



Visa/NHS Costs Survey

Report of Findings & Recommendations

Postdocs of Cambridge Society
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Report of Findings & Recommendations

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EXECUTIVE SUMMARY

A major concern for the PdOC society and its members is the **high cost of visa and NHS expenses** for non-EU postdocs who are offered jobs at the University of Cambridge. These expenses add to the pressure of the job and of moving to a new country at a period that usually coincides with the time when they are hoping to settle down, take out a mortgage or start a family.

The aim of this initiative is to provide a **quantitative assessment of the size of the problem** and its implications, to help the University develop an evidence-based policy to alleviate this pressing financial burden, and therefore sustain its attractiveness to outstanding researchers internationally. This report sheds light on this major issue by providing figures and facts related to these expenses, the financial and social situation of the concerned postdocs, including their backgrounds, funding agencies and departments. We also show in this report that these expenses are generally incurred more than once, and the **chance of getting reimbursed for these expenses is low (around 20%), dropping to about 10% on the second and subsequent occasions.**

We present clear evidence, collected from a substantial **sample size of 70 postdocs** across departments and University partner institutions, that **these expenses are a financial burden** affecting early-career researchers, their families (34% have at least 1 dependant) and their well-being. This also has implications on their efficacy, research potential and professional decisions as we find that almost **50% of the postdocs consider it a factor in accepting a job offer.** In fact, given the current situation regarding Brexit, the impact of this analysis may go beyond non-EU postdocs.

We emphasise the importance of addressing this issue and implementing a **unified university-wide policy** that supports early-career researchers by alleviating these expenses as well as the associated financial and social burdens. We note that this should not only have a positive effect on postdocs' individual performance, but should also contribute to the continuous improvement of research excellence that characterizes this university.

INTRODUCTION

The high visa and NHS expenses incurred by non-EU postdocs in order to take up positions at the University of Cambridge is a major problem that affects a large number of postdocs annually. A study was instigated by the committee of the PdOC society to shed light on this issue by collecting statistics. We have designed, implemented and analysed a comprehensive survey that asked postdocs about the expenses they incurred for themselves and their dependents to be able to take up their position at the University of Cambridge, whether they were reimbursed and how this affects their plans, finances and general well-being. The results of the analysis are presented in this report, hoping to bring the size of this issue into prominence.

METHODOLOGY

In order to collect data, postdocs from departments and institutes across the University were surveyed. We asked about the visa/NHS expenses they incurred, the frequency of these expenses, whether the costs were reimbursed and their number of dependents. Seventy postdocs filled the survey. They come from diverse geographical backgrounds and are distributed across the various University departments and partner institutions. They are funded by a wide range of agencies and have different situations with regards to their personal life (single, with partners, with dependants, etc).

Two forms of data were collected:

- *Quantitative data* include citizenship, departments, funding agencies, expenses, their frequency and number of dependents.
- *Qualitative data* include implications of such expenses on their decision-making regarding jobs offers, and how this affects their general well-being.

FINDINGS

1. DISTRIBUTION OF SURVEYED NON-EU POSTDOCS IN CITIZENSHIP, DEPARTMENT AND FUNDING AGENCY

The postdocs surveyed work across **24 departments** and institutes including Astronomy, Medicine, Biochemistry, Physics, Zoology and Public Health as shown in Fig. 1. They have diverse backgrounds and come from **21 different countries** shown in Fig 2, including India, Japan, China, Australia, Canada, Sri Lanka, Indonesia, Serbia, Belarus, Russia, Latin America, the Middle East and the United States. The highest population in our survey is Indian with 14 participants, then Australian and Chinese with 8 participants each. They are also funded by various national and international agencies as depicted in Fig. 3.

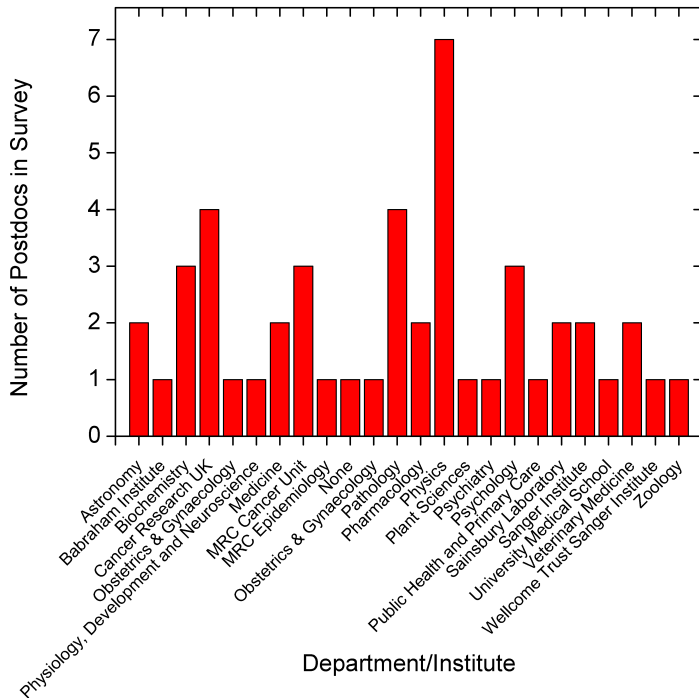


Figure 1 Surveyed postdocs work at 24 departments and institutes ranging from Astronomy to Plant Sciences, Public Health, medicine and cancer research.

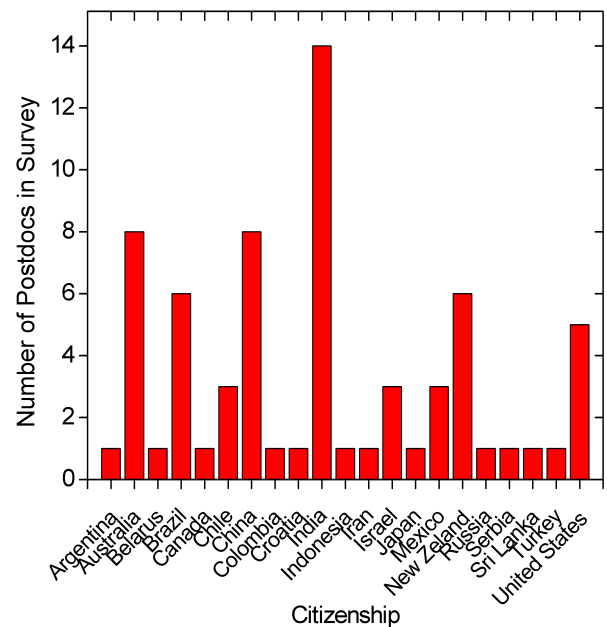


Figure 2 The figure shows the rich geographical distribution of the surveyed postdocs. They come from 21 different countries across the globe.

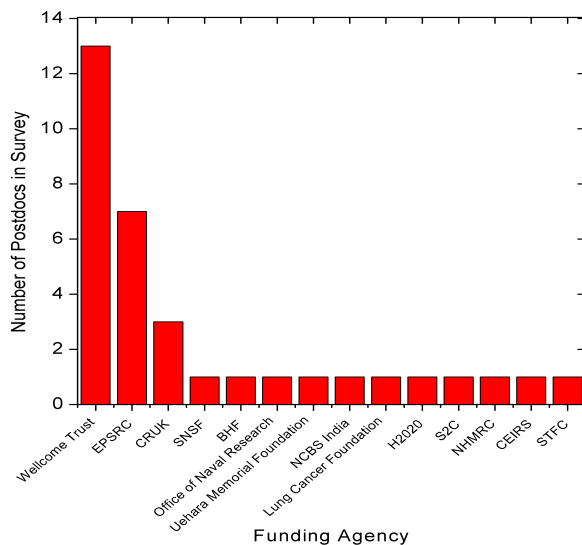


Figure 3 Funding Agencies are international, including English, Japanese, Indian, American and European (see Appendix A for the full names of the funding bodies).

2. VISA/NHS EXPENSES AND REIMBURSEMENT

56 of the 70 participants paid both visa and NHS fees and 14 paid visa fees only as shown in Fig 4. Almost half of them had to apply for a second time after their visas expired, as can be clearly seen in Fig. 5.

Fig. 6 shows the visa and NHS costs. The solid black squares are the mean values, and the bars show the dispersion in each category since visa and NHS costs vary for different countries, visa type and their period of stay. The costs corresponding to the postdoc are labelled as “self”, and those which correspond to the expenses of the postdoc’s dependents are labelled “dependents”. On average, **visa expenses for a postdoc are around £800**, depending on the length of the visa, and the **average cost of the NHS surcharge is about £400**, which makes the **total cost about £1200 on average**. With dependents, there is an **added visa and NHS cost of about £1400 on average**. For dependents, the cost range is larger because it is directly proportional to the number of dependents, which is shown in Fig. 7. A substantial number of postdocs (almost 34%) have at least one dependent. This means that the costs of a postdoc with a dependent increase from about £1200 to £2600, on average.

Did you pay visa costs and NHS, or only NHS?

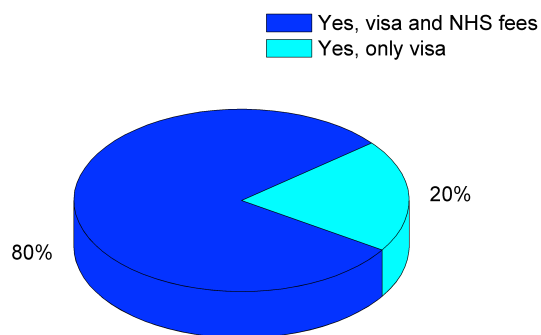


Figure 4 Of the postdocs surveyed, 56 (or 80%) had to pay both visa and NHS expenses, and 14 only paid for their visa.

Did you have to apply a second time for a visa?

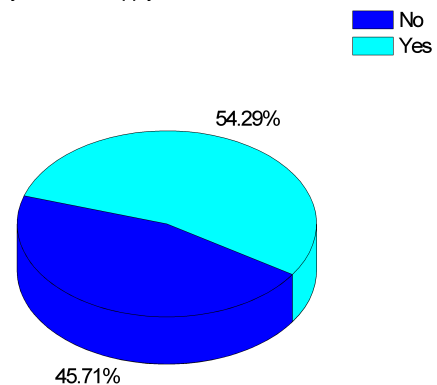


Figure 5 The percentage of postdocs who had to apply for a second time, incurring additional charges.

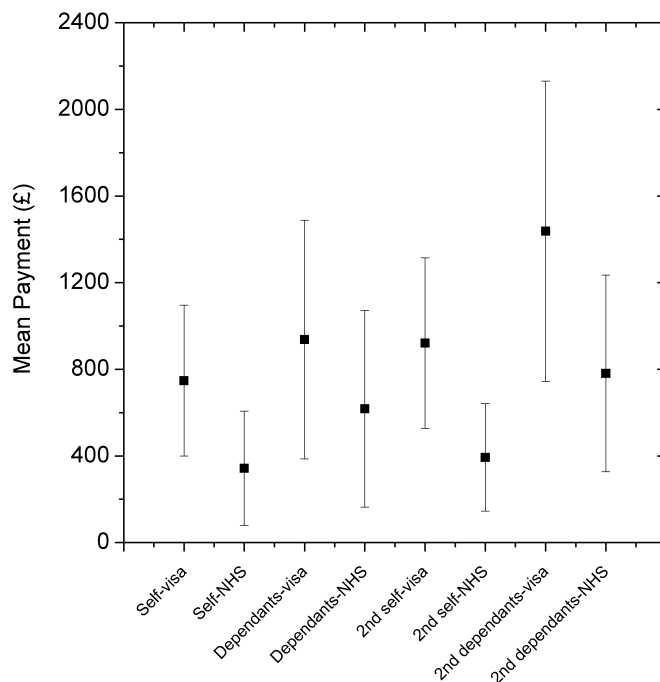


Figure 6 Postdoc's average expenses (visa and NHS) are labelled "self", while those of dependents are labelled "dependents", shown with error bars. Second-time expenses of visa and NHS for both self and dependents are also shown and labelled as "2nd".

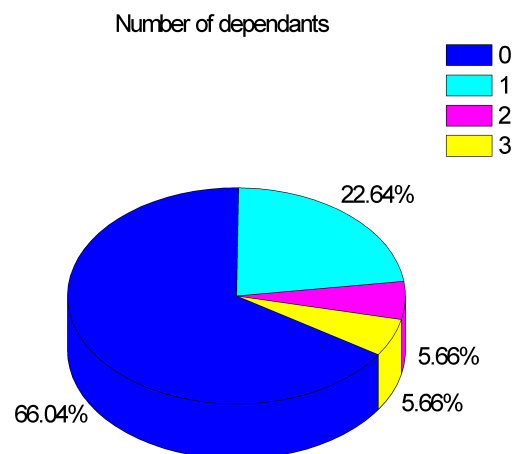


Figure 7 The number of dependants of the postdocs in the survey. Almost 34% have at least 1 dependent, which increases visa and NHS costs as shown in Fig. 6.

An important question arises: were these costs reimbursed?

Fig. 8 shows that **more than half of the surveyed postdocs were not reimbursed. This percentage hikes to 64% for those who applied for a second time**, with only 11% getting reimbursed in the second round. This is expected to have implications on the financial status of an early-career researcher, as well general well-being and decision to accept the offer of a job or contract extension.

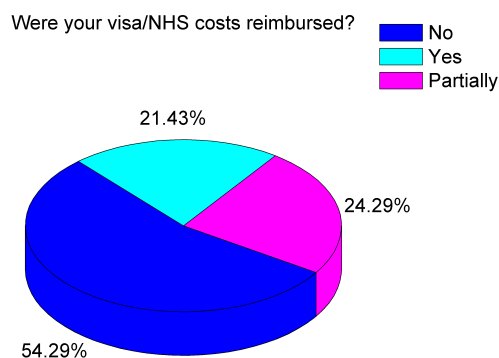


Figure 8 The majority of the postdocs did not get reimbursed for their expenses. A minority were reimbursed fully or even partially.

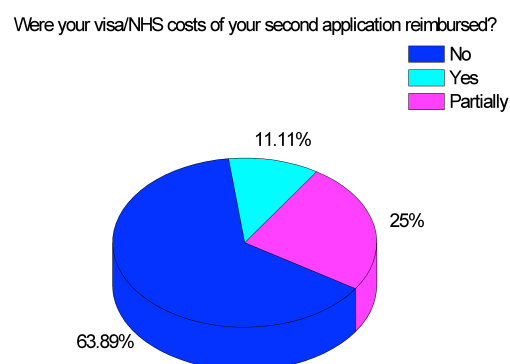


Figure 9 The percentage of those who were not reimbursed for their second-time applications is even higher, about 64%.

3. IMPLICATIONS ON JOB OFFER ACCEPTANCE, FINANCES AND WELL-BEING

3.1 Job Offer Acceptance

Fig. 10 shows that almost half of the postdocs surveyed consider that visa and NHS expenses are a factor in deciding whether to accept a job offer, while for the rest this is not a major factor of influence. However, it is crucial to note here that **our survey has a major selection bias**: all those reached by the survey have already accepted the job offer and now are postdocs at the University of Cambridge. We do not know the number of postdocs who possibly turned down offers because the visa and NHS expenses - added to their relocation expenses - were too high for them to afford. If this number is significant, the university is potentially losing talented and highly skilled researchers who simply cannot overcome this financial barrier. While this number is inaccessible to us, our conclusion is supported by the results shown in Fig. 11, which

shows that around 13% knew at least one person who had to turn down an offer from the University of Cambridge because of the mentioned expenses. We elaborate on this further in the “Reflections” section.

Are visa/NHS costs a factor that decides accepting a job offer?

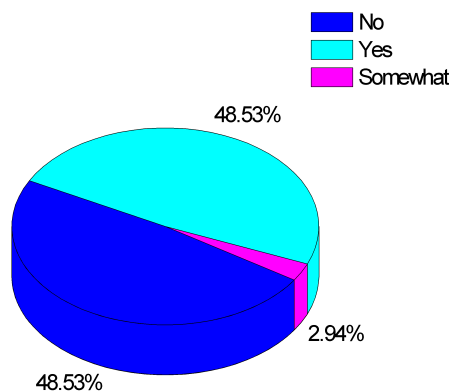


Figure 10 Almost half of the participants consider such expenses affect their decision to accept a job offer.

Do you know anyone who rejected a job offer because of visa/NHS costs?

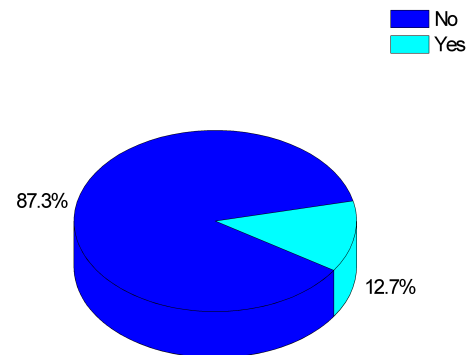


Figure 11 13% of the 63 who answered this question know at least one person who had to turn down a job offer from the University of Cambridge because of the high visa and NHS expenses.

3.2 Impact on Finances

The majority of the answers to the question: “Have the visa and NHS charges affected your lifestyle or wellbeing?” reported that these expenses are a **huge financial burden**. It depleted their savings, made them sell their possessions (e.g. car), and/or put them in debt. This has clear implications for both their professional and social life, thereby affecting their professional performance and well-being. The postdocs who reported that this was not the case for them are generally those who were reimbursed. The responses we got for this question are powerful, telling and reflect a clear message. We present some of them verbatim:

“I had to sell my car to pay for it”

“Yes. It's more like by the time the debt is paid off, the next visa renewal will come and then you are in debt again[..]!”

“Crushed my social life: I had no money to go out and be with my friends!!”

“immensely - it has affected my research as well.”

REFLECTIONS

The University of Cambridge is one of the few top universities in the UK which do not support its staff with their immigration fees. St Andrews University, for example, covers visa expenses for their employees and their dependant(s) (under Tier 2), as well as fees for visa renewals and applications for ‘indefinite leave to remain’. This policy clearly highlights their aim to attract international and top-notch students and researchers. Further details can be found at:

<https://www.st-andrews.ac.uk/staff/policy/immigration/costs/>.

Visa expenses are not only relevant for accepting a job offer, but also for choosing to remain in the UK, thus posing a threat not only to attracting highly skilled researchers but also retaining them.

A postdoc period is generally an unsettled life stage that creates a lot of anxiety. Postdocs usually make less money than equally qualified professionals working in industry for example, they are not always able to save money for retirement, and are sometimes forced to put off starting a family. The competitiveness in academia does not guarantee jobs for all postdocs but the University should undoubtedly aim to retain the very best. An attractive policy for this would be to cover their immigration expenses.

The University of Cambridge plays a leading role in advancing science and research in the UK. As such, it holds responsibility for pioneering good practices and setting good examples as a supportive employer that is concerned with the general well-being of its employees. Moreover, this would also have a positive impact on the quality of research that is performed in this institution.

RECOMMENDATIONS

- We suggest a **unified reimbursement policy** across departments and institutes of the University managed and controlled directly by the Human Resources.
- If the university resorts to a loan scheme for postdocs to assist with their expenses, we urge that the **loans be interest free** and that the University considers it under a **salary sacrifice arrangement**.
- If the loan has to be taxable, we recommend that the university underwrites the incurred tax.
- The PdOC society will explicitly state the possibility for reimbursement of immigration expenses in its **induction package** and encourage postdocs to pursue this with their departments and institutes.