital. In this report we provide both quantitative and qualitative analysis to assess the scale and nature of this dividend, showing how the growing contribution from international students extends beyond fees and offers a series of impacts for London's economy.

1.1 Introduction

One in four students attending London's higher education institutions are from outside the UK, a characteristic which delivers significant economic dividends. The additional base of students adds value in their expenditure on goods and services, including the purchase of education itself. In addition to such direct benefits, the internationalisation of the student base has become critically important to institutions in maintaining a robust business model and sustaining excellence. The development of human capital via such international study can also lead to significant benefits for London and the UK following graduation, with international alumni working, investing and visiting the capital as a result of their initial student experience.

It is important at a policy level that the link between international students and economic impacts is clearly understood to ensure that future plans for development reflect this contribution. As a result Study London has commissioned this exercise to establish the total economic contribution of international students in 2009/10 in terms of:

- Fees
- Subsistence (living expenses, travel, etc)
- Family visits while studying in London

There was also a desire to articulate exactly how these and wider economic impacts are stimulated by the attraction of international students to London's higher education institutions. In this report we provide evidence for how such impacts occur and draw overall conclusions on the overall dividend for London's economy from its international student base.

1.2 The methodology deployed

The evidence set out in this report has been generated from a combination of both quantitative and qualitative analysis. The quantitative perspective is essential to provide an indication of the added value of international students and to facilitate comparison with the two previous studies undertaken by Oxford Economics in 2007 and GLA Economics in 2003. However this analysis only presents in

effect the ‘minimum’ impact which is directly measurable. It neglects a significant economic dividend which is realised in less tangible ways, but which can nonetheless be articulated in a more qualitative manner. To ensure that the study reflected all aspects of economic impact, we have deployed a robust methodology which drew on evidence from various sources as shown in Figure 1.1.

Figure 1.1: Methodology Adopted in Assessing Economic Impact

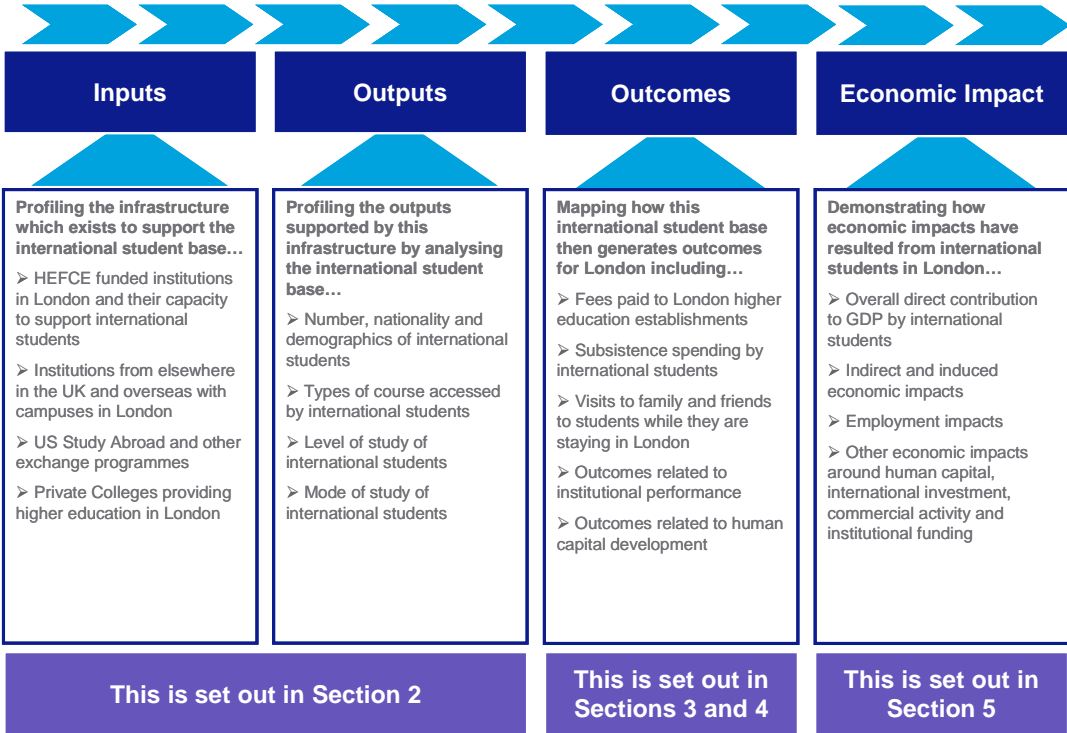
Study Component	Approach and Methodology
Establishing Higher Education Institutions which attract international students in London	<ul style="list-style-type: none"> • Comprehensive institutional profile drawn up from information from Study London, the Association of American Study Abroad Programmes and HESA • Further desk research undertaken to establish the level of study in each institution
Establishing the international student base studying in London in 2009/10	<ul style="list-style-type: none"> • Information on student numbers across the London-based institutions drawn from HESA • All private colleges offering degree level provision contacted to try to establish student numbers
Establishing the international student base at London institutions studying ‘off shore’	<ul style="list-style-type: none"> • Information on ‘off shore’ student numbers drawn from HESA data • Fee income estimates based on Reddin’s 2009/10 fee analysis. PA have assumed that fees for off shore students are charged at the same level as fees to ‘on shore’ international students. We also assume that the fee income accrues to the university but that additional impacts are not realised in the London economy
Establishing the level of fees paid by international students in 2009/10	<ul style="list-style-type: none"> • Fee income from international students confirmed by HESA and the Association of American Study Abroad programmes • Validated by review of fee income data in institution financial reports and by further 2009/10 fee analysis by Reddin (2010)
Establishing the subsistence expenditure by international students in London in 2009/10	<ul style="list-style-type: none"> • Expenditure by international students based on Student Income and Expenditure Survey which breaks spend down into living costs, housing costs and participation costs (books, travel, etc but excluding fees) • This also validated by analysis of subsistence guidance provided to international students by institutions and the British Council
Tourism expenditure by family and friends visiting international students in London	<ul style="list-style-type: none"> • Tourism spend by family and friends based on International Passenger Survey data on spend by those visiting friends and relatives in London from North America, Europe and other countries • Study Abroad student visitor figures adjusted for length of time student spends in London
Qualitative analysis of the scale and nature of impacts from international students	<ul style="list-style-type: none"> • Contacted 15 HEFCE funded, 30 private colleges and 4 universities with campuses in London to identify evidence of the impact of international students • Additional consultation with the Association of American Study Abroad Programmes, the British Accreditation Council and the Association of Commonwealth Universities • Desk research to build up case study analysis

Study Component	Approach and Methodology
Analysis of the institutional and human capital benefits that deliver economic impact	<ul style="list-style-type: none"> • Analysis of institutional performance data to examine link with the internationalization of the student base • Analysis of international graduates destination statistics from a sample of institutions to track benefits following study • Desk research to establish commercialization and spin-out successes from research by international students • Consultation with alumni identified to identify the benefits of international study in London and the impacts that have resulted
Identifying the employment impact from international students in London	<ul style="list-style-type: none"> • Output per university job estimates from 'The Impact of UK Universities' Report applied to fee income estimates • Output per job estimates for the whole economy applied to subsistence and visitor spend estimates
Identifying indirect & induced impacts from international students in London	<ul style="list-style-type: none"> • Multipliers sourced from 'The Impact of UK Universities' Report and applied to fees, subsistence and visitor expenditure estimates

1.3 The link between international students and economic impact

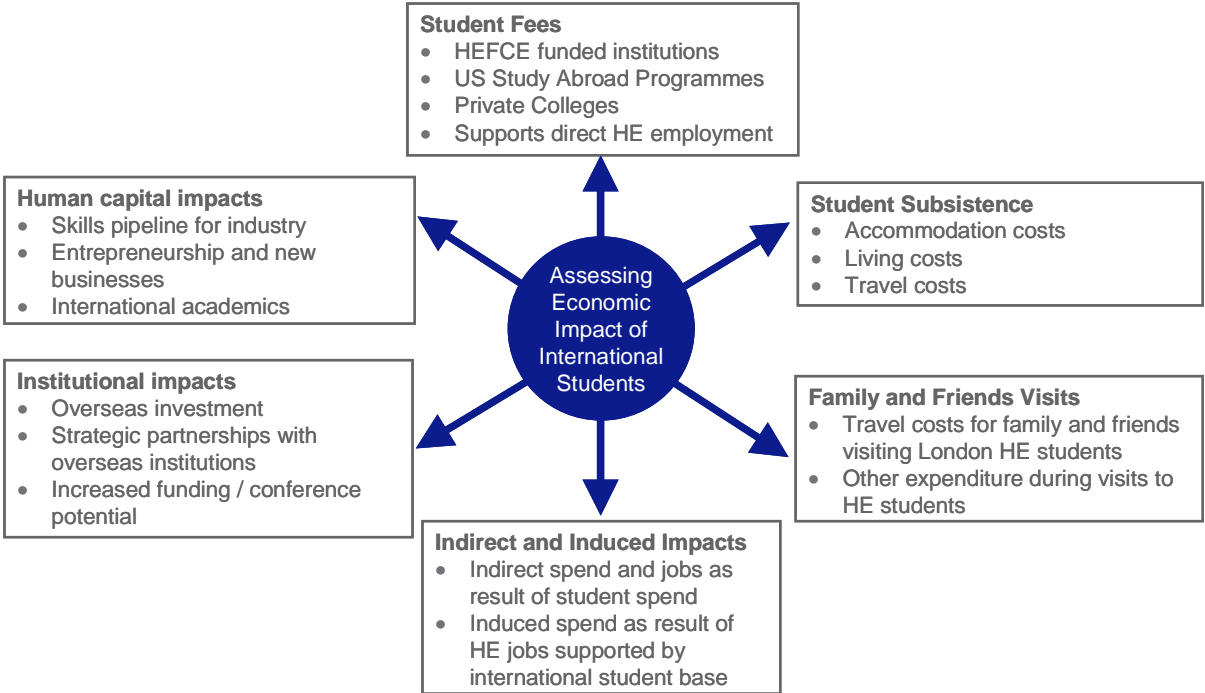
The ability to attract such a significant base of international students should be a notable asset which provides a platform for the generation of economic impact. The first essential characteristic in this regard is having the higher education institutional infrastructure in place and the surrounding environment which can attract students from abroad. This allows international student demand to be stimulated, with a range of courses, levels and modes of study available. The base of international students provides a platform for generation of a series of direct outcomes in terms of expenditure and indirect outcomes in terms of the development of institutional performance and human capital. These effects combine to generate an overall economic impact for London. The links between international students and impact in this way are illustrated in Figure 1.2.

Figure 1.2: Economic Impact Assessment Framework



We have based our approach on building up analysis of inputs, outputs, outcomes and impacts in this way and this is presented in this order throughout the remainder of the report. These resultant impacts from international students are multi-faceted, with 6 distinct categories identified as shown in Figure 1.3. The report will provide evidence of the nature and scale of such impacts to build up an overall picture of the economic dividend.

Figure 1.3: Key Economic Impacts from International Students



2 Profiling the international student base in London

In this section we set out the nature and scale of the international student base in London. The first task is to set out the higher education institutions which attract and support international students. We then examine the characteristics of the capital's international student population in 2009/10, considering features such as host institution, nationality and mode and level of study. We conclude by looking at the key drivers which bring these students to London and generate economic impacts, providing a platform for further analysis of these impacts in the next section of the report.

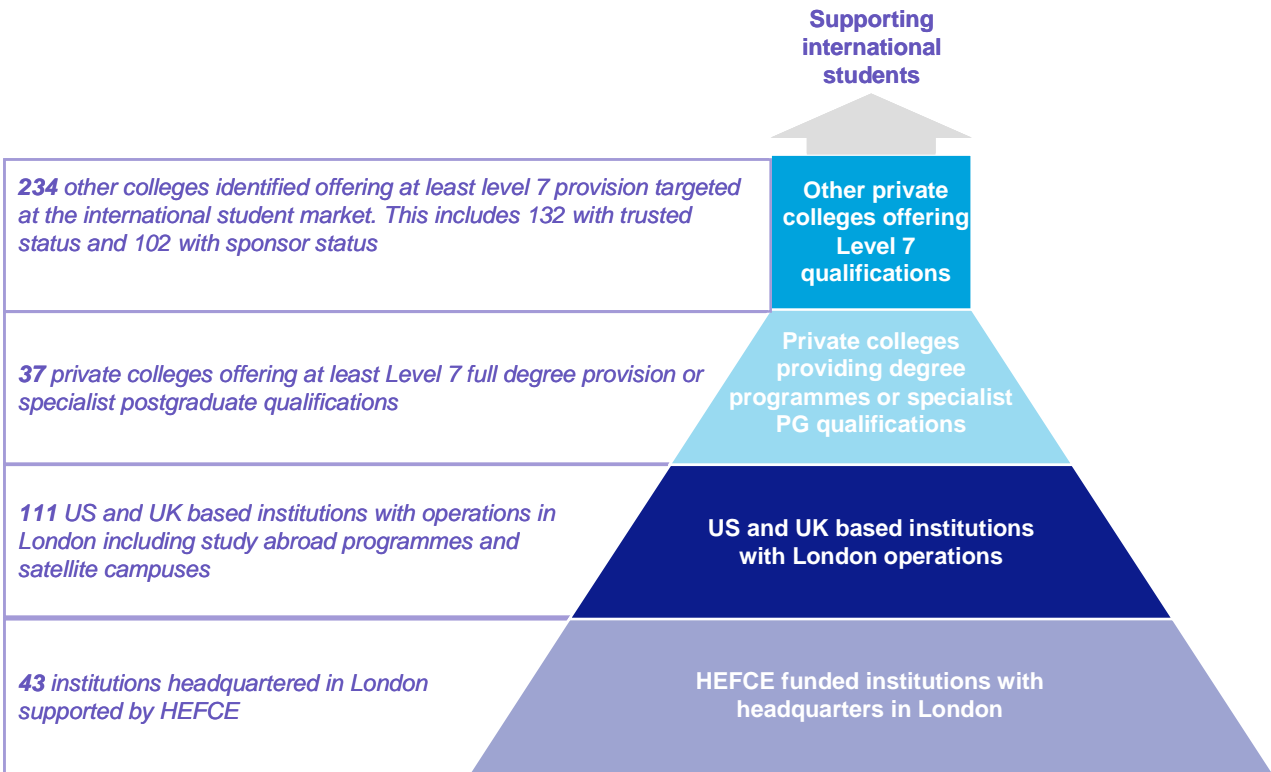
2.1 Higher education institutions attracting international students in London

London's status as a global hub of higher education is underpinned by a core base of 43 publicly funded institutions spread across the capital. However this only accounts for a proportion of higher education activity, with many other institutions operating in London on a private basis. The business decision of such institutions to locate in the city is predominantly driven by the international student market, and there are a number of different tiers of provider.

The US higher education sector has become a major player in this market, both via study abroad and exchange programmes and through the location of 'satellite' campuses within London. This latter development has also been mirrored by similar steps by other publicly funded institutions in the UK and elsewhere internationally, with universities including Glasgow Caledonian, East Anglia, Northumbria, Cumbria and Coventry (and soon Abertay) among those with operations in London focused on meeting demand from international students. In addition, there is a base of purely private sector operators delivering degree programmes and specialist postgraduate qualifications within London. There is also a significant base of other private colleges offering more basic higher level qualifications, mainly in the form of business or hospitality focused postgraduate diplomas which are targeted specifically at students from overseas.

A summary of the higher education institutional base which supports international students in London is shown in Figure 2.1. A full profile of the individual institutions within each category of provider is shown in Appendix A of the report.

Figure 2.1: Higher Education Institutions Supporting International Students in London



The institutional profile above is reflective of the demand for, and current abundance of, channels for encouraging and facilitating foreign students to study in London, with 424 organisations identified. The analysis in this report is focused on the 190 public and private institutions providing full degree programmes and specialist postgraduate qualifications. The 234 other higher education providers identified are all accredited as Tier 4 providers under the points-based system introduced in 2009 to facilitate a primary path to study in the UK for those who could not avail of the existing provision. However given the impending changes to visa restrictions and the limited focus of this base of higher education activity, it is prudent to omit this provision from assessment of impact.

Case Study on INTO UAE: The Developing Model of International Student Satellite Campuses in London

Several regional universities have established campuses in London over recent years, primarily to improve their recruitment and services for international students. They include the University of Northumbria, Glasgow Caledonia University, Coventry University and the University of East Anglia (UEA).

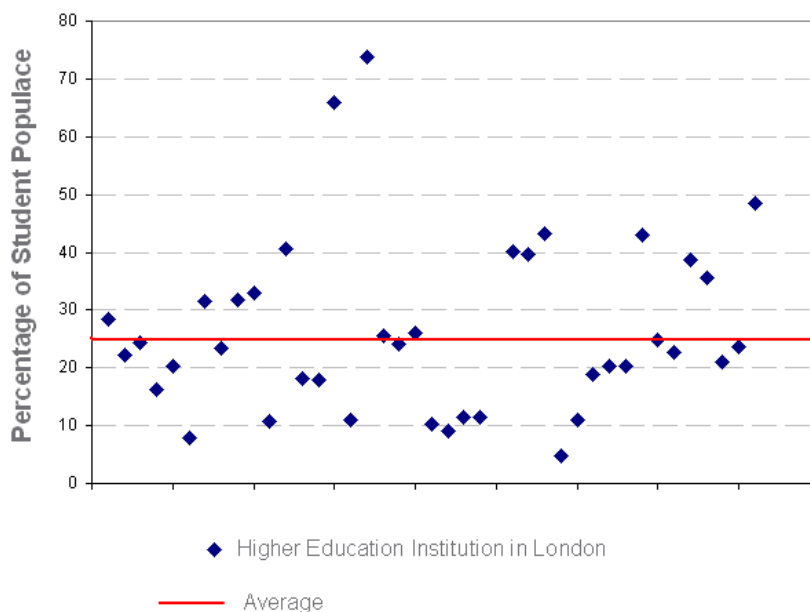
UEA, in a public-private joint venture with INTO University Partnerships, opened a branch centre in the City of London in January 2010. From an initial student intake of 150, the Centre has grown to a current body of 1,000 students. Courses offered, predominantly for international students, include post-graduate courses ranging from strategic carbon management to creative enterprise and international business management. The centre also hosts the University’s School of Diplomacy, offering post-graduate and short courses for diplomats from around the world.

2.2 The nature of the international student base

In 2009/10, there were 104,805 international students attending HEFCE funded institutions in London. Of this base, 32,725 were from the elsewhere in the EU, with the remaining 72,080 from outside the EU¹. The number of international students studying in London has risen dramatically over the last 10 years. Since the last study on international student impact was undertaken by Oxford Economics in 2007, there has been a 22% increase in the number of foreign students studying in London. This study itself had revealed a 40% increase in international students at HEFCE funded institutions since the GLA Economics study in 2004 (which focused on the academic year 2002/03), and overall the international student base has almost doubled in size since in the decade between 1999/2000 and 2009/2010.

On average, these international students account for approximately 25% of the student populace at these publicly funded institutions. However the 'internationalisation' of the student base within specific institutions varies significantly. In the London School of Economics and Political Science, the London Business School, Imperial College London, the Royal College of Music, Royal College of Art, Royal Academy of Music, University of the Arts, and the School of Oriental and African Studies, students from overseas account for over 40% of the student population. The international student base across individual institutions is shown in Figure 2.2 below.

Figure 2.2: The International Student Base across HEFCE Funded Institutions



Source: HESA

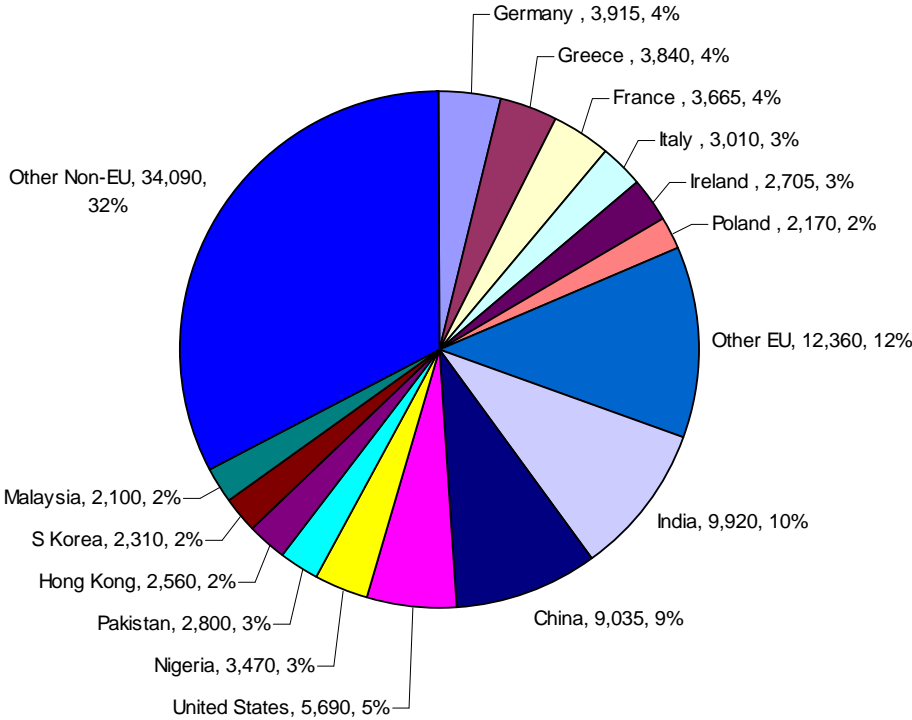
Outside the HEFCE funded institutions, American Study Abroad programmes brought an additional 16,731 students to London in 2009/10. It has not been possible to quantify the international students in private higher education colleges as these organisations have no obligation to divulge such figures.

¹ The distinction between EU and other international students is important as EU students pay the same fees as UK students to higher education institutions, while fees to other international students can vary substantially and are typically much higher.

However from our own research as part of this study, we have been able to identify international student numbers across circa 10 of the leading private colleges of approximately 10,000. We can also provide some indication of the international students from outside the EU that are studying across the Tier 4 approved institutions by looking at UK Border Agency statistics on visas issued. Between April 2009 and August 2010, over 17,000 Confirmation of Acceptance for Studies (CAS) from a sponsoring Tier 4 institution were logged for international students. Although no separation can be provided between London colleges and those elsewhere in the UK, it is likely that the majority of those represented by this figure are pursuing study opportunities within the capital.

Profiling the international student base by country of origin reveals a number of key sources of demand for London institutions. The diagram in Figure 2.3 shows the most important sources in terms of their proportion of the overall international student base. India and China are the most important contributors, with each providing around 10% of the market. However it is also important to note the wide diversity in nationality of students in London, with 91 different nations contributing a base of at least 100 students in London in 2009/10. A full analysis of the international student base by country of origin is provided in Appendix B.

Figure 2.3: International Student Base 2009/10 by Country of Origin

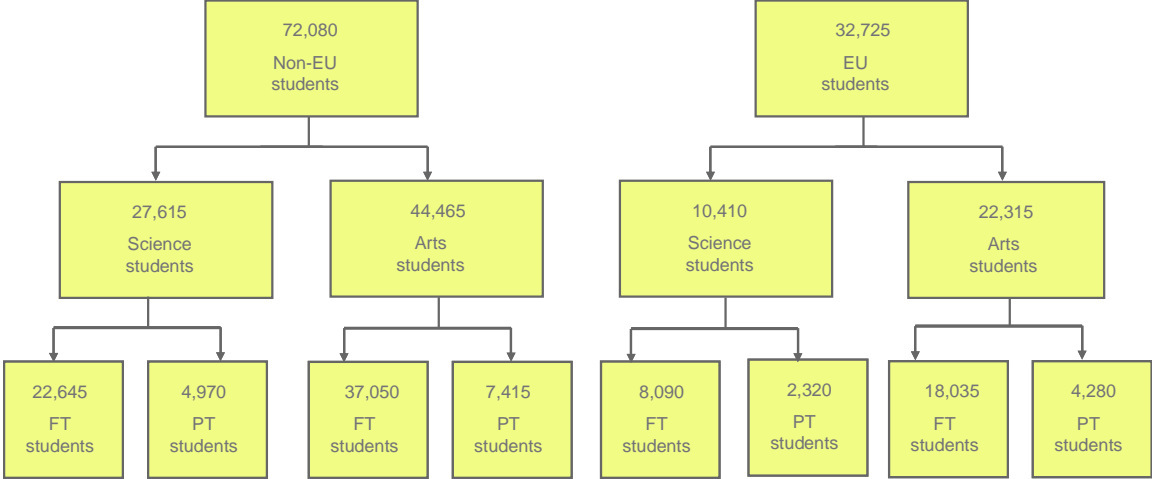


Source: HESA

Of the international student base, some 45.5% are studying at undergraduate level with 54.5% undertaking postgraduate study. Most are involved in full-time study (81.6%). There is stronger international demand for arts rather than science related courses, and the difference in fee levels attached to each type of course means that this characteristic is reflected in the subsequent economic impact. Data gathered by Reddin (www.publicgoods.co.uk, 2010) on fee levels in 2009/10 showed a premium of over £1,000 on annual fees for an undergraduate science degree over an arts degree. For postgraduate qualifications, the equivalent premium was approximately £2,000. Figure 2.4 outlines

some of the key characteristics of the international student profile across London's HEFCE funded institutions.

Figure 2.4: Analysis of International Students by Discipline and Nature of Study



Source: HESA

Case Study: Drawing International Students to the University of Coventry London Campus

Coventry University's London Campus is situated in the heart of London's financial district, just 250 metres from Liverpool Street Station. The university set up the campus some 92 miles away from their headquarters in the Midlands to tap into the international student market drawn to the significant higher education hub of the City of London. The campus, which offers MBA, MSc and undergraduate top up courses, attracts international students from China, India, Nigeria and the Middle East. Latest estimates indicate a current international student population of 400. A profile of a selection of students undertaking the MBA course highlights the attractiveness of London as a place to study:

- 'Studying in the heart of London not only gives me the experience of living in such a lively multicultural city, but with the campus situated in the financial and business district I feel it will also open up a wealth of networking opportunities for me.' MBA student from the Democratic Republic of Congo
- 'After completing my degree in Finance, I decided to pursue a career in the field of global business. Coventry University has a good reputation and London Campus is in a brilliant location, so I chose to study here to help me achieve my career ambition.' MBA student from China
- 'Campus location was one of the things that attracted me – all major global companies are based in London. The campus provides a good environment for networking and is good for learning about the market in London. Provides opportunity to speak to people from all over the world, learning each others culture. This is helpful in the context of globalisation.' MBA student from India

This small selection of quotations indicates the importance that these students attach to institutional location, specifically, proximity to major global companies in London. Once their studies are completed, a significant proportion will go onto gain employment in London, bringing further benefits to the economy.

2.3 The key drivers of international student impact

In considering how international students generate impacts for the wider economy, it is important to identify the key drivers of international student demand and impact. Articulating the reasons why students have come, and will continue to come to London in the future, will assist in planning to maximise the economic impact moving forward. It is also important to take into account the fact that the nature of international study in London, and of the wider living environment, causes different patterns of expenditure and hence impact than would be the case related study elsewhere. From the research conducted during this study, key drivers of international student impact were found to include:

- **Institutional reputation:** The presence of world class universities with significant reputations for excellence in teaching; significant research capability; and supporting infrastructure such as libraries, museums, etc is a critical factor in bringing international students to London. Imperial College London (9th), UCL (22nd), King's College London (77th), LSE (86th) and Royal Holloway (88th) are all ranked within the top 100 institutions globally² and all HEFCE funded institutions in the capital have a long track record in delivery of learning to international students. This is reflected in the attraction of substantial research and philanthropic funding and these are characteristics which are further explored in Section 4.
- **Specialist niche:** Success in stimulating student demand tends to depend on the ability of the institution to distinguish its offering from the many competing education providers and develop an international reputation for specialist excellence. Our research showed a strong interest in business degrees and those related to professional qualifications, but a further attribute in the capital is the status of more specialist institutions. These include the Institute of Education (ranked highest in the UK for educational research), the Royal College of Art (offering solely postgraduate focused opportunities in art and design) and the Royal Academy of Music (drawing students from over 50 countries to study 20 specialist musical disciplines), which bring substantial numbers to study from abroad as a result of expertise within their particular specialist disciplines.
- **Multi-cultural environment:** The growth of the international student base has also had an impact in terms of generating a multi-cultural environment within institutions. The analysis earlier in this section revealed that there is a base of over 3,000 students from Germany, Greece, France, Italy, India, China, the United States and Nigeria. This creates ready made support communities which can make a very positive contribution to the student experience and the presence of others from the same nationality is undoubtedly a contributory factor in international student demand.
- **Culture and amenities:** The wider attraction of spending a period of time in London itself is a key driver of international student demand. Its status as a major tourist and cultural destination and the significant base of associated infrastructure are key assets in persuading students to come to London and also to remain once the period of study concludes. The presence of a wide variety of amenities also encourages greater levels of spend than would be the case for students in other locations in the UK.

² Times Higher Education World University Rankings 2010-11

- **Business and employment opportunities:** London's status as a global business hub (with a third of world foreign exchange turnover taking place in the city) brings many people to the capital to study with the prospect of further business and employment opportunities after graduation. A further key feature is its location as the headquarters of many professional bodies³ which attracts international students which are pursuing a career in such professions.
- **Accessibility:** London's status as a global transport hub, with the world's busiest international airport and direct access to most international destinations makes institutions highly accessible to potential students. The range of flight options available facilitates cost effective travel and the transport infrastructure within the city is a notable asset in drawing people to study in the capital.
- **Cost effectiveness:** While there is a perception that London is a relatively expensive city, it is also true that the development of the international student base has been supported by an ability to offer cost-effective educational opportunities which are tailored to the needs of the market. International student fees at London are comparable to international norms, including equivalent international fees in the US, Canada and Australia, but the perceived value of the educational experience, in line with the factors noted above, drives considerable student demand.

These characteristics have provided the impetus for a significant expansion in the international student base in London in recent years and this in turn has provided the platform for a substantial economic dividend. They are reflected in London's status as the leading higher education city in the world, confirmed by research undertaken by RMIT University which considered factors such as size, liveability and connectedness, the number of excellent universities and sustained investment in education and research.

³ For example, RICS, ACCA, ICSA, CIPD, etc.

3 A quantitative analysis of the impact of international students on London's economy

In this section of the report we set out quantitative analysis on the impact of international students on London's economy. This calculates the total student fees, subsistence spend and visitor spend by family and friends for the academic year 2009/10. An estimation of the employment impact of international students in London is also provided. The results are then compared with those of the Oxford Economics study (on 2006/07) and the GLA Economics study on (2002/03) to highlight how the impact has grown over time.

3.1 Student fees

The **fees** paid to London's higher education institutions represent the most immediate benefit from international students and although fees charged to Home/EU students were the same across London's institutions in 2009/10, fees charged to international students varied considerably between institutions. For example, across London's publicly funded HE institutions, fees charged to international students ranged from £4,000 to £47,900.

As we note within the methodology, the fee data used for the analysis was drawn from HESA and information provided from the results of a survey of its London based members conducted by the Association of American Study Abroad Programmes/United Kingdom. The information provided by HESA acted as a 'control total' for PA's analysis which estimated fee incomes for each publicly funded HE institution in London. Our approach to estimating fee income levels was as follows:

- The www.publicgoods.co.uk website publishes fee income levels, collected from institutions, for UK/EU students and international students by level of study (undergraduate/postgraduate) and broad subject area (science/lab based or art/classroom based).
- PA classified each London institution's student population into the same classifications as presented in www.publicgoods.co.uk and multiplied the fee level for each classification by the number of students to generate fee incomes per institution for UK, EU and International students.
- In the absence of part time fees from www.publicgoods.co.uk part time student fees were assumed to be half the full time rate. To avoid concerns that this approach could inflate fee incomes⁴, the results were 'scaled' to the control total provided by HESA

⁴ This approach generated fee income estimates to within 3% of HESA's aggregate figure.

Fees charged to international (non-EU) students generated £754m in fee income for London’s universities while fees charged to non UK EU students generated a further £92.8m. There were also close to 17,000 US students who attended London universities through the US study abroad programmes (these are students who study in London but not at London’s HEFCE funded institutions). In addition, fee income was also generated from offshore study by international students. These figures are presented in Figure 3.1 below.

Figure 3.1: Analysis of Fee Revenue from International Students (£million)

Category	Fee Income
Fee income from international Students (HEFCE funded HEIs in London)	£754m
Fee Income from non UK EU students	£92.8m
Study Abroad Programme	£79.8m
Offshore Study by International Students	£246.4mn
Total fee income	£1,173m

Source: PA Consulting

Total fee income from all London’s HEFCE funded institutions was £1,870million in 2009/10. The fee income from international students (EU and international) therefore accounts for 45% of this total fee income. In addition to this significant contribution to university funding, the presence of international students provides significant additional economic benefits through their own living costs and through the expenditure and of people who come to visit them during their studies.

3.2 Subsistence expenditure

Subsistence spending is based on the student income and expenditure survey. This report presents the most detailed, comprehensive and authoritative assessment undertaken of the income and expenditure of students in Higher Education (HE) in England and Wales. The key components of student expenditure identified in the survey are:

- **Living costs:** this is by far the largest category and includes expenditure on: food and drink; personal items such as clothes, toiletries, mobile phones, CDs, magazines and cigarettes; entertainment, including nightclubs, concerts, sports and gambling; household goods including cleaning and servicing costs; and non-course travel.
- **Housing costs:** this is the second-largest category of expenditure for most students and includes rent, mortgage costs, retainers, council tax and household bills.
- **Participation costs:** these are the costs that students incur as a direct result of attending university or college and are the third-largest category of expenditure for most students. They include: the costs of course-related books, equipment and stationery; the costs of travelling to and from their university or college; the costs of any childcare that parents obtain in order to allow them to study; and all course fees paid by the students or paid by their families on their behalf. PA have removed course fees from this factor to avoid double counting

Our analysis estimates that the annual average expenditure by full-time students is £9,850 and that by part-time students is £14,660. The difference between full time and part time can be explained by differences in ‘life stage’ between full time and part time students, with part timers more likely to own/rent a property compared to full timers who may live with parents or share with friends. Spending on children is also more likely to impact on part time students than full time.

The average expenditure figures have been verified through a desk research exercise to review websites and relevant published material of London institutions and international student advisory groups and PA is content that they are reasonable. By applying these expenditure figures to the international student base we produce the analysis in Figure 3.2. This reveals an estimate of the total level of **subsistence expenditure of £1,216 million**.

Figure 3.2: Subsistence Expenditure by International Students

Category	Subsistence Expenditure
Spend by international Students HEFCE	£770mn
Spend by non UK EU students	£354mn
Study Abroad Programme	£92mn
Total fee income	£1,216mn

Source: PA Consulting

Case Study on Generating Direct Economic Impacts in UCL

UCL is recognised as one of the leading higher education institutions across the globe, placed at 22nd in the world by the Times Higher Education world university rankings for 2010/11. Its profile and reputation stands hand-in-hand with a strong international focus across both academic staff and students, reflected in 36% of the latter being drawn from overseas in 2009/10. This international student base of 2,600 EU students and 5,690 from elsewhere generate an estimated income for the institution of approximately £89mn. However these students also spend a significant amount in the local economy in order to live from day-to-day. UCL guidance suggests a minimum subsistence requirement of £210 per week, and wider analysis of student expenditure concludes that a level of £9,851 is typical for a full time student resident in London. Based on this assumption, it is estimated that £86mn of additional expenditure is generated from UCL international students in this way. The overseas students at UCL also tend to be visited by family and friends throughout the year. By considering our wider analysis, which suggests that each international student generates £113 visitor expenditure, we estimate that UCL students generate a further £939,000 to the economy. By adding all these components together, we can conclude that UCL international students contribute an estimated £176m in direct economic impacts for London, with an estimated associated employment impact of 3,468 jobs. Indirect impacts add a further £246mn and 4,091 jobs.

3.3 Expenditure on visits by family and friends

International students generate further benefits through attracting visitors from their home country to London. In the 2007 Oxford Economics Report on the economic impact of London's international students, the authors caveat their calculation based on the available data from the International Passenger Survey. Having reviewed the available data, PA has followed a similar approach to that taken in the previous report, namely:

- London's population is disaggregated to show country of birth information, working on the assumption used in the 2007 report that visitors who are visiting 'friends or relatives' are all visiting foreign nationals from their own country and that the percentage of these visits is proportionate to the percentage of the population of that nationality that is made up of students. For example, there are 5,690 students from America and an American population of 43,000 in London. Therefore, the assumption is that 13% of the American visitors to friends and relatives will be visiting a student.
- Once the number of visits to students is known, the IPS estimates of average spend per visit by visitors from each country is applied to generate a 'spending by visitors to London visiting foreign students' figure. Average spend per visit differs markedly between countries. For example, the average spend by Americans visiting friends and family is £445 compared to £1,107 for China or £245 from France.
- When all the average spend per visit figures are applied to the number of visits to students, we estimate that **£139.5million is generated from visits to international students by friends and family.**

This figure is slightly lower than the £147m that Oxford Economics estimated in the 2007 study. Two factors appear to be influencing this. Firstly, the International Passenger Survey adopted a revised methodology for their 2009 figures. The revised approach, which improved the methodology employed in the non response weight resulted in a 2% reduction in earnings from foreign visitors when 2008 data was prepared under both the revised and original approach. Another factor impacting on the figures is the economic downturn. Prior to 2008, visits to the UK had grown every year from 2002, before a decline of 2.7 per cent in 2008 and a further decline of 6.3% in 2009.

3.4 Overall direct expenditure and employment impacts

Taking the fee income, subsistence expenditure and spend by family and friends together, an overall direct economic impact of international students in London can be estimated for 2009/10. This totals **£2.5billion**, and is significantly higher (up 68%) than the equivalent figure calculated in the study by Oxford Economics 4 years previously, as shown in Figure 3.3. The increase has been predominantly driven by an increase in student numbers, generating more in fee income and subsistence spending.

Figure 3.3: Comparative Analysis of the Economic Impact of International Students in London’s HEFCE Funded Institutions

Study	Direct Economic Impact Calculated
GLA Economics Study 2003/04	£750mn
Oxford Economics Study 2005/06	£1,500mn
PA Consulting 2009/10 Analysis	£2,528mn

Source: PA Consulting, Oxford Economics, GLA Economics

The £2,528mn figure quoted above excludes the impact of international students in private colleges. PA contacted over 30 private institutions initially by telephone, with email follow up, to request their international student numbers. Approximately 10 institutions responded to the information request, identifying 10,000 international students. PA has assumed a conservative average fee level of £4,000 per student and also assumed that subsistence spend is at the full time rate of £9,851. In terms of visitor spend, an average spend generated per students at publicly funded colleges was applied. This approach suggests that the 10,000 students at private HE providers generate an impact of £140mn. When multiplier effects are included, the impact increases to £336mn. This equates to an employment impact of 5,970, with 2,941 direct jobs and 3,029 indirect or induced jobs supported.

The significant direct impacts of international students outlined above generate additional benefits through supporting employment and through ‘knock on’ effects as universities purchase goods and services and university staff spend their income on consumer goods and services. It should be noted that the fee income from off shore students are not included in calculations of further economic benefits.

The impact on employment is calculated by applying an ‘output per university employee’ figure to the fee incomes and a ‘whole economy output per employee’ figure to the subsistence and visitor spend figures. A study of ‘The impact of universities on the UK economy’ by the University of Strathclyde in 2009 provides helpful information in this regard. This study found that, against a total income of £23,440mn, 372,415 jobs were supported in universities. Applying the same ratio to the fee income from international students suggests that circa 14,700 university jobs were supported in London universities. The impact of subsistence and for spending by visitors has been estimated on the basis that approximately £44,000 output supports one job. The subsistence and visitor spend figures therefore support 30,900 jobs. This brings the **overall direct employment impact of international students in London to 45,600 jobs.**

3.5 Indirect and induced impacts

International students make a significant direct impact to the London economy. This direct impact creates further impacts across other sectors of the economy. As ‘The impact of universities on the UK economy’ report noted, these multiplier effects typically comprise two types of impact:

- **Indirect effects:** universities purchase goods and services from other sectors in order to support their own activity, thereby stimulating activity within those industries. The supplying industries also

buy from other suppliers in order to fulfil university orders, and those suppliers in turn buy, so that there is a 'rippling-out' effect

- **Induced effects:** universities pay wages and salaries to employees who in turn spend this income on consumer goods and services. This then creates wages income for employees in other sectors who also spend their income. This process continues, rippling through the whole economy

To estimate these multiplier effects, the University of Strathclyde team that prepared 'The impact of universities on the UK economy' report constructed an input-output model which enables the impact generated by university expenditure to be traced through the economy. The multipliers generated in that study have been applied here as follows.

- **Sectoral gross output multiplier:** for every £1mn of direct university output, a further £1.38mn was generated in other sectors of the economy.
- **Subsistence multiplier:** for every £1mn of direct subsistence spend, a further £1.42mn is generated in wider economy
- **Visitor spend multiplier:** for every £1mn of direct subsistence spend, a further £1.40mn is generated in wider economy
- **Employment multipliers:** for every 100 jobs supported directly in an institution through fees income, a further 103 jobs are generated elsewhere in the economy. The same multiplier is applied jobs created through subsistence and visitor spend.

Applying these multipliers to our analysis generates the 'knock on' effects shown in Figure 3.4. While these multipliers refer to the effect on the entire UK economy (i.e. they are not necessarily constrained to the London area), it is nonetheless likely that the vast majority of the estimated impacts will be accrued within the city. Some leakage may result from, for example, beneficiaries in employment that commute from outside London, but such instances are likely to be sufficiently small to have a negligible effect on the overall impact figure. By combining this analysis with the direct impacts estimated above a calculation of the overall economic impact of international students can be generated, as set out in the right hand column.

Figure 3.4: Multiplier Impacts from International Students in London's HEFCE Funded Institutions

Category	Direct impact	'Knock on' effect	Total impact
Fee income	£1,173mn	£1,279mn	£2,452mn
Subsistence	£1,216mn	£1,726mn	£2,942mn
Visitor income	£140mn	£195mn	£335mn
Total	£2,528mn	£3,200mn	£5,728mn
Jobs impact	45,600	48,400	94,000

Source: PA Consulting

The analysis concludes that **international students at publicly funded HE institutions contributed an estimated £5.7billion to the London economy in 2009/10. Adding the information from the sample of private colleges increases the total impact to £6 billion and 100,000 jobs.**

4 Wider economic impacts of international students

It is important to recognise that the direct economic impact from international students set out in the previous section represents the immediate quantifiable benefits. There are many other wider economic impacts that are derived from the presence of a large base of multi-national students in the capital and from London's status as a global hub of higher education. In this section we articulate some of these impacts, beginning with the enhancement of institutional reputation and then considering development of human capital, stimulation of commercial activity and finally the indirect and induced effects of the significant injection of expenditure.

4.1 The impact in terms of enhanced institutional reputation

A number of London's institutions have well established reputations among the leading higher education providers across the globe, with long track records of attracting a diverse base of highly skilled international students. However the presence of overseas students in an institution is no longer the preserve of the leading institutions and as we have shown they account for a significant and growing proportion of students in all London providers. Indeed the internationalisation of the student base is now a key component in maintaining and growing an institution's reputation, profile and performance. There are many ways in which international students contribute in this way, including:

- **International institutional ranking:** There is no doubt that an ability to demonstrate, and be recognised for, being able to attract a significant base of leading international students, researchers and academics is a characteristic which serves as a key drivers of an institution's global standing. The current Times Higher Education international university rankings assess reputation by gauging the opinions of international academics and having the contacts and acknowledgement beyond domestic counterparts is critical in achieving a status as a global higher education leader. Currently Imperial College London (9th), UCL (22nd), King's College London (77th), LSE (86th) and Royal Holloway (88th)⁵. However it is also important to note that 5 of the top 10 ranked non-UK global institutions⁶ have operations in London, either directly via a dedicated campus or via study abroad programmes.
- **Specialist institutional reputation:** London also hosts a base of highly specialised institutions, including the Royal Veterinary College, Royal Academy of Dramatic Art, Royal College of Art, Royal Academy of Music and the School of Pharmacy. Private colleges such as the Architectural Association School of Architecture, the Urdang Academy (specialising in dance), the Met Film

⁵ Times Higher Education World University Rankings 2010/11

⁶ These are Harvard, Yale, University of California, University of Chicago and Cornell University

School and the Sotheby's Institute of Art also offer highly specialised provision to an international market. These institutions draw their legitimacy as centres of excellence in these fields from the continuing ability to attract students with the greatest potential from across the globe.

- **Research performance:** International students have played a critical role in sustaining London's research leadership position. A high proportion of postgraduate students and the great majority of doctoral students in London's research-based universities are from overseas, with HESA analysis showing a level of 41% of total students across all HEFCE funded institutions in 2009/10. This provides the mainstay of basic research activity and capability in universities. Indeed there is little doubt that the research reputation of UCL, Imperial, King's College, LSE et al depends heavily on the contributions of these students. This also links directly to the attraction of international thought leaders within particular fields of study.
- **Overseas investment:** Having a strong international student base should also be reflected in the levels of overseas investment which are attracted to the institution. A base of students from a particular country should increase the ability of the university to attract investment from that location. There should also be a substantial alumni effect where international students contribute finance to their former place of study after they progress into employment because of the ties established. There is also evidence of philanthropic funding from overseas where individuals fund an institution because of the area of research and teaching in which they are involved, with examples including Imperial College London, Brunel University and Queen Mary University. This is also demonstrated in private colleges where, for example the Aga Khan University Institute for the Study of Muslim Civilisations involves significant subsidies from overseas benefactors.
- **Strategic partnerships with international institutions:** The importance of international students to research performance was noted above. However a further key feature of such study is that when students return home, they keep in touch with their London counterparts during their subsequent research careers, fostering research collaborations and access to further research funding. There is evidence of many significant strategic partnerships between London institutions and leading universities and colleges in other countries. These links are dependent on a strong international focus in teaching and research and are often centred around particular specialist areas. For example, UCL agreed a partnership with Yale University in 2009 around the pooling of research expertise and resources. The London School of Economics has 5 formal academic partnership agreements with leading universities including Columbia University in New York, Sciences Po in Paris, Peking University in Beijing and the National University of Singapore.

Although it is impossible to measure how these institutional impacts lead to increased income for the higher education sector in London and to increased wider expenditure as a result, the strong evidence of their occurrence should be taken into account when considering wider economic impacts. The international dimension is a key aspect of performance across every London institution and securing continuing overseas demand is pivotal to future success.

Case Study on Links Between International Students & Institutional Profile in Imperial College London

Imperial College London is ranked as 9th in the Times Higher Education global university rankings and is the leading UK university outside of Oxford and Cambridge. With a base of 2,980 international postgraduate students (53% of the total) and 3,030 undergraduate students (36% of the total) in 2009/10, this continues to reflect a strong international focus by the college. The substantial international student base has played a key role in supporting the development of strategic partnerships with other overseas colleges and attracting international investment to support operations. Examples include:

- Imperial College's Grantham Institute for Climate Change and the Divecha Institute for Climate Change at the Indian Institute of Science Bangalore are collaborating around commercialisation of research.
- The College has launched a joint PhD programme with new joint qualifications offered in partnership with the National University of Singapore, Nanyang Technological University, Singapore, and the University of Hong Kong. This allows students to split their time equally between London and Singapore or Hong Kong, encouraging international mobility and preparing leading early-career researchers for global careers.
- The College's Centre for Bio-Inspired Technology opened in December 2009 and was funded by investment from a former international student. Taiwanese business leader and Physics alumnus, Professor Winston Wong supported the establishment of the centre which develops a range of devices that use technology to tackle health problems.

4.2 The impact in terms of human capital development

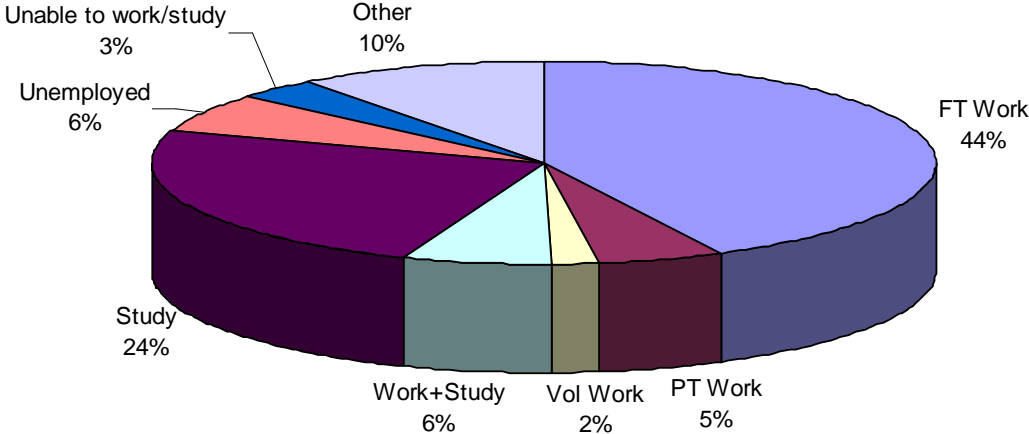
There is tendency when considering the benefits of international students to focus only the financial injection which the additional fees and associated spend brings to a locality. However one of the most critical impacts lies in the contribution of the international student base to human capital development. The development of overseas students and the attachment built up to London can offer a number of advantages post graduation⁷.

Those that decide to stay and pursue work opportunities provide a pool of highly skilled labour for the city, while others remaining in academia often progress important research and become thought leaders within their fields, making major contributions to economy and society. One of the striking aspects of the earlier analysis was the business-related motivations that stimulated demand for international study in London, and the creation of a potential base of tomorrow's entrepreneurs as a result of business and other specialist skills developed in the capital can have a notable long-term impact, with many remaining in London to progress such ideas. Often such commercial impacts can be the benefit of research undertaken by international students and academics themselves, with spin-out and start-up companies created to commercialise the benefits of IP developed in institutions. All of these factors which are related to the human capital developed via international study are difficult to quantify, but they remain relevant in any consideration of the impact.

⁷ The Tier 1 (Post-study work) visa category allows the UK to retain the most able international graduates who have studied here. It also enhances the UK's overall offer to international students.

The development of a skilled labour pool is reinforced by the analysis of international alumni destinations. By drawing together analysis across 17 of the HEFCE funded London institutions⁸, we are able to track how many international graduates went on to work in London and the other pathways that resulted from international study. This analysis is presented in Figure 4.1.

Figure 4.1: Analysis of International Alumni Destinations



Source: Institutional Data

Figure 4.1 shows that around half of the international graduates from the 17 London institutions secured employment following graduation. If we then look at the location of such employment, we find that 47.4% found this employment in the Greater London area. The contacts and experience of study in London clearly plays a significant role in the decision to progress to employment in the city. If we apply the ‘retention’ rate to the wider international student base in 2009/10, this should mean that a base of approximately 25,000 skilled international graduates were taken on by City employers. This is also reinforced by feedback from the London School of Economics which indicated that around 30% of international graduates progressed to employment in London.

Any concern about the quality of this employment or that it is displacing jobs that would otherwise be taken up by UK nationals is somewhat dispelled by considering the main employers of international graduates. This shows that the top 20 employers can be split into 3 main categories:

- **Key City multi-nationals:** Ernst & Young, Barclays, HSBC, Deutsche Bank, JP Morgan, Deloitte and KPMG are all among the top 20 employers, alongside major retailers Tesco and Boots. The international focus of these employers means that they tend to focus strongly on securing the best available skills regardless of nationality and progression into such positions reinforces the quality of London’s international graduates.
- **Progression in academia:** UCL, St Mary’s and Imperial College London are also among the top 20 employers and this is a sign that international students are progressing into research and other

⁸ The 17 institutions were: St Mary’s University College; Birkbeck College; Goldsmiths College; Institute of Education, University of London; King’s College London; London School of Hygiene and Tropical Medicine; Queen Mary, UoL; Royal Holloway, UoL; Royal Veterinary College; St George’s Hospital Medical School; School of Oriental and African Studies; School of Pharmacy; University College London; University of London Institutes; Institute of Cancer Research; Courtauld Institute of Art; Heythrop College

academic positions. This is important in order to continue to generate a pipeline of international thought leaders within London's institutions and help build the institutional impacts identified in Section 4.1.

- **Key public sector positions:** The NHS, Department of Health, Department of Education and Ministry of Defence all appear on the list of significant employers, meaning that international graduates are making a contribution to filling skills gaps in health, education and defence sectors.

In addition to the skills base available, the international alumni from the institutions have also demonstrated a long track record of achievement and this can only further augment the reputation of their alma mater. There are many examples of leading statesmen, scientists and businessmen that graduated from London's institutions some time ago. However it is worth listing some of the key examples of recent international alumni that went on to make substantial contributions to economy and society include:

- Nicholas Tombazis graduated with a degree in Aeronautical engineering from the **Imperial College London**: He was employed at Ferrari as chief aerodynamicist before leaving to work at McLaren in 2003. He returned to Ferrari on March 1, 2006, to become chief designer.
- Ching-He Huang graduated from **Queen Mary University** with a degree in Economics in 1999. She is a cook, a television personality and an entrepreneur; as well as being an ambassador for Chinese cooking in Britain. Upon graduation, Ching-He established her own company Fuge Foods and launched TZE, a range of healthy soft drinks. She now has a range of Ching-branded Woks marketed by the Typhoon Cookware company, as well as branded exotic mushrooms grown in the UK and available through Tesco. She is strongly committed to supporting the Tzu Chi Foundation, which aims to address poverty in eastern Taiwan, and Mothers' Bridge of Love, a charity for Chinese children.
- Dr Manuel Dayrit graduated from the **London School of Hygiene and Tropical Medicine**. Dr Dayrit is currently Director of Human Resources for Health at the World Health Organisation, having previously served as Minister for Health for the Philippines from 2001-2005. He is also President of the Alumni Association for the institution.
- Zaha Hadid, founding partner of Zaha Hadid Architects in London who graduated from the private London higher education college **Architectural Association School of Architecture**. A case study of this final example is provided below.

Case Study on Zaha Hadid, Architect

Zaha Hadid received a degree in mathematics from the American University of Beirut before moving to study at the Architectural Association School of Architecture in London. In 1980 she established her own London-based practice. During the 1980s she also taught at the Architectural Association.

Internationally renowned, Zaha Hadid has won many awards, including the Royal Institute of British Architects Stirling Prize for the Maxxi Museum in Rome. In 2002, Zaha Hadid was awarded a CBE in 2002.

Zaha Hadid Architects have made a significant contribution to the London economy. Employing around 300 people, the most recent accounts for the company show that with pre-tax profits at the company increased to £4.1 million in the year to April 2010 compared with £1.6 million in the previous period.

In addition to the economic benefits to London, Zaha Hadid Architects have made a significant recent impact on London's built environment through the London Aquatics Centre and the Evelyn Grace Academy in Brixton. The London Aquatics which will be one of the main venues of the London 2012 Summer Olympics and the Paralympics while the Evelyn Grace Academy, which caters for 1,200 pupils has been shortlisted for Building Awards Public Building Project of the Year 2011.

4.3 The generation of commercial impacts

A final impact to consider, which is related to the human capital produced from international study, lies in the generation of impacts as a result of future commercial activity stimulated from the international student's experience of studying in London. As noted above, this can result from the development of business and entrepreneurial skills which then lead to the graduate starting up a company which subsequently generates turnover and employment. This is undoubtedly a general impact of the study opportunities provided by institutions such as the London Business School and London School of Economics.

A more direct example of commercial impact lies in the generation of IP from international students or researchers which then realize value in the form of spin-outs or sale of licenses. During the study we have focused on identifying examples of where such research activity can be clearly linked to commercial impacts in this way. A prime example lies in the sale of Playfish, a company created out of the IP developed by international students that studied at LSE and Imperial College to Electronic Arts, which is further detailed in the case study below. Another example can be drawn from the work of Siavash Haroun Mahdavi, originally from Iran, who undertook a B.Sc. in Mechatronics Engineering at King's College London. He then went on to study a M.Sc. in Intelligent Systems at University College London and continued his research to complete a doctorate in Evolutionary Robotics. A spin-out company was created from this research, Complex Matters Ltd, in 2005, which is still trading successfully.

Case Study: Commercial Success by International Graduates from LSE and Imperial College

Kristian Segerstrale was born in Finland and came to Britain to study. Having attained his MSc at London School of Economics, Kristian applied the knowledge he had gained to a personal interest of his, which was the computer games business.

The first company of his that was produced from this was Macrospace. Macrospace was set up in 2001 and developed games for mobile phones. Four years later it was sold into what became Glu Mobile (the third largest computer game development company at the time), and which floated on Nasdaq in 2007.

However Kristian's biggest success came when he joined up with fellow international students and London graduates, Sami Lababidi and Shukri Shammass. Sami Lababidi had studied Mathematics and Computer Science at Imperial College London, while Shukri Shammass had attained a BA in business administration at American College London.

The three London graduates identified a niche in the market and co-founded Playfish. Playfish was to be a computer games development company that specialised in capitalising on "the social revolution" that was being experienced online through channels such as Facebook. The solid business case allowed Playfish to secure £12.5 million in backing from angel investors and Accel Partners and Index Ventures, the venture capitalists. "Who has the Biggest Brain?" was the company's first hit and was one of the first Facebook games to attract millions of daily players, allowing the company to raise funding necessary to produce other hits. Uniquely at the time, the company adopted a model whereby games are free, but where revenue is generated through the sale of in-game digital items (or assets).

Finally in 2009, Electronic Arts announced their acquisition of Playfish for \$400 million. The acquisition was initially for \$275 million cash and \$25 million in equity—with a further \$100 million in performance-based bonuses available if the company hit targets set by EA executives.

Playfish is growing extremely fast and currently attracts roughly 55 million users a month, with over 37 million users solely coming from Facebook. As a result, the company has already had to move its London offices twice and is looking to hire 25 more people throughout 2011. The group also has offices in San Francisco and Beijing.

Finally, there are also benefits related to international students where alumni investment has led to commercialized research. As a result of the alumni investment to establish the Centre for Bio-Inspired Technology in Imperial College noted in the case study earlier in this section, significant achievements have been made in healthcare technology. A key example is the 'SNP Doctor', developed in the centre, which is a handheld device that predicts whether patients will respond adversely to medication, and a digital 'plaster' that should ultimately enable doctors to monitor patients recovering from surgery at home. This is expected to yield significant commercial income in future years in addition to delivering health benefits that will have wider economic impacts.

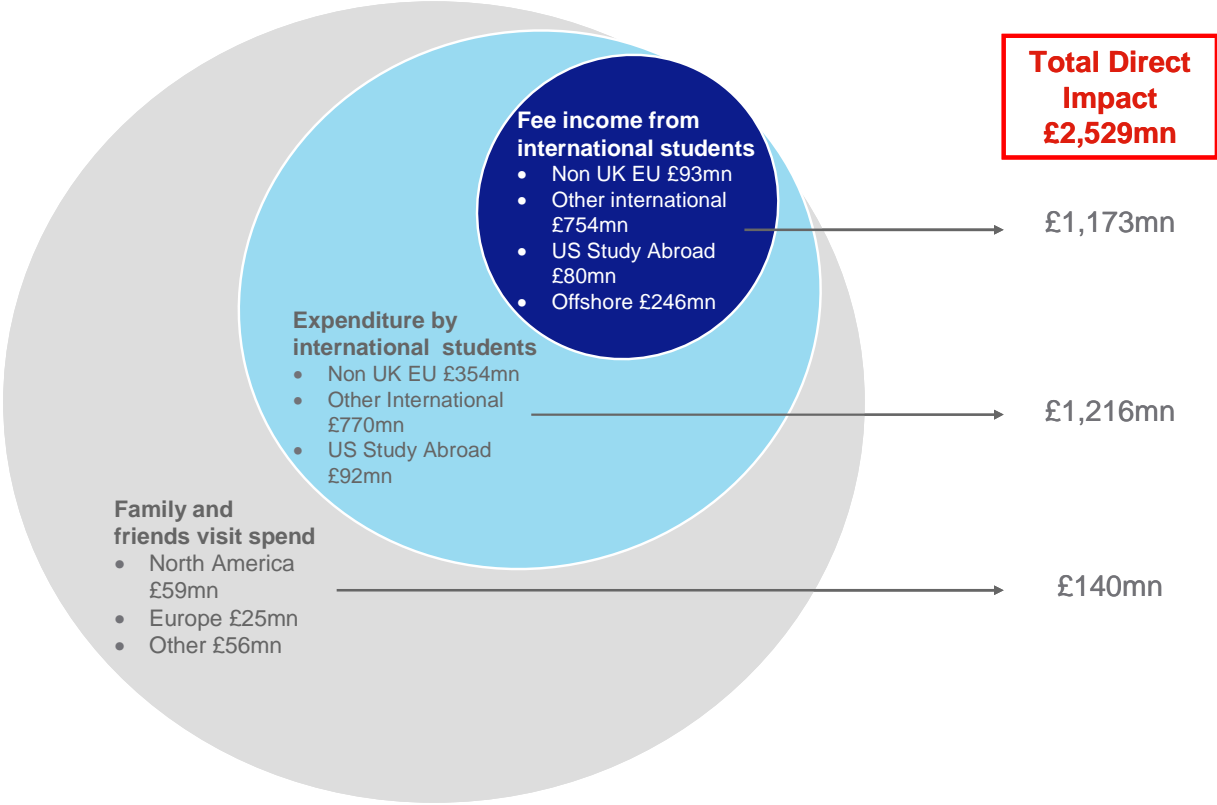
Of course, the many variables involved in commercialising research in this way means it is very difficult to attribute direct impacts to the outcomes. In quantifying the benefits we have not therefore included such impacts, but they are worth noting nonetheless as in many ways they deliver the most significant long-term economic benefits for the capital.

5 Conclusions

In this report we have detailed the significant and expanding international student base attracted to London by a wide variety of higher education institutions. This has been shown to generate significant direct expenditure impacts for the capital, while generating many other economic benefits which are more difficult to quantify. We conclude the report with a summary of the findings in this regard, summarising the findings on overall impact.

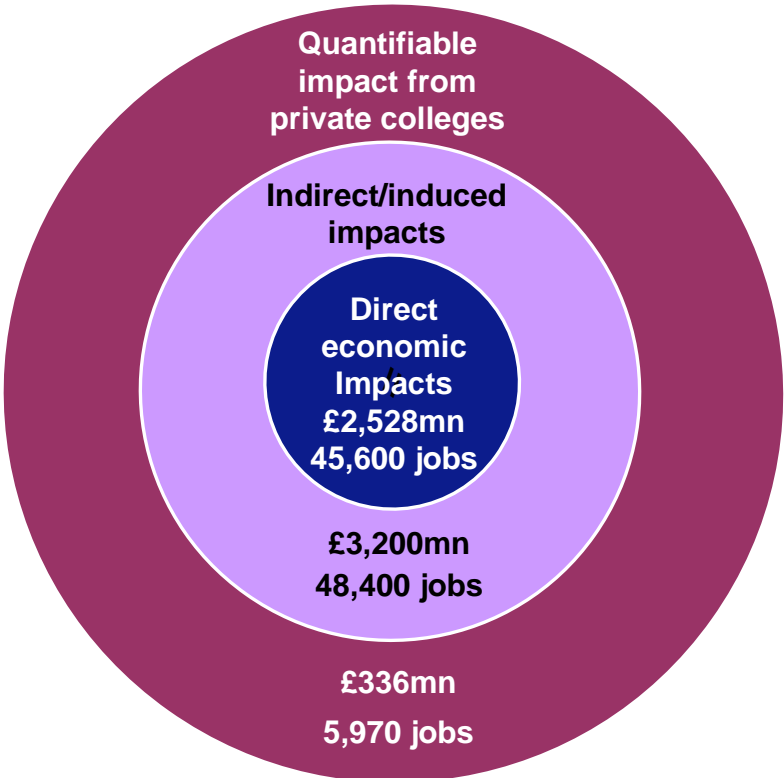
This assessment has found significant quantitative and qualitative evidence of economic impacts arising for London from the international student base in 2009/10. We have set out how the contribution from student fees, subsistence and visitor spend has generated an overall impact of over £2.5billion, as shown in the diagram in Figure 5.1.

Figure 5.1: Overview of the Direct Impact of International Students on London’s Economy 2009/10



In addition to these direct impacts, the study has also been able to quantify indirect and induced impacts, the overall employment impact and an additional impact based on information on student numbers obtained from circa 10 leading privately funded colleges operating in London. Figure 5.2 summarises the overall assessment of economic impact taking these factors into account. This finds that international students contributed an estimated £5.728billion to the London economy in 2009/10.

Figure 5.2: Overall Assessment of Economic Impact of International Students in London 2009/10



The assessment also found evidence of other less tangible impacts from international students. These include:

- Impacts from other higher education institutions:** The quantification of impact is based only on the HEFCE funded institutions, those participating on US Study Abroad Programmes and a selection of other colleges which were prepared to divulge details on international students. This study identified 420 institutions providing higher education in London and the students attending private colleges in the capital will all deliver economic impacts in the same way as the students included within our analysis.
- Impacts from improved international performance and reputation:** A substantial international student base is a critical component in the success of London’s leading higher education institutions, particularly in those operating in specialist fields. This has been reinforced by increased levels of overseas investment and sponsorship in these institutions. The concentration of leading international academics, a characteristic closely related to the international student base, has further supported the development of global institutional reputations and research performance and funding. It has also led to the establishment of strategic partnerships with leading overseas institutions, further enhancing profile and income.
- Impacts from human capital development:** This report has demonstrated how the international student base has provided an important source of skilled labour for City employers upon graduation. Around a half of all graduates securing employment remain in London, with most securing positions with key multi-national corporations. At individual level, there are many notable examples of alumni making significant contributions to economy and society as a result of their studies.

- **Impacts from the commercialization of research:** There are also impacts as a result of research undertaken by international students in London institutions. These have resulted in spin-out and start-up enterprises which have commercialized the IP produced and realized benefits in terms of investment, turnover and employment. The development of business and entrepreneurial skills was also found to be important in stimulating future commercial activity.

The economic impacts of international students in London go far beyond the direct impact measured of £2.5 billion or the overall impact estimated at £6 billion. Therefore it is important that these are recognized as the minimum impacts from the international student base in 2009/10. They nevertheless confirm a significant dividend from this source and underline its importance to the wider economy of London.

Appendix A: Institutional Baseline

Organisation	Sponsor Status	HE Provision Level
HEFCE Funded Institutions		
1 Brunel University	Highly Trusted	Level 6-8
2 Goldsmiths University of London	Highly Trusted	Level 6-8
3 King's College London	Highly Trusted	Level 6-7
4 Thames Valley University	Highly Trusted	Level 6-8
5 University of East London (School of Technology & Management affiliate)	Highly Trusted	Level 6-8
6 Birkbeck College, University of London	Highly Trusted	Level 6-7
7 City University (arrangement with INTO)	Highly Trusted	Level 6-8
8 Conservatoire for Dance and Drama	Highly Trusted	Level 6-7
9 Courtauld Institute of Art	Highly Trusted	Level 6-8
10 Guildhall School of Music & Drama	Highly Trusted	Level 6
11 Heythrop College	Highly Trusted	Level 6-7
12 Imperial College London	Highly Trusted	Level 6-8
13 Institute of Education	Highly Trusted	Level 6-7
14 Kingston University (accredit Richmond upon Thames College)	Highly Trusted	Level 6-8
15 London School of Economic and Political Science	Highly Trusted	Level 6-8
16 London South Bank University	Highly Trusted	Level 6-8
17 London Business School	Highly Trusted	Level 6-8
18 London Metropolitan University	Highly Trusted	Level 6-8
19 Middlesex University (Oak Hill College)	Highly Trusted	Level 6-8
20 Queen Mary University of London	Highly Trusted	Level 6-8
21 Ravensbourne	Highly Trusted	Level 6-7
22 Roehampton University	Highly Trusted	Level 6-8
23 Rose Bruford College	Highly Trusted	Level 6-7
24 Royal Veterinary College, University of London	Highly Trusted	Level 6-7
25 Royal Academy of Dramatic Art	Highly Trusted	Level 6-7
26 Royal College of Art	Highly Trusted	Level 6-7
27 Royal Academy of Music	Highly Trusted	Level 6-7
28 Royal Holloway University of London	Highly Trusted	Level 6-8
29 School of Oriental and African Studies	Highly Trusted	Level 6-8
30 St George's, University of London	Highly Trusted	Level 6-8
31 St Mary's University College	Highly Trusted	Level 6-7
32 The Central School of Speech and Drama	Highly Trusted	Level 6-7
33 The School of Pharmacy, University of London	Highly Trusted	Level 6-8
34 The Institute of Cancer Research	Highly Trusted	Level 6-7
35 The Royal College of Music	Highly Trusted	Level 6-8
36 Trinity Laban	Highly Trusted	Level 6-7
37 University of Greenwich	Highly Trusted	Level 6-8
38 University of the Arts London	Highly Trusted	Level 6-8
39 University College London	Highly Trusted	Level 6-8
40 University of London	Highly Trusted	Level 6-8
41 University of Westminster	Highly Trusted	Level 6-8
42 London School of Hygiene & Tropical Medicine	A (Trusted)	Level 6-7
43 The Circus Space	Highly Trusted	Level 6
Institutions from Elsewhere in UK with Operations in London		
1 Glasgow Caledonian University	N/a	Level 7-8
2 INTO UEA (University of East Anglia)	N/a	Level 7-8
3 Coventry University	N/a	Level 7-8
4 College of Law	N/a	Level 7-8
5 Bangor University London Business Centre	N/a	Level 7-8
6 University of Cumbria	N/a	Level 7-8
7 University of Essex Loughton Campus	N/a	Level 7-8
8 Northumbria University School of Design	N/a	Level 7-8

Organisation	Sponsor Status	HE Provision Level
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Institutions from US with Operations in London

1 Boston University London Programme	Highly Trusted	Level 7-8
2 American University of the Caribbean	Highly Trusted	Level 7-8
3 Brigham Young University	Highly Trusted	Level 7-8
4 Central University of Iowa	A (Trusted)	Level 7-8
5 Danenberg Oberlin-in-London Program	A (Trusted)	Level 7-8
6 Florida State University International Programs Association UK	A (Trusted)	Level 7-8
7 Grinnell College (Grinnell-in-London)	A (Trusted)	Level 7-8
8 Hollins University	A (Trusted)	Level 7-8
9 NYU in London	A (Trusted)	Level 7-8
10 New York University Tisch School of the Arts London Program	A (Trusted)	Level 7-8
11 University of Connecticut in London	A (Trusted)	Level 7-8
12 University of Notre Dame	A (Trusted)	Level 7-8
13 University of Maryland	A (Trusted)	Level 7-8
14 Schiller International University	A (Trusted)	Level 7-8
15 Stetson University College of Law Autumn in London Program	A (Trusted)	Level 7-8
16 University of Chicago Graduate School of Business	A (Trusted)	Level 7-8
17 University of Delaware (USA) in London	A (Trusted)	Level 7-8
18 University of Wisconsin-Stevens Point	A (Trusted)	Level 7-8
19 Eckerd College London Study Centre	B (Sponsor)	Level 7-8
20 St. Lawrence University (USA) London Programme	A (Trusted)	Level 7-8
21 Pepperdine University UK Ltd	A (Trusted)	Level 7-8
22 Paul Mellon Centre for Studies in British Art (Yale programme)	A (Trusted)	Level 7-8
23 Syracuse University London Program	A (Trusted)	Level 7-8
24 Samford University London Study Centre	A (Trusted)	Level 7-8
25 George Mason University	A (Trusted)	Level 7-8
26 Harding University	A (Trusted)	Level 7-8
27 Wake Forst University	A (Trusted)	Level 7-8
28 Berklee College of Music	A (Trusted)	Level 7-8
29 Pace London Law Program (Law School study abroad initiative)	A (Trusted)	Level 6
30 James Madison University & JMU Overseas Programs Ltd	A (Trusted)	Level 6-7
31 Abilene Christian University	A (Trusted)	Level 7-8
32 Advanced Studies in England	A (Trusted)	Level 7-8
33 AHA International	A (Trusted)	Level 7-8
34 American InterContinental University	A (Trusted)	Level 7-8
35 Arcadia University The College of Global Studies	A (Trusted)	Level 7-8
36 Babson College	A (Trusted)	Level 7-8
37 Binghamton Semester in London	A (Trusted)	Level 7-8
38 Boston College	A (Trusted)	Level 7-8
39 Bucknell University	A (Trusted)	Level 7-8
40 Carleton College	A (Trusted)	Level 7-8
41 Castleton State College	A (Trusted)	Level 7-8
42 Colgate University	A (Trusted)	Level 7-8
43 Columbus State University	A (Trusted)	Level 7-8
44 Cornell/Brown/Penn UK Centre	A (Trusted)	Level 7-8
45 Dartmouth College	A (Trusted)	Level 7-8
46 Dominican University London Programme	A (Trusted)	Level 7-8
47 Drew University	A (Trusted)	Level 7-8
48 Earlham College	A (Trusted)	Level 7-8
49 Elon University	A (Trusted)	Level 7-8
50 Emory University	A (Trusted)	Level 7-8
51 Fordham University	A (Trusted)	Level 7-8
52 Furman University	A (Trusted)	Level 7-8

Organisation	Sponsor Status	HE Provision Level
Institutions from US with Operations in London		
53 George Washington University England Center	A (Trusted)	Level 7-8
54 Georgetown University	A (Trusted)	Level 7-8
55 Georgia Institute of Technology	A (Trusted)	Level 7-8
56 Harlaxton College	A (Trusted)	Level 7-8
57 Harvard University	A (Trusted)	Level 7-8
58 Hult International Business School	A (Trusted)	Level 7-8
59 Illinois Wesleyan University	A (Trusted)	Level 7-8
60 Indiana University (Cultural Immersion Projects)	A (Trusted)	Level 7-8
61 Institute for Study Abroad / Butler University	A (Trusted)	Level 7-8
62 Ithaca College	A (Trusted)	Level 7-8
63 Johnson & Wales University	A (Trusted)	Level 7-8
64 Lawrence University London Centre	A (Trusted)	Level 7-8
65 Loyola Law School: London Summer International Intellectual Property I	A (Trusted)	Level 7-8
66 Marymount University	A (Trusted)	Level 7-8
67 Meredith Abroad in the UK	A (Trusted)	Level 7-8
68 Michigan State University	A (Trusted)	Level 7-8
69 Ohio University	A (Trusted)	Level 7-8
70 Pace London Law Program (Pace University)	A (Trusted)	Level 7-8
71 Randolph College	A (Trusted)	Level 7-8
72 Richmond the American International University in London	A (Trusted)	Level 7-8
73 Rutgers University Study Abroad Program in Great Britain & Ireland	A (Trusted)	Level 7-8
74 Santa Clara University School of Law	A (Trusted)	Level 7-8
75 Simpson College	A (Trusted)	Level 7-8
76 St. Bonaventure University	A (Trusted)	Level 7-8
77 St. Cloud State University Centre for British Studies at Alnwick Castle	A (Trusted)	Level 7-8
78 Stanford University Centre in Oxford	A (Trusted)	Level 7-8
79 SUNY Brockport London Program	A (Trusted)	Level 7-8
80 Susquehanna University London Programme	A (Trusted)	Level 7-8
81 The College of William and Mary	A (Trusted)	Level 7-8
82 The State University of New York: Fashion Institute of Technology	A (Trusted)	Level 7-8
83 Tisch School of the Arts London Program	A (Trusted)	Level 7-8
84 Tufts in London	A (Trusted)	Level 7-8
85 University of California Education Abroad Program	A (Trusted)	Level 7-8
86 University of Illinois	A (Trusted)	Level 7-8
87 University of Iowa - London Law Consortium	A (Trusted)	Level 7-8
88 University of Michigan, Center for Global and Intercultural Study	A (Trusted)	Level 7-8
89 University of Minnesota Duluth Study in England Programme	A (Trusted)	Level 7-8
90 University of North Carolina	A (Trusted)	Level 7-8
91 University of South Carolina School of Law	A (Trusted)	Level 7-8
92 University of Washington	A (Trusted)	Level 7-8
93 University of Wisconsin in Scotland	A (Trusted)	Level 7-8
94 University Studies Abroad Consortium	A (Trusted)	Level 7-8
95 Valparaiso University Study Centre in Cambridge	A (Trusted)	Level 7-8
96 Vanderbilt University	A (Trusted)	Level 7-8
97 Washington University in St Louis, Olin Business School	A (Trusted)	Level 7-8
98 Webster University (Webster Graduate School at Regent's College)	A (Trusted)	Level 7-8
99 Williams College Oxford Programme	A (Trusted)	Level 7-8
100 Worcester Polytechnic Institute London Project Centre	A (Trusted)	Level 7-8
101 Wroxton College of Fairleigh Dickinson University	A (Trusted)	Level 7-8
102 Yale University	A (Trusted)	Level 7-8
103 Fordham University	A (Trusted)	Level 6-8

Organisation	Sponsor Status	HE Provision Level
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Other Colleges Offering Min Level 7 Degree Programmes/Specialist PGDs

1 Kaplan International Colleges London Covent Garden	Highly Trusted	Level 6-7
2 Kaplan International Colleges London Leicester Square	Highly Trusted	Level 6-7
3 Kaplan Professional Higher Education Ltd	B (Sponsor)	Level 6-8
4 Architectural Association School of Architecture	Highly Trusted	Level 6-8
5 Greenwich School of Management	Highly Trusted	Level 6-8
6 Met Film School	Highly Trusted	Level 6-7
7 Regent's College	Highly Trusted	Level 6-7
8 Richmond The American International University in London	Highly Trusted	Level 6-7
9 Kaplan Financial Ltd	A (Trusted)	Level 6-7
10 American InterContinental University London Ltd	A (Trusted)	Level 6-7
11 Amity Global Business School	A (Trusted)	Level 6-7
12 BPP University College of Professional Studies Ltd	A (Trusted)	Level 6-7
13 Cromwell College of IT and Management	A (Trusted)	Level 7
14 Hult International Business School	A (Trusted)	Level 7-8
15 Regent International Graduate School	A (Trusted)	Level 7-8
16 Regent London	A (Trusted)	Level 7-8
17 Mountview Academy of Theatre Arts	A (Trusted)	Level 6-8
18 Royal Academy of Arts	A (Trusted)	Level 8
19 Millennium City Academy (offer business related masters)	A (Trusted)	Level 6-8
20 Sotheby's Institute of Art	A (Trusted)	Level 6-8
21 The London International Film School t/a London Film School	A (Trusted)	Level 6-8
22 The Aga Khan University (International) in the UK	A (Trusted)	Level 6-8
23 SAE Education Ltd (Creative Industries Masters)	A (Trusted)	Level 6-8
24 Spurgeon's College (specialist college in religion)	A (Trusted)	Level 6-8
25 Tech Music School Ltd (specialist music school)	A (Trusted)	Level 7
26 The Urdang Academy (Dance and ballet - BA)	A (Trusted)	Level 7
27 St Mellitus College (BA - specialist religious)	A (Trusted)	Level 6-7
28 TASMAC UK LTd (MBA - University of Wales accredited)	A (Trusted)	Level 6-7
29 The Prince's School of Traditional Arts	A (Trusted)	Level 6-8
30 The Islamic College (Irshad Trust) (validated by Middlesex University)	A (Trusted)	Level 6-8
31 Middlesex College of Law Ltd (Level 6 but access for intl to law degrees)	A (Trusted)	Level 6
32 International School of Business Studies	A (Trusted)	Level 7/ACCA
33 London School of Accountancy & Management	A (Trusted)	Level 7/ACCA
34 Kaplan Law School	A (Trusted)	Level 6-7
35 Istituto Marangoni	A (Trusted)	Level 6-7
36 Limkokwing University of Creative Technology	A (Trusted)	Level 6-7

Organisation	Sponsor Status	HE Provision Level
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Other Colleges Offering Minimum Level 7 Qualifications (Trusted Status)

1 London Thames College	A (Trusted)	Level 6-7
2 London Trinity College	A (Trusted)	Level 6-7
3 London Victoria College	A (Trusted)	Level 6-7
4 Maritime Greenwich College	A (Trusted)	Level 6-7
5 Mont Rose College of Management and Sciences	A (Trusted)	Level 6-7
6 North London College of Business Studies	A (Trusted)	Level 6-7
7 Oxbridge College of IT & Management (ACCA, MBA, PGD)	A (Trusted)	Level 6-7
8 Oxford College of London	A (Trusted)	Level 6-7
9 Oxford House College	A (Trusted)	Level 6-7
10 Queensland College (Reading and Acton Campus)	A (Trusted)	Level 6-7
11 William Shakespeare College	A (Trusted)	Level 6-7
12 South London Christian College	A (Trusted)	Level 6-7
13 Oxford College International	A (Trusted)	Level 6-7
14 Pinnacle College London	A (Trusted)	Level 6-7
15 Royal London College	A (Trusted)	Level 6-7
16 Scott's College London-Sure Choice Ltd	A (Trusted)	Level 6-7
17 Severn Business College Ltd	A (Trusted)	Level 6-7
18 Sharp Development Solutions Ltd T/A SDS College	A (Trusted)	Level 6-7
19 St Patrick's International College	A (Trusted)	Level 6-7
20 Western Governors Graduate School	A (Trusted)	Level 6-7
21 Stanfords College UK Ltd	A (Trusted)	Level 6-7
22 St. Agnes College	A (Trusted)	Level 6-7
23 Stratford College of Management	A (Trusted)	Level 6-7
24 Thames College of Technology	A (Trusted)	Level 6-7
25 The School of Information Risk Management	A (Trusted)	Level 6-7
26 The Central College of London (TCCOL)	A (Trusted)	Level 6-7
27 The City College	A (Trusted)	Level 6-7
28 Trinity College of Management and IT	A (Trusted)	Level 6-7
29 Tudor College London	A (Trusted)	Level 6-7
30 Wilson College	A (Trusted)	Level 6-7
31 Royal Academy of Dance	Highly Trusted	Level 6-7
32 Birkbeck College	A (Trusted)	Level 6-7
33 British School of Osteopathy	A (Trusted)	Level 6-7
34 The College of Haringay, Enfield and North East London	Highly Trusted	Level 6-7
35 Newham College of Further Education	Highly Trusted	Level 6-7
36 London School of Business and Finance	Highly Trusted	Level 6-7
37 Institute of Ismaili Studies	Highly Trusted	Level 6-7
38 Havering College of Higher & Further Education	Highly Trusted	Level 6-7
39 Bromley College of Further and Higher Education	Highly Trusted	Level 6-7
40 Christ the Redeemer College	Highly Trusted	Level 6-7
41 City of Westminster College	Highly Trusted	Level 6-7
42 College of North West London	Highly Trusted	Level 7 (PGCE)
43 St. Peter's College of London	A (Trusted)	Level 6-7
44 The Business School of London	A (Trusted)	Level 6-7
45 The London Oriental Academy	A (Trusted)	Level 6-7
46 UK College of Business and Computing Ltd	A (Trusted)	Level 6-7
47 Universal Professional and Vocational College	A (Trusted)	Level 6-7
48 West London College of Business and Management Sciences	A (Trusted)	Level 6-7
49 West London Business College Ltd	A (Trusted)	Level 6-7
50 West London School of Management and Technology	A (Trusted)	Level 6-7
51 West End College London	A (Trusted)	Level 6-7
52 West London College	A (Trusted)	Level 6-7
53 BELL'S College	A (Trusted)	Level 6-7
54 Leo Baeck College	Highly Trusted	Level 6-7
55 London School of Commerce (A Division of St. Piran's School (GB) Ltd)	Highly Trusted	Level 6-7
56 City Banking College Ltd	Highly Trusted	Level 6-7
57 Inchbald School of Design	Highly Trusted	Level 6-7
58 Meridian Business School	Highly Trusted	Level 6-7
59 School of Business and Law (SBL) A Division of St. Piran's School GB Ltd	Highly Trusted	Level 6-7
60 South London College	Highly Trusted	Level 6-7
61 Vision College of Theology and Business Studies	Highly Trusted	Level 6-7
62 Westminster Kingsway College	Highly Trusted	Level 6-7
63 Hammersmith Management College	A (Trusted)	Level 6-7
64 360 GSP College	A (Trusted)	Level 6-7
65 ANDY DAVIDSON COLLEGE	A (Trusted)	Level 7 (Pgd)
66 Academic College of London Ltd	A (Trusted)	Level 6-7
67 Academy of Management Studies	A (Trusted)	Level 6-7 (ACCA, Pgd)

Other Colleges Offering Minimum Level 7 Qualifications (Trusted Status)

68 Access College of London	A (Trusted)	Level 6-7
69 ALPERTON COLLEGE LTD	A (Trusted)	Level 6-7
70 Benett Interantional College	A (Trusted)	Level 6-7
71 Bloomsbury Business School	A (Trusted)	Level 6-7
72 East End Computing & Business College	A (Trusted)	Level 6, 7 (diplomas)
73 ecollege	A (Trusted)	Level 6, 7 (diplomas)
74 Eynsford College	A (Trusted)	Level 6?
75 Gemal College	A (Trusted)	Level 6
76 ESCP Europe Business School	A (Trusted)	Level 6,7
77 EThames Graduate School	A (Trusted)	Level 6-7
78 European School of Economics Interantional Ltd	A (Trusted)	Level 6-7
79 Fulham and Chelsea College Ltd	A (Trusted)	Level 6-7
80 Globe Education London	A (Trusted)	Level 6-7
81 Goldsmith International Business School	A (Trusted)	Level 6-7
82 Grafton College of Management Sciences	A (Trusted)	Level 6-7
83 Greenwich London College	A (Trusted)	Level 7 (PgD)
84 Guildhall College	A (Trusted)	Level 6-7
85 Harrow International Business School	A (Trusted)	Level 6-7
86 Holborn College	A (Trusted)	Level 6-7
87 ICON College of Technology and Management	A (Trusted)	Level 6-7
88 International School of Sikh Studies	A (Trusted)	Level 6-7
89 Katherine & King's College of London	A (Trusted)	Level 6-7
90 Kensington College of Business	A (Trusted)	Level 6-7
91 Kings Langly College of Management	A (Trusted)	Level 6-7
92 LCHRM Education	A (Trusted)	Level 6-7
93 London School of Marketing t/a LSM Business School	A (Trusted)	Level 6-7
94 London College of Business Management and Information Technology	A (Trusted)	Level 6-7
95 London Institute of Management and Technology	A (Trusted)	Level 6-7
96 London College of Accounting & Finance	A (Trusted)	Level 6-7
97 London College of Accountancy Ltd London	A (Trusted)	Level 6-7
98 London School of Management and Science Ltd	A (Trusted)	Level 6-7
99 London College of Computing and Management Sciences	A (Trusted)	Level 6-7
100 London College of Social and Management Sciences	A (Trusted)	Level 6-7
101 London School of Exccellence Ltd	A (Trusted)	Level 6-7
102 London Institute of Technical Education	A (Trusted)	Level 6-7
103 London Academy of Management Sciences	A (Trusted)	Level 6-7
104 London School of Management Ltd	A (Trusted)	Level 6-7
105 London Spectrum College Ltd	A (Trusted)	Level 6-7
106 London College of Management and IT	A (Trusted)	Level 6-7
107 London School of Commerce and IT	A (Trusted)	Level 6-7
108 London School of Business and Management	A (Trusted)	Level 6-7
109 London School of Management Education	A (Trusted)	Level 6-7
110 London West Valley College	A (Trusted)	Level 6-7
111 London School of Business Management	A (Trusted)	Level 6-7
112 London College of Management Studies	A (Trusted)	Level 6-7
113 London College of Management	A (Trusted)	Level 6-7
114 London Premier College Ltd	A (Trusted)	Level 6-7
115 London College	A (Trusted)	Level 6-7
116 London Training College	A (Trusted)	Level 6-7
117 London Waltham College	A (Trusted)	Level 6-7
118 London Business Academy	A (Trusted)	Level 6-7
119 London Empire Academy	A (Trusted)	Level 6-7
120 London Business College	A (Trusted)	Level 6-7
121 London Camden College	A (Trusted)	Level 6-7
122 London Churchill College	A (Trusted)	Level 6-7
123 London Corporate College	A (Trusted)	Level 6-7
124 Swiss School of Management (core focus on intl students)	A (Trusted)	Level 6
125 British Institute of Technology & E-commerce	A (Trusted)	Level 6-7
126 CENTRAL Greenwich College	A (Trusted)	Level 7 (PgD)
127 City of London College	A (Trusted)	Level 6,7
128 College of East London	A (Trusted)	Level 7 (PgD)
129 College of Technology	A (Trusted)	Level 7 (PgD)
130 College of IT & Ecommerce Ltd	A (Trusted)	Level 6,7
131 College of Venereal Disease Prevention	A (Trusted)	Level 6,7
132 Concepts College London	A (Trusted)	Level 7 (PgD)

Organisation	Sponsor Status	HE Provision Level
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B Sponsor Status		
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1 Albion College	B (Sponsor)	Level 6-7
2 Centre Academy	B (Sponsor)	Level 6-7
3 London College of Engineering and Management	B (Sponsor)	Level 6-7
4 The Harroddian School	B (Sponsor)	Level 6-7
5 Abraham Baxter Ltd	B (Sponsor)	Level 6-7
6 ALEXANDER COLLEGE	B (Sponsor)	Level 6-7
7 Alfred the Great College Ltd	B (Sponsor)	Level 6-7
8 ALPHA COLLEGE	B (Sponsor)	Level 6-7
9 Anglian College London	B (Sponsor)	Level 6-7
10 Ashley School of Management	B (Sponsor)	Level 6-7
11 Axon College Ltd	B (Sponsor)	Level 6-7
12 Beckett College	B (Sponsor)	Level 6-7
13 Bliss Services UK Ltd T/A Bliss College	B (Sponsor)	Level 6-7
14 Boston College of London	B (Sponsor)	Level 6-7
15 Brentford College of London	B (Sponsor)	Level 6-7
16 Brit College	B (Sponsor)	Level 6-7
17 Britannia College of Excellence	B (Sponsor)	Level 6-7
18 CCP Group	B (Sponsor)	Level 6-7
19 Central London College of Reflexology	B (Sponsor)	Level 6-7
20 Charles Edward College Ltd	B (Sponsor)	Level 6-7
21 City Business College (Trading name of: City College of Business Ltd)	B (Sponsor)	Level 6-7
22 City College of Management & IT	B (Sponsor)	Level 6-7
23 City Business Academy	B (Sponsor)	Level 6-7
24 College of Excellence Ltd	B (Sponsor)	Level 6-7
25 Commonwealth College London	B (Sponsor)	Level 6-7
26 Cosmopolitan College London	B (Sponsor)	Level 6-7
27 Crescent College of London Ltd	B (Sponsor)	Level 6-7
28 East London Business college	B (Sponsor)	Level 6-7
29 Essex College of Management and IT Ltd	B (Sponsor)	Level 6-7
30 Essex Interantional College	B (Sponsor)	Level 6-7
31 Focus Insight UK Ltd T/A Nova Institute of Technology and Mana	B (Sponsor)	Level 6-7
32 Futures College	B (Sponsor)	Level 6-7
33 Global School of Management	B (Sponsor)	Level 6-7
34 Godfrey College Ltd	B (Sponsor)	Level 6-7
35 Griffith College Ltd	B (Sponsor)	Level 6-7
36 Halifax College	B (Sponsor)	Level 6-7
37 Holbrook College of London	B (Sponsor)	Level 6-7
38 International College of Professional Studies Ltd	B (Sponsor)	Level 6-7
39 Islington College	B (Sponsor)	Level 6-7
40 Kingsland College of Business Studies	B (Sponsor)	Level 6-7
41 Kingston College of IT & Management Private Ltd	B (Sponsor)	Level 6-7
42 Leaders College London	B (Sponsor)	Level 6-7
43 LIMRA College Ltd	B (Sponsor)	Level 6-7
44 Lincolns College London	B (Sponsor)	Level 6-7
45 London Learning Centre (a trading name of Paul's College London)	B (Sponsor)	Level 6-7
46 London College of Accounting and Management (CAM)	B (Sponsor)	Level 6-7
47 London College of Business and Computer Studies	B (Sponsor)	Level 6-7
48 London School of Business and Accountancy	B (Sponsor)	Level 6-7
49 London College of Management and Leadership Ltd	B (Sponsor)	Level 6-7
50 London College of Finance & Accounting	B (Sponsor)	Level 6-7
51 London School of Science & Technology	B (Sponsor)	Level 6-7
52 London Training College UK Ltd	B (Sponsor)	Level 6-7
53 London Business and Management School	B (Sponsor)	Level 6-7
54 LONDON Business and Sports College	B (Sponsor)	Level 6-7
55 London East End College Ltd	B (Sponsor)	Level 6-7
56 LONDON College of Theology	B (Sponsor)	Level 6-7
57 London College of Social Studies	B (Sponsor)	Level 6-7
58 London Academy of learning	B (Sponsor)	Level 6-7
59 London Waterloo Academy Ltd	B (Sponsor)	Level 6-7
60 London Guildhall College Ltd	B (Sponsor)	Level 6-7
61 London Capital College	B (Sponsor)	Level 6-7
62 London Crown College	B (Sponsor)	Level 6-7
63 London Denning College	B (Sponsor)	Level 6-7
64 London Millennium College	B (Sponsor)	Level 6-7
65 London Regal College	B (Sponsor)	Level 6-7
66 London Richmond College	B (Sponsor)	Level 6-7
67 London Tottenham College	B (Sponsor)	Level 6-7
68 London Educators Ltd	B (Sponsor)	Level 6-7
69 Maryland College London	B (Sponsor)	Level 6-7
70 Meridian Graduate College	B (Sponsor)	Level 6-7
71 Metropolitan College of London	B (Sponsor)	Level 6-7
72 North London Management School	B (Sponsor)	Level 6-7
73 Northam College Ltd	B (Sponsor)	Level 6-7
74 Princeton College	B (Sponsor)	Level 6-7
75 Rambert School of Ballet and Contemporary Dance	B (Sponsor)	Level 6-7
76 Raya Academy	B (Sponsor)	Level 6-7
77 Rayat London College	B (Sponsor)	Level 6-7
78 Redwick United College	B (Sponsor)	Level 6-7
79 Renaissance College of Higher Education	B (Sponsor)	Level 6-7
80 South Chelsea College	B (Sponsor)	Level 6-7
81 SPECTRA College London	B (Sponsor)	Level 6-7
82 St Stephen's College (UK) Ltd	B (Sponsor)	Level 6-7
83 St. Albans College	B (Sponsor)	Level 6-7
84 St. John's College London	B (Sponsor)	Level 6-7
85 Stamford College	B (Sponsor)	Level 6-7
86 Sterling Academy	B (Sponsor)	Level 6-7
87 Stevens College of Technology and Management	B (Sponsor)	Level 6-7
88 Stratford College of Management	B (Sponsor)	Level 6-7
89 Superior College London	B (Sponsor)	Level 6-7
90 The Gemmological Association of Great Britain	B (Sponsor)	Level 6-7
91 The Meridian College of London	B (Sponsor)	Level 6-7
92 The Management School	B (Sponsor)	Level 6-7
93 The Lord College	B (Sponsor)	Level 6-7
94 UK College of Excellence Ltd T/A UK College of Excellence	B (Sponsor)	Level 6-7
95 UK School of Business	B (Sponsor)	Level 6-7
96 Union College	B (Sponsor)	Level 6-7
97 Westbridge College	B (Sponsor)	Level 6-7
98 Westech College Ltd	B (Sponsor)	Level 6-7
99 Westfield College London	B (Sponsor)	Level 6-7
100 Widows and Orphans International	B (Sponsor)	Level 6-7
101 Winston College Ltd	B (Sponsor)	Level 6-7
102 Zaskin College	B (Sponsor)	Level 6-7

Appendix B: International Student Profile

Number of EU students studying in the United Kingdom by Country of Origin

Country	Number of Students	Country	Number of Students
Austria	510	Romania	790
Germany	3,915	Lithuania	765
Greece	3,840	Denmark	550
France	3,665	Austria	510
Italy {Includes Sardinia, Sicily}	3,010	Finland	430
Ireland	2,705	Slovakia	390
Poland	2,170	Hungary	360
Spain {includes Ceuta, Melilla}	1,600	Latvia	360
Cyprus (EU)	1,555	Czech Republic	330
Sweden	1,240	Luxembourg	250
Netherlands	910	Malta	245
Belgium	900	Estonia	205
Bulgaria	870	Slovenia	100

Number of Non-EU international students studying in the UK by Country of Origin 2009/10

Country	Number	Country	Number	Country	Number	Country	Number
India	9,920	Brazil	630	Chile	180	Gambia, The	75
China	9,035	Mauritius	630	Jamaica	170	Sierra Leone	75
United States	5,690	Kazakhstan	605	New Zealand	165	Uzbekistan	70
Nigeria	3,470	Kenya	560	Qatar	155	Croatia	65
Pakistan	2,800	Australia	550	Syria	155	Angola	65
Hong Kong	2,560	Ghana	540	Iceland	140	Macao	65
S Korea	2,310	S Africa	440	Morocco	135	Barbados	60
Malaysia	2,100	Nepal	410	Oman	130	Cyprus	60
Bangladesh	1,715	Mexico	385	Serbia	130	Belarus	55
Thailand	1,710	Philippines	380	Zambia	125	Mongolia	55
Sri Lanka	1,630	Non-EU unknown	375	Bermuda	120	Sudan	50
Canada	1,600	Egypt	360	Iraq	120	Ethiopia	50
Singapore	1,500	Kuwait	350	Libya	115	Maldives	45
Saudi Arabia	1,410	Colombia	305	Azerbaijan	115	British Virgin Islands	45
Japan	1,405	Israel	280	Burma	110	Afghanistan	45
Russia	1,380	Jordan	280	Algeria	110	St Lucia	40
Taiwan	1,375	Indonesia	280	Gibraltar	105	Moldova	40
Turkey	1,160	Bahrain	270	Peru	105	Tunisia	40
Iran	1,080	Lebanon	260	Argentina	90	Macedonia	35
Norway	1,010	Uganda	260	Albania	90	Palestinian Territories	30
Portugal	1,000	Ukraine	240	Botswana	90	94 other non-EU countries with 30 or less students studying in the UK	875
United Arab Emirates	840	Trinidad & Tobago	240	Cameroon	85		
Cyprus	670	Brunei	240	Venezuela	85		
Vietnam	670	Zimbabwe	220	Georgia	80		



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