

The OfS's operating environment

Board's primary role in relation to this paper:

- A. Set strategy
- B. Set risk appetite
- C. Oversee performance
- D. Understand context

Purpose

1. To support the board's understanding of the context for the OfS's work. This paper provides an overview of recent political, sector and student developments that shape our operating environment.
2. The board is invited to:
 - a. Note the contents of the paper and Annex A and Annex B.

Developments

Duty of care

3. MPs debated the merits of a statutory duty of care for universities in January, which would give providers a legal duty to prevent foreseeable harm to students in relation to mental health and potentially sexual misconduct. **Exempt from publication.**
4. **Exempt from publication.** We are planning to develop a statement of expectations for providers in relation to disability, including mental health as a disability, which would provide clarity about our expectations and drive improvement and consistency across the sector. The OfS remains a member of the Department for Education's (DfE) Higher Education Mental Health Implementation Taskforce which has accountability measures as a key area of focus.
5. We will continue to monitor the sector's performance in relation to disability and mental health as part of our 'student experience and support' strategy goal and be ready to adapt our approach in response.

Transnational education

6. The government published its International Education Strategy on 21 January which sets three key ambitions: (1) to strengthen the UK's international standing through education, which will be achieved through an expansion in transnational education (TNE); (2) to recruit high quality

international students in a 'more sustainable' way and (3) to grow education exports to £40bn by 2030.¹

7. If targets are met this creates a significant expansion of TNE activity, which has already been growing since 2018-19, and English institutions are well placed to meet this demand given the positive international reputation of the sector. Expanding TNE offers benefits to students and providers; at the same time, any expansion could exacerbate strategic risks including in relation to the quality of provision, which would present a reputational risk to English higher education and potentially reduce international demand across key markets.
8. TNE courses offered by providers are subject to the same OfS regulatory requirements as those delivered in the UK. The OfS receives intelligence through data collection, notifications and reportable events while routine stakeholder engagement and information sharing helps to support compliance. **Exempt from publication.**

Free speech

9. In January, the Higher Education Policy Institute published polling of students on free speech issues.² Results found that students who participated in the poll had complex and contradictory views, with strong support for the principle of free speech but an increase in support for bans of likely lawful speech in some areas. **Exempt from publication.**

UUK

10. UUK is beginning work to implement its new reputation strategy. The campaign will be 'unapologetically positive' about universities as vital to the UK's future and will seek cross-party support for a long-term plan for the sector.³

Legislation affecting higher education

11. **Exempt from publication.**
12. The government introduced the Medical Training (Prioritisation) Bill, which aims to prioritise graduates from UK medical schools for speciality training places and is intended to be in place for this year's applicants.⁴ In response to concerns from MPs, the government noted all medical graduates will still be eligible to apply and explained there are twice as many overseas-trained applicants compared to UK-trained applicants this year.⁵

Headlines from OfS engagement

13. Over 150 students and interested stakeholders attended an OfS student debrief event on students' consumer rights on 27 January.⁶ The input from participants in the session, gathered

¹ [The UK's International Education Strategy 2026 - GOV.UK](#)

² [Are students still 'woke'? - HEPI](#)

³ [Universities must be a reason for optimism about the country's future | Wonkhe](#)

⁴ [Medical Training \(Prioritisation\) Bill: impact statement - GOV.UK](#)

⁵ [Medical Training \(Prioritisation\) Bill: Second Reading - Hansard - UK Parliament](#)

⁶ [OfS student debrief: Consumer rights - Office for Students](#)

through polling and interactive tools, will be used in the development of our upcoming consultation on consumer protection.

14. Exempt from publication.

15. We plan to publish a summary report showing data from our heartbeat survey at regular intervals throughout the year. It will focus on showing trends over time for each of the key measures of student experience. We expect to publish the first report in February.

16. Two provider visits took place in January and these are listed at Annex B. The next phase of our programme of provider visits will start in February.

Paper publication

17. To be published alongside board papers, subject to appropriate redactions. Annex A is considered to be exempt from publication.

Annex B: Provider visits

Provider name	Date
Wiltshire College and University Centre	15 January 2026
London School of Management Education	21 January 2026