

What the higher education Brexit debate has not covered

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Vangelis Tsiligiris¹ and ²Alex de Ruyter

There has been a lot of speculation about the potential impact of Brexit on UK higher education. This has been particularly pronounced for the following three aspects: 1) EU inbound student mobility; 2) access to EU research funding; and 3) recruitment of EU staff. The forecasted impact of Brexit on each of these three areas has varied significantly and as such, has often sparked debate.

Take for instance EU staff recruitment. Despite the expectation of a negative impact on EU staff recruitment, a [study](#) by the Universities and Colleges Employers Association (UCEA) revealed no impact for 75% of universities. However, indicative of the negative expectations about the impact of Brexit formed in the HE sector is the finding in the [annual membership survey by the Chartered Association of Business School](#) (CABS) where 41.9% of business schools consider likely to lose EU staff and 41.5% to encounter difficulties in requiring EU staff during 2017/18.

Another example of the unclear impact of the Brexit is that of EU student inbound mobility. UCAS applications from EU students for 2017 entry declined by 7% and this [was attributed](#) to the EU referendum. However, the actual number of inbound EU students in 2017 was reported to be similar to that of 2016. In addition, in October 2017 [UCAS](#) announced that applications from EU students for 2018 entry were 6% higher than 2017. A more mixed picture on EU student recruitment is evident in the CABS 2017 annual membership survey where approximately 1 in 3 business schools reported an increase, 1 in 3 no change and 1 in 3 a decrease in the EU student applications.

However, what is often neglected in the discussion about the future trend of EU student inbound mobility and EU staff recruitment has been the significant developments in the HE systems of other EU countries. [In the past five or so years](#), there have been coordinated and well-thought efforts by countries such as Germany, the Netherlands, and France to strengthen their attractiveness as destination countries for foreign students. These efforts include special fee arrangements, visa policies that allow students to remain and work in the country after graduation, and the expansion of programmes taught in English. Also, EU staff are attracted by these emerging HE markets in EU countries which often provide favourable working conditions for EU academics and administrators. These strategic developments at a European level are far more likely to impact on EU and non-EU student mobility and EU staff recruitment than Brexit.

UK transnational education in the EU: A neglected dimension of Brexit

So far, the discussion about the anticipated impact of Brexit has been concerned with the three aspects mentioned earlier. However, UK transnational education provision in the EU is another dimension of internationalisation for UK HE to consider in the context of Brexit.

¹ Principal Lecturer and Founder of TNE-Hub (www.tnehub.org) at Nottingham Business School, Nottingham Trent University

² Professor, Director of the Centre for Brexit Studies, Birmingham City University

Transnational education (TNE) allows foreign students to study for an award of a UK university without leaving their country of origin. The UK has been a world leader in TNE provision with 701,010³ registered TNE students and a net figure of approximately 385,000 TNE students in 2015/16. According to [HESA](#), in 2015/16 there were 74,965 students studying for an award of a UK provider in a country within the European Union and the majority of them were in Greece, Ireland, Germany, Cyprus, Spain, and Poland.

Despite the creation of the European Higher Education area, which facilitates the free movement of students and academic staff, “*individual governments of EU countries remain responsible for their education systems and are free to apply their own rules, including whether or not to recognise academic qualifications obtained elsewhere*”⁴. Some EU member countries, by being protective of their HE system, imposed obstacles and strict requirements for the academic recognition of foreign qualifications, including those obtained by TNE programmes. In contrast to the academic recognition of higher education qualifications, under the directive [36/2005](#) EU member states are obliged to follow a more standardised approach in recognising the professional rights of qualifications obtained in others EU countries as well as through TNE arrangements. For several EU countries (e.g. Greece, Italy, Cyprus) it was this legislation that facilitated the recognition of professional rights for TNE qualifications and contributed to the expansion of TNE in the EU.

The most typical example is Greece, the major host country of UK TNE in the EU with 15,835 students in 2015/16. For many years (e.g. from the early 1990s to 2014), the Greek government [refused](#) to comply with the EU directive (36/2005) which allowed the recognition of professional rights of graduates who have completed a TNE programme. Even after 2010, when the Greek government was forced to adopt the EU directive, Greece did not effectively recognise any TNE qualifications. It was not until 2015 when the first TNE graduates had their professional rights recognised in Greece. This came as a huge relief to approximately 50,000 TNE graduates and their families who were waiting, some of them for more than five years, having their professional rights recognised. This example shows that if it had not been for EU legislation, it is very unlikely that UK TNE would have ever existed in Greece on the scale it does today.

If UK leaves the EU, the recognition of UK TNE qualifications might be subject to national policies of member states, and not the EU directive for recognising of professional rights, which might affect the recognition of professional rights for TNE graduates, like the example of Greece shows. Of course, one needs to acknowledge and praise the efforts of the UK NARIC to establish bilateral agreements for the recognition of qualifications with NARICs in different countries. However, the uncertainty about the impact of Brexit on matters like the recognition of TNE qualifications creates mixed expectations for existing and prospective students about the future of UK TNE in EU. Indicative of these mixed expectations is what Mr Yannis Ververidis, Principal of City College – an international faculty of the University of Sheffield -, says about the impact of Brexit: “*Brexit has created some kind of concern but nothing spectacular. The main worries were associated with possible implications of Brexit*

³ This figure includes the students registered for the Oxford Brookes University/ACCA BSc (Hons) Degree in Applied Accounting. These students have up to ten years to complete the programme and are reported in the student statistics for each of these years. As such, the TNE student numbers of Oxford Brookes are artificially high, thus distorting the total number of UK TNE students. Hence, the net figure, which is excluding the Oxford Brookes TNE students, is used as a more accurate reflection of the UK TNE market. According to [UniversitiesUK](#), in 2015/16, the Oxford Brookes University students, registered on the BSc/ACCA programme, were 45% of the total UK TNE students.

⁴ http://europa.eu/youreurope/citizens/education/university/recognition/index_en.htm

to the recognition of the degrees on the one hand and the unknown day after on the other. There is no evidence that it had an effect on recruitment. On the contrary, it has created a significant worry to those who were thinking of going to UK to study. It might not have affected their final decision now but it looks like that it most probably will in the future especially if Brexit implications are visa restrictions, no access to student loans, and much higher fees.”

Additionally, similar uncertainty and mixed expectations exist amongst the TNE partners of UK HEIs. For example, Mr Ververidis, who is also the Secretary for the Hellenic Colleges Association, states: *“I think most of the [Greek] Colleges are waiting to see what might be the developments for the time being. However, they are definitely thinking about the alternatives [HEIs from other EU countries] and I expect that some of them sooner than other will start exploring other options”.*

Reflecting on the example of Greece, it explains how the outcome of the EU referendum had an immediate effect on creating mixed expectations amongst the key stakeholders of the UK TNE in EU. Considering the scale of UK TNE and its strategic importance for many UK HEIs, there is the need for further investigation on the expectations and perception of the impact of Brexit on UK TNE.

Brexit as an opportunity for UK HE

The potential for Brexit to disrupt the UK’s higher education relations with the EU should not overlook the fact that at a global level, structural shifts have been going on that will affect the position of UK HE, regardless of its future Brexit trajectory. As highlighted earlier, competition in international education has increased significantly over the past ten years, and a key feature of this has been the rise of East Asian HE institutions on the global landscape, with a Chinese university (Tsinghua University) now featuring in top ten for the world HE employability rankings for the first time⁵. Several EU and Asian countries have developed their national strategies and channelled significant volume of resources in becoming education and research hubs. As such, the growth of intra-regional mobility has been significant, particularly in East Asia, with China hosting over 330,000 foreign students during 2012 alone (target of 500,000 by 2020), Japan with a target of 300,000 inbound students by 2020, and Malaysia also positing itself as a regional educational hub.⁶

As a result, even if Brexit were not to happen, it is still very likely that the UK HE would see its inbound student mobility trends stagnate, if not to decline, because of the rise of new destination countries for international students. Therefore, Brexit could be seen as a “wake-up call” for UK HEIs to review their strategy in the context of the new international higher education landscape. UK HEIs need to consider carefully the macro and micro factors likely to affect their market segments. Any international strategic decisions need to reflect on evidence that goes beyond the typical recruitment-focused approach. For example, UK HEIs need to explore new international markets based on demographic trends and HE demand-

⁵ Four East Asian universities (University of Hong Kong, Peking University, University of Tokyo and Tsinghua featured in the top 20 for 2018) <https://www.topuniversities.com/university-rankings/employability-rankings/2018>

⁶ <http://monitor.icef.com/2015/11/the-state-of-international-student-mobility-in-2015/student-mobility-growth>

supply imbalances. Also, there needs to be consideration of new models of exporting education with the use of technology.

At the same time, Brexit could act as a catalyst for the rationalisation and, potential, consolidation of the UK HE sector. Following a period of rapid expansion - which has included the emergence of new non-traditional providers as well as new universities – several UK HEIs seems to be “stuck in the middle”, struggling to develop elements of differentiation to secure a sustainable future. Brexit and the need to review institutional strategies could accelerate harsh, but vital, decisions that otherwise would have been difficult to take.

Gaps in research evidence

The availability of research evidence is a crucial prerequisite for developing appropriate responses to the different challenges of Brexit, including those that have not received much attention up to now, and there are significant gaps in our knowledge in this regard.

Below, we outline four areas where further research is needed:

- **Expectations and perceptions of EU students currently studying in the UK.** This would help identify the emerging word-of-mouth for UK HE after the initiation of the Brexit process. As such it could be a lead indicator for the future trend of EU student inbound mobility in the UK.
- **Measure and monitor the impact of the Brexit.** Considering the unclear and often contradicting claims about the impact of Brexit, it would be of great value to conduct an HE industry-wide survey to capture the real impact on each of the three areas likely to be affected (e.g. student mobility, research, and staff recruitment). Repeating the survey once every six months would enable the development of a barometer for the impact of Brexit on UK HE.
- **Factors affecting the decision of prospective EU students to study in the UK.** There is the need to measure the sensitivity of EU prospective students on factors such as the fees, rankings, and national evaluations (e.g. TEF, NSS). This would enable UK HEIs to develop appropriate strategies for hedging the risk of a decline in inbound EU student mobility.
- **Explore the EU legal framework to identify potential target countries where UK HEIs can develop appropriate organisational structures (i.e. joint ventures) and hence secure uninterrupted access to the EU research funding programmes.** There is speculation, and variant expectations, about the range of potential policy response options available to UK HEIs in response to a possible exclusion from EU research funding programmes. Mapping the HE legal framework in each EU country against the different types of TNE would enable UK HEIs to identify and develop effective strategies for securing uninterrupted access to the EU research funding programmes.