WONKHE

The higher education policy landscape

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In association with KPMG

Welcome to the latest edition of our regular briefing on the higher education policy landscape, brought to you by Wonkhe and KPMG.

Ahead of the Comprehensive Spending Review on 11 June the indication from the Westminster government is of a very tight funding settlement for higher education, with cuts announced in recurrent and capital strategic priorities funding for 2025–26. Financial sustainability continues to be a challenge across the UK, with parliamentary education committees in England, Wales and Scotland taking a close interest in the financial condition of their higher education sectors.

The government has launched an immigration white paper with implications for higher education, and there is new regulatory activity and guidance to consider on free speech, consumer protection, foreign influence, and the application of competence standards for disabled students.

This briefing is designed to offer a digested summary of policies and their implications with particular focus on boards of governors and university stakeholders who are not working full time in higher education. If you have any feedback or comments please let us know.

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Unless otherwise stated, all opinions remain those of the Wonkhe team and not KPMG.

Key issues and considerations for boards of governors

Justine Andrew, Partner, KPMG

It continues to be an exceptionally challenging time for the sector.

Education and skills are fundamental to the success, security and future prosperity of the United Kingdom. They underpin the Westminster government's modern industrial strategy. They are core to the place-based strategies of mayoral combined authorities and more widely to a more balanced UK economy. Research and innovation remains fundamental to the UK's global competitiveness and to bringing inward investment to the UK. All of this is key to unlocking the productivity puzzle in the UK.

Notwithstanding the importance of our higher education institutions to the life and economic success of the nation, the landscape of higher education in the United Kingdom is shifting. Higher education is facing a myriad of challenges, with the financial and operating sustainability of institutions becoming increasingly uncertain. How to respond to these challenges is the top agenda item for vice chancellors, boards and senior leadership teams. How to do more on widening participation; continue to contribute to economic growth locally, regionally and nationally; support key industries; build on a strong civic role as an anchor institution; raise the bar on teaching and student outcomes and do all this within a funding envelope that is reducing in real terms, in real time?

Part of the answer must be to shift the focus onto medium- and longer- term solutions as well as traditional efficiencies. The conversation is moving beyond "doing what has always been done, more efficiently" to looking at structural change and different models of operating. The perennial conversations on shared services; mergers and more structured collaborative models are once again on board agendas.

Efficiency is not the only driver. To meet the diverse needs of a rapidly evolving society it seems only right to challenge the wider tertiary education sector on whether the current model, based on institutional autonomy and competition, meets the needs of the local economy, potential and current students and the wider needs of industry in the most effective way. Many of the policy updates below, from all nations, show that policy too is shifting the focus to more directly measurable impact and outcomes aligned with government priorities.

It remains a complex landscape to navigate, and in June 2025 we are publishing a paper, jointly curated by KPMG and Mills & Reeve, which seeks to move the conversation on radical collaboration, building on our Wonkhe series on the topic and we would welcome feedback and input.

On a personal note, this will be my last introduction to this guide as I am retiring from the KPMG Partnership in September 2025, though I intend to stay involved in the sector. My colleague Sam Sanders has stepped into the KPMG Head of Education, Skills and Productivity role and his contact details are below.

If you have not done so already please register for the KPMG Board Leadership Centre for timely updates on the sector and wider board issues.

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The Westminster government's agenda for higher education

On 11 June the Comprehensive Spending Review will be published, setting out the spending envelope for the remainder of this parliament. The coming months will also see the government publish a post-16 education and skills white paper, incorporating a plan for higher education reform. Details of the government's plans for higher education have been sparse, though Minister for Skills Jacqui Smith made a recent public statement warning that in the government's view universities have "lost sight of their responsibility to protect public money" and indicating that the forthcoming HE reform package would make a clear link between financial support measures and a renewed focus from universities on opportunity, graduate outcomes and contribution to economic growth.

"Minister for Skills Jacqui Smith made a recent public statement warning that in the government's view universities have 'lost sight of their responsibility to protect public money'."

While not stated explicitly, it is likely that the government has in mind to allow higher education institutions to increase undergraduate fees by inflation annually and intends to drill down on the social impact of higher education in return. One measure floated is the publication of a new "league table" mapping head of institution salary against graduate outcomes: two datasets that are not very closely related but that offer a punchy public narrative.

More broadly, the post-16 strategy is likely to be focused on driving forward a greater degree of regional collaboration between post-16 education providers to enable a more coordinated approach to skills planning in line with the creation of Skills England and regional growth planning. The finalised Industrial Strategy is expected to be published at the same time as the Spending Review, and will act as a blueprint for the industries and geographies that post-16 providers will need to coalesce around to drive skills and innovation.

Other policy agendas that remain in train include the rollout of the Lifelong Learning Entitlement (LLE) from January 2027, but with only a handful of designated technical courses available to access in a modular form; and the defunding of level 7 apprenticeships. On the latter, the government has confirmed that from January 2026 only those aged 21 and under and those up to 25 who are care leavers or have an education, health and care plan (EHCP) will be eligible for a funded apprenticeship at level 7. The overall framework for apprenticeship funding and the planned replacement of the Apprenticeship Levy with a Growth and Skills Levy has not yet been set out, but there will likely be an immediate impact on those institutions whose level 7 apprenticeship offer may need to be wound down or reconfigured.

"In the period between the autumn Budget and the Spending Review the economic outlook has worsened."

In the period between the autumn Budget and the Spending Review the economic outlook has worsened, due in part to the election of Donald Trump to the US Presidency and the economic and geopolitical turmoil arising from US trade policy. The government has pledged additional spending on defence, has announced investment in the Oxford-Cambridge growth corridor among other infrastructure investments, and has updated planning regulations to encourage faster construction. The announcement in April of the funding settlement for UK Research and Innovation (UKRI) in 2025–26 at £8.81bn following the £20.4bn of investment in research overall from the autumn budget confirmed that the government is protecting the overall research budget.

Cuts to the Strategic Priorities Grant for 2025–26

Secretary of State for Education Bridget Phillipson has written to the Office for Students (OfS) to set out the government's funding priorities for the Strategic Priorities Grant (SPG) and Strategic Priorities Grant capital funding. The SPG recurrent allocation for 2025–26 will be £1,347.7m, a reduction of £108.3m and the capital allocation will be cut to £84m from £450m. The portion of the recurrent allocation designated for high-cost subjects will be directed towards nursing, midwifery, allied health and high-cost STEM provision, with media studies, journalism, publishing and information services downgraded.

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Priorities for student access and success, world-leading specialist providers and national facilities and regulatory initiatives (such as OfS' challenge competitions) remain, but funding streams for development of level 4 and 5 provision and degree apprenticeships have been removed. The majority of capital funding will continue to be allocated through a competitive process, aligned with government missions and priorities for growth, particularly those identified in Local Skills Improvement Plans and/or by Skills England.

"Following the spending review the SPG is to be reviewed, so that from 2026–27 high-cost subject funding will be targeted towards provision that supports future skills needs and the industrial strategy."

Courses delivered through franchised provision will be excluded from receipt of student premium funding, except where the delivery provider is registered in the Approved (fee cap) category with OfS – and OfS is asked to explore whether the same conditions could apply to funding for high-cost subjects. Following the spending review the SPG is to be reviewed, so that from 2026–27 high-cost subject funding will be targeted towards provision that supports future skills needs and the industrial strategy. The letter indicates a broad direction of travel in which funding will be tightly controlled and tightly targeted on the government's strategic priorities. Boards will need to consider the implications for their specific institutions – it should still be theoretically possible, for example, to develop level 4 and 5 provision, but the costs of doing so will increase for those institutions who had been in receipt of SPG development funding.

Immigration white paper

The signals from the Home Office in the lead up to the publication of the white paper Restoring control over the immigration system in May suggested that the focus for higher education would be primarily on reducing the number of asylum claims from individuals who enter the UK via the student visa route – nearly 16,000 in 2024, comprising 14.8 per cent of all claimants – as part of a primary objective of driving down net migration. The government had also been clear that it wants via Skills England to link skills planning more closely to the migration system with industry-specific plans to reduce the reliance on overseas workers for lower-skilled jobs.

"The length of time undergraduate and Masters students are permitted to stay in the UK to seek work following graduation will be reduced to 18 months from two years."

In the event, the white paper had more material proposals for international students and graduates, including on the conditions institutions have to meet to retain their status as a sponsoring institution. The current metrics used to determine whether a sponsoring higher education provider is fulfilling its duties are – via the annual basic compliance assessment (BCA) – having a visa refusal rate of less than 10 per cent, a course enrolment rate of at least 90 per cent, and a course completion rate of at least 85 per cent. The white paper reveals that all of these measures will be made five percentage points stricter – and the possibility of a public RAG rating to indicate which providers are compliant is also floated. Providers who want to expand their CAS allocation may be required to show evidence they have considered the local impacts. All sponsors using agents for overseas recruitment will be required to sign up to the Agent Quality Framework.

The length of time undergraduate and Masters students are permitted to stay in the UK to seek work following graduation will be reduced to 18 months from two years – a measure that will inevitably play badly in international media and reduce the attractiveness of the UK as a study destination. Concerns are raised about the numbers on the Graduate route who do not report having secured graduate-level work, suggesting that the government's objectives for the route are focusing more narrowly on this metric rather than the broader objective of enhancing the attractiveness of the UK.

"Government will explore the possibility of a six per cent levy on international fees to be reinvested in the higher education and skills system."

Most startlingly (and in a suspected late addition to the white paper) government will explore the possibility of a six per cent levy on international fees to be reinvested in the higher education and skills system. A similar idea was proposed – and ultimately rejected – in the Australian Universities Accord proposals. On the positive side, there are also plans to expand and improve the Global Talent visa route which fast-tracks the process for highly-skilled leaders in their fields to be approved to work in the UK.

The immediate response from the higher education sector seems to be that the measures could have been worse, though the levy proposals in particular are likely to be unpopular. In addition to engaging with policymakers on the specifics of the government's plans and their implications, boards of governors will wish to consider their current performance against the proposed basic visa compliance metrics as well as provision and support for international student employability and progression to graduate-level work, whether in the UK or internationally. The government's international education strategy continues to be pending a "refresh" and it is likely that the focus will be more closely on sustainable growth of quality applicants rather than the rapid expansion seen immediately post-Covid.

Financial sustainability

The latest report from the Office for Students (OfS) on the financial sustainability of the sector in England, published in May and based on financial returns for the academic year 2023–24 warns that, for the third year in a row, the sector's collective financial performance is in decline. Some 43 per cent of providers expect to return a deficit in 2024–25, and there is an overall decline in overall surplus and liquidity – albeit with the expectation of growth in the years ahead.

After issuing stiff warnings about over-optimistic projections for home and student recruitment in May 2024, OfS says that many providers are taking steps to manage their finances, by reducing costs and downgrading recruitment growth projections. Much of the sector is in the process of restructuring and making redundancies, and Universities UK is actively working through its transformation and efficiency taskforce on options for closer collaboration and shared services between institutions to realise savings, with a report due to be published shortly. Advance HE has launched a "big conversation" about higher education governance, with the objective of understanding in more detail the link between governance structures and processes and financial sustainability – implicitly acknowledging the criticism that some boards may have been too sanguine in signing off projections of future growth.

“OfS Director of Regulation Philippa Pickford said that the most important thing is that providers plan for a range of possible scenarios, and have a mitigation plan in place if projections are not achieved.”

While it remains unlikely that the sector will see a large multi-faculty provider exit the market in the year ahead, OfS remains worried that the aggregate estimate of an increase of 26 per cent in UK entrants and 19.5 per cent in non-UK entrants between 2023–24 and 2027–28 remains too optimistic – and confirmed it would like to see a special administration regime in place for higher education. OfS Director of Regulation Philippa Pickford said that the most important thing is that providers plan for a range of possible scenarios, and have a mitigation plan in place if projections are not achieved.

“The government is working with the Competition and Markets Authority to ‘determine the extent to which the sector is facing challenges related to competition law’.”

OfS has also identified some longer term sustainability challenges around deferral of estates maintenance, suspension of planned physical or digital infrastructure investments, and a significant increase in sub contractual (franchising) arrangements that require robust governance to manage the reputational risks involved. OfS powers are to monitor and discuss financial sustainability with providers and, if necessary, issue directives relating to student protection. Activity of this nature has ramped up considerably in the past year, but financial sustainability remains, at base, individual providers’ responsibility – and no actor is empowered to convene system-level intervention on things like changing patterns of provision, or management of the wider impact of institutional insolvency.

In April OfS published an insight brief on institutional closure which included the steer to governing bodies to review and if necessary update student protection plans in light of portfolio rationalisation and redundancy programmes.

In May the Commons Education Committee wrote to Secretary of State for Education Bridget Phillipson following a one-off evidence session on higher education finances, urgently requesting clarification on the government’s plans to stabilise the sector. Phillipson’s response said that the government is working with the Competition and Markets Authority to “determine the extent to which the sector is facing challenges related to competition law” and that the post-16 education and skills white paper will set out plans for further enhancing “appropriate collaboration” between further and higher education. The letter emphasises that the government will continue to welcome international students where they meet the criteria for study in the UK – adding that as autonomous institutions higher education providers need to focus on the governance of financial planning and oversight.

Financial sustainability and Scotland

The Scottish government announced £25m in financing available to support the Scottish higher education sector, in addition to £5.83m for the 2024–25 financial year to cover the costs of increases to Scottish Teachers’ Pension Scheme and NHS pensions employer contribution rates.

Following this announcement, the Scottish Funding Council determined that £22m of the funds would be used in a recovery package specifically for the University of Dundee, after the university announced that it was in danger of running out of money, and that it would need to shed hundreds of jobs to remain a going concern. The funding is a mix of grants and low-interest loans, and there is an open question as to whether more will be needed beyond the initial injection of liquidity. There will also be an independent investigation into the circumstances that led to the university's current financial situation, and a separate taskforce to advise on the future of the university.

Regulation in England

Franchised provision continues to raise concerns both on quality and financial conduct grounds. In a written statement to parliament on protecting public money in higher education Bridget Phillipson has set out actions the government is taking to tackle evidence of abuse of public money associated with the franchise higher education system, including asking the Public Sector Fraud Authority to coordinate action to prevent future abuses in the system. Writing in The Sunday Times Phillipson promised to legislate at the first opportunity to strengthen OfS regulatory powers to protect public money. Measures could also include requiring any provider with more than 300 students to register with OfS.

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Data has emerged via a parliamentary written question that the last three academic years saw tuition fee loans totalling well in excess of £1bn made for students studying at franchised higher education providers that were unregistered with OfS. New Student Loans Company data up to 2023–24 also shows that last academic year in England there were 58,705 tuition fee loan recipients at unregistered franchised providers, compared to 44,645 at OfS-registered franchisees.

OfS has consulted on two key new conditions of initial registration for new providers entering the market: a more comprehensive condition C5 that would oblige a provider to demonstrate how it will treat students fairly, as opposed to having due regard to consumer protection law, and condition E7 would require providers to have effective governance arrangements in place for the purposes of being a higher education provider, notably in relation to prevention of fraud.

"The Digital Markets, Competition and Consumers Act 2024 came into force on 6 April with accompanying new guidance from the Competition and Markets Authority."

OfS director for access and participation John Blake has written to providers in England setting out six "key expectations" for protecting student interests during any future industrial action. These include removing contractual terms that limit liability, developing effective contingency plans that prioritise education delivery, communicating clearly with students, and paying fair compensation when plans fail. The regulatory statement was accompanied by polling data from YouGov surveying student experience of the 2023 marking and assessment boycott, which found that 54 per cent of respondents were dissatisfied with how their institution managed the situation, and only 30 per cent were aware of a right to request financial compensation.

The Digital Markets, Competition and Consumers Act 2024 came into force on 6 April with accompanying new guidance from the Competition and Markets Authority. The Act redefines a transactional decision to include any decision made by a consumer about whether, how, or on what terms to purchase, retain, or cancel a service. It extends liability for making representations about a product or service to entities acting on behalf of a provider – bringing agents and recruitment partners into its purview – and a new duty to avoid exploiting consumers' "situational vulnerability" such as mental health crises or temporary hardship. It also strengthens requirements about transparency of costs – meaning that students should be apprised of all necessary costs relating to their study, not just the "sticker price." Boards, if they have not already, should review the implications for their institution's consumer practice and be clear that their institution has sought the appropriate legal advice on the implications of the Act.

Free speech and the University of Sussex

March saw the announcement that the University of Sussex is to be fined a record £585,000 by OfS on the alleged grounds of failure to uphold free speech and academic freedom. The first fine issued under the new free speech regulation – but on the basis of an investigation begun three years before the Higher Education (Freedom of Speech) Act came into force. The scale of the intervention signals the regulator's determination to push forward with free speech regulation, a policy agenda that providers worry is overly burdensome and a distraction from the core quality mission and current financial sustainability challenges.

The basis of the ruling was a judgement that the university's policy statement on trans and non-binary equality failed to uphold the principles of freedom of speech and academic freedom governance, and had created a "chilling effect" on campus. The University of Sussex has already signalled its intent to mount a legal challenge to the OfS ruling, criticising both the process and the outcome, which vice chancellor Sasha Roseneil said amounted to "free speech absolutism." The university warned that the judgement would make it much more difficult for higher education providers to protect students from harassment – another regulatory duty due to come into force in August.

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While no provider would dispute the importance of securing and promoting free speech on campus, it is undoubtedly true that providers in England are now walking a regulatory tightrope between policies designed to secure the safety and wellbeing of students and staff, and the risk that the regulator may view these as suppressing free speech. Boards will already be taking legal advice on the framing of policies and the management of risk – there is also a case to test the resilience of the broader strategic approach to establishing and encouraging standards of behaviour and the degree to which the views of the various interest groups and institutional expertise is being deployed to support an ongoing constructive conversation.

Scottish government agenda

New legislation to reshape the Scottish funding body landscape has begun passage through Holyrood. The Tertiary Education and Training (Funding and Governance) (Scotland) Bill will consolidate institutional funding responsibilities for the whole tertiary sector within the Scottish Funding Council (SFC), and student funding at Student Awards Agency Scotland. The legislation also provides SFC with additional powers and duties around monitoring financial sustainability – in particular, it will be able to issue guidance that governing bodies must "have regard to" (ie comply or explain), and institutions will be required to notify the funding council in the event of certain material changes to circumstances. However, the exact nature of these changes to circumstances is being left to secondary legislation, and the sector is asking for more clarity around exactly what is in scope.

"The Scottish Funding Council's decision to delay publication of its annual financial sustainability report has come under sustained criticism from MSPs."

Elsewhere the Scottish Funding Council's decision to delay publication of its annual financial sustainability report has come under sustained criticism from MSPs. The delay reflects a desire on the part of the funding council to include more up-to-date financial data – but the fact of the report not appearing until September, rather than January as in past years, is provoking concern given reports of financial strain at many universities and colleges.

Regulatory change in Wales

Welsh funder and regulator Medr has confirmed its first strategic plan, which commits the regulator to focus the tertiary sector around learner needs, including establishing a learner voice forum and learner engagement code; to create a flexible and joined-up tertiary system that promotes collaboration among providers and between providers, employers, industries and investors on skills and innovation; and to create the conditions for high quality education and research. The final version of the plan, which was put out for consultation in the autumn of 2024 includes strengthened commitments to lifelong learning and adult education, providers' civic mission, and the development of a comprehensive mental health and welfare framework.

Medr has also opened up consultation on a new regulatory framework, which will apply to all tertiary providers in Wales. For higher education there will be two categories of registration, Core and Alternative. The framework itself proposes initial conditions of registration and funding on financial sustainability, governance and management, quality, and welfare of staff and students. Ongoing conditions of registration and funding include learner protection and engagement, equality of opportunity, complaints process and Welsh language. There are also additional conditions of registration (but not funding) including charitable status, provision of information, and fee limits. A new quality framework makes provision for cyclical assessment (for now by QAA and Estyn) and is built around a series of "pillars" including learner engagement, learner voice, engagement of governing body, self-evaluation, externality, continuous improvement and professional learning and development.

Student experience and wellbeing

Universities UK has published an "access to success" action plan for the sector in England, and government, which proposes work on contextual admissions, increased HE-FE collaboration in cold spots, a better student maintenance package, and more targeted careers support. The contextual admissions project would see Universities UK work with UCAS and the Sutton Trust on developing a more consistent and transparent approach to the use of contextual data on applicants in admissions in England, and to encourage more universities to adopt the use of contextual information in their admissions practice.

Advance HE's Disabled Student Commitment Advisory Group has launched new Competence Standards Guidance. The guidance provides comprehensive guidance on interpreting and implementing competence standards in accordance with the Equality Act. The guidance explores what constitutes a "reasonable adjustment" for a student who is disabled, and the legal framework for higher and further education institutions making exemptions to reasonable adjustment duties in the context of applying a competence standard. Providers have a duty to have a sound understanding of competence standards in order for exemptions to be lawful: competence standards must apply to every student, be demonstrably relevant to a course, be necessary in the service of a lawful objective (eg protecting the public), and proportional.

Belong – student health

The latest tranche of data from Wonkhe and Cybil's Belong panel surveyed just over 1,000 students from 88 providers across the UK on the subject of health and wellbeing. Students self-report experiencing very good health at lower rates than the general population. In the 2021 census, 48 per cent of the population said they are in very good health – compared to only 20 per cent of the Belong sample. Self-reported perception of health correlates with feeling part of a community of staff and students, and also with perceptions of education quality. Most report being registered with a GP, but much fewer are registered with a dentist, and the qualitative data suggests particular issues with accessing dental care. More generally, only one third report feeling satisfied with the way the NHS is run nowadays.

"Students report in the main no or moderate alcohol intake, and few report misuse or abuse of drugs."

Students report in the main no or moderate alcohol intake, and few report misuse or abuse of drugs. Patterns of disordered eating manifest in the student population at the same rate as the general population at around a quarter of students. For around one fifth of students, their housing situation negatively impacts their health. And of those who menstruate, 45 per cent report symptoms that affect their daily lives. When asked what they would like to see, students suggested better alignment between mental health service provision and the wider learning environment, reducing barriers to accessing everyday health resources, and more accessible information and advice on health-related matters.

Foreign influence and HE

The Home Office has published higher education sector-specific guidance for the Foreign Influence Registration Scheme (FIRS), the government's initiative to promote transparency and reduce national security risks for arrangements involving other countries that involve an element of "political influence" ie direction from foreign powers to deploy higher education activities such as research to influence public policy. FIRS will come into force from 1 July.

The areas the guidance covers include research collaboration, education, and the activities of student societies – scholarships and transnational education have largely been exempted. There is a substantial scale-up in what needs to be disclosed if a country is put on the "enhanced tier" of scrutiny – the government has only announced plans to do so for Iran and Russia at this stage. Boards should be apprised of where their institution has disclosed any relevant activities to the Home Office, especially where these activities fall into the enhanced tier category.

Movers and shakers

The sector has seen a flurry of senior appointments in the last few months. Nottingham Trent University vice chancellor Edward Peck has been appointed to take up the role of chair of OfS, inheriting the position from interim chair David Behan. Peck will take up his position in the summer of 2025.

At Medr, founding chief executive Simon Pirotte has announced his departure, with a new appointment currently in train. Pirotte has held the role – which was never intended to be a permanent appointment – since the establishment of Medr in September 2023.

The Department for Education (DfE) appointed Tessa Griffiths and Sarah Maclean as joint chief executives of Skills England – both are currently joint directors of post-16 skills at DfE. Greater Manchester Combined Authority's education and skills director Gemma Marsh will be deputy chief executive. Former Innovate UK chair Phil Smith has been named chair of the quango, with University of Sunderland vice chancellor David Bell as vice chair.

The Committee of University Chairs (CUC) executive secretary John Rushforth is stepping down after 12 years in the role. CUC has begun recruitment for a full-time or near full-time chief executive.

UK Atomic Energy Authority chief executive Ian Chapman will be the next UKRI chief executive, the Department for Science, Innovation and Technology has announced. He is a physicist by background, has been chief executive of the UK Atomic Energy Authority since 2016, and is a current member of UKRI's board. He will take up his role in June 2025.

Tom Adeyoola will be the next executive chair of Innovate UK, following endorsement by the Commons Science, Innovation and Technology Committee. Adeyoola is a technology entrepreneur and co-authored Labour's 2022 review of start-up and scale-up funding commissioned in opposition.

Former Universities UK chief executive Alistair Jarvis will take up the role of chief executive of Advance HE from August 2025. He joins from the University of London, where he is pro vice chancellor (partnerships and governance).

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