



# Issues and agendas for the sector

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Worshipful Company of Educators  
Governance series

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## The HE policy landscape

- Competitive markets
- Reductions in Govt T and WP funding
- Higher Education & Research Bill
- BREXIT
- HE and schools
- HE and Industrial Strategy
- HE and English devo
- Apprenticeship levy
- TNE including Europe
- Accelerated degrees/on-line
- Removal of student number cap
- Increased funding for R and HEIF
- Increased focus on high-level STEM skills

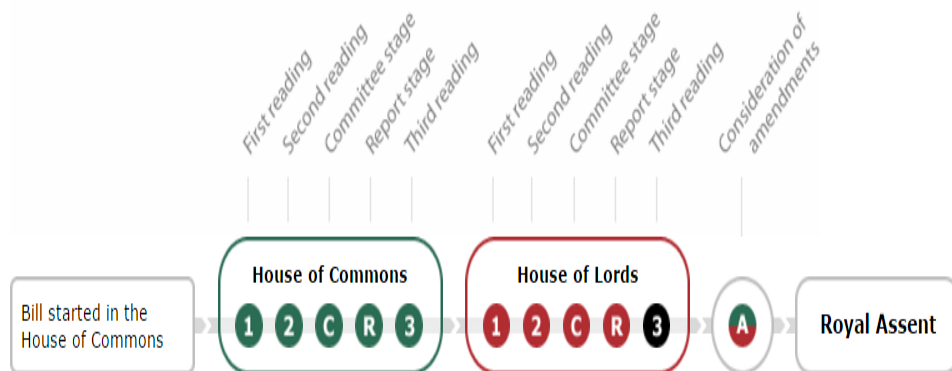


## The HE sector

- Dynamic, innovating
- Seeking resilience; prudent investment
- Increasing diversity
- Place-making
- New forms of partnership

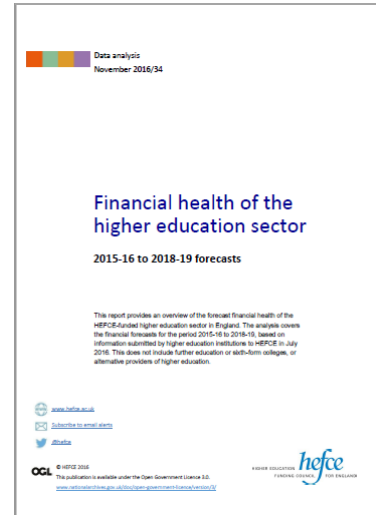


## Progress of the Bill

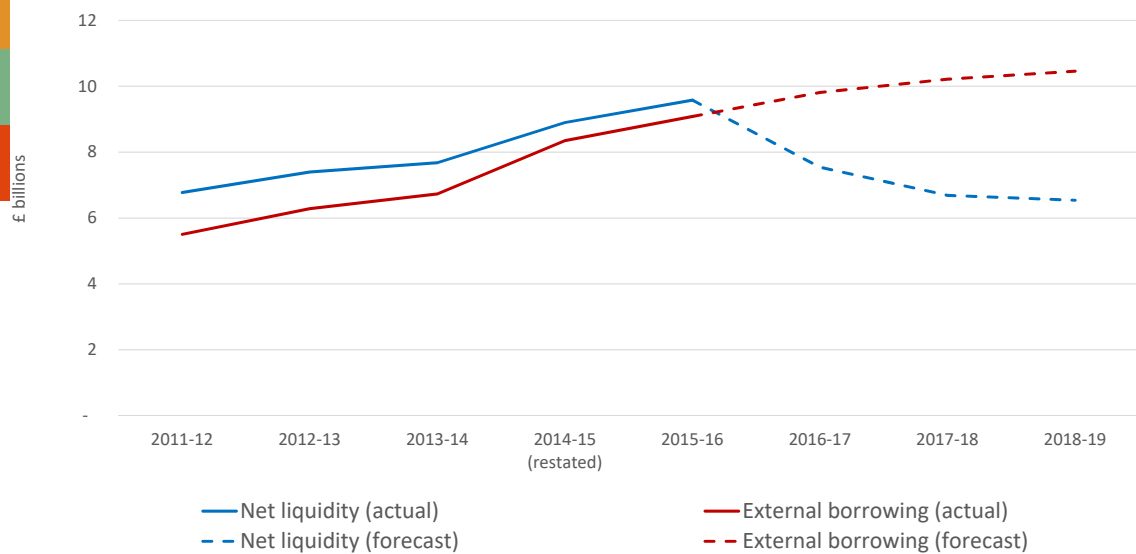


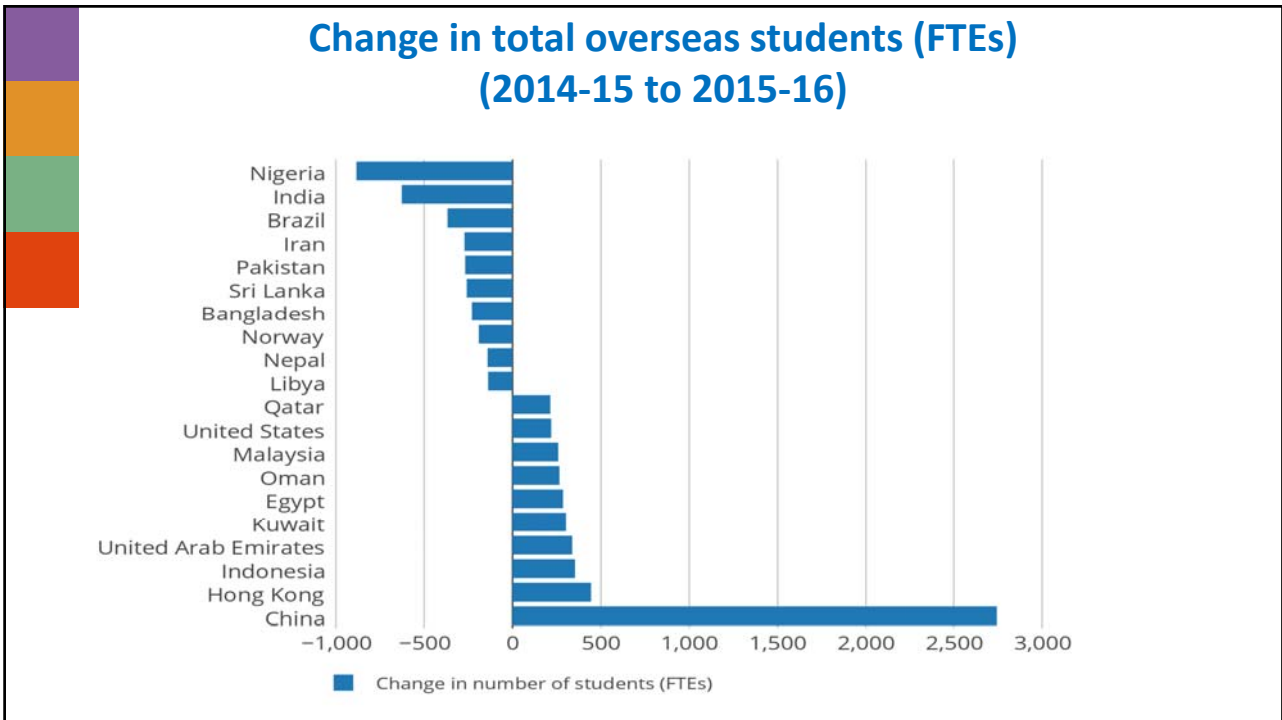
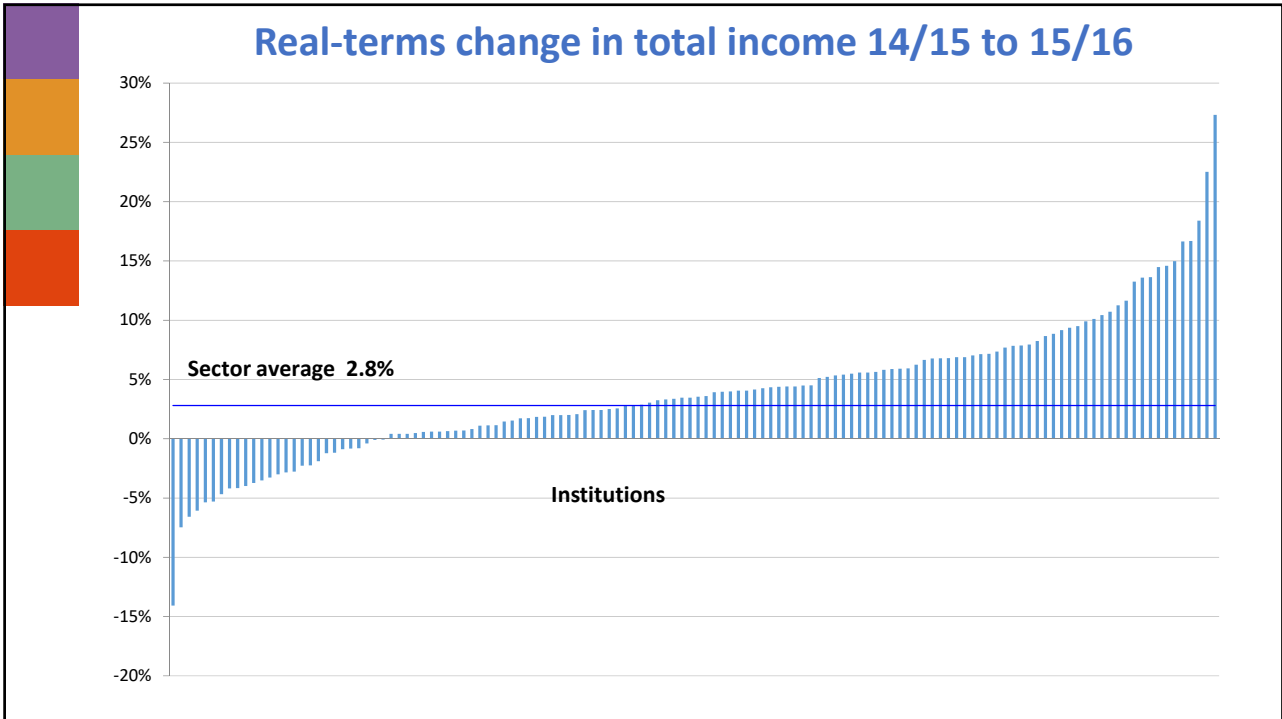
## Financial health of the sector


- Current position is overall 'sound'
- Significant variation in future financial projections
- Sector surpluses between 2.3 per cent and 4.3 per cent of income
- Increasing reliance on Overseas fee income and growth in Home students
- Trend of falling liquidity and increasing borrowing continues
- Diverging levels of Capex and also increasing costs of backlog estates maintenance



## Net debt








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