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Brexit, EU Students and UK Higher Education

Broken Bridges

Vassiliki Papatsiba
and Simon Marginson

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Bloomsbury Higher Education Research

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Contents

Figures

Tables

Series Editor's Foreword

Brexit, EU Students and UK Higher Education is the tenth book to be published in the Bloomsbury Higher Education Research book series. This series brings to the public, government and universities across the world the new ideas and research evidence being generated by researchers from the ESRC Centre for Global Higher Education.[1] The Centre for Global Higher Education (CGHE), a partnership of researchers from eleven UK and international universities, is the world's largest concentration of expertise in relation to higher education and its social contributions. The core focus of CGHE's work, and of the Bloomsbury Higher Education Research Series, is higher education, especially the future of higher education in the changing global landscape.

Each year this mega-topic of 'higher education' seems to take on greater importance for governments, business, civil organizations, students, families and the public at large. In higher education, much is at stake. The role and impact of the sector is growing everywhere. More than 265 million students enrol at the tertiary level across the world, four-fifths of them in degree programmes. Over 42 per cent of school leavers now enter some kind of tertiary education each year, though resources and quality vary significantly. In North America and Europe, that ratio rises to four young people in every five. Universities and colleges are seen as the primary medium for personal opportunity, social mobility and the development of whole communities. About 3 million new science papers are published worldwide each year, and the role of research in industry and government continues to expand everywhere.

In short, there is much at stake in higher education. It has become central to social, economic, cultural and political life. One reason is that even while serving local society and national policy, the higher education and research sectors are especially globalized in character. Each year 6.5 million students change countries to enrol in education for a year or more, and almost one quarter of published research papers involve joint authors across national borders. In

[1] The initials ESRC stand for the Economic and Social Research Council. Part of the original ESRC funding that supported the Centre for Global Higher Education's research work was sourced from the Higher Education Funding Council for England (HEFCE), and subsequently Research England, one of the successor bodies to HEFCE, continued to provide financial support for the research.

some countries fee-based international education is a major source of export revenues, while many countries in the global South lose talent in net terms each year. Routine cross-border movements of students, academics and researchers, knowledge, information and money shape not only nations but the international order itself.

At the same time, the global higher education landscape is changing with compelling speed, reflecting larger economic, political and cultural shifts in the geostrategic setting. Though universities in the United States (US) and the United Kingdom (UK) remain strong in comparative terms, the worldwide map of power in higher education is becoming more plural. A larger range of higher education practices, including models of teaching/learning, delivery, institutional organization and system, are now shaping higher education. Anglo-American (and Western) norms and models will be less dominant in future and will themselves evolve. Rising universities and science in East Asia and Singapore have changed the flow of knowledge. Latin America, South East Asia, India, Central Asia and the Arab nations have a growing global importance. The trajectories of education and research in sub-Saharan Africa are crucial to state-building and community development.

All of this has led to a more intensive focus on how higher education systems and institutions function and their value, performance, effectiveness, openness and sustainability. This, in turn, has made research on higher education more significant – both because it provides us with insights into one important facet of the human condition and because it informs evidence-based government policies and professional practices.

CGHE opened on 1 November 2015 and the main ESRC award which governed its funding finished on 31 May 2024, though the centre continues its research work, publishing and academic discussion of higher education. The centre investigates higher education using a range of social science disciplines, including economics, sociology, political science and policy studies, psychology and anthropology, and a portfolio of quantitative, qualitative and synthetic-historical research techniques. It has conducted seventeen discrete research projects variously of one to eight years' duration, and smaller projects, and has involved more than forty active individual researchers. Over its eight-year award, it was financed by about £10 million from the UK Economic and Social Research Council, partner universities and other sources. Its UK researchers have been drawn from the Universities of Oxford, Lancaster, Surrey, Bath, Birmingham, Sheffield and University College London. The centre headquarters is at Oxford. Its affiliated international researchers have included Hiroshima University in Japan, Shanghai

Jiao Tong University in China, Lingnan University in Hong Kong, Cape Town University and the University of Joannesburg in South Africa, Virginia Tech in the United States and Technological University Dublin. CGHE also collaborates with many other researchers in seminars, conferences and exchange of papers. It runs an active programme of global webinars.

The centre has a full agenda. The unprecedented growth of mass higher education, the striving for excellence and innovation in research universities and the changing global landscape pose many researchable questions. Some of these questions already figure in CGHE research projects. For example: What are the formative effects on societies and economies of the now much wider distribution of advanced levels of learning? How does it change individual graduates as people? What does it mean when half or more of the workforce is higher educated and more mobile; and when confident human agency is widely distributed across civil and political society in nations where the main experience has been colonial or authoritarian rule? What does it mean when many more people are steeped in the sciences, many others understand the world through social sciences or humanities lenses and a third group are engaged in neither? And what happens to those parts of the population left outside the formative effects of higher education, and the social distinctions it provides? What is the larger public role and contribution of higher education, as distinct from the private benefits for and private effects on individual graduates? What does it mean when large and growing higher education institutions are the major employers in many locations and help to sustain community and cultural life, almost like branches of local government while linked to global cities across the world? And what is the contribution of higher education, beyond helping to form the attributes of individual graduates, to the development of the emerging global society?

Likewise, the many practical problems associated with building higher education and science take on greater importance. How can scarce public budgets provide for the public role of higher education institutions, for socially equitable access and research excellence, at the same time? What is the role and limits of family financing and tuition loan systems? What is the potential contribution of private institutions, including for-profit colleges? In national systems, what is the best balance between research-intensive and primarily teaching institutions, and academic and vocational education? What are the potentials for technological delivery in extending access? What are the transformative implications of generative AI for the curriculum and learning, assessment, institutional

administration and research? What is happening in graduate labour markets, where returns to degrees are becoming more dispersed between families with differing levels of income, different kinds of universities and different fields of study? Do larger education systems provide better opportunities for social mobility and income equality? How does the internationalization of universities contribute to national policy and local societies? Does mobile international education expand opportunity or further stratify societies? What are the implications of populist tensions between national and global goals for higher education and research? And always, what can national systems of higher education and science learn from each other, and how can they build stronger common ground?

In tackling these research challenges and bringing the research to all, we are very grateful to have the opportunity to work with such a high-quality publisher as Bloomsbury Academic. In the book series, monographs are selected on the basis of their relevance to one or more areas of higher education policy, management, practice and theory. Topics range from teaching and learning and technologies to research and its organization; the design of national higher education systems; the public good role of higher education, social stratification and equity, institutional governance and management; the cross-border mobility of people, programmes and ideas; and global geopolitics in higher education and science. Much of CGHE's work is global and comparative in scale, drawing lessons from many different countries: the centre's cross-country and multi-project structure allows it to tap into the increasingly plural higher education landscape. The book series draws on authors from across the world and is prepared for relevance across the world.

CGHE places special emphasis on the relevance of its research, on communicating its findings and on maximizing the usefulness and impacts of those findings in higher education policy and practice. CGHE has a relatively high public profile for an academic research centre and reaches out to engage higher education stakeholders, national and international organizations, policymakers, regulators and the broader public in the UK and across the world. These objectives are also central to the book series. Recognizing that the translation from research outputs to high quality scholarly monographs is not always straightforward – while achieving impact in both academic and policy/practice circles is crucial – monographs in the book series are scrutinized critically before publication, for readability as well as quality. Texts are carefully written and edited to ensure that they have achieved the right combination of,

on one hand, intellectual depth and originality, and, on the other hand, full accessibility for public, higher education and policy circles across the world.

Simon Marginson
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Summary and Acknowledgements

The Brexit decision in 2016 has brought about a profound transformation in UK higher education, with the decline in EU engagement reshaping the sector in many areas including recruitment of academic staff, research collaboration, university facilities and the mix of students in British institutions. This study focuses especially on the declining diversity in the student body and its educational, social and economic consequences in the UK.

Before the severance triggered by Brexit was implemented, non-UK students from EU member countries entered UK higher education institutions in two ways: through the subsidized Erasmus+ mobility scheme, whereby European students spent part of their degree programmes in different European countries, and through the full enrolment of non-UK EU students in UK degree programmes. Under the terms of EU membership, the latter students paid UK-level fees rather than international student fees and could take out tuition loans to cover their fees on the same basis as UK citizen students, with repayment occurring on the basis of income earned after graduation. Through these two routes European students built up a large presence in the UK and this was unanimously seen as a win-win outcome – despite the prevalence of public concerns about the level of permanent migration and of refugee entry, there was no evidence of resistance to the presence of European students as temporary entrants. Nevertheless, after Brexit, when the then British Conservative government responsible for implementing the withdrawal started a new international mobility scheme enabling British students to study at various higher education institutions internationally or work abroad, the Turing Scheme, that same government refused overtures from the EU to start a new mobility scheme whereby EU-citizen students could enter the UK. Meanwhile, the number of EU-citizen students enrolling in British degrees tumbled dramatically after the home-equivalent places shut down in 2021.

The study draws on a 2017–19 ESRC-funded research project that involved 127 participants from twelve universities in the four UK nations, including institutional leaders, senior staff, administrators, academics, and student and governing body representatives. Their insights shed light on the complexities

of Brexit, the overlapping and far-reaching consequences and the challenges of disentangling Brexit effects from broader changes and national policies affecting higher education. They reveal mounting pressures on multiple fronts, including urgent financial concerns; questions about the 'size and shape' of the sector; and more nuanced, aspirational considerations regarding the values, purposes and intrinsic nature of higher education. The evidence reviewed here especially focuses on the consequences of Brexit for the engagement with European students. The research highlights the devastating impact of Brexit on the higher education sector, with nearly all participants expressing grave concerns about the decrease in EU student demand for UK higher education places and the educational effects on the student mix. Senior leaders expressed anxiety about the level of risk for the sector and their institutions, particularly in relation to the implications for income. Participants also discussed the threat to diversity and quality, increased competition for scarce resources and talent between UK universities and a weakened global position for UK universities. One feared consequence was that the higher education sector would become more 'insular' and 'inward-looking'. Lower-ranked universities were predicted to be hit hardest by the compound impacts of Brexit, alongside their pre-existing issues and problems within the hierarchical sector.

The interviews provide exceptional insights into the way actors in UK higher education see the world, read the changing conditions in which they work, understand their responsibilities and respond proactively as needed – and also how these factors vary according to nation, institutional type, discipline and position within the institution. These data make a larger and long-term contribution to higher education studies: their value is not limited to understanding the Brexit issues alone.

Indeed, the book sheds light on issues that uncomfortably bring together multiple risks and threats to UK universities, which represent a key driver of national prosperity and an aspect of national life. These stem from a combination of influences, intersections and pressures, including state regulation, market competition, managerial authority and corporate interests. The tuition fee-dependent funding model, relying heavily on student volume, is a central concern. Moreover, UK universities are deeply embedded in the political landscape, making them vulnerable to shifts near home as well as from further afield. They are subjected to national policies and influenced by politics as well as by broader geopolitics, reflecting the UK's position as a world leading higher education system. By examining these

tensions and complex influences, the book illuminates a period of significant political change that has introduced uncertainty into the landscape in which universities operate.

Some participants in this study had begun to view this through the lens of 'existential' risk, an expression that has come to dominate in recent years. The endemic uncertainty has not only sparked concern about Brexit-related changes but also brought to the forefront the multitude of challenges that higher education institutions face. Although Brexit and its effects on universities merit their own analysis, a task that this book undertakes in part, Brexit also serves as a catalyst, prompting university actors to project into an uncertain future and articulate concerns that go beyond typical 'business as usual' rhetoric. The book provides evidence of discussions that break out of the academic echo chamber and bring boardroom discussions into the public square. Brexit uncertainty also pushed universities to grapple with fundamental questions about their purpose and identity in a rapidly evolving landscape. The book reveals how institutions are seeking to define a mission that transcends mere business considerations as they navigate complex financial and demographic challenges. It also highlights the resilience of the higher education sector, showcasing how universities are adapting to change while maintaining hope for the future.

In relation to Brexit and European students, the study reveals that people in UK universities have three distinct perspectives on EU students: as a source of revenue, as a promoter of diversity and quality and as a subject of competition with other UK universities. These discursive framings highlight how Brexit is a major disruption to UK higher education with far-reaching consequences and how the negative effects overlap and compound one another. As the sector emerges from the pandemic and navigates through the most difficult funding setting since the 1990s, the disruptive effects have become more tangible in all three dimensions. Brexit has changed the student demographics, dramatically in some institutions, with the expected implications for academic quality, diversity and competition. These effects are expected to continue impacting the sector for years to come. The danger facing UK higher education is that in combination with the declining value of the domestic student fee and ceilings on full-fee international students, the breaking of ties with Europe will render the sector both poorer and more insular, trapped within shrinking horizons. The findings of the study underscore the urgency for universities to develop collaboration strategies to mitigate Brexit's negative impact on higher education. Repairing

and rebuilding bridges with Europe must be part of any post-Brexit strategy designed to enhance academic viability, quality and reputation.

* * * * * * * * * * *

We warmly thank Ludovic Highman (project organization and interviews) and Xin Xu (data management and analysis) who worked on the project as postdocs, Alex Hetherington who assisted with the compilation of the case studies in Chapter 7 and William Locke who took part in some interviews. We are also very grateful to Al Bell and Saranya Kalathi at Bloomsbury Academic, and Luke Taylor at the University of Oxford who facilitated the application to UKRI for Open Access publishing.

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1

Introduction

The issues at stake

The UK made the decision to leave the European Union (EU) in a referendum on 23 June 2016 and exited the EU in January 2020. Before the 2016 referendum, the EU student presence in UK higher education was a vibrant feature of UK university life and a prime source of learning for UK students and talent for the country. It took time for the full separation triggered by Brexit to be implemented, but EU student enrolment sharply declined in the first year of the full post-Brexit regime in higher education in 2021–22.

In the previous year, in 2020–21, there had been 66,880 new students from EU countries entering UK institutions. In 2021–22, that total dropped to 31,400, less than half. EU students were 6.0 per cent of all new students in UK higher education the year after the Brexit referendum in 2017–18, but 2.4 per cent of new students in 2021–22 (HESA, 2024). At the same time, EU students were no longer participating in UK institutions through the EU's much-lauded Erasmus+ programme, and the entry of EU-citizen doctoral students was increasingly inhibited by the uncertainty about the UK's future association with the European Horizon research programme.

Until the full implementation of Brexit, UK higher education had been an increasingly popular study destination for EU students. Between 2012 and 2016 (as seen in Table 1.1), there was a notable increase year after year, with EU student applications peaking at 51,850 in 2016 – the year of the Brexit referendum. Despite the Brexit vote and prolonged uncertainty, the attractiveness of UK higher education remained resilient between then and 2021–22, while EU students still enjoyed similar rights to UK students: paying tuition at UK rates (e.g. £9,250 per full-time year in English Higher Education institutions) and accessing tuition loans that could be paid back using later earnings in the workforce. However, 2021 marked a considerable drop in new EU student

applications, as new students found themselves facing full international student fees, averaging £22,000 per annum, that had to be paid prior to enrolment. Following Brexit, EU students also face bureaucratic hurdles stemming from migration policy. They must obtain a student visa (costing £490) for studies longer than six months and pay an annual healthcare surcharge of £470, as the UK no longer accepts European Health Insurance Cards. These requirements mark a significant change from the previous system, where EU citizenship alone granted study and work rights in the UK.

As the academic year progressed in 2022, the admissions body UCAS (University and College Admission Service) noted a 40 per cent drop in EU student applications across undergraduate programmes for the 2021 end-of-cycle (see Figure 1.1).

It was not a surprise. It had been widely expected that EU students would be deterred from UK degrees by full international student fee rates, migration restrictions and the end of free movement under EU rules, and perhaps a perception of a less welcoming UK.

The striking impact of Brexit on the pattern of student mobility, and the future composition of British universities, is captured in UCAS application data of 30 June 2021. Table 1.1 shows a sudden decrease from 49,650 in 2019, not far below the 2016 high point, to only 28,400 in 2021. Note that EU students could apply directly to UK universities for an undergraduate place from 2021 onwards without going through UCAS, but the majority apply through UCAS and the sudden change in 2021 was very significant.

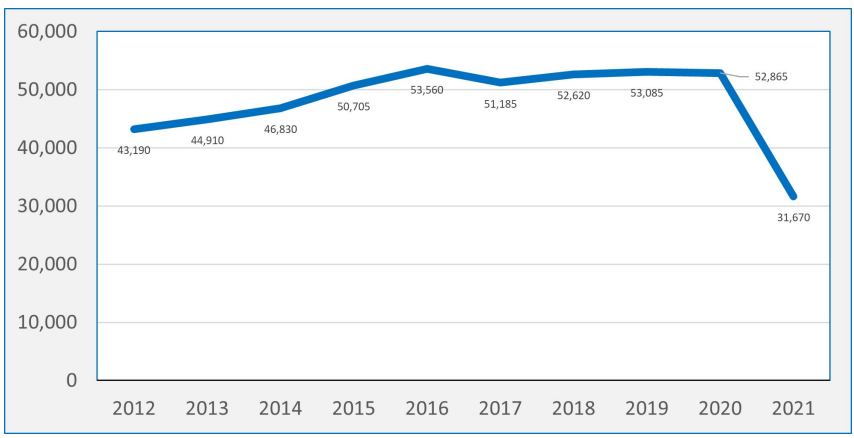

Figure 1.1 EU student applications across undergraduate programmes, 2012–21 end-of-cycle. *Source*: Authors, original data from UCAS.

Table 1.1 EU Student Applications Made to UK Higher Education between 2011–12 and 2020–21 (30 June Deadline)

Number of applications	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
1 application	4,210	4,270	4,240	4,240	4,300	4,410	4,400	4,150	3,750	2,480
2 applications	1,640	1,700	1,640	1,750	2,040	2,110	2,480	2,800	2,260	1,130
3 applications	1,820	1,930	1,890	2,130	2,110	2,100	2,290	2,350	2,240	1,320
4 applications	3,460	3,540	3,480	3,680	3,770	3,520	3,670	3,700	3,550	2,410
5 applications	30,390	31,920	34,130	37,130	39,630	37,120	37,290	37,650	37,340	21,070
total	41,510	43,360	45,380	48,930	51,850	49,250	50,130	50,650	49,650	28,400

Source: Authors, original data from UCAS.

The end of the 2022 cycle confirmed the earlier picture, as shown by the UCAS graph below. There were 24,015 EU applicants and 11,365 accepted applicants. The number of end-of-cycle applicants had fallen from the high point of 51,850 in 2016, the year of Brexit, to 24,015 in 2022. This was a drop of 53.7 per cent. These numbers were the sharpest direct consequence of Brexit in UK higher education.

Collateral damage of Brexit

Brexit in general, and in relation to EU students in the UK, has been a change of historic proportion, transforming UK higher education and not for the better, as Chapter 3 shows. While there has been much commentary on Brexit and higher education, there has been relatively little social science research on phenomena associated with it, and commentary has focused mostly on research links to Europe (particularly, the question of the UK's engagement after Brexit with the EU's Horizon Europe research programme). There has been less attention to the falling away of European students in the UK.

Before the severance triggered by Brexit was implemented, non-UK students from EU member countries entered UK higher education institutions in two ways: through the subsidized Erasmus+ mobility scheme, whereby European students spent part of their degree programmes in different European countries, and through the full enrolment of non-UK EU students in UK degree programmes. Under the terms of EU membership, the latter students paid UK-level fees rather than international student fees and could take out tuition loans to cover their fees on the same basis as UK citizen students, with repayment occurring on the basis of income earned after graduation. Through these two routes, European students built up a large UK presence that was unanimously seen as a 'win-win' outcome.

Despite public concerns about the level of permanent migration into the UK, one of the factors that triggered support for a Leave vote in 2016, and also opposition to refugee entry, there was and is no evidence of resistance to the presence of European students as temporary entrants. In that sense, the barriers to European students erected by Brexit are collateral damage from the process, best understood as an unintended consequence. The political significance of this effect may well be minimal, as despite the fact that there was no public resistance to their presence, neither was there evident strong support. There has probably been more consternation about UK students missing out on study abroad

opportunities after the departure of the UK from Erasmus. Increasingly too, a conflictual representation of different student cohorts has emerged, with the media reflecting the sentiment that non-UK students are taking up places that could go to UK students. Regardless, the barriers to student mobility post-Brexit are a 'lose-lose' outcome for all parties, whether in Europe or the UK.

There are many aspects to this collateral damage. Appraisal of the change in the composition of the student body would be partial, limited and one-sided if it solely revolved around the dimensions of revenue and students as a unit of resource, despite the vital significance of these matters. Money is a primary immediate concern for the higher education sector, certainly, but Brexit also triggered a demographic shift that runs deep within UK higher education. Internationalization has long been a crucial dimension of higher education in the UK, and a factor positioning the UK strongly at the global level (Chapter 3). The decline in EU student entry has a significant educational and social impact on the experiences of both home and international students, as well as harming the sector's national and international reputation. Declining numbers of European students in first degrees and Master's programmes also affect the pipeline into doctoral studies and the UK research system. There are immediate effects and also a longer-term smouldering impact that will play out over decades unless there is an intensive re-engagement with Europe.

Understanding the effects

This study sheds light on the full array of these changes and their implications for universities. It is especially well positioned to inform an appraisal of the effects of the decline in EU student enrolment in UK higher education post-Brexit. It draws on a unique time-sensitive and historically important set of data collected in 2017–19, the first three years after the June 2016 Brexit referendum, and just prior to the final Brexit severance, consisting of institutional reflections on Brexit and the expected institutional responses in anticipation of the decline in European students once Brexit was completed. The interviews, reported in detail in Chapters 4–7, have proven to be remarkably perspicacious in anticipating how the post-Brexit climate would unfold in UK higher education, though the funding position of the universities almost a decade after the 2016 referendum is even worse than expected by most of the interviewees in the study.

The data were gathered during an ESRC (Economic and Social Research Council) funded study, which included 127 participants from twelve universities

in the four UK nations: England, Scotland, Northern Ireland and Wales. These participants were predominantly institutional leaders, including senior university executives, senior administrators and academics, with some student and governing body representatives also included.

The withdrawal of the UK from the EU has ended the freedom to work, study and live between the two entities. The abolition of home fees and access to student loans, along with new visa requirements, has extensively modified the landscape within which EU students make their study choices. According to Studyportals (2021), EU student perceptions of the UK as a desirable study destination have worsened, with 68 per cent of surveyed students in 2020 feeling that Brexit had negatively affected the UK's attractiveness. This is very disappointing but in the circumstances, not at all surprising.

A decrease in EU student demand for UK higher education places was foreseen by nearly all participants in the research discussed in detail in Chapters 4–7 of this book. The majority of the interview participants had senior roles in their universities and they knew what they were talking about. Their views, projections, concerns and mitigating strategies matter. Their high-level and frontline experience of higher education and research as captured in our data provides deep insights into the complexities of the current situation in UK higher education and the overlapping and far-reaching consequences of Brexit.

As we further show later in this book, the unprecedented drop in EU students in UK higher education and the resulting change in demographics are notable effects in themselves. However, these drastic changes also intersect with research culture, performance and quality, as well as the UK's attractiveness to EU researchers and academics. Each of these distinct effects and also the compounding effects need examination. As noted, it is not just about the immediate quantitative changes in student numbers and institutional finances.

Only a large-scale qualitative study has the scope and depth needed to provide an authentic insight into each of the effects of Brexit and the way they intermesh and compound, reshaping the environment in which universities operate. Only expert witnesses can take us to the myriad impacts that lie beneath and beyond the numeric indicators.

Although the primary concern raised by our participants is a fall in EU student numbers, substantial topics of discussion explore the threat to diversity, increased (and on the whole unwelcome and unproductive) intra-national competition for scarce resources and talent among UK universities, as well as a weakened position globally for UK higher education.

The participants suggest that the narrowing of the diversity of the student body may impact academic quality and undermine the international reputation of UK universities, leading to the sector becoming more insular and inward-looking. Lower-ranked, less traditionally prestigious universities were expected to be hit hardest by the impacts of Brexit, combining with their pre-existing disadvantages within the hierarchical UK sector.

Contents of the book

This chapter continues with a brief outline of the ESRC-funded project that contributed the primary data used in the book. An outline of the key themes follows.

The next two chapters provide background and context for the main focus on Brexit and European students. Chapter 2 looks at international education and the UK. It reviews developments and issues in cross-border student mobility, including but not only in relation to Europe, in UK higher education and the world as a whole. As indicated, Chapter 3, which has been co-written with Dr Ludovic Highman who conducted most of the interviews in the twelve universities, summarizes the effects of Brexit across all areas of policy and practice in UK higher education.

Chapters 4–7 provide detailed data on the views of study participants concerning the implications of Brexit in relation to European students. The chapters look in turn at the effects of the expected decline in revenues from EU-citizen students (Chapter 4), the likely narrowing of diversity and downward pressures on educational quality (Chapter 5), the effect of Brexit in triggering a more intense competition for international students (Chapter 6) and case studies of these effects in each of the twelve individual universities in the study (Chapter 7). Chapters 4–7 benefited from Alex Heatherington's valuable research assistance during the early stages of this work.

Chapter 8 concludes with a discussion of the key issues and policy implications. Brexit has constituted only one of a number of policy changes in worldwide higher education that have destabilized or reduced international student mobility. The decline in student movement between Europe and the UK after Brexit was the first big shift in cross-border higher education but has not been the last. Several nations, including the UK in 2023 and 2024, have since reduced international student visas in response to domestic migration resistance – often couched as concerns about the crowding out of local students, or the

crowding out of national populations in housing markets and the use of public services. The global standoff between the United States and China has led to reduced research collaboration between the countries and impediments to visas for some Chinese doctoral students and students in other programmes who have been invited to American universities.

The internationalization of higher education, which only recently was generally supported across the world, has become more problematic for risk-averse governments. These governments are implementing measures to protect and safeguard their educational assets in the context of geopolitical tensions and new security agreements. Additionally, both within the UK and on a global scale, societies are confronting escalating challenges of political polarization and growing intolerance, which threaten social cohesion and democratic values (Papatsiba, 2024). Against this backdrop, including Brexit, the challenge for UK higher education is to rebuild support for international education and, as much as possible, to re-engage with Europe.

The study

This book reports part of a larger ESRC-funded project investigating the broader impact of Brexit on UK higher education, undertaken by the Centre for Global Higher Education (2017–19) (https://www.researchcghe.org/research/2015-2020/local-higher-education-engagement/project/brexit-trade-migration-and-higher-education/) and situated within the ESRC's UK in a Changing Europe programme. The project is further discussed in Marginson et al. (2020), Highman, et al. (2023).

The project sought to ascertain the perceived implications of Brexit for UK universities, the organizational capabilities they could deploy to address it and how consequences and responses might be inflected by institutional mission, status, resources, disciplinary mix and location. It asked questions about responses and consequences that can better be understood once placed within the parameters of the UK higher education system.

The data collected enable the construction of twelve nested case studies, entailing interviews and document reviews in twelve universities across the UK (see Table 1.2). These institutions were selected as a purposive sample that included a range of university in terms of nation, mission, degree of selectivity and research intensity. The team received ethics approval for naming the case study universities, where appropriate.

Table 1.2 Case Study Universities across the Four UK Nations

England	Coventry University, Durham University, The University of Exeter, Sheffield Hallam University, Keele University, University College London, The University of Manchester, SOAS University London
Scotland	The University of Aberdeen, The University of St Andrews
Wales	The University of South Wales
Northern Ireland	Ulster University

As noted, the data consisted of 127 interviews with senior executives, administrators, academic leaders, governing body members and some student representatives. Personnel from three disciplinary areas were included in order to track differential effects of Brexit: health/medical sciences, law/social sciences and chemistry/natural sciences. Around half of the academics interviewed occupied middle-level leadership positions, like head of department. The specifics of this distribution are described by Table 1.3:

Table 1.3 Distribution of Participant Roles

Senior executives (VC – DVC – PVC)	44
Academic leaders (Heads of Faculty or Department)	42
Senior administrators	23
Governing body	10
Students	8

The primary data collection took place between November 2017 and July 2018, with some additional data collection in early 2019 to complete the twelve cases.

The raw body of information collected amounted to approximately 500,000 words – a 1,200-page document of single-spaced text.

The interviews provide exceptional insights into the way actors in UK higher education see the world, read the changing conditions in which they work, understand their responsibilities and respond proactively as needed – and also how these factors vary according to nation, institutional type, discipline and position within the institution. These data make a larger and long-term contribution to higher education studies: their value is not limited to understanding the Brexit issues alone.

Methods

After the interviews were transcribed, a systematic coding process was initiated via NVivo. Initially, deductive codes were developed based on the research questions and interview protocol, leading to coding into two main topics: 'Brexit and differential effects', which included differential effects among institution types, disciplines and UK nations, and 'Implications and consequences of Brexit', which encompassed student enrolment, staffing, research positioning, financial sustainability, European, regional and local relations, and reputational impacts. However, upon closer examination of the data, it was revealed that the topic of students was just as dominant as research. This is evident from the word cloud that displays the distribution of terms across the entire dataset (Figure 1.2).

We decided to focus this book on EU students for three reasons. Firstly, the discussions related to students were significant in terms of quantity, as evidenced by the number of references made. Secondly, Brexit's direct impact on the status of EU students has had profound material effects, in the significant reduction in enrolments in the post-Brexit environment, as noted. Thirdly, there has been a

Figure 1.2 Word cloud displaying the distribution of terms across the entire dataset. *Source*: Authors.

lack of research on European students in UK universities, both prior to and since the Brexit referendum, despite there being an abundance of literature on other international students who have long paid full fees.

European students represent a unique demographic whose specific circumstances have been insufficiently considered. They share some cultural experiences with other international students, such as living and studying in a foreign country. However, they also enjoyed similar rights to UK students during the UK's EU membership, which provided them with a sense of security, protection and agency to exercise EU-citizen rights. This potentially led to higher levels of inclusion in the host society but also made them less noticed as foreigners. Within higher education, EU students were in a grey zone in the middle, neither international students nor home students. They were sometimes treated as international students in certain aspects while seen as home students in other ways. Universities often failed to extend their internationalization policies to this demographic group.

For the analysis focusing on EU students, the coding used was taken initially from the topic: 'Implications and consequences of Brexit'. Within this node, three sub-nodes were dedicated to students: 'EU students', 'non-EU international students' and 'UK students' – including 783 total references (527, 174, 82, respectively). Further analysis revealed that there was some overlap – many participants referred to multiple categories of students simultaneously during their interviews. The 'EU students' node in isolation contained about 50,000 words, roughly 10 per cent of the greater dataset. All 127 participants referred to EU students during the interviews. Figure 1.3 is a word cloud illustrating the distribution of terms within the 'EU Students' code:

The 'EU students' node of about 50,000 words underwent further analysis using a process of inductive coding. The coding took place over a period of eight months, enabling theme identification through close reviews of participant narratives. The approach was grounded in the data, and our long-standing acquaintance with the field of higher education studies supported the process of deeper meaning-making.

In the pursuit of a deeper analysis, the scope of the data was initially limited by focusing on a subsample of the fifteen participants who dedicated the most significant proportion of their one-hour interviews to discussing EU students. These fifteen participants were identified by using NVivo to visualize the proportional coverage of EU student coding in their interviews. The assumption was that the participants who spent the largest amount of time discussing EU students would also provide the most depth and richness. This approach was

Figure 1.3 Word cloud displaying the distribution of terms within the 'EU students' node. *Source*: Authors.

further justified by a cursory examination of the participants who discussed EU students the least, revealing far more brief mentions that easily fell under the themes derived from the more intensive and focused interviews on EU students.

Working with the interview data inductively, we identified three main themes that characterized the discussion of EU students within the data: the contribution of those students to total student numbers, the effects of their presence in relation to cultural diversity and educational quality and the consequences of the reduction in EU students for inter-university competition both in the UK and globally. To test how these broader themes were reflected throughout the remainder of the dataset, the original interviews were revisited and all references to these three themes related to EU students were collated. Corresponding quote bank documents were created and detailed analysis of each quote began. NVivo's word search functionality was used to complement identification of a comprehensive corpus of data on each theme.

The three key themes alongside a statement of their relative quantitative significance within the data are introduced below. Chapters 4–7 provide further qualitative analysis and contextualize these three themes within the twelve case studies of universities where the research was undertaken.

Snapshot of research insights

Key concerns: EU student numbers, diversity and competition

As noted, the research findings highlight key concerns: EU student numbers, diversity and competition within UK higher education institutions.

Institutional leaders and senior academics expressed their primary concern over the potential for Brexit to impact *EU student numbers* with implications for income, as students were often represented as 'units of resource'. Participants discussed the potential demographic shifts between home, EU and international students, and how the change could represent existential threats to institutions. They also discussed particularly vulnerable disciplines and departments, potential post-Brexit trends and the social responsibilities of higher education institutions. All 127 participants referred to EU student numbers. Chapter 4 provides more details.

The second most dominant concern was the impending threat of Brexit to *student diversity* through the loss of European students. Participants emphasized that the loss of EU students was undesirable because of the negative implications for diversity regardless of income concerns. A fall in the diversity of the student body was expected to impact both the student experience and academic quality, undermine the international reputation of UK universities and lead to the sector becoming more insular and inward-looking. This was an unexpected finding, as the research design did not invite participants to talk about these ideas. Despite this, it was one of the most prominent topics of discussion, with 83 out of 127 participants speaking about EU students and the implications for diversity in some way. Chapter 5 provides further details.

Competition between universities was the last major theme. This was expressed by participants in relation to the expected effects of Brexit on revenues, people (students and staff) and reputation. All of these factors contributed to intensifying competitive pressure between institutions within the UK higher education sector. Most participants noted that institutions with significant exposure to EU students would need to make up the numbers and this would set in train a situation where each was recruiting against all others. This theme brought to the surface the compounding effects where the UK's declining appeal to EU students met with research culture, performance, quality and reputation. Of the 127 total participants, 72 discussed the outlook for inter-institutional competition. Chapter 6 provides more details.

Although the study here presents the different themes separately for analytical purposes, there was much intersection between them. Some of the issues and challenges identified in this research existed prior to Brexit, but the scale of change brought about by Brexit has given them new urgency and added intensity. As such, this data presents an opportunity to revisit and take stock, disentangle the issues and consider the longer-term effects. Chapter 7 examines the intersection between the issues on an institution-by-institution basis, where there are both matters in common and also significant variations. Chapter 8 looks at the overall implications of Brexit, and the findings of the study, for higher education at both UK and global levels, and asks the question, 'where to now that Brexit is done?'.

Contributions of the book

Middle-range theory, theoretical pluralism and emergent understanding

When this study commenced, Brexit represented an unprecedented political event whose implications for higher education were largely unknown and unknowable. No existing theoretical framework could fully capture the complexity and uncertainty of this pivotal moment in international relations, or predict and comprehensively explain its ramifications for universities. Rather than imposing a rigid theoretical frame that might constrain our understanding from the outset, we adopted an open, exploratory approach that privileged the emergence of meaning from the field. Given that Brexit represented an unfolding historical event with uncertain trajectories, our decision to proceed without a predetermined theoretical framework reflected both scholarly humility and methodological pragmatism, the latter imposed by the need to capture time-sensitive observations as they emerged. As Marginson (2016) notes, higher education research must sometimes privilege empirical observation over theoretical prediction when studying novel phenomena. Brexit represented such a case – a complex political event whose effects on universities could not be fully anticipated through a specific conceptual framework. Brexit's unique historical significance required us to foreground participant voice while maintaining theoretical flexibility.

Our identification of three distinct framings of EU students – as units of resource, as desirable diversity and as objects of competition – emerged from

interview data analysis and proved generalizable across institutions. This approach exemplifies the value of middle-range theorizing, which Merton (1968) advocated as particularly valuable for social research. Middle-range theories are empirically grounded and corrigible – capable of being modified based on new evidence – while maintaining sufficient generalizability to draw meaningful conclusions beyond individual cases. As Trowler (2012) argues, middle-range theories often prove more useful than grand theoretical frameworks when studying institutional change in higher education, as they allow researchers to remain sensitive to context while still providing analytical purchase. By avoiding predetermined theoretical predictions, we could identify patterns inductively across institutions while remaining sensitive to local contexts and variations, thus providing insights into how universities navigate major political disruption.

Our approach acknowledges what Clark (1973) termed the 'bottom-heavy' nature of higher education systems, where meaning and practice emerge significantly from the ground up. By recording the voices of institutional leaders and decision-makers as they grappled with Brexit's implications in real time, we captured how universities made sense of unprecedented change as it unfolded. These testimonies provide both historical documentation and theoretical insights into how universities interpret and respond to major geopolitical disruption.

These empirically grounded findings can now be interpreted through multiple theoretical lenses, enriching our understanding of how universities navigate policy changes in international relations that affect resource allocation, diversity values and competitive dynamics. This epistemological choice aligns with established traditions in higher education studies (Tight, 2012) that value theoretical pluralism – the use of multiple theoretical lenses to interpret complex social phenomena.

The three distinct framings of EU students identified in this study – as units of resource, as desirable diversity and as objects of competition – offer theoretical insights into how universities navigate major political disruption in key international relations with unknown ripple effects. While a comprehensive theoretical analysis lies beyond our scope, these empirical findings open up several important lines of inquiry. They demonstrate how Brexit disrupts: established patterns of capital accumulation (Bourdieu, 1986; Marginson, 2008); institutional legitimacy-seeking behaviours (DiMaggio and Powell, 1983); market dynamics in UK higher education (Brown and Carasso, 2013); institutional ecological systems (Clark, 1983); and processes of knowledge

production (Gibbons et al., 1994) with academic programmes threatened to discontinue.

Our findings contribute to several key theoretical debates in higher education studies: the tension between neoliberal and social justice orientations (Naidoo and Williams, 2015); the privileging of Western knowledge systems and students (Shahjahan and Morgan, 2016); the ideal of the cosmopolitan university (Rizvi, 2014); the politics of academic mobility (Bauder, 2020); and multi-level and nested competition in global higher education (Marginson, 2006). While distinct, these theoretical perspectives intersect to reveal how Brexit fundamentally reshapes not just student mobility patterns and international student demographics as isolated dimensions but their intersections with the institutional identity, mission and position of UK universities within global knowledge networks.

Diverse sites and inductive data analysis

In the sweeping scale of data collection in diverse sites, coupled with inductive data analysis, this study continues a long tradition in higher education studies. Consider, for example, the case study approach in Clark's (1998) review of the emerging 'entrepreneurial university' in multiple countries; the 'enterprise university' study of neoliberal system reform in seventeen contrasting universities in Australia by Marginson and Considine (2000); and Shattock's and Horvath's (2019) study of UK governance of higher education, which likewise developed a purposeful sample of contrasting institutions while being open to what it would find.

The disadvantage of such an approach, compared to a narrower focused inquiry based on a theorized question, is that by casting the net wide, it takes in a great deal of material without exhaustively investigating a single aspect. The advantage of the approach is that it maximizes openness to the empirical terrain and to the multiple voices within it, while maximizing the space for new insights and interpretations to develop. Brexit was an unprecedented event with many potential flow-on effects, as yet untheorized. The inductive approach ensured that we would not pre-empt what we would find. Our interview questions were sufficiently open-ended to allow phenomena and opinions to emerge freely. This enabled us to maximize the possible learning from the participants.

The inductive method enabled us to identify the three broad themes that have shaped this book. An approach using deductive codes might have hidden one

or more of these themes. Likewise, a discipline-specific approach – for example solely psychological (focusing on emotions and cognitions in response to Brexit), or political economic (solely focusing on the effects on university bottom lines, and relations of competition) – would have missed key aspects.

Higher education studies

The worldwide scholarly field of higher education studies is a sub-field within educational studies with its own journals and conferences. It is concerned with higher education teaching and learning; research and knowledge; institutional administration, management and governance; national policies, funding, system design and system coordination; and cross-border relations and global phenomena in the sector. This book contributes to research on higher education across a range of domains of inquiry.

It adds to the literature on cross-border student mobility in general (see Chapter 2), and especially research on the effects of sharp changes in student mobility patterns, European student mobility including the Erasmus+ programme and the movement of doctoral students, and related studies of phenomena including the nexus between financing and student mobility, global competition in international education and the workings of student and cultural diversity in and through international education.

The book also augments the body of research on multi-scalar connections and relations in higher education (Marginson, 2022) by focusing on the intersection of global/regional relations, national politics and policies and the local institution, in the context of Brexit. The effects of Brexit in relation to European students in local British institutions are a striking example of the point repeatedly made by globalization theorists that in the connected global setting, changes in one geo-social scale can flow readily into others. In 2016, tensions between the nation-state and regional EU governance spilled over into multiple effects in the local scale of higher education. Such tensions and effects could happen in any EU member country, and the British case informs other European higher education systems.

In addition, *Brexit, EU Students and UK Higher Education* draws together a large body of data that illuminates key themes of higher education research everywhere, such as university management and organization; academic work; the internal institutional relations between academic disciplines and managers; and the interface between internationalization, the national-cultural composition

and academic composition of the student body and the prestige of the university. How leaders read the changing conditions in which they work, how they read trends and prioritize in response; how they strategize and act inside and outside the university: these are universal questions. The tension in the twelve case study universities between the goal of maintaining and increasing student numbers, and the goal of protecting and enhancing educational (and student) quality, is a perennial issue in higher education all over the world. Likewise, the discussions here of institutional competition and organizational behaviour, and the ambiguity and malleability of diversity, speak to higher education well beyond the UK.

Closer to home, the book augments academic knowledge of UK higher education in the present era. It adds to the small literature on higher education and Brexit – see Chapter 3, and particularly Finn (2018), Highman et al. (2023) and Lohse (2024) – but its contribution to scholarship on UK higher education is larger. The present era in the sector's history began when the full marketization of domestic student education was implemented in 2012, and student tuition, rather than government funding, became unequivocally the principal source of resources for higher education (see Chapter 2 and Chapter 8). In this period, the corporate freedoms and responsibilities of institutions and their manager-leaders have advanced, but the financial settings have become much more difficult. The book offers successive glimpses into how senior university personnel read and respond to their financial settings in the wake of an existential shock; though those settings have worsened since the research: at the time of writing, UK higher education faced its greatest financial crisis since the 1990s.

This book provides insights into the prevailing management and financing of British institutions, their interpretation of mission and purpose, their institutional positioning and identities, their understanding and handling of inter-institutional competition for students and for prestige, their strategies and priorities, their approaches to uncertainty and risk and their mood and resilience. By interviewing a significant number of senior leaders and managers from a structured sample of institutions, the research ensured that insights in these areas would both represent the position of their specific institutions and also be suggestive in relation to the national UK system as a whole.

Brexit is a uniform change that was applied to a differentiated system, creating the forms of a natural experiment. The present study has allowed the variegated effects to be observed, especially in the detailed institutional cases in Chapter 7. The selection of a range of UK institutions with differing nations, missions, status and resources facilitates detailed exploration of and comparison within both the

four-nation configuration of higher education in the UK and the stratification of the British system. Social and institutional stratification are core preoccupations of sociology and of great interest in higher education studies worldwide. The UK higher education system is an exemplar system whose developments can be broadly influential and are closely watched, and in the UK the interaction of stratification and competition is especially transparent. *Brexit, EU Students and UK Higher Education* identifies aspects of the stratification in higher education in a key national case, enabling us to better understand the reciprocal interplay of hierarchy, funding, policy, institutional management, and map the perpetual competition for university prestige.

Insights for policy and practice

Brexit, EU Students and UK Higher Education also has multiple implications for policy and higher education practice. The shock of Brexit set new conditions in train, created new gaps in capacity and resources and many new challenges for leaders at the top and middle of their institutions. This book does not set out to prescribe policy and practice, but it provides background on issues specific to European students and the strategic implications of those issues, as well as problems of student diversity and quality, and financing and competition in UK higher education.

Some post-Brexit challenges discussed in this book are too large to be solved by single institutions, however shrewd their strategies and tactics. For example, individual universities acting alone cannot move the dials on tuition costs and visa conditions to restore their European student populations. These challenges need to engage government policymakers, as well as institutional leaders, governing bodies and communities. There are also matters that can be addressed by institutions alone, regardless of the policy settings.

Matters for government and universities

Higher education is a mass sector that takes in half or more of the young age population and is actively engaged with local, regional, national and global agents, continually and at many points. Education and research are expected to serve society, the economy and government. Relevance and 'impact' are now built into all policy expectations. Higher education institutions are *connected*: locally, regionally, nationally and globally. The continuous growth of connections is the normal historic process; the severance of connections on a large scale is an unprecedented and traumatic event.

The UK's membership in the EU facilitated voluminous higher education connections into European countries with that volume continuing to grow until the Brexit moment. These connections fostered and sustained large-scale research programmes, student flows, financial flows in all directions, student mobility agreements between universities in different countries, networks in all spheres of activity and many thousands of specific cooperative linkages between persons. These connections had an impact on all sides, and they also relayed the impacts of education and research. In a stroke, Brexit removed most of this infrastructure of connections and impacts, though some survived. Unless compensating changes occur, after Brexit, UK universities and their personnel are more isolated and less impactful, especially in relation to matters concerning European students, the focus of this book. The book draws attention to this isolation and the implication for policy and practice, which are (1) the need to restrengthen connections and impact in European higher education, especially engagement with European students, doctoral researchers and academic faculty; and (2) the need to find new means of facilitating those elements in higher education constituted by European students, especially cultural diversity in the classroom, and the more educationally balanced, less commercial approach to internationalization.

The nature of the international student mix is an issue immediately for institutions, which determine the students they admit, but it ought to be seen also as a larger matter of educational policy. Chapters 4–8 show how European students played a crucial balancing role in UK higher education. They sat between domestic students, whose participation was free at the point of enrolment and sustained by income-contingent loans, and full-fee international students for whom the relationship with UK higher education was solely commercial. European students ensured that in part at least, the mode of international relations was educational and cultural, and intellectual merit rather than financial capacity fostered international students' opportunities. This enriched the environment for domestic students and helped to take the edge off the commercial form of international education experienced by non-EU internationals. This finding of *Brexit, EU Students and UK Higher Education* points to the need to foster a less harshly commercial relationship with non-EU international students.

The book also sheds light on a related issue for both government and institutions that was frequently remarked upon during the research reported in Chapters 4–7: the impact of Brexit in general, and the loss of a large proportion of European students in particular, on the reputation of British institutions. The concern is that they appear to be more closed, less engaged

across borders and more parochial than before. Reputation matters in higher education, and Brexit has hardly slipped under the radar. The book strongly suggests there is a fundamental need to reset the identity of UK universities, to re-emphasize that they are international in orientation and open to collaboration. This requires more than a marketing campaign of the type that the UK government and higher education sector is good at. Ultimately, the problem is best addressed by new policies and practices in relation to cross-border mobility.

One possible course of action is to open a new inward mobility scheme for European first-degree and/or Masters students, or to rejoin Erasmus+. The situation at the time of writing this book was that the UK funded the outward movement of UK-resident students through the Turing programme but not the inward movement of students from Europe. The findings of this book demonstrate that the one-way mobility regime cannot look anything other than closed. It is ultimately unsustainable. Other possibilities are to mount an extensive scholarship programme to facilitate European student entry into UK higher education at each level from the first degree to the doctorate and to encourage staff recruitment in EU countries, which, the book shows, is sorely missed. For example, policies could include a specific visa and targeted funding focused on academic staffing in areas of national need in relation to both vocational training in higher education and research.

Other matters for universities

For individual universities, the practical problems that follow from the issues discussed in this book boil down to the need to nurture and reinvigorate their own capacity following its partial destruction by the loss of European connections, students, doctoral researchers and academic talent. Unmistakably, this means reopening lines to European countries and higher education through any and every possible strategy. The main mistake would be to accept Brexit as a kind of *de facto* apartheid in relation to the EU region and ignore the need to rebuild the connections and flows. How can universities foster linguistically and culturally diverse classrooms following the exit of all but a much smaller (and more affluent) cohort of Europeans? How will universities act to protect those disciplines that are an essential part of the mix of knowledge and skills provided in UK universities but have been decimated financially by the loss of European student enrolments? The research reported in this book suggests that some university leaders were insufficiently mindful of this problem.

As noted, *Brexit, EU Students and UK Higher Education* offers many insights into institutional responses and strategies in relation to the loss of European students and the associated effects. Above all, though, the implication of this book is that UK universities need leaders with particular qualities for the times. Not only leaders with strategic and financial acumen, good communicators and consulters, and good delegators, but leaders who can keep their people going under difficult circumstances. Leaders who foster resilience, resolve and hope. The need for that kind of leader will be more than apparent in the pages that follow.

2

Internationalization and UK Higher Education

Introduction

Higher education and the associated research together constitute a major social sector at the national level in the UK. In 2022–23 there were 2,937,155 enrolled students, of whom 74.1 per cent had permanent addresses in the country. Higher education students constituted 4.3 per cent of the total national population. Participation had expanded to the point where more than half of all young people leaving school could expect to enrol in higher education in their lifetimes, the majority doing so immediately. In total, in 2022–23, 57 per cent of all enrolled students, and 52 per cent of all doctoral students, were women, though gender patterns varied by field of study (HESA, 2024). Of the first degrees awarded in 2020–21, 31.2 per cent went to students classified ethnically as Black, Asian or Mixed (HESA, 2023).

There were 214 classified higher education provider institutions in 2020–21, and in addition, 5.6 per cent of all enrolled higher education students were pursuing accredited higher education in Further Education institutions. However, the social and economic role of higher education, especially the larger universities, extends well beyond the student enrolment and the 240,420 full-time equivalent academic staff, excluding staff on 'atypical' contracts, in 2022–23 (HESA, 2024). Each successive cohort of graduates enters the workforce and the professions, the institutions and their students and staff drive employment and commercial turnover in cities and regional economies and higher education is the vehicle for extensive international relations and knowledge transfers. Frontier Economics (2021), commissioned by Universities UK (UUK), estimates that in 2018–19, universities across the UK generated £95 billion in gross economic output and contributed £52 billion to GDP. The total gross benefit of the 2018–19 cohort of international students to the UK economy alone was estimated at £28.8 billion (UUK, 2022). OECD

R&D (research and development) data show the UK spent £9.1 billion on research in higher education institutions in 2019 (OECD, 2023).

Beyond the national border

However, the national summary of UK higher education does not capture all aspects of it, either its day-to-day existence or its effects in the world. UK institutions have always had a world-level role, and this has become more important in the last three decades as the internationalization of world and UK higher education and research has gathered weight.

The larger role of UK higher education institutions, and of the national system qua system, is not well understood. Nationally bound thinking dominates in politics and policy in higher education, so that 'methodological nationalism' blinkers perception. Methodological nationalism is 'the belief that the nation/state/society is the natural social and political form of the modern world' (Wimmer and Schiller, 2002, p. 301; see also Dale, 2005; Shahjahan and Kezar, 2013) and no other scale or dimension of society is important. Methodological nationalism was crucial in shaping national UK politics during the Brexit debate. It is the reason why those advocating Brexit did not fully understand, or even want to discuss, its alarmingly negative implications for national and local higher education and science. However, it is essential to set aside nation-bound thought to grasp the meaning of Brexit.

For the methodological nationalist, international and global phenomena appear simply as outgrowths of the nation (the old Imperial thinking contains an element of methodological nationalism). This limitation on vision blocks out a clear awareness of the importance of cross-border and trans-border activity, such as student and academic mobility, and the global science system based on networked cooperation between researchers, which is epistemically dominant in science while being independent of any one nation-state (Marginson, 2022a). In short, the methodological nationalist lacks a full grasp of reality. Human society is irretrievably multi-scalar (Marginson, 2022b); more so in higher education than most other social sectors but akin in this regard to communications and finance. As well as being active locally, regionally in one of the four nations within the centralized polity that is the UK, higher education institutions and people are active in the planetary and global, and pan-national regional (as in Europe) scales.

Higher education institutions, especially research-intensive universities, are both embedded in particular locations (cities and nation-states) and also

have a much wider reach. Ideas and information flow quickly across borders. Knowledge by its nature has a universal cast rather than being confined to particular contexts or the property of one polity (or person). Once knowledge is circulated, anyone can use it, without blocking others from it. For this reason, economists describe scientific knowledge, including much of social science, as a 'global public good' (Stiglitz, 1999). Certain languages – Sanskrit in South Asia, Chinese in East Asia, Latin and Ancient Greek in medieval Europe, Arabic in West Asia and Africa, later French, German and Russian – have played the role of common languages, facilitating cross-border communication and cooperation. In the twentieth century, English became the sole global language, facilitating the participation of UK HEIs and students in Europe.

UK universities' global role

Arguably, higher education has long been one of the most internationalized, and internationally successful, sectors of UK society. UK higher education institutions not only play a significant role at the world level, in both education and research, but collectively they are larger international and global players than is the case for higher education in most countries, until recently second only to the United States in influence, though other nations are now rising. The UK is the country that draws the second-largest number of international students, after the United States, and its research universities continue to perform exceptionally well in high citation science. Scientists based in the UK produce the sixth-largest output of science papers each year (NSB, 2024) but are third in the volume of high citation science – on that measure China has risen recently to pass not only the United Kingdom but also the United States – and the UK's leading universities enjoy global reputations that are second only to those of the United States.

The global impact of UK higher education is partly a function of the imperial legacy, and sustained by the continued Anglophone hegemony in science and models of the university, embodied in university rankings (Marginson, 2022c), but it is also underpinned by the accumulated intellectual and reputational firepower of the institutions. The last factor has enabled the universities to sustain their global role despite the fact that their level of public funding is relatively low compared to other leading higher education systems (OECD, 2023). Another reason why UK universities have been strong in international terms has been their effectiveness in Europe, a region which in itself has lifted internationally because of the way regional collaboration (the Bologna agreement and European

Higher Education Area (EHEA), the Framework programmes (FPs) in research) has built an entity that is stronger than the sum of its national parts. Prior to Brexit, UK higher education institutions were highly engaged with European institutions, while also being relatively well engaged outside Europe.

This chapter looks more closely at how internationalization has evolved in higher education, with emphasis on student mobility and research, and the trajectory of UK institutions in each of these domains. The chapter starts with a brief discussion of the concept of 'internationalization', which has been the subject of varying interpretations, and then moves to the fast-changing global landscape in the sector. This is followed by sections specifically focused on the UK's role beyond the border, in relation to research and science; and cross-border student mobility and the UK 'education export' industry. It closes with a discussion of the extent to which higher education was Europeanized prior to Brexit.

Globalization and internationalization

In its most straightforward and literal meaning in both academic geography and common sense, the term 'international' means between nations, international. More technically, the adjective 'international' refers to 'phenomena, processes or relations between nations or between organisations or persons in nations'. Hence the noun 'internationalization' signifies a process, the 'creation or growth of relations between nations, or between organisations or persons in nations'. When we engage in internationalization, we extend or intensify relations across national borders in an ongoing fashion (Marginson, 2023, p. 12). This is the way that the terms 'international' and 'internationalization' are used in this book.

The terms 'global' and 'globalization' likewise have neutral geographical meanings and those are the meanings used here. The 'global' refers to 'phenomena, processes or relations pertaining to the world as a whole, or a large part of the world' (Marginson, 2023, p. 12). In a landmark study of the process of globalization, David Held and colleagues (1999) described it as a multi-sector process of integration and convergence at the world level, taking in one or more of the domains of society, economics, culture, knowledge and politics (see also James and Steger, 2016). Chakrabarty (2021) distinguishes between the 'global' and the 'planetary'. While the 'global' refers to human society, involving relations between people, their organizations and their nation-states, the term 'planetary' decentres the human and embraces also the ecological systems, and

the natural world. For the purposes of this book, globalization is understood as 'any extension or intensification of relations on the world or planetary scale, leading to convergence and/or integration' (Marginson, 2023, p. 12).

Meanings ascribed to 'internationalization'

The discussion about internationalization in higher education runs more easily when neutral geographical language is used, but these are by no means the only meanings on display. In a much-cited approach in international education studies, Knight (1994, 1999, 2004) proposes a definition for worldwide adoption in the practice of, and research and scholarship on, cross-border relations. She defines internationalization as carrying particular baggage. Her definition evolved over a decade and in its final form is as follows:

> Internationalisation at the national, sector and institutional levels is defined as the process of integrating an international, intercultural or global dimension into the purpose, functions or delivery of post-secondary education. (Knight, 2004, p. 11)

Knight nests her definition in a narrative in which 'internationalization' is positioned as virtuous, education-focused international activity conducted from within the boundaries of national systems. This is contrasted with 'globalization', which is seen as inherently neoliberal, economic and invasive of the autonomy of higher education institutions and national systems. This is methodological nationalism. The definition treats cross-border educational relations as an outgrowth of nations and occludes global relations that are interdependent and non-economic in character, notably the global science system and global ecology. Nevertheless, Knight's definition has been widely adopted by practitioners and policymakers in higher education, especially in Euro-American ('Western') countries. Ironically, some of its most fervent advocates have been Anglophone universities engaged in marketing their programmes, and other practitioners of the commercial fee-based education, which Knight locates as economic 'globalization' rather than 'internationalization'.

Knight's definition, which has functioned also as a claim for continued Western leadership in higher education – albeit one that constitutes a liberal educational hegemony rather than a liberal capitalist hegemony – is strongly criticized by some non-Western scholars. As a careful reading shows, Knight's definition is non-relational in form. It solely focuses on the qualities of the self (whether person, institution or nation) without regard for the effects of

internationalization on others. Changing one's own education is the end in itself, not fostering positive outcomes for all parties. Knight's primary audience always was and is Western, and the definition is primarily pitched at internationalizing the universities of the West. There are sharp critiques of Knight in countries where the global connections made by Western internationalization are at best two-sided in their effects and at worst, simply diminish local and national higher education agency. From the global East, Yang Rui states:

> To non-Western societies, modern universities are an imported concept. They originated from Europe, spreading worldwide from the mid-19th century to the present time mainly due to colonialism. Even the countries that escaped colonial domination adopted Western models as well. The European-North American university model has never been tolerant toward other alternatives, leading to the inefficacy of universities in non-Western societies, on whom a so-called 'international' perspective has been imposed from the outset. What is lacking is an appropriate combination of the 'international' and the local. Within the contemporary context of Western dominance, internationalisation of higher education in non-Western societies necessarily touches on longstanding knotty issues and tensions between Westernisation and indigenisation. This is particularly true in China, a country with a continuous history of fostering unique cultural heritages for thousands of years. (Yang, 2014)

Likewise, Ogachi (2009) argues from Africa: 'What internationalisation may well do is to deepen the relation of dependency of local higher education institutions on higher education institutions in industrialised countries.' For Teferra (2019a, 2019b), universities in the global South engage in 'massive consumption' of ideas, knowledge and textbooks from the global North 'while staunchly, but helplessly, adhering to international academic and scholastic norms and values'. Former colonies find themselves entrenching the academic language of the colonizer. Global rankings 'have pushed the internationalisation pendulum from intention to coercion', pressuring universities in African countries 'to do things not necessarily within the realm of burning institutional needs'.

Notwithstanding Knight's efforts to push reality back into a Western national bottle, after the end of the Cold War and the advent of the internet in the early 1990s, the terms 'global' and 'globalization' became very widely used, in general and in higher education. Perhaps this was less the case in UK higher education than elsewhere. In the UK, the term 'international' continued to be used much more often than 'global' for the cross-border dimension of activity. Possibly 'global' was felt to be synonymous with a claim for worldwide Americanization, whereas 'international', which was in continuity with the

longer-standing terminology, spoke to the earlier era when Britain was the leading world power and could pick and choose its cross-border interventions on a bilateral basis.

Brooks and Waters (2022) analyse the ways 'in which "international" is mobilised in international student mobility' (p. 518), in the UK and elsewhere. They note that '"the international" does not have one, straightforward and universally understood meaning' (p. 519). It carries affective as well as explanatory meanings and is a positioning device in agentic projects. It can be used to emphasize a sense of home, and also to capture the excitement of engagement with the other. It can also be used to exclude the other.

The authors note that 'international' can signify engagement with a limited range of countries in Europe and the Anglophone world, the movement of students from the global South to North and the hegemonies of the English language and Western knowledge, obscuring other geographies, including regional mobility in different parts of the world (pp. 520–21). It can also be used to demarcate mobile students, separating them from local students, a project which can imply the stratification of the student population in terms of tuition arrangements, educational legitimacy, citizen entitlements and human rights (pp. 523–24). In the national context of the UK, 'international student' calls up varying and often contrary associations, including model students who work hard and are a good example to locals, struggling foreigners in cultural deficit, tools of national soft power (see also Lomer, 2017b), financial saviours of UK HEIs. International students are also differentiated by country of origin (Brooks and Waters, 2022, p. 525) with various myths attached: East Asians are seen as hard working, Indians as migration focused and so on. The term 'international' has also become attached to assumptions about employability after students return to their countries of origin (pp. 528–29). There is a prevalent notion of international students as 'cash cows' milked for revenues and also pushback against this reification. (The chapter returns to this below.) Notwithstanding this plethora of meanings, this book will continue to use 'international student' and 'international education' as neutral descriptors.

Globalization after 1990

At the close of the 1980s, the Cold War ended on the initiative of the Soviet Union. Then, surprisingly, the Soviet Union dissolved at the end of 1991. From the US perspective, there was less pressure to accommodate systemic differences in international relations, and little immediate obstacle to a process

of global political Americanization, the triumph of a liberal capitalist order with American-style democracy in 'the end of history' as Francis Fukuyama (1992) famously called it. Supported by much of the Western political mainstream, the US leadership took the strategic opportunity to change course, pursuing US-led Western political, economic and cultural hegemony on a global basis. In what it called the 'rules-based order', nations were expected to conform to American civilizational standards and accept US global leadership (Sakwa, 2023). The internet became joined up in 1989 and in the 1990s networked communications spread rapidly, initially dominated by US sites, advancing the processes of Americanizing economic and cultural globalization.

The internet was the vehicle for the establishment and rapid evolution of the networked global science system, which again began in the United States, though open to other researchers and other science countries; and a decade later, the internet was the vehicle for the new systems of global rankings, which installed the large comprehensive Anglophone science university as the model by which all others were judged (Hazelkorn, 2015; Marginson, 2014). As these two examples show, in higher education, the post-1990 period has been one of extraordinary transformation. The dominant motifs have been massification, neoliberalism and also globalization and internationalization. These three intertwined processes have been less earth-moving in UK higher education than in many other systems, because UK higher education was strong and established in something like its present form long before 1990, but UK higher education and its conditions of operation have greatly changed.

From the mid-1990s onwards, in almost every country aside from the poorest quarter in terms of national income per head, growth surged in educational participation, and in at least sixty nations there was also a surge in global scientific output, cross-border papers and research university funding. These tendencies were not fostered by Americanization per se, though arguably all were invigorated by global convergence. Rather, they reflected rising aspirations in both families and states, and growing public and private economic capacity to support higher education and science. All indicators for global and international activity in higher education and science trended sharply upwards from the 1990s onwards and have continued to do so ever since, even though economic globalization has faltered.

After the mid-1990s, there was a massive expansion in participation in tertiary education in all countries except the poorest 20 per cent, where public and private resources were too scarce to finance massification. Using the standardized UNESCO data, the worldwide gross enrolment ratio in tertiary

education rose from 14 per cent in 1992 to 42 per cent in 2022. Participation has expanded especially rapidly in East Asia and the Pacific, and Latin America. In China, the gross enrolment ratio rose from only 3 per cent in 1992 to 72 per cent in 2022 (UNESCO, 2024; World Bank, 2024; Cantwell et al., 2018). The worldwide spread of higher education has two implications for the UK. Firstly, advanced education is no longer largely concentrated in the Anglophone countries, Western Europe and Russia as it was in the early 1990s. In three-quarters of the world's countries, majority tertiary participation has become a fact or is in the process of becoming a fact, and the UK now deals with many other national systems on more equal terms than before. Secondly, the level of participation in the UK itself is no longer high in world terms, especially when international students are removed from the data. It is about average among the OECD countries (OECD, 2023).

At the same time, the number of cross-border students increased by more than 5 per cent a year between 1998 and 2022, doubling every twelve years. Using the UNESCO (2024) measure, which captures students who cross borders for higher education for one year or more, thereby excluding shorter stays, there were 1.9 million cross-border students in 1998 and 6.4 million in 2022. After the pandemic, the growth trajectory in student mobility resumed at the world level, though the timing of the resumption was uneven by country. The UK had maintained continuing growth during the pandemic and came out of the pandemic period in a stronger position in terms of global market share.

In science, there was no global system prior to the internet. In 1970, less than 2 per cent of science papers were authored by scientists from more than one country (Olechnicka et al., 2019). Papers were specific to the leading science countries, though they were widely read. The internet-mediated system that emerged after 1990 developed autonomously on a bottom-up basis, with its own dynamics (Wagner et al., 2017; Marginson, 2022a) separate from the administration of national science, through the collaboration between scientists who were now able to share data and write papers together freely at a distance. The growing global output was accessed freely in journals that became codified as part of the global system in two leading publication repositories, Web of Science (WoS) and Elsevier's Scopus. The proportion of research papers with authors from two or more countries rose from 13 per cent to 23 per cent between 1998 and 2020, though it declined slightly in 2021 and 2022 due to a reduction in US-China collaborative papers (NSB, 2024) following the US China Initiative of 2018, designed to secure the decoupling of the United States and China in science.

The massification of participation and the spread of science coincided with the roll-out across the world of neoliberal systems of governance and the introduction of new public management reforms in institutions, including institutional competition and performance regimes, albeit with national nuancing. Neoliberalism was more than half a UK invention, the ideological child of the Thatcher government in the 1980s and also strongly (though less consistently) pursued in the United States. Neoliberalism was of a piece with Americanized globalization, and inevitably the flourishing of higher education and science after 1990 was touched by this conjunction. Policy economists positioned higher education and research as moving parts in an imagined knowledge economy (Olssen and Peters, 2005), and many university leaders invested in that discourse, gaining legitimation and market revenues. As is discussed below in relation to the UK, commercial cross-border education grew exceptionally rapidly in some Anglophone countries, transferring capital out of emerging nations and quickening their brain drain of talent, in continuity with the colonial years.

For well over two decades, the growth of cross-border activity in higher education and science was treated as an unequivocal good, not just among universities, scientists and firms that benefited from student mobility, such as education agents, but also in mainstream politics and policy. This normative reading of virtuous 'internationalization', often expressed in terms of the Knight (2004) definition of that term, was a feature of university websites all over the world and at the same time was a staple of education ministers' rhetoric.

Growing multipolarity in higher education and science

Then the ground began to shift. In the outcome, the beneficiaries of two decades of Americanizing globalization in trade and culture were not all located in the West. Accelerated state and economy building in the global East and South generated a more distributed pattern of autonomous national agency, destabilizing the US-dominated post-Cold War international relations framework. China's GDP achieved purchasing power parity with the United States by 2016, though exchange rate-based parity is yet to be achieved. It was not just the rise of China. India, Indonesia and Vietnam sustained high growth rates and South Korea, Brazil and Iran were other large middle powers outside the West. Though globalization was associated with growing inequalities *within* the majority of nations, economic inequalities *between* nations shrank noticeably overall (Bourguignon, 2015). The economic gravity was shifting from the G7

to G20. Many non-Western nations (though not all) were lifting economically, modernizing their infrastructure and state coherence. The formal political independence achieved in the transition to neocolonialism was evolving towards greater independent agency and more pronounced global traction.

The growing multipolarity evident in political economy, with its potential to divide the world into a combination of civilizational blocs and rising middle powers (Macaes, 2018), challenged the assumptions of unipolar American global leadership that had prevailed since the end of the Second World War. A parallel process of multipolarization was taking place in higher education and science, enabled by the same phenomenon: the emergence of multiple stronger nation-states that were being nurtured within global systems. This was especially apparent in the evolution of global science capacity, where distributed agency was naturally fostered within the worldwide network, and even, albeit in a more Western-culture way, in the rise of some non-Western universities in global rankings.

Within the networked global science system, established institutions and large countries attract more connections, but the system is an open one: leaders do not gate-keep because newly joining researchers can freely form ties with any other researcher in the network. The fastest growth in collaborative relations in global science has been in relations between researchers in emerging science countries (Graf and Kalthaus, 2018; Choi, 2012). Since 1996 there has been especially rapid growth in the number of science papers in China, India and the rest of the world. Established science in the United States, the United Kingdom, Germany and Japan has grown more slowly. The number of countries generating 90 per cent of science increased from twenty in 1987 to thirty-three in 2022. In 2022, fifty-nine countries produced over 5,000 science papers (NSB, 2024), indicating that they had viable endogenous science systems, self-reproducing in character, able to generate their own doctorally trained people in at least some disciplines and able to connect effectively to the shared global science system. China exceeded the number of science papers produced in the United States in 2017, and in 2022, its affiliated researchers generated 898,949 papers in total, compared to 457,335 in the United States. India has become the third-largest producer of science, well ahead of Germany, the UK and Japan. South Korea, Iran, Brazil and Indonesia are other non-Western science countries with large rapidly growing science systems (NSB, 2024). Science is no longer an oligopoly of the West, Russia and Japan.

It is not just a matter of paper volumes. Quality as measured by citation rate is a flawed measure, but it indicates which work is getting global attention. The

incidence of highly cited work varies in the newly emerged science countries, but in China, and also Singapore, the leading science universities have become exceptionally strong in world terms. In the STEM research fields – physical sciences, engineering, mathematics and computing – China now absolutely dominates the list of leading institutions in the production of top 5 per cent and top 1 per cent papers by citation rate. Here, the Chinese universities have benefited not just from the improved quality of the work of their scientists but also from the growth of the national research system in China, which augments the number of citations of Chinese papers. In the most rigorous research ranking, from the Leiden University (CWTS, 2024) using WoS data, and top 5 per cent papers published in 2019–22 inclusive as the unit of measure, China had the top 13 institutions in the world, with MIT at fourteenth place and no other US university in the world top 20. Singapore had both of its main research universities in the top 20. China had seventeen. Only ten years earlier, in the parallel Leiden University ranking table, twelve of the top universities in physical sciences and engineering were from the United States and only one was from China. China is just as dominant in mathematics and the associated cluster of computing research. Tsinghua University in Beijing has replaced MIT as the world's top STEM university in leading science.

China's position is not as strong in biomedicine and health sciences, which are largely dominated by Anglophone universities, with the Harvard Medical School as the world leader. In terms of top 5 per cent papers from 2019 to 2022, China had four universities in the top 20, but the highest was Shanghai Jiao Tong University at eleventh. There were twelve US universities in the top 20, and the top 10 included Toronto in Canada, and Oxford and University College London (UCL) in the UK. However, China's position had improved sharply from two years before, when it had no universities in the top 20 in biomedicine and health. In the composite Leiden list for 2019–22 in life and earth sciences, Chinese universities occupied nine of the top 10 places (CWTS, 2024).

Beyond national boundaries: The making of European higher education policy (1957–2025)

The development of the EU higher education policy represents a remarkable case in educational governance. What was traditionally a domain of national sovereignty has evolved into also being an area of significant EU influence. Through several mechanisms, the EU has successfully positioned itself as a legitimate transnational policy actor in higher education. Most noteworthy are

the focus on mobility and cooperation, the strategic use of funding instruments, policy coordination frameworks like the Bologna Process and finally, linking education to broader economic and social goals (Bache, 2006; Papatsiba, 2009, 2020; Croché, 2010).

The 1957 Treaty of Rome's provisions on vocational training established the foundation for EU involvement in higher education. Education was not explicitly mentioned, but the European Commission strategically leveraged this connection to expand its influence (Pépin, 2007). The 1985 Gravier ruling by the European Court of Justice marked a crucial turning point by broadly interpreting vocational training to encompass higher education, paving the way for the landmark Erasmus programme in 1987 (Corbett, 2005).

The Maastricht Treaty (1992) marked a pivotal moment in EU education policy by formally recognizing education as an area of EU competency. However, this recognition was balanced with the principle of subsidiarity, maintaining member states' primary responsibility for educational content and system organization (Dakowska and Serrano-Velarde, 2018). While preserving national sovereignty over core educational matters, it endowed the EU with specific powers to coordinate national initiatives and supplement national actions through supporting measures. This legal recognition exemplified the 'Monnet method' (Papatsiba, 2009) – a strategy of European integration characterized by progressive, incremental changes in areas less sensitive to national sovereignty. Under this approach, integration advances through multilateral coordination and multi-actor governance frameworks, domains that traditionally fell outside the scope of national initiatives, which had historically been limited to bilateral agreements and long-standing, historical partnerships between individual states.

Two major initiatives further consolidated EU influence in higher education. The Bologna Process, launched in 1999, represents perhaps the most significant development in European higher education coordination (Keeling, 2006). Though formally intergovernmental, it became increasingly intertwined with EU mechanisms through the commission's active participation, multilateral coordination instruments and resource provision (Croché, 2010). The 2000 Lisbon Strategy explicitly linked higher education to economic objectives, introducing the Open Method of Coordination and requiring member states to report on progress towards common goals (Capano and Piattoni, 2011).

In sum, the EU's influence operates through three main mechanisms (Lohse, 2024). Firstly, the 'power of instruments' employs standards, benchmarks and quality assurance frameworks to shape national policies through comparative pressure (Fenwick et al., 2014; Ozga et al., 2011). Secondly, the 'power of the purse'

uses EU funding to incentivize institutional compliance and reform (Batory and Lindstrom, 2011). Thirdly, networks of experts and policy entrepreneurs facilitate knowledge transfer and norm diffusion across national boundaries (Lawn and Grek, 2012).

Implementation patterns vary significantly across Europe. Western European countries typically show diverse interpretations of EU recommendations (Musselin, 2009; Gornitzka, 2007), while Central and Eastern European countries have often embraced market-oriented reforms more enthusiastically (Dakowska and Harmsen, 2015). This variation reflects what Maassen and Olsen (2007) identify as the EU's ability to extend influence through soft governance mechanisms and policy coordination.

The current state of European higher education policy presents both achievements and challenges. The creation of the EHEA has facilitated increased mobility and standardization of qualifications. However, bureaucratization threatens to alienate academic practitioners (Brøgger, 2019). Brexit adds another layer of complexity (Papatsiba, 2020), creating uncertainty about future cooperation while leaving a legacy of market-oriented reforms introduced through British influence (Alexiadou and Lange, 2013).

Looking forward, the European Education Area 2025 initiative represents the next phase in integration, aiming to strengthen mobility, enhance institutional cooperation and forge a stronger European identity through education (Veiga et al., 2018). At the same time, universities are considered essential sites where education, research and innovation converge to advance both economic competitiveness and social cohesion (Chou and Gornitzka, 2014).

The transformation of European higher education policy thus represents a successful case of integration through incremental changes, where cooperation in supposedly less sensitive areas gradually led to deeper integration. The process exemplifies how European-level authorities created both the conceptual space and practical need for transnational policy action while positioning themselves as competent policy actors and brokers, even without formal transfer of competencies to the EU level (Robertson, 2009).

Nativist pushback and deglobalization

Nothing stays the same. Universalizing discourses sometimes flip over to their opposites. Since the mid-nineteenth century, global geopolitics has seen long swings between global integration and deglobalization. The last decade has seen a radical reversal, at least in the Western world, of the trend towards

globalization in political economy that prevailed between the 1980s and the 2000s. By the early 2010s, it was apparent that the growth of global trade was slowing, the economic role of multinationals was reducing and the offshoring of production had begun to reverse (*The Economist* 2016, 2019, 2023). Open trade globalization's economic payoff for the American elite was declining, there was a growing feeling that China benefited more than the United States, and there was mounting grassroots opposition because of lost jobs. There was also an unwillingness to face the fact of multipolarity, and one side of American politics based its political stance on denial ('Make America Great Again'). After Donald Trump was elected in 2016, the ideological American commitment to economic globalization spectacularly reversed, followed by the selective deglobalization of science and technology in the decoupling with China. It was not just Trumpism, however. In the United States, the turn away from open trade and the would-be containment of China were bipartisan.

Arguably, one of the root causes of the nativist pushback, and resulting deglobalization in the political sphere, that has been evident in the United States, in Brexit and in much of Western Europe deglobalization, is global multipolarity itself. The rise of the non-West has generated economic competition and also disturbed the long-standing racially imbued Western notions, inherited from colonialism, that Western societies are inherently superior. Another and more conventionally recognizable root cause, especially in the Anglophone jurisdictions, is the economic immiseration of parts of the population generated by the accumulation of slow economic growth rates, stagnant workplace remuneration and austerity in public services. The retreat from globalization has played out not only in nativist opposition to cosmopolitanism and migration, which has been increasingly echoed in mainstream politics, but also in the widespread shift in nation-state policy from open trade to tariff barriers.

So far, higher education and science have not really been direct targets of nativist ire, except in Hungary and the United States, where populism with a nativist strand plays out in the 'anti-woke' politics of the Republican party as a critique of US universities. In the UK, opposition to migration is focused primarily on refugees and would-be permanent migrants rather than international students. However, universities have been collateral damage of nativism and deglobalization, as the Brexit referendum and its aftermath (Chapter 3) have shown. Further, amid the rise of migration resistance, there has been growing restrictions on international student visas. This is a strand of populist policy in the Netherlands and has led to reductions in incoming international students in Denmark (Tange and Jaeger, 2021; Brogger, 2023).

In 2023, Australia and Canada set ceilings on international student numbers for 2024, with the Canadian policy change expected to reduce international student numbers by at least 40 per cent. In the same year, the UK blocked visas for members of students' families except in the case of doctoral students (UK Government, 2024a). The main reason given in the UK was the government's desire to reduce net migration. This policy change triggered a significant fall in applications and subsequently in visas granted. On 22 August 2024, the UK Home Office (UK Government, 2024b) issued data showing that there was a 13 per cent fall in study-related visas granted between June 2023 and June 2024. Between January and June 2024, visas issued to dependants of students fell by 81 per cent compared to the same period in 2023, and the number of visas granted to 'main applicants' (i.e. to the students themselves) fell by 23 per cent over the same time period. As in Canada, this was a major reduction in international student numbers. The UK, Australia and Canada all receive major export earnings through international education. Their new willingness to reduce student numbers indicates that nativist deglobalization is now taking priority over economic goals.

In addition, the geopolitics of US/China decoupling (Lee and Haupt, 2020; Marginson, forthcoming) is affecting research cooperation not only between those countries but across the West. In the United States, the 2018 China Initiative triggered the intrusive investigation of scientists with dual appointments and projects, reducing the willingness of scientists to sustain relations with their Chinese counterparts (Lee and Li, 2021), and leading to restrictions on visas for some doctoral students and researchers. The US State Department has pressed its Western allies to regulate research links with China on the basis of blanket security regimes and risk management. The intrusion of states into the bottom-up relations between scientists reduces academic freedoms in global science. With the mainstreaming of nativist identity, national geopolitical agendas and deglobalization, the old normative internationalization – the consensus that cross-border relations in higher education and research are necessarily a good thing – has partly broken down (Marginson, forthcoming). In the case of UK higher education, in this weakening of internationalization, there is much to lose because UK universities and their personnel have been effective on the world stage.

Internationalization in UK higher education

The potency of UK universities beyond the border – and the fact that 'beyond the border' is also a dimension of action 'inside the UK' – is clear when the data

on both education and science are examined. This section of the chapter now looks at scientific output, scientific collaboration and the UK's role in incoming international student mobility.

Research

The number of published research papers produced each year by UK-affiliated researchers has shown only modest growth in recent years, from 95,150 in 2010 to 105,984 in 2022, based on a paper count in which authorship of shared papers is attributed on a fractional basis (NSB, 2024), at a time when world scientific output was growing by 5 per cent a year. However, slow growth is normal for established national science systems, unless there is a sizeable increase in the national investment in basic science. The United States and Germany exhibit a similar pattern of slow growth to that of the United Kingdom.

UK research plays a larger part in worldwide scientific networks than the size of the country or the size of its science output would suggest. The country is the world's sixth-largest spender on research in higher education (OECD, 2024) and sixth in the total paper count (NSB, 2024) but its research has the third-largest scientific impact after China and the United States. UK researchers' scientific output constituted 3.59 per cent of total Scopus-recognized global science in 2020 ('science' here includes social sciences and some humanities). The Scopus data show that 3.9 per cent of all authors were from the UK, but 10.4 per cent of all citations were to publications authored from the UK. In 2021, 9.3 per cent of publications produced in the UK were ranked in the top 5 per cent of their field on the basis of citations (UUK, 2023).

Table 2.1 contains data on the proportion of each nation's papers in Scopus that were in the top 1 per cent of papers in their research field on the basis of citation counts, between 2010 and 2020. The world average is 1.00 per cent and numbers above that level indicate a country that at the system level delivers superior results. Towards the end of the period, the United Kingdom moved past the United States in this indicator, and it compares favourably with Germany and China. China's performance early in the decade was weak because its system carried a large volume of low-cited papers, it reached the global average point only in 2020. The table includes Switzerland and Singapore: small-scale high-quality research systems with few weaker papers do best in this indicator. Singapore's research quality is exceptional in world terms.

Table 2.1 Proportion of Nation's Science Papers That Were in the Top 1 Per cent in Their Field on the Basis of Citations, All Fields of Science, 2010–20 (World Average = 1.00)

Country	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
UK	1.50	1.58	1.60	1.64	1.67	1.75	1.73	1.68	1.61	1.66	1.60
USA	1.84	1.83	1.81	1.81	1.80	1.76	1.75	1.68	1.63	1.57	1.40
Australia	1.46	1.42	1.47	1.45	1.52	1.47	1.54	1.54	1.60	1.65	1.42
Germany	1.15	1.15	1.16	1.14	1.18	1.13	1.10	1.09	1.08	1.10	0.96
Switzerland	1.79	1.97	1.91	1.91	1.84	1.93	1.74	1.72	1.85	1.82	1.40
Singapore	1.74	1.61	2.17	2.12	2.11	2.12	2.18	2.20	2.33	2.54	2.39
China	0.46	0.51	0.54	0.58	0.62	0.67	0.72	0.83	0.90	0.98	1.09

Source: Authors, using data from NSB (2024), originally from Scopus.

Reputable university rankings for research

According to the Shanghai Academic Ranking of World Universities (ARWU, 2024) which, unlike the Times Higher Education ranking and the QS ranking, uses objective indicators of research performance, the United Kingdom has eight universities in the world top 100, which is third after the United States (thirty-eight) and China (fourteen including Hong Kong).

According to the WoS data field normalized by Leiden University for science papers in 2019–22 inclusive, the UK had seven of the world's top 100 universities in the number of top 5 per cent papers, including three of the top 15 institutions: Oxford, UCL and Cambridge. In the discipline clusters listed by Leiden, the UK had nine of the leading 100 universities in biomedicine and health sciences, six in physical sciences and engineering and four in mathematics and complex computing (CWTS, 2024).

Networked collaboration

In global terms, the UK is very strong in cross-border research collaboration. UK science is not as widely networked as science in the United States, whose researchers have significant links to almost every national science system, but in terms of the intensity and centrality of global networking, when co-authored science publications or citation patterns are the indicator, network analyses find that UK higher education is second in centrality to the United States (e.g. Choi, 2012; Zhang et al., 2018; Olechnicka et al., 2019).

Drawing on Scopus, in 2022, 66.6 per cent of all science papers involving UK authors included authors from at least one other country, compared to the overall proportion at the world level of 22.6 per cent (NSB, 2024), though it must be said that all countries in Western Europe perform strongly in this indicator because of the key role played by collaborative multi-country grants in European-funded research programmes. The leading research universities in the UK, by volume of papers, have relatively high rates of collaboration on the world scale. The Leiden data show that in relation to papers published in 2019–22, the proportion of papers that involved international partners was 69.9 per cent at UCL, 71.8 per cent at Oxford, 68.5 per cent at KCL, 73.5 per cent at Imperial, 71.1 per cent at Cambridge, 62.7 per cent at Manchester and 67.7 per cent at Edinburgh (CWTS, 2024).

With which countries do UK researchers collaborate on the global scale? The US National Science Board (NSB, 2024) issues data indicating that in relation to each national research system, which other nations are most favoured as

research collaborators, as measured by the incidence of co-authored papers. The data are expressed in pairs of countries. Hence, if country A collaborates 1.00 with country B, this indicates that the rate of collaboration is what would be expected, given the overall worldwide patterns of co-authorship pertaining to each country. A collaboration rate of 2.00 indicates that each country collaborates with the other at a level of exceptional intensity. A collaboration rate of 0.50 indicates a tendency to collaborate that is much lower than expected.

Table 2.2 lists those countries with which UK researchers collaborate at a greater rate than 1.00; that is those countries where there was a pattern of relatively intensive networked association in science. It also includes the volume of co-authored papers for each country pairing (this includes multi-authored papers which may have involved researchers from countries other than those named in the pair).

In these data, cultural-linguistic affinities and geographical proximity often show up as intensive rates of collaboration. For example, the rates are high for co-authorship between the Nordic countries, in Spanish-speaking South America, and between the UK and Ireland.

The data show that in 2022, there was intensive research cooperation between UK-affiliated researchers and researchers in the Anglophone world and in Europe. There was a pattern of intensive partnership in fourteen of the twenty-seven EU member countries and two non-member European countries with strong research systems, Switzerland and Norway, both of which have operated within the framework of EU research programmes, though Switzerland's participation has been partial because of disputes between that nation and the European Commission. The UK's collaborations with Canada (0.90) and the United States (0.79) were lower than expected, taking all collaborations of each country into account, but the volume of papers co-authored by UK and US researchers was high, 34,418 in 2022. The US/UK pairing generated the second-largest volume of co-authored papers in science in 2022, the largest being the 58,546 published papers involving authors from the United States and China (NSB, 2024).

Rates of collaboration between UK researchers and those in the recently emerged non-Western systems were relatively low: Singapore 0.87, China 0.79, India 0.67, Indonesia 0.59, Iran 0.56 and South Korea only 0.53 (NSB, 2024). This indicates that by 2022, six years after the Brexit vote, and two years after the UK had ceased to be a party to the EU's Horizon research programme (as Chapter 3 notes, the UK rejoined at associate member level in 2023), the UK science system continued to be highly dependent on its collaborative links with

Table 2.2 Propensity to Publish Co-authored Papers, between UK Researchers and Researchers from Other Countries, Countries Where the Collaboration Index Exceeded the Expected 1.00, 2022

Europe			Rest of World		
Country	**Propensity to Co-author**	**Co-authored Papers 2022**	**Country**	**Propensity to Co-author**	**Co-authored Papers 2022**
Ireland	2.17	4,203	South Africa	1.46	4,113
Greece	1.78	3,609	New Zealand	1.36	2,383
The Netherlands	1.59	11,272	Australia	1.19	13,350
Denmark	1.50	5,314	Nigeria	1.06	1,505
Belgium	1.41	6,064	Israel	1.04	2,125
Sweden	1.37	6,990			
Switzerland	1.37	8,494			
Norway	1.37	4,010			
Italy	1.32	14,498			
Spain	1.20	10,923			
Finland	1.19	2,946			
Portugal	1.17	3,370			
Germany	1.14	18,966			
Austria	1.14	3,801			
France	1.12	12,309			
Poland	1.00	3,639			

Source: Authors, from NSB (2024), originally sourced from Scopus.

science in Europe and there was no sign of a newly flourishing 'Global Britain' in science.

International students

Of the UK's 26 per cent of enrolled higher education students in 2022–23 who were not UK permanent residents, 95,505 were from EU countries and another 663,355 from non-EU countries, about half of the latter from China or India (HESA, 2024). Almost all the non-EU students paid tuition fees that were high on the world scale, averaging at £22,000 per full-time year (British Council, 2024) and ranging up to £50,000 and beyond. The EU-origin students paid a mixture of full international student fees, as for non-EU internationals, and UK home country fees, depending on when they were first enrolled. The academic year 2020–21 was the final year that EU-citizen students could enrol on the home country basis; after that, the final severance between the UK and the EU was effected in higher education.

Except in 2019 when it was briefly passed by Australia, the UK has long had the world's second-largest number of incoming international students after the United States (UNESCO, 2024). The UK was more successful than the other major international education provider nations in sustaining incoming students during the pandemic in 2020 and 2021, recording continuing growth while there were significant falls in the United States and Australia (UCAS, 2021; HESA, 2024). After the pandemic, the UK re-emerged in second place as a national provider, with 674,931 incoming students in the UNESCO data in 2022 compared to 382,007 in Australia (UNESCO, 2024).

Four kinds of cross-border education

Across the world, universities, especially large multidisciplinary research universities, are remarkable for the range and number of heterogeneous activities that they sustain. In the best-known book on the modern university, Clark Kerr (1963), the former president of the University of California and architect of the Californian Master Plan, which became an influential blueprint for hierarchical system design in a massifying higher education system, christened universities as 'multiversities'. The scale and complexity of higher education is well illustrated by the UK's historical approach to incoming cross-border student.

Until Brexit, the large international student population fell into four main groups: (1) onshore full-fee paying students, paying fees above cost levels used to subsidize university operations, recruited by a commercial 'education

export' industry that was run by universities as commercial businesses; (2) offshore transnational education (TNE) (not further discussed here) provided in conjunction with franchised partners, often used to funnel students into onshore full-fee places, which was again commercial but entailed lower rates of fees; (3) EU students who enrolled in UK universities on the basis of home country student fees and, like UK-resident 'domiciled' students, paid back tuition loans from earnings after graduation; and (4) EU students who entered UK institutions onshore for shorter periods through the EU's Erasmus+ mobility scheme. A further small group of cross-border students received and still receive scholarship support from the UK and student source countries.

Both EU students enrolled in British degrees and the Erasmus programme are discussed more fully in the next chapter, and there are reflections on both in Chapters 4–8. Here, Chapter 2 reflects on the commercial full-fee programme, which for long time was solely for non-EU students, especially from the global East and South, including former British colonies, and on the mix of EU and non-EU arrangements.

In the first three decades after the Second World War, incoming international students were largely drawn from former Empire countries, including the United States, with some supported by scholarships provided by UK-based organizations and endowments. There was a mix of soft power-oriented leadership training, for example through the scholarships funded by the Rhodes Trust, and private investment by families for whom a UK education constituted elite formation or opportunities for upward social and geographical mobility. However, in 1979, the recently elected Thatcher Conservative government made a momentous change, introducing full-fee places for international students (Shattock, 2012).

It was scarcely understood at the time, but this was the beginning of the wholesale transformation of the political economy of UK higher education. It was the first use of student tuition charges and the first opportunity on a scale for entrepreneurially minded university leaders and managers to build their own source of income to supplement government funding. Universities were given the power to set their own international student fees and thereby leverage their reputational position as a source of income. The role of fee-paying international education within university budgets increased only gradually, however. As Figure 2.1 shows, in England the proportion of all income that was derived from non-EU international students was just 4.9 per cent in 1995–96 after fifteen years of the international student market, but it had risen to 13.0 per cent by 2013–14, the year that full-cost fees were

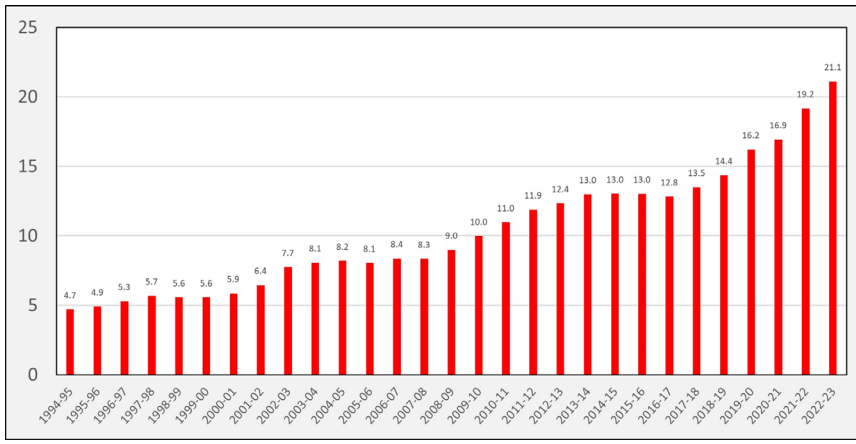

Figure 2.1 Proportion of the income of all higher education institutions in England that was derived from non-EU international student fees, 1994–95 to 2022–23. *Source*: Authors, based on data from HESA (2024).

introduced for domestic students at £9,000, and dependence on international student fees increased rapidly after 2016–17 (HESA, 2024). There is more discussion of this dependence, and UK competition for international students, in the final Chapter 8 of this book.

Figure 2.1 uses data from England only to illustrate the growth of dependence on international student fees, as income patterns in Scotland are different; Scotland does not charge home country fees.

By 2022–23, almost one student in every four was a non-EU full-fee paying student, and income from those students in England was approaching the level of total income from all domestic students. Such a level of international student enrolment and commercial activity was unimaginable even ten years before, let alone when full-fee international places were announced in 1979. However, in the more than forty years since Thatcher's neoliberal reform, the higher education world had become much more internationalized, universities had become more like businesses and public funding had shrunk as a proportion of university support.

The last trend has been the main driver of the UK's dramatic growth in the commercial model of higher education. Universities wanting to sustain the quality of their teaching; build their research programmes; modernize their facilities in line with the growth of participation; and strengthen their local, national and global reputations have had little choice but to step up their non-EU international student enrolments.

For its part, the government has encouraged the UK export earnings, the stimulus to city and regional economies and the replacement over time of a large part of taxpayer financing of higher education by entrepreneurial university earnings. Successive UK governments have seen international education as a means of combining revenues with global engagement (Lomer, 2017b; Higher Education Commission, 2018). Nevertheless, from time to time, migration resistance in the electorate has led government to slow or halt the growth of visas for commercial international enrolments, notably for much of the decade after 2010 and, after the high growth trajectory was again unleashed in 2019, in 2023 and 2024.

The UK's commitment to commercial international education is not unique. Australia followed the 1979 Thatcher reform by phasing out subsidized international education and introducing its own marketization of student places in 1987 and 1988. Australia is regionally located close to student source countries in East, Southeast and South Asia, and the trade offices in its regional embassies played a key role at the beginning (Marginson et al., 2010). For their part, the Australian universities took to international entrepreneurship even more enthusiastically than their UK counterparts and prior to the Covid-19 pandemic, that country was approaching an enrolment level of one-third of places and an income level of one-quarter. However, the picture at the global level is mixed. Of the 6.4 million students who crossed borders for higher education of one year or more in 2022, less than half entered full-fee paying places (OECD, 2023). The remainder enrolled on a free education basis (e.g. in Germany) or heavily subsidized basis (e.g. Japan and many of the international students in China). In US doctoral universities, international education was often seen more as a soft power exercise than a source of profit, and many student places were subsidized.

The capacity of the Anglophone universities to earn significant revenues from international students has not gone unnoticed by finance ministries around the world, and in recent years full-fee international student places have been announced in place of free education in Denmark, Finland and Norway. However, the fact that full-fee international places opened the door to the marketization of Anglophone domestic education is not unnoticed either. Full fees for international students have triggered a fractious debate in France, and in Finland, implementation by the institutions was incomplete at the time of writing.

Debate and discussion about commercial international education

Since the 1980s, the scale and impact of full-fee international education have generated considerable research and discussion in the UK (for an overview, see

Brooks and Waters, 2011). A large part of the research, much of it outside the public domain, is directed to fulfilling the business objectives of recruitment and student satisfaction. Some of it concerns the welfare of international students, or is focused on international students as self-determining agents (Oldac et al., 2023). Some of it focuses on educational and cross-cultural issues (for a recent literature review, see Lomer and Mittelmeier, 2021), such as the pedagogical challenges of classrooms with mixed student backgrounds, where for many students English is not the first language, and also the mixing (or lack of it) between international and domestic students.

A minority of the scholarly research on international education is sharply critical of the foundations and practices of the commercial programme and draws attention to negative effects (e.g of many Lomer et al., 2018). Much of the critique is driven by tension between business objectives and the construction of students as consumers, and educational objectives and the construction of students as learning subjects engaged in self-formation through immersion in knowledge. In a text-based analysis of British policy discourses, Lomer (2018) finds that policy constructs the students as sources of income, 'immigrants of doubtful value' and consumers. At the same time, the marketing of UK higher education rests on its reputation for the provision of education of 'quality', and this is about the educational dimension of higher education rather than the provision of business services. The commercial market in international education, and the revenues it secures, thereby rests on something other than itself. Unless the UK institutions sustain good educational programmes, their commercial capability in cross-border education begins to deteriorate.

Balancing educational and commercial practices

Arguably, good educational programmes consist of strong academic cultures and student-staff relations focused on pastoral care, respect for student self-formation and intrinsic commitment to learning and knowledge/skill (Marginson, 2024). This requires more than marketing-based demonstrations of value for money and a focus on generic customer satisfaction. Paradoxically, just as the commercial business of academic publishing rests on the production of science and scholarship as a public good and the voluntary work of collegial networks, so commercial international education rests on the maintenance of educational values and practices that are prior to the commercialization process. This is the limit of the neoliberal model of higher education (Marginson, 2013). Academic universities are competitively stronger than pure business operations.

It is not just because of their first-mover advantage, though that helps; it is because their product is more attractive; and that product cannot be sustained solely by market-based revenues without losing quality.

In 2017–18, the first UK academic year after the Brexit referendum, there were 142,840 EU students enrolled in British degrees inside the country, 5.9 per cent of all students. At the same time, there were 326,315 non-EU international students paying full-cost fees, 13.5 per cent of all students (HESA, 2024). There had been negligible research conducted by either government or academic scholars on the EU portion of the international student intake, in comparison with the considerable attention given to full-fee paying students. Yet it is now apparent that the EU part of the intake performed an essential balancing role within the total international cohort. They allowed universities and their staff to focus on the educational potentials and challenges of student learning in cross-cultural classrooms, and the opportunities of a cosmopolitan student body, without using a commercial lens, in which quality is standardized at a minimum necessary level rather than maximized (Marginson et al., forthcoming) and pedagogical creativity is simply cost-ineffective. The large EU student population balanced cross-border education in the UK by sustaining the educational possibility of something richer. Without it, the business imperatives become more compelling and shaping of management, academic life and student life.

Regional identity: How European was UK higher education in 2016?

Arguably, one of the consequences of worldwide convergence and integration has been to highlight the strategic potential of civilizational blocs and contiguous world regions, as well as more localized cross-border regional interfaces (see Robertson et al., 2016 for case studies on regionalism in higher education). Regional cooperation offers a strategy for sustaining identity and agency in the face of a global power with hegemonic ambitions, as in the case of the post-1990 US. Regions are more likely to form where there are historical associations and cultural similarities. The ten nations in the Association of Southeast Asia have a free-trade zone, mutual recognition and mobility protocols, and staff and student exchanges (Chou and Ravinet, 2017). There is regional student mobility in South America, sub-Saharan Africa into South Africa, in Central Asia and between those nations and Russia, between countries in East Asia and from Southeast Asia into East Asia. However, except in Europe and to an extent in ASEAN, similar languages and/or adjacent geographies have not led

to educational system making as such. Arguably, only in Europe has regional system-building in higher education and research definitely led to a potent scale of action, beyond the nation-state, that has advanced the global impact of member nations both separately and together.

How regionally identified then was UK higher education prior to Brexit? The engagement of many UK universities in research collaboration in Europe as evidenced by the co-authorship data (Table 2.2), the leading role of UK scientists in the European FPs in research, the contribution of EU-citizen doctoral students within STEM programmes in the UK and the high proportion of UK academic staff appointed on merit who had non-UK EU origins (for all this see the next chapter), might all suggest that UK higher education had undergone thorough Europeanization by June 2016. However, it is not so simple.

The Maastricht Treaty of 1992 formally recognizes higher education as a domain of EU competence and gives the European Commission the right to encourage cooperation in education. However, member states retain full responsibility for the content of programmes, the organization of their systems, and cultural and linguistic diversity. Essentially, the extent of Europeanization, and especially the adoption of the EU's normative perspective of greater integration over time, is voluntary. The UK government and UK institutions were free to evade Europeanization if they so determined, and the chief factor driving regional commonality was the need to meet conditions for funding, for example the requirement in many European research projects for collaborative cross-country teams.

Brooks (2021) compares 'spatial imaginaries' of Europe in Denmark, Germany, Poland, Spain, Ireland and England. The methods used were document analysis and interviews with identified 'policy influencers' in each country. The author found that England, and to a lesser extent Denmark, stood out in comparison with the other countries in the study in the extent to which they manifest limited identification with Europe. In the policy documents in England and Denmark, there were fewer references to Europe as a space – for example, the Bologna Process was an important point of reference in Germany, Ireland, Poland and Spain but was hardly mentioned in England (which had made little effort to adjust its higher education system in line with Bologna) and Denmark. This was also the case in the interviews in England. Brooks (2021) notes that politics in Denmark is characterized by 'soft Euroscepticism'. In England, Euroscepticism took a 'harder form', and 'policy makers have also been more reluctant to

implement European initiatives within education'. Uniquely, in the English interviews, there was little acknowledgement of Europeanization as such.

Similarly, in the 127 research interviews that provide the empirical foundations of the present book, few of the UK-born personally called themselves European. 'If you ask anybody . . . it's always been it starts at Calais' as one interviewee put it. Some talked of an individual journey towards personal European identity, and many described the UK higher education sector, or their own institution, as 'European' or 'part of Europe'. To that extent the UK higher education institutions might have been different from most of the UK, and given both the continent-born presence and the slow change in the native-born, in another generation a much larger proportion might have believed themselves to be regional as well as national, European as well as British. If so, Brexit in 2016 put a stop to that trajectory.

3

Brexit and UK Higher Education

Ludovic Highman, Simon Marginson and Vassiliki Papatsiba

Introduction

Chapter 2 provided data on the importance of UK higher education not only in national life but in cross-border international education and networked science. Higher education and the associated science sector have been unambiguously successful in world terms. However, the international role and weight of the sector have never been fixed in stone. Its positive outcomes have not been the spontaneous outcome of natural superiority but have been the product of a complex policy context and ever-changing patterns of capacity, opportunity and incentive, in which the UK's links with higher education and science in Europe have been formative and until 2016, increasingly central. Because of the importance of Europe to UK higher education, especially but not only in research, the trajectory of UK higher education and research was and is highly vulnerable to Brexit. The negative effects that were widely predicted in 2016 are now becoming apparent.

Given its relatively high level of active integration into Europe, especially in research, with 17 per cent of academic staff being non-UK EU citizens (HESA, 2023), and with students, like many other young people, strongly favouring EU membership, it is not surprising that the sector closely identified with the Remain camp in the 2016 referendum (Finn, 2018). This may have compounded its post-Brexit problems in the policy sphere and in UK politics and public life. Protecting higher education and science from the effects of Brexit has not been a high priority for a Conservative government that won the 2019 election with the slogan 'get Brexit done' and was determined to do so without acknowledging the downsides or reconciling its critics. That government argued that the alternative trajectory to the UK in Europe was 'Global Britain', but its higher education ministry did little to build global connections beyond Europe for UK higher

education institutions and researchers. UK higher education has long been well connected internationally, but in the eight years after the Brexit referendum, there has been little evidence of positive growth into post-EU portfolios of activity, let alone a new global strategy. Instead, individual institutions have counted the costs of Brexit.

The topic of Brexit and UK higher education has triggered many newspaper articles, columns and blogs. Two notable scholarly monographs complement our empirical research in *Brexit, EU Students and UK Higher Education*: Anna Lohse's *Higher Education in an Age of Disruption* (2024) and Mike Finn's *British Universities in the Brexit Moment* (2018).

Lohse's comparative work examines through the lens of institutional theory how universities in France, Germany and the UK navigated both Brexit and Covid-19. The UK component of her research comprises fourteen interviews conducted between September 2020 and November 2021, with participants representing nine universities (six Russell Group and three post-1992 institutions) and sector organizations including Universities UK International, the British Council and the German Academic Exchange Service (DAAD) in London. Her theoretically grounded analysis considers the extent to which both disruptions have led to institutional changes across regulatory, normative and cultural-cognitive dimensions.

Finn's work, which was published earlier, soon after the 2016 referendum and before the cessation of home-equivalent tuition fees for EU students, offers a sharp-minded and readable account of the political predicament faced by a Remain-supporting university sector. While not based on extensive fieldwork, it provides valuable insights into the implications for academic staff and students during the immediate post-referendum period. Finn draws attention to the weight of non-UK EU-origin academic staff in UK universities: then 15 per cent of staff with much higher proportions among younger staff and staff in certain disciplines, including STEM fields and languages (p. 39), noting also that many non-UK academics from Europe were considering leaving the country.

The main domains in which Brexit has played out specifically in higher education since 2016 have been fourfold. Firstly, the enrolment of EU-citizen students in UK degree courses, as discussed throughout this book. Secondly, patterns of student mobility in both directions through the EU's flagship Erasmus+ and later, the UK-based Turing Scheme. Thirdly, research funding and collaboration, primarily through the EU's large-scale Horizon programme, which historically has been associated not only with funding and projects but with the entry into the UK of significant numbers of EU-citizen researchers.

EU-citizen movement into UK university employment was much facilitated by the free movement of labour within the EU. Fourthly, the support provided for UK institutions through European 'structural' funds, from the European Regional Development Fund (ERDF) and the European Social Fund (ESF), and also loans from the European Investment Bank (EIB). This chapter will now discuss each of these four domains in turn.

Enrolment of EU students in UK higher education institutions

In the early years, the referendum and its aftermath seemed to have no negative impact on the number of EU-citizen students entering degree programmes in the UK. In 2016–17, there were 138,040 non-UK EU-citizen students, 5.92 per cent of the total. In 2020–21, there were 152,905 EU-citizen students, an increase of almost 15,000 though a slight fall to 5.56 per cent of the total. Commencing (first-year) EU students had fallen in 2019–20 but rose slightly in 2020–21 (HESA, 2024), despite the deepening cultural divide between continental Europe and the UK as Brexit became normalized.

However, Brexit embodied a lag until the severance was complete, and pipeline effects as students, their fee status determined by the rules pertaining at entry, moved through their higher education programmes. The 2020–21 academic year was the last year in which EU students enjoyed home fee status and access to student finance through the UK tuition loans system. From 2021 to 2022 onwards, new EU students paid full international student fees and were required to pay up front in the year of study unless they had scholarship support. The slight rise in 2020–21 is readily explained as the accumulation of last-chance demand for subsidized places. As discussed in Chapter 1, EU student applications submitted to UCAS for the 2021–22 academic year fell by 40 per cent on the previous year (UCAS, 2021; UUK, 2022). Figure 3.1 compares the decline in EU-origin students with increases in other categories of international students in 2022–23.

Table 3.1 provides data on the level of EU student enrolments in 2022–23 compared to 2018–19, two years before the end of the pre-Brexit tuition system when all new EU students still enrolled on the basis of home country (UK) fees and tuition loan repayment arrangements.

The effects have been most dramatic in those institutions that have historically enrolled large numbers of EU-citizen students, including most of the universities in London, three in Scotland, and Coventry and Warwick

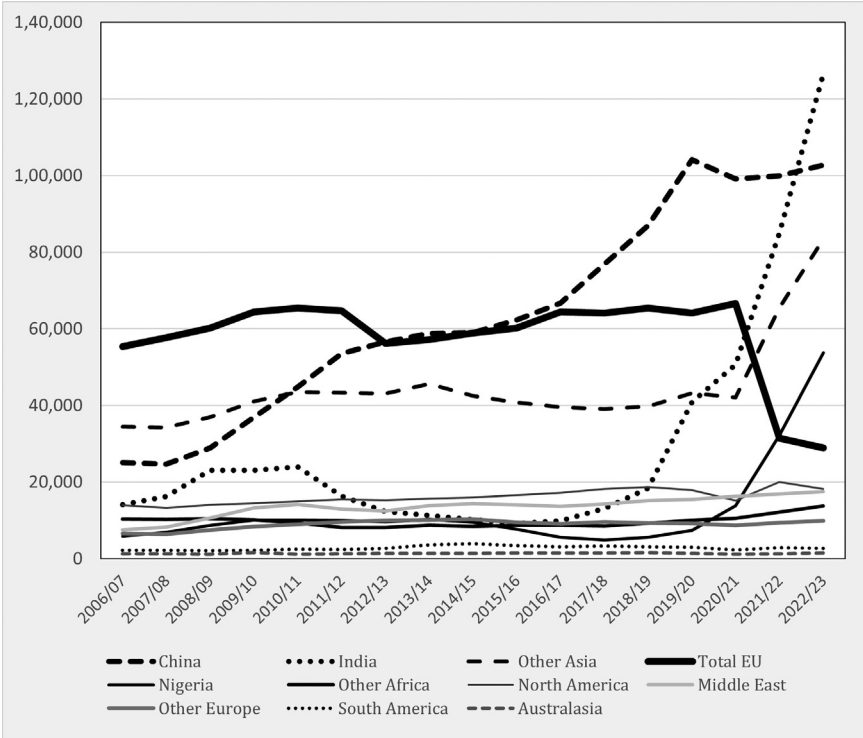

Figure 3.1 Entrant students with a permanent address outside the UK by permanent address. Academic years 2006–07 to 2022–23. *Source*: Authors, original data from HESA (2024).

Table 3.1 EU and International Non-EU Student Enrolments from 2018–19 to 2022–23

	2018/19	2019/20	2020/21	2021/22	2022/23
European Union	146,725	147,920	152,910	120,145	95,505
Non-European Union	349,590	406,310	447,225	555,060	663,355
Total Non-UK	496,315	554,230	600,135	675,200	758,855

Source: Authors, original data from HESA (2024).

in the West Midlands of England. High-demand institutions can replace EU students with domestic students, but the viability of some specialist programmes dependent on EU student demand, for example a Masters in European Law, is inevitably undermined.

These figures in Table 3.1 for 2022–23 include many students from EU countries who entered the UK under the pre-Brexit arrangements, enrolling in

Table 3.2 Change in First-Year Enrolments in UK Higher Education Between 2018–19 and 2022–23: Ten EU Countries with the Largest Number of Entrants in 2022–23

	2022–23	**2018–19**	**2022–23 as ratio of 2018–19**
France	4,110	6,840	0.60
Ireland	3,915	4,400	0.89
Germany	3,355	7,250	0.46
Italy	2,895	6,195	0.47
Spain	2,540	4,845	0.52
Greece	1,615	4,845	0.33
Cyprus (EU)	1,395	3,340	0.42
The Netherlands	1,055	1,855	0.57
Poland	1,040	3,625	0.29
Portugal	855	3,075	0.28

Source: Authors, original data from HESA (2024).

2020–21 or before on the basis of home country fee arrangements. Table 3.2 provides a sharper expression of the effects of Brexit. It compares first-year enrolments of EU students in 2018–19 and 2022–23, with the students coming from the ten leading EU source countries in 2022–23. All of the students in 2022–23 enrolled under the post-Brexit regime, paying full international fees. Note that the falls in EU student numbers were greater in Portugal and Eastern Europe, where average income per head was lower than in most of Western Europe. Note also that students from Ireland continued to pay UK home country fees after Brexit was done.

Student mobility: Reciprocal Erasmus+ replaced by unilateral Turing

As noted in Chapter 2, until the Brexit referendum changed the landscape, the UK combined three heterogeneous approaches to cross-border student mobility in higher education, all on a large scale. The first was commercial international education, including the inward movement of students into the UK, offshore campuses of UK institutions and TNE, whereby UK universities offered offshore degrees through franchising to partners or online education. Commercial international education had become (as it still is) a major source of funding for higher education in the UK, including research (Adams, 2022). In the most recent year for which data are available, 2022–23, fees from the 663,355 non-EU

international students enrolled in programmes within the UK generated £10.89 billion in revenue, 21.11 per cent of all institutional income (HESA, 2024).

The second approach to student mobility, a primary focus of this book, was the enrolment of European students in UK degrees, on largely the same basis as home country students – the same standardized fee (then £9,000 a full-time year for first-degree students) in all disciplines, with the right to access tuition loans paid back on the basis of future earnings. The only difference between EU students enrolled in the UK and local students was that the EU students were not eligible for grants and loans to cover living costs, designated in the UK as maintenance grants. The third form of student mobility was participation in the European student mobility scheme Erasmus+, funded by the EU and based on reciprocity between inward and outward student movement. Erasmus+ involved mobility for part rather than the whole of the degree programme. Erasmus+ is the subject of this section of the chapter.

Erasmus+ in UK

Altbach and Knight (2007) use the term 'European internationalization' (p. 293) to refer to a type of internationalization that fosters cooperation and integration between countries within the EU and the immediate European neighbourhood. Erasmus+ is the EU's programme for education, training, youth and sport. One of its main aims is to promote a sense of European identity and citizenship among participants (Papatsiba, 2006; Van Mol, 2018). However, prior to Brexit, the commitment to European integration was never strongly felt by UK elites, who understood EU membership more in terms of a cost-benefit accounting than as a geopolitical strategy for ending warfare in the region. This comparative lack of commitment to European identity and integration in the UK (Mitchell, 2012; Mitchell, 2015; Papatsiba, 2009; Sigalas, 2010), confirmed in our research (Marginson et al., 2020), also played out in the relatively low number of UK students going abroad through Erasmus, compared to the number of European students coming in. This lopsided pattern indicates that Erasmus was not fully successful, more so given that the education of twice as many non-UK Europeans in the UK, compared to UK Europeans in Europe, meant that the UK was losing financially through its participation (Finn, 2018, pp. 50–58). These factors made UK participation in Erasmus more vulnerable after the referendum.

After decades of protracted negotiations between member states contesting EU action in Education, Erasmus finally launched on 7 June 1987. The first student exchange occurred between eleven member states (Belgium, Denmark,

Germany, Greece, France, Ireland, Italy, the Netherlands, Portugal, Spain and the UK) and included 3,244 higher education students in 1987–88. Student mobility was considered a precursor of future professional mobility and would also provide opportunities for youth to experience international understanding among peoples and widen their sense of belonging. In the next three decades, Erasmus gained in popularity not only within higher education settings but also in school education, vocational education and training, adult learning and youth. It has come to be seen as perhaps the flagship EU programme, championing the geographic mobility of people. In the 2021–27 period, Erasmus+ has an overall budget of €26.2 billion, an increase of 56 per cent from the €14.7 billion provided in the previous phase (European Commission, 2022).

The European Commission estimates that more than 648,000 learners and staff benefited from a mobility activity in 2021 alone, 83 per cent of whom were students or trainees, while 17 per cent were staff. Overall, between 1987 and 2021, 12.5 million people were supported through Erasmus (European Union, 2022). In 2022, the programme included thirty-three countries throughout the European region and its neighbourhood and encompassed a plethora of activities, including student and trainee mobility, staff mobility, vocational education and training, projects for youth, sport actions and learning mobility activities for school pupils and staff (Hubble et al., 2021). Between 1987 and the UK's withdrawal from the EU, 200,000 UK-based individuals studied and worked in Europe (Adams, 2020).

The final programme involving the UK ran from 2014 to 2020. The UK Erasmus+ National Agency (2020) estimates that 6,993 projects were funded, and €1 billion was awarded in total in the UK. The UK Erasmus+ National Agency was a partnership between the British Council and Ecorys UK. The UK Department of Education was ultimately responsible for overseeing the operation of the programme. Institutions were funded in three Key Action (KA) areas: KA1 (Mobility of Individuals), which absorbed the largest part of the funds, €104 million in the 2017 call (Hubble et al. 2021); KA2 (Cooperation among organizations and institutions); and KA3 (Support to policy development and cooperation). Those institutions with a strong internationalization agenda benefited most. Under KA1, 169 UK institutions received grants to support mobility in higher education, ranging up to €2.6 million at the University of Edinburgh, the top UK sending institution in 2019.

In these final stages, the three most active universities in the programme were the Universities of Edinburgh, Warwick and Glasgow and the three most popular destinations for UK-domiciled students and trainees were Spain,

France and Germany. In 2019, 54,619 participants in 684 UK projects benefited from mobility in higher education, vocational education and training, school education, adult learning and youth for a total grant amount of €144.69 million. In higher education in 2018–19, there were 18,305 outgoing students and trainees (9,993 students, 8,106 trainees and 206 students/trainees) from the UK using the Erasmus+ scheme, compared with 30,501 incoming students and trainees (European Commission, 2019). Although the number of outgoing students and trainees increased every year from 2014, there was a decrease of incomers in 2018–19 compared with 2017–18. Table 3.3 has details.

Erasmus students were a significant part of the student community in many UK institutions. These students paid European home institution tuition fees as part of agreed reciprocal arrangements under Erasmus+. Hence, their fees were either non-existent or significantly lower than those paid by their UK counterparts. Their education in the UK was subsidized by the UK taxpayer, just as the Erasmus participation of UK students abroad was subsidized in the countries concerned. However, there was a financial imbalance because of British students' relatively low take-up of Erasmus places in non-English-speaking countries.

Inbound mobility under Erasmus+ was important not just because of reciprocity and building trust between equal partners, but also because it contributed to the UK economy through European student spending on goods and services, as with

Table 3.3 Incoming and outgoing Erasmus+ Student and Trainees, UK, 2014–15 to 2018–19

Incoming Students and Trainees					
Category	**2014–15**	**2015–16**	**2016–17**	**2017–18**	**2018–19**
Students	17,645	18,392	18,723	18,389	17,768
Trainees	12,590	12,677	12,595	13,001	12,029
Students and trainees	0	295	484	482	704
Total	30,235	31,364	31,802	31,871	30,501
Outgoing Students and Trainees					
Category	**2014–15**	**2015–16**	**2016–17**	**2017–18**	**2018–19**
Students	9,264	9,554	9,615	9,540	9,993
Trainees	5,539	6,089	6,799	7,328	8,106
Students and trainees	0	141	145	180	206
Total	14,803	15,784	16,559	17,048	18,305

Source: The Erasmus+ Annual Report 2019 (https://ec.europa.eu/programmes/erasmus-plus/about/statistics). European Commission, 2020.

the commercial education of students outside Europe. Incoming students under Erasmus+ contributed an estimated £440 million to the UK economy in 2018 (Hubble et al., 2021). In the case of student trainees, Erasmus also created a 'vital support to the private and public sectors by bringing distinctive perspectives and skills' while supporting collaboration across countries. Incoming students also championed language learning, raised home students' knowledge of the benefits associated with mobility and had 'lasting impacts on the networks of institutions and collaborations, including a catalytic effect on attracting other students' to pursue further studies in the UK (British Academy, 2020, p. 9).

Crucially also, Erasmus played a key role in Northern Ireland as a mediator of the geopolitical tensions of the previous decades, by promoting cultural exchange and the role of universities as international intersections between Northern Ireland and the Republic of Ireland. Erasmus also provided an important pathway for language degrees, the educational promotion of languages and an international dimension in many non-language degrees at UK universities; for example, in business studies, law, management and political science. Language learning is closely linked to the development of intercultural competence. Foreign languages struggle to maintain a role in UK education. Every instance of multilingual exposure helps local students and Erasmus legitimated plural languages and cultures.

The UK dumps Erasmus

After the Brexit decision, the initial position of the UK government was that it would seek continued participation in Erasmus+ by specifically funding its role in the scheme. However, in December 2020, it made a sudden announcement that the UK would withdraw from Erasmus and introduce its own Turing Scheme for student mobility (Paul, 2021). Continued participation in Erasmus was said to be too costly and limited by the scheme's regional bias. In contrast, Turing would constitute a truly global programme. While the decision to move to Turing was a surprise, the aspiration of Erasmus to foster European identity and quasi-citizenship (Papatsiba, 2009) was hard to reconcile with the 'Global Britain' discourse and lacked political support in a post-Brexit UK. The UK's International Education Strategy (HM Government, 2019) repeatedly articulates that opportunity lies beyond Europe, and that 'leaving the EU presents the UK with the opportunity to extend its role on the global stage' (p. 10).

In announcing the decision, then prime minister Boris Johnson also argued that Erasmus+ benefited the EU more than the UK in economic terms. He stated

that 'the UK is a massive net contributor to the continent's higher-education economy because over the last decades we had so many EU nationals, which has been a wonderful thing, but our arrangements mean the UK exchequer more or less loses out on the deal' (Gallardo, 2020).

The Turing Scheme

The four objectives of the Turing Scheme include advancing 'Global Britain', with over 150 countries involved; 'levelling up' within the UK; developing key skills to improve employability; and the better value for UK taxpayers (UK Government, 2022). The Turing Scheme was (and is) not based on reciprocity: it makes no provision for overseas students entering the UK for study purposes. It is entirely focused on the outward movement of UK students. This non-reciprocal structure deviates from one of the core principles of student exchange as public diplomacy (Mitchell, 1986; Papatsiba, 2005; Ellis, 2023), whereby states seek to accomplish foreign policy objectives by engaging with foreign publics and on the basis that international learning experiences should be mutually beneficial. Exchange diplomacy can be defined as 'an actor's attempt to manage the international environment by sending its citizens overseas and reciprocally accepting citizens from overseas for a period of study and/or acculturation' (Cull, 2008, p. 33). Turing also contradicts notions of soft power via education, whereby states achieve influence by welcoming and educating students from abroad.

The 2022–23 budget for the Turing Scheme was £110 million, less than the total value of all Erasmus+ projects funded in the UK, valued at €144.69 million in 2019. The scheme includes student financial support for living costs, but unlike Erasmus, it limits travel support to disadvantaged students only. It is expected that tuition fees will be waived by the host institution (Brooks and Waters, 2022, p. 2).

After a first inaugural year under the auspices of the British Council, in December 2021, administration and promotion of the Turing programme were surprisingly outsourced to Capita plc ('Capita'), a private consulting and digital services business also known to be one of the largest business process outsourcing and professional services companies in the UK. This change occurred despite the British Council's experience in building and managing international educational exchanges. The twenty-three-month awarded contract was worth £6.27 million (Capita, 2021), to administer funding of £110 million (Adams, 2021). This temporality contrasts with the seven-year EU funding frameworks for research and education and risked diverting more resources towards the administration

and management of short cyclical schemes. Capita appointed the Association of Commonwealth Universities as principal partner to lead on the assessment of applications and to support with monitoring and evaluation. This suggests that British priorities and strategic interests were being reworked along traditional lines. In the context of deepening tensions between China and the UK, and the absence of energetic promotion of educational links into other world regions such as Latin America, non-Anglophone Africa and Central Asia, the default for 'Global Britain' was neo-Imperial revival.

Questions, therefore, arise about the extent to which the Turing Scheme can and will foster diverse experiences. While Erasmus+ has a regional bias framed as 'European internationalization' (Altbach and Knight, 2007, p. 293) it encompasses very diverse settings in linguistic and cultural terms and has expanded its reach beyond Europe, especially in Latin America and the Asia-Pacific regions, notably through the Erasmus Mundus Action and capacity-building projects in higher education, vocational education, training, youth and sport. The EU alone has twenty-four official languages, and many member states are home to several other officially recognized national and regional languages. There is also a wide variety of structural models of higher education systems (Kyvik, 2004) and academic traditions (Picard, 2012). Inter-regional partnerships between far-flung English-speaking Commonwealth nations espousing similar academic traditions and steeped in a long-standing colonial legacy are unlikely to foster a comparable range of experiences.

As argued by Brennan et al. (2007) when it comes to the internationalization of UK higher education, certain specific UK characteristics should be considered, particularly the global role of the English language. On the one hand, this can facilitate UK academics' capacity to internationalize and enhance the popularity of the UK as a study destination, but the global language can also narrow the definition of 'international' as restricted to just a small number of English-speaking former colonies, as illustrated by some 'international' conferences and academic journals that 'limit themselves to the UK, Australia, Canada, and New Zealand with an occasional American squeezed in' (p. 171). The narrowing of linguistic and cultural diversity inherent in Turing-style mobility has socio-economic implications within the UK. The British Council's report *Language trends* (2018) highlights a widening gap in access to foreign languages at school according to students' socio-economic background (Tinsley and Doležal, 2018). Compared to their predecessors in Erasmus+, Turing's student participants may have less stimulus to develop intercultural competences.

More positively, the UK government has singled out increased access to disadvantaged student groups through Turing as the key differentiator and measure of improvement, taking in the 'levelling up' theme developed by the Boris Johnson Conservative government. In August 2021, it was stated that 48 per cent of participants in Turing would be from disadvantaged backgrounds, whereas when the UK was part of Erasmus+, the most privileged students were 1.7 times more likely to benefit from studying abroad than students as a whole. However, while Turing enables 40,000 UK-based students to study and work abroad anywhere in the world in 2021–22, only thirty-nine universities received grants for these placements (Department for Education, 2021b), less than one-fifth of all provider institutions. This is likely to exclude many institutions with relatively high numbers of students from disadvantaged backgrounds. Reports of issues delivering Turing bursaries to students while on their mobility placement are emerging, issues compounded by the high percentage of UK students from disadvantaged backgrounds. With universities having to apply for Turing mobility funds annually and only receiving their allocation during the summer holidays, it is difficult for students and universities to plan with certainty as typically overseas placements are arranged over a year ahead (Staton and Foster, 2023). The funding cycle appears to be out of touch with the needs of disadvantaged students (who need to pay upfront visa costs and organize travel arrangements without knowing whether their university has been successful) and the planning requirements of international mobility.

Brooks and Waters (2023) examine 100 UK university websites 'to explore the messages given to students about the Turing scheme' (p. 1). The 100 universities were randomly selected from the potential total of 167 institutions. The authors note that on the websites the use of the term 'global' was prominent, alongside citing the government's 'Global Britain' rhetoric, while 'international' appeared to be de-emphasized. 'Global' was often linked to a focus on the benefits of mobility in strengthening employability. However, in many cases 'global' simply meant adding the Anglophone world to Europe:

> Interesting also, but perhaps not surprising, is the way in 'global' was often de facto represented by a relatively narrow number and 'range' of countries (in terms of income level and geographical location). Kingston University's 'world-wide partners', for example, are based almost exclusively in the USA, Canada, and Australia. For Abertay University, the USA is the only non-Erasmus+ destination students can apply to study in. The ubiquity of the US in HEIs' study abroad offerings was apparent, featuring in the vast majority of webpages (when this information was given). Such a preference (for a relatively wealthy,

> Anglophone and neoliberal country with a high level of exposure through media in the UK) reflects renowned geographical disparities within international higher education, which in turn are mirrored in the relatively circumscribed 'international' mobilities of students, particularly British students. (Brooks and Waters, 2023, p. 6)

The study also finds that many of the university-to-university partnerships being promoted as carriers of Turing were in Europe and had been previously developed through Erasmus+. 'It seems likely that they are not new partnerships but a repackaging of older relationships, adapted to support student exchange in the post-Brexit era' (Brooks and Waters, 2023, p. 8). The authors also note that often universities promoted shorter trips abroad than were the norm under Erasmus, and this was presented as an enhancement of access.

Brooks and Walters (2022) also note that the governmental emphasis on increasing the participation of disadvantaged groups 'was reflected much less obviously in the HEI websites . . . the targeting of disadvantaged groups was not presented as a key aspect of the scheme on websites, while the enhanced Turing grants available to disadvantaged groups were mentioned only rarely' (p. 15).

In January 2024, the UK Department of Education (2024) released an evaluation of Year 1 of the Turing Scheme in 2021–22, a year in which education was substantially impacted by the Covid-19 pandemic. It states that 95 per cent of the providers of the Turing Scheme in UK higher education had previously received funding for international mobility under Erasmus (pp. 7, 21). The average/mean duration of placements in higher education was 109 days with a median of 68 days (p. 14). In total, 52 per cent of all higher education providers had increased the number of outward mobility placements compared to the Erasmus experience (p. 22), though no data were provided on comparative duration.

In total, 20,822 individuals took part in the scheme compared to the target of 35,000 (p. 14). The host institutions were most commonly in Europe (47 per cent), although North America (22 per cent) and Asia (19 per cent) were also prominent, and there were small minorities in Africa (7 per cent), Oceania (4 per cent) and South America (2 per cent) (Department of Education, 2024, p. 14). In a survey, 89 per cent of providers stated that Turing had 'enabled them to improve participation in international' but most fell short of targets in that respect (p. 28). Only 45 per cent of participating higher education students felt the scheme had covered half or more of their costs. The report softly suggests that this shortfall may have impacted more heavily on students from disadvantaged backgrounds (pp. 8, 29). The report provides no hard data on the participation

of disadvantaged students or comparison between Erasmus and Turing in that regard.

Horizon: Three years out of European research

While UK university scholarship and research have ancient roots and the country's advanced scientific capacity has accumulated since the nineteenth century, its present global standing and impact especially rest on effective positioning and networking within Europe. The centrality achieved by UK research within European networks at the time of the Brexit referendum is highlighted in data from the European Commission (2017). Brexit placed at risk this centrality and its productive synergy between regional activity and local/national capacity building. How great was that risk depended on the extent to which UK researchers, and universities, were able to sustain research relationships in Europe. That, in turn, was closely affected by whether after Brexit the UK would maintain at least attenuated participation in EU FPs via Horizon Europe, the main funded research programme.

In the UK's Brexit negotiations with the EU, both parties committed to UK participation in Horizon Europe as an associate member, noting that as such the UK would enjoy terms less favourable than the EU member countries. For example, the UK would be unable to take out any more monies in research grants for its researchers than it allocated for participation in the programme. The EU-UK Trade and Cooperation Agreement, commonly known as the 'Brexit deal', includes provisions for UK association with Horizon, which had a planned budget of €95.5 billion for the years 2021–27. However, the Brexit negotiations were fractious. For a time, the EU held agreement on UK inclusion in Horizon subject to the resolution of core disputes about matters related to the Northern Ireland protocol. (Science/Business, 2021; Politico, 2022; House of Lords European Affairs Committee, 2022). When the obstacles on the EU side were removed, it was expected that the resolution of Horizon would proceed quickly, but the UK then disputed the EU's calculation of the UK's financial obligation for participation. It was widely reported that the then prime minister, Rishi Sunak, was opposed to rejoining Horizon. There was considerable lobbying of the government by UK-based science and research organizations, and eventually on 6 September 2023, the deal was signed, bringing the UK back to Horizon, and also Copernicus, the EU's £8 billion Earth observation programme. The UK did not rejoin the European nuclear research alliance Euratom R&D. It was agreed

that the UK would contribute £2.2 billion to enable participation in Horizon as an associate member (Amos, 2023).

The five-year process of delay in resolving associate membership led to increasingly severe disruption to carefully curated research collaborations and long-term strategic partnerships, and inhibited or blocked potential new partnerships and projects.

Prior to Brexit, the UK had evolved as an increasingly effective participant in the successive EU FPs in research, such as Horizon and its predecessors. European sources had come to constitute a significant source of funds and talent for research in the UK, while the free movement protocols of the EU had facilitated mobility into the UK research system. The net result of Brexit was to take the UK out of Horizon altogether for three years, disrupting the continuity of not only UK participation in individual projects but also the leadership of British scientists in European research, and inhibiting future mobility of scientists and doctoral students into the UK, as well as mobility out of the UK. As a non-member, the UK's future participation in European research will be less extensive and intensive than it was before 2016, though those outcomes are yet to unfold. This section of the chapter tracks the rise of the UK in European research and its partial fall consequent to Brexit.

The UK and European research

EU-funded research and innovation networks are not confined to EU countries: researchers from 149 countries participated in Horizon 2020 in 2014–17, providing nearly 1.5 million one-to-one opportunities to collaborate among 23,664 participants in over 7,500 projects (Balland et al., 2019). This is knowledge production on an extensive scale, surpassing research collaboration instigated by single countries, bilateral or small multi-country schemes. As the largest single research system in the world, paralleling those of the United States and China, European research offers enormous potential benefits, and there are corresponding disadvantages in exclusion or self-exclusion. Science is a collaborative endeavour in which national research systems and research groups depend crucially for their effectiveness on participation in networks and active production of new science within those networks.

As Highman (2017) notes, beneath 'the tip of the iceberg', the visible inflow of research grants, lies the 'added value of collaboration, reputation, networking, joint use of research facilities and the leverage effect of EU funding'. Network centrality continually improves 'the knowledge, capabilities, organisational

structures and strategies of the organisations involved' (Breschi et al., 2009, p. 833). You have to be in it to win it.

The first EU FP for Research and Innovation in 1984 had a budget of €3.75 billion. By 2020, when Horizon 2020 finished, it had €80 billion. Many regional projects require cross-country partnerships as a condition of funding and this has reinforced the networking that is naturally fostered by electronic communications in global science (Wagner et al., 2015; Marginson, 2022). Over the thirty-six years of FP activity prior to Brexit, the UK continuously bolstered its position as a central hub and influential network member within the research and innovation collaborations incentivized by successive EU FPs.

Two significant EU funding schemes for research and innovation that foster flows of research talent are the European Research Council (ERC) and Marie Skłodowska-Curie Actions (MSCA). The ERC grants are awarded to outstanding researchers with a track record of research excellence in any field of research, while the MSCA awards are open to talented researchers in any field, including both early career and experienced researchers. Both schemes provide long-term funding for excellent research projects, ranging from basic research to marketable innovation. Prior to Brexit, the UK excelled in winning these prestigious grants. Data from FP7 (2007–13) show that it was the top-performing country, receiving €1.665 billion in ERC grants and €1.086 billion in MSCAs. Next most successful was Germany with €1.087 billion and €0.564 billion, respectively (EEAS, 2021). As well as being a vital second source of funding alongside UK research council funding, European funding has been especially important in those specific disciplines where research is more strongly supported in relative terms in Europe than in the UK, fields such as Archaeology, Classics and Computing (Technopolis, 2017). Between the commencement of ERC grants in 2007 until its exit from the EU in 2020, the UK retained the position of leading recipient nation in relation to ERC grants (European Research Council, 2023).

An interim evaluation of Horizon 2020 concludes that, among all eligible organizations from across the public and private sectors, the 'British universities . . . typically act as the main knowledge brokers' (European Commission, 2017, p. 372). As Jackson-Bowers et al. state (2006, p. 2), 'knowledge brokers build relationships and networks, and are well informed and up to date on what is happening in their domain . . . [and are] trustworthy subject experts with a high level of credibility'. This role implies the accumulation of expanding capabilities for connections, collaborations and joint ventures, and facility in the exchange of ideas and resources that develop in the flow of people and funding. De Domenico and Arenas (2016) assert that key explanatory factors in a country's

success in EU research funding are its attractiveness, meaning its ability to attract researchers from abroad, and its stickiness, meaning its ability to prevent brain drain. In the 2007–14 FP, Switzerland and the UK exhibited the greatest attractiveness, and Israel and the UK the highest stickiness. Prior to Brexit, the UK was a major net importer of mobile EU doctoral students, researchers and academics, drawn by 'a combination of inter alia linguistics, the reputation of its universities and international outlook', as well as an 'open labour market' (Garben, 2020, pp. 335–36).

Given how much UK university research has benefited from EU membership, from both the business and the science points of view and given the broader benefits of the research collaborations to the UK economy and society, it is surprising that the anti-Brexit message in relation to research did not break out of the sector's echo chambers. Perhaps this suggests shortcomings in the communication systems of the universities and of science, but Corbett (2018) argues that higher education and research are second-order policy domains that are unlikely to 'be a make-or-break issue for either the UK government or the EU'. Interestingly, it was Leave, rather than Remain, that included research and higher education as a policy issue in 2016. The Leave campaign claimed that EU-focused collaborations were holding back the UK and promised a more open international environment and truly global opportunities for research post-Brexit (BBC, 2017). Little has been heard of this since 2016. Meanwhile, the costs of Brexit for research have become increasingly apparent.

Just as success breeds success, the reverse is true: absence and failure also magnify themselves. Yet while it takes decades to build the roles of knowledge broker and talent magnet in research, these are lost more quickly if the advantages of collaborating with the knowledge broker diminish or vanish. Uncertainty has already diminished the UK's position.

The UK was the second-largest recipient of Horizon 2020 funding, with EU contributions amounting to €6.9 billion (Cut-off date August 2020) (House of Commons Library, 2020, p. 27). Around 14 per cent of funds allocated from Horizon 2020 went to the UK, with three British universities in the top 10 recipients. This was a relatively strong performance given the high levels of uncertainty and antagonism during the protracted EU/UK negotiations, but nevertheless, it indicates a decline in the UK's position. Between 2017 and 2020, the UK dropped from joint first place with Germany to fifth place, behind Germany, France, Spain and Italy (THE, 2021). If the UK had kept pace with Germany, it would have participated in 2,742 more projects between 2017 and 2020. From a high of €1.484 billion in grant income in 2015, UK institutions

won €0.919 billion in 2020, a drop of 38 per cent. Brexit cost UK research £1.46 billion in Horizon 2020 grant income (Scientists for Europe, 2021).

The decline of UK participation in and coordination of collaborative projects between 2016 and 2020 can be attributed to the risk represented by partnerships with British universities. Marie Skłodowska-Curie grants that involve individual researcher mobility have also been affected. The end of free movement for EU citizens has curtailed their residency rights in the UK, has imposed visa related costs and additional bureaucratic processes and has implications for the prospect of long-term residence after the MCRA fellowship.

Loss of talent

In 2016–17, there were 14,985 research students from EU countries in UK higher education, representing 13.3 per cent of all research students. At each of Cambridge and Imperial, where there were very large concentrations of STEM researchers, 40.1 per cent of all postgraduate researchers in STEM were from EU countries (HESA, 2023), and in all fields, 20.5 per cent of Imperial research students and 20.6 per cent of those from Cambridge were from the EU. But in 2022–23, the overall number of EU research students had fallen from 14,985 to 10,355, a drop from 13.3 to 8.4 per cent of the research student workforce. At Imperial, 15.3 per cent of the research students were from the EU, and at Cambridge, 16.1 per cent (HESA, 2024). There were similar declines in the engagement of EU students in most UK institutions. This is due to the combined effects of the Brexit shock, the loss of free movement within Europe and the long wobble over UK participation in Horizon. Increasingly, UK science will depend in the future on the entry of high-quality students from China, but if UK/China tensions continue, that inflow of talent is potentially unstable.

In 2020–21, 38,320 full-time equivalent academic staff had EU country nationality, 17.1 per cent of all academic staff. The proportion was higher in some research-intensive universities and in the natural, mathematical and medical sciences (HESA, 2023). However, the proportion of staff who are EU citizens is in decline. While up to 2020–21 there was little change in the overall proportion of academic staff who were EU citizens, in 2020–21, 23.3 per cent of academic staff from Imperial were non-UK EU citizens compared to 32.0 per cent in 2016–17. At UCL, the drop was from 27.2 to 21.4 per cent, at Cambridge from 26.1 to 19.5 per cent and at Oxford from 25.1 to only 16.5 per cent (HESA, 2023).

This trend is driven not only by a reduction in hiring from Europe but by the exit of European citizens within UK universities. In 2022, it was reported that one in eight of the UK-based recipients of the 2021 round of ERC grants had left the UK to move their grant to an eligible EU organization Science/Business (2022b). Almost 50 per cent of all UK-based ERC grantees are nationals of a country other than the UK, a higher proportion than anywhere except Switzerland (Siftova, 2022). If there are continued obstacles to effective participation in European research programmes in the future, many more research leaders will leave the UK research system.

EU structural funds and bank loans in UK higher education

Prior to the completion of Brexit, in addition to the FPs for research, UK higher education institutions drew support from various EU funding programmes that foster economic and social development, such as the ERDF and the ESF, programmes collectively designated as 'structural funds'. These sources financed new capital facilities, with a marked emphasis on disadvantaged regions of the country, and some research activities. In addition, from 2007 to 2016, UK universities received €2.625 billion in EIB loans.

Structural funding supported UK policies for innovation, small and medium enterprise (SME) competitiveness, low carbon, broadband, urban development, social inclusion, skills and employment. EU funding was critical for investment projects and services for local authorities, development/enterprise bodies and the voluntary sector. In higher education, these funds supported long-term investment and provided opportunities to participate in projects that contribute to the economic and social development of regions and populations. The evaluation of Research Impact and Knowledge Exchange activities played a significant role in driving UK universities towards greater engagement and active contribution beyond just generating new research knowledge.

Long-term investments in infrastructure supported by ERDF helped universities to enhance their role as regional hubs of knowledge and innovation. This expectation was reiterated by the 2023 Nurse Review of the research, development and innovation landscape:

> Universities and other RPOs should support their local community and economy by enhancing their role as an information nexus and by helping local industries

> link to research capabilities wherever they are in the UK. (Department for Science, Innovation, and Technology, 2023, p. 15)

After joining the European Community in 1975, the UK received £66 billion in structural funds, over £100 billion when combined with co-financing from the public and private sectors for regional economic and social development (Bachtler and Begg, 2017). During the 2014–20 Multiannual Financial Framework, the UK received €11 billion in structural funds, with €5.8 billion from the ERDF and €5.1 billion from the ESF (House of Commons Library, 2020). In relation to research, ERDF grants in 2007–13 provided €1.9 billion to UK research organizations compared to €7.0 billion provided by FP grants. Whereas FP grants tend to favour the leading research universities, structural funds were especially linked to poorer regions, notably Wales and Northern Ireland, where in each case ERDF research and innovation funding in universities was relatively more important than FP funding (Technopolis, 2017).

Overall, universities played a crucial role within the UK in implementing European structural funds, with 20.6 per cent of the £2.696 billion ERDF funds that were assigned to England in 2014–20 being reserved for university-led projects. In Wales, universities led 30 per cent of the projects that received funding (UUK, 2022). After Brexit the UK government pledged to match EU funding with the UK Shared Prosperity Fund (UKSPF) launched in April 2022, but this scheme has been criticized for not being as extensive or effective in supporting the differing regional needs as was the ERDF (Institute for Government, 2018). Additionally, the department in charge of the UKSPF lacked experience in managing research and innovation. For universities, the transition to UKSPF funding marked the abrupt end of about a hundred projects and left considerable uncertainty not only for universities but also for their partners. These projects had been undertaken in collaboration with SMEs and large companies, which in turn had also benefited from their involvement in multiple EU FPs, leading to improved access to other European markets.

As noted, the matched funding component of these EU programmes provided financial leverage, with EIB loans covering up to 50 per cent of the total cost. This created a 'crowding-in' effect that encouraged further private investment in R&D outside the programme. Studies estimate this effect at 0.74, meaning that for every €1 spent on R&D by the European Commission, a further €0.74 was invested by other organizations in the EU economy (Technopolis, 2017, p. 6).

Before Brexit, the EIB also played a significant role in financing UK universities. The EIB provided loans for research and innovation-related activities totalling

€5.9 billion from 2007 to 2016. For example, in 2011, the University of Strathclyde received €100.9 million for restructuring its two main sites. In 2014, Ulster's relocation to Belfast City Centre received €182.6 million. Kent borrowed €94.3 million for teaching and research facilities. Imperial received €178.5 million in 2014, Oxford €278.8 million in 2015, UCL €365.7 million in 2015 and 2016 and Edinburgh €257.0 million in 2016 (Technopolis, 2017, Appendix D). After Brexit, new EIB lending to the UK university sector ceased, and some universities repaid their loans because of concerns over the flexibility of covenants after Brexit (McCann et al., 2019). UK universities had also been relying on EIB loans to finance their campus development. Russell Group universities and universities with a relatively large number of staff and postgraduate taught students were also more likely to borrow: prestigious universities had better access to debt markets and they borrowed to expand their campuses to meet accommodation needs.

Effects of Brexit for universities in Europe

Most of the discussion about Brexit in this book, as elsewhere in UK analyses of Brexit and higher education, is about the consequences in the UK. It is important not to forget that Brexit has also had profound implications for non-UK European universities, faculty, other researchers and students connected to the UK sector, and those that would have connected in the absence of the Brexit event.

In 2017, the ESRC Centre for Global Higher Education led a cross-country research project on university perceptions of Brexit, with interviews conducted in Denmark, Germany, Hungary, Ireland, the Netherlands, Norway, Poland, Portugal, Switzerland and the UK. A total of 127 interviews were conducted across the ten case study countries. What follows is a summary of the findings of that project; for a fuller report, see Courtois (2018).

Most country case studies were based on two different institutions, and a vertical slice of interviews from central government to university leadership and academics on secure and insecure contracts. In the spirit of an exploratory research project, in which each country team had significant autonomy, the teams adopted slightly different methods. Thus, for instance, the Dutch study favoured a cross-institutional approach rather than a case study approach, while the German study focused on three higher education institutions. The Swiss study respondents were recruited across four institutions. The Hungarian team encountered access issues and their interviews were complemented by a survey that was completed at fifteen higher education institutions.

A number of themes emerged that were common to all the countries under study. At the time the data was collected, little was known about the future position of the UK in relation to EU research funding or the conditions for student and staff mobility within post-Brexit Europe. Uncertainty and concerns for the future of European research – and for the European project at large – were expressed across all case studies. The UK had been sought as a research partner due to the prestige of UK higher education institutions and the presence of high-profile researchers in the UK. As such, the UK has played a role in enhancing European research, with benefits to all members. For these reasons, the exclusion of the UK was often perceived as a risk for the European Research Area. The UK was an important research partner for research teams across Europe; it was where several key research facilities were located and it was a popular destination for students and staff from many EU countries. Its inclusion in the EU was valued as such by its EU research partners.

Academic interviewees, in particular, emphasized the importance of their UK collaborators to their ongoing research activities. They feared that the exclusion of the UK would damage the quality and reputation of European research and have a detrimental impact on their own research work. The loss of the UK as an academic exchange partner was also a source of concern for countries sending significant numbers of students to the UK.

Conclusion

In higher education and research, the largest change resulting from Brexit is not the reduction in resource flows, important as they are, but the implications for the demography of the UK sector and hence for its internal diversity, external connectedness and evolving cultural identity. With European people movement into UK higher education having been dramatically reduced, the country no longer functions as a magnet for talent in the same manner as it was when explicitly positioned within Europe, with inward mobility fostered by European schemes and subsidies. Coupled with the conscious refusal of Europe which Brexit represents, there is every prospect that insularity will take hold in the island nation. As the chapters that follow will show, this prospect deeply concerned many of the participants who were interviewed for the present study.

Undergraduate and taught Masters students from EU countries are now required to pay full-cost international student fees, averaging £22,000 a year (British Council, 2024) and ranging beyond £40,000 for a single year at a

prestigious university. The proportion of students from EU countries is falling sharply, as Tables 3.1 and 3.2 show. Unlike prospective international students from affluent families in much of the world, many students from Western Europe have access to high-quality universities (fostered by three decades of cooperative regional development within the EHEA and the largest R&D budget in the world) that are free to enter or charge only nominal tuition fees. For most of them, the UK is now unaffordable. This demographic effect has been compounded by the end of subsidized shorter-term inward student mobility under Erasmus+. The UK's 'replacement', the Turing Scheme, funds only the outward journeys of UK-resident students. A small minority of UK students each year will have an enriched cultural-educational experience, but the potential for internationalization at home of all students has been weakened drastically.

Corresponding to this, the weakened role of the UK in collaborative European research has generated reductions in the inward flows of doctoral students, postdoctoral researchers and scholars, and mature researchers. Participation in Horizon was salvaged at the associate member level after six years of uncertainty, but from outside the EU, UK science cannot play its prior leadership role, has less financial capacity to draw talent and offers larger visa barriers. The end of free people movement into the UK from EU countries (not to mention perceptions of UK hostility and insularity, whether justified or not) has further reduced potential applications from EU member countries for UK-based academic posts.

The diminishing of European faces and voices has effects also for the four-fifths of UK-based academic staff who are not EU country citizens. The interviews for the present study on Brexit and higher education found that comparatively few non-EU citizens themselves identified as 'European' – British exceptionalism runs deep – yet the overwhelming majority of the 127 people interviewed had a strong sense of engagement with Europe. Brexit had a potent emotional dimension that was largely negative. Many interviewees referred to a profound sense of loss (Marginson et al., 2020). Links with European higher education and research continue in the UK higher education sector but the compelling drivers, the flow of Erasmus+ students, the single EU talent pool with free movement within it and the unambiguous role of the UK in Horizon Europe, with scope to build an ever-larger portfolio of activity, have now been attenuated or are absent altogether. In the long run, the severance wounds in higher education will heal. But at this time, it is unclear what, if anything, will replace the many-sided EU links in terms of resources, activities, people, cultural immersion and the larger sense of regional belonging within the global space.

4

EU Student Numbers

"*The sector may see them disappear overnight.*"

Introduction

This chapter examines how the framing of EU students as 'numbers' and 'units of resource' shaped institutional responses to Brexit. The reduction of students to numerical values created a fundamental contradiction with their educational contributions while highlighting two critical issues: their role in institutional financial sustainability and the mounting anxiety about institutional survival. In the context of intensifying marketization following the 2012 tuition-fee reforms, changes in student demographics and enrolments have increasingly been viewed through the lens of 'existential' threats to UK universities – a stark departure from the era of public funding when institutional survival was rarely questioned and was indeed taken for granted. This tension between viewing students as learners versus viewing them as financial assets emerged as a central theme in how universities approached the challenges of Brexit. The dominance of this resource-oriented framing signals the entrenchment of business models amid the commodification and marketization in UK higher education: the treatment of EU students as primarily financial units both reflects and legitimizes broader trends in the commercialization of international higher education.

Impending changes in the aftermath of the Brexit referendum provided a pressing context for HEIs to monitor, closer than they had ever done before, their EU student enrolments. This heightened attention to EU student numbers represented a significant shift – while institutions had always tracked international student data, Brexit compelled a more granular and anxious monitoring of EU-specific trends. All 127 participants in our study discussed EU student numbers, reflecting both the salience of this issue and its centrality to institutional planning. This intensive focus served three key purposes: firstly, to establish precise baseline data about existing EU student cohorts; secondly, to

model various scenarios for managing the anticipated decline in EU enrolments; and thirdly, to articulate more explicitly the contributions that EU students made to UK universities. One participant in the study highlighted how detailed monitoring of EU student numbers was a new practice in their institution:

> We started reporting our student data, rather than that kind of tradition home, EU, overseas, we've started to split out EU students [and] whether EU students numbers are going up and down by departmental level. (Senior Administrator, Small Pre-1992 University)

The vast majority of participants anticipated a substantial sector-wide drop in EU student enrolments. Some viewed it as having a damaging effect on higher education: 'I think it will be a disaster for the higher education system, I think that we will lose a lot of students.' Others did not fear any adverse systemic effect, but they were keen to stress that they were not prepared to give up on European students: 'The European students are important to us, so while we know that we can survive, you know, turbulence and whatever else, we wouldn't want to lose the European students.'

Our study participants attributed the expected decline in student numbers directly to the introduction of international student fees for EU students, the discontinuation of their access to the UK student loan system and the impending visa requirements for migration following the end of freedom of movement. The discontinuation of the UK's EU membership would end EU students' access to UK higher education (e.g. tuition fees and loans) on the same terms as domestic students. It would also end their freedom of mobility and residency rights by introducing visa controls and permissions regulated by migration policy. The scale of changes left the participants pondering over the disincentives of bureaucratic processes and the newly introduced economic obstacles for EU students.

> if the fee structure is such that it becomes prohibitively expensive – and we already have high fees in our country, if you look at our fees compared to Europe, generally they don't have any – so you know, why would you go to the UK to study when you can go elsewhere, and you don't come out with an amount of debt? (Academic Leader, Mid-sized Russell Group University)

> now it's pretty easy, you know, it's just across the sea and there is no paperwork to do, it's going to make the recruitment process as well more complicated if there is a visa. (Academic Leader, Mid-sized Russell Group University)

> you also need to think about, you know, can they afford it, is there a loan book equivalent in their country that allows them to go abroad and maybe, you

> know, get support for fees and maintenance when studying abroad. (Senior Administrator, Mid-sized Pre-1992 University)
>
> lot of the students are going to be worried, with visas and funding and money and then they feel like it's too much trouble to come over here and study, that they'll maybe just stay over there. (Student representative, Mid-sized Pre-1992 University)

Alongside the hindrance caused by these very real practical restrictions, many participants believed Brexit had 'sent out' an 'unwelcoming message' and that EU students would hold off on studying in the UK due to the creation of this 'hostile environment'.

> since Brexit, and since just before Brexit as well, I think that we've had a lot more feedback from students that they feel that – to use the phrase 'hostile environment' – certainly for international students, but even for EU students, there have been conversations around that, and about that they, merely the fact the vote happened makes them feel unwelcome. (Student representative, Small Pre-1992 University)
>
> I think the white European students, because they haven't faced any kind of racism or discrimination before, they find it more marked. (Student representative, Small Pre-1992 University)
>
> issues around attitudes and how that's changed since Brexit is something that we talk to a whole range of people about, including the Chief Constable, so there's been a definite turn towards intolerance (. . .), so I would say that that's something that we talk about a lot. (Senior Executive, Mid-sized Russell Group University)

This xenophobic sentiment was one of the ways participants anticipated damage to the UK's international reputation – however others included: a diminished participation in collaboration and research networks, resulting in the UK becoming more 'inward looking' and isolationist. In parallel, there was a decreased sense of the UK continuing to act as a geopolitical research leader. Independently of the exact detail of future collaboration policy and frameworks, participants felt that UK universities will no longer be the partner of choice for their EU counterparts.

Many participants explained that the earlier growth of EU student numbers was in no small part due to networking and collaboration undertaken by talented EU staff. They also added that EU research grants/leadership contributed to making the academic job market dynamic and prosperous, giving new academic homes to many EU researchers and academics, who were later joined by EU students.

As such, they feared that disruptions to different forms of EU involvement would put a halt to, or drive down, the 'organic' growth of EU students.

The ubiquitous success of the Erasmus programme was highlighted by many as one such form of involvement. Notably, few participants anticipated that the UK would lose access to the Erasmus programme, but did worry that disruptions in student exchanges and mobility would have a concomitant impact on enrolment and numbers. Although they anticipated bilateral and other student exchange agreements to continue, they were concerned about the level of future funding. They made the point that any potential reduction in funding for undergraduate student mobility will further disadvantage students who cannot afford the additional costs associated with a student mobility experience, irrespective of whether they are outgoing or incoming students.

The concerns and issues were inflected somewhat by geography given the differences in higher education funding and governance; concerns in Scotland, Wales and Northern Ireland varied expectedly as the prospective changes to fees and mobility differed in each region. These specificities are explored in more depth in the section 'Regional impacts on devolved higher education systems'.

Is Brexit an 'existential' threat (to financial institutional viability)?

As a consequence of tuition-fee and migration regime changes and their potential impact on EU student enrolment levels, senior leaders found themselves confronting the scale of the threat to the sector and to their institutions. The destabilizing effect of Brexit alongside changes in higher education policy and student demographics prompted leaders to examine whether or not the danger could be considered 'existential', as the senior executive below describes:

> there are institutions where these things are existential, if you're an institution, you know this rough figure that about a third of British universities have lost about 20 per cent upwards of their UK student numbers since 2013, so you've got this happening . . . you've filled your boots with EU students. (Senior Executive, Mid-sized Russell Group University)

Similar ideas were shared across the participants; the risks to the sector were described by some as 'sector shrinkage'; others feared 'universities going under', 'closure of a large number of universities' or 'universities disappearing'; some questioned whether the government would take action to prevent universities

from 'going bust'. These considerations demonstrate that universities contemplate and appraise changes of 'size and shape' in the sector through the lens of financial 'viability' for individual institutions, and whether or not their operations could be affected to a degree that could cause business failure.

> I guess we need to be prepared for potential shrinkage of the higher education sector, because with the demographics coming through, just, you know, of home based students, it's not growing, so you know, you might be looking ultimately at a contraction, unless you can refill with, you know, sort of rest of the world type students, rather than EU only, so I think, you know, potentially, it has quite major implications, short and long term. (Academic Leader, Mid-sized Pre-1992 University)

As expected, given this consideration about existential threats, the key focus turned to income and the financial implications of a decrease in EU student numbers.

> [We] are the most exposed [region] university to European HE recruitment, 20 per cent of our students are Europeans, so clearly it is a priority to, how should I phrase it, be able to replace that income. (Academic Leader, Mid-sized Pre-1992 University)

In some institutions, the prospect of reduced EU student numbers suggested that a closer look into academic posts was perhaps inevitable, even though redundancies would come at the end of exploring other options for redressing institutional finances.

> Financially, we're going to take a hit, for sure, that might reduce – have an effect on staffing levels. (Academic Leader, Mid-sized Post-1992 University)

> We've not put a freeze on posts yet because we've been growing, but those are the sort of things we'd have to do. (. . .) [W]e would hope that, I think, that we could deal with some of it through natural wastage, as it were, through churn, (. . .), so we've recruited new staff and there is an element of churn, of people being promoted, people moving on and everything, so we'd look to try and do it that way. (Academic Leader, Large Post-1992 University)

These reflections on potential post-Brexit shifts in student demographics revealed deeper concerns and anxieties that participants qualified as 'existential', a choice of term which emphasizes the gravity and fundamental nature of these concerns for the future of higher education institutions. Brexit-related changes were highlighted as a potential turning point where financial pressures could escalate to the extent of jeopardizing universities' operational viability – a scenario that,

due to these changes, was no longer unthinkable. This study provides evidence of this point in time when participants not only considered implications affecting some areas of institutional operations but questioned their present and futures. Yet, despite this potential challenge, the majority of our participants did not anticipate their institutions experiencing substantial income losses.

> We reckon we would be able to plug gaps, but for some other universities anecdotally, I hear it would be extremely difficult for them and you know, it could be that some universities end up going to the wall or having to merge or whatever, but we're not in that situation. (Governing Body, Small Pre-1992 University)

Notwithstanding that downplaying specific financial impacts on their individual institutions is part of the anticipated, well-told, positive accounts of institutional strategy and effective mitigations that senior managers are positioned to provide to the outside world, there may be a financial rationale that only a minority expanded on: even if there are fewer EU students, those who come to the UK will be paying higher international rate fees, which either mitigates income loss or presents an opportunity to increase revenue. These participants tended to be from Russell Group universities or institutions that combined a degree of institutional prestige with the geographic advantage provided by their location. One senior executive described this as a simple calculation:

> I think our international fees are double our UK/Europe fees, so we will need, if it's half the number of students, we should be okay. (. . .) So on Brexit specifically, our working assumption is half the number of students but twice the fees, so it will net off. (Senior Executive, Small Pre-1992 University)

It is worth mentioning that econometric modelling, taking into account student data up to 2016–17, projected that 159 UK HEIs were likely to be financially worse off as a result of a drop in EU student enrolments post-Brexit (Department for Education, 2021a). The only winners were projected to be Oxford and Cambridge, for whom increased fees from postgrads would offset reduced overall EU enrolments. This scenario underscores a broader trend: institutions with highly selective admissions processes stood to gain financially from the shift. As EU student numbers declined, these elite universities could fill the vacated places with other students, particularly those from non-EU countries paying higher international fees. Although likely to have been commissioned by DFE in 2018, the report was released in February 2021 (Department for Education, 2021a), and therefore it is highly unlikely that its findings would have

been made available to higher education institutions pre-Brexit when different financial scenarios were drawn by institutions.

Prevalence of an institution-wide view

Our participants at this level show more allegiance to the university as a whole. Participants recognized that changing student demographics could impact particular academic departments, units and subject areas; however, their concern remained focused on broader consequences for the institution as a whole entity. As long as overall numbers could be accounted for, the specific negative consequences for individual departments and subject areas could be tolerated:

> we've got a certain number of schools or courses where we've got more than 50 per cent of our students are from the EU, so (. . .) over 50, you've definitely got an issue, because you may lose, like, Psychology is one of those, you may lose lots and lots of EU students, but Scottish students might want to come and study something else. (Senior Executive, Mid-sized Pre-1992 University)

Restructuring at a departmental level was simply noted by senior executives, often in an impassive way and without receiving thorough exploration in the interviews. This implied that effects on specific academic units would constitute an acceptable level of disturbance for leadership, whose priority is the financial health of a whole institution capable of balancing its books:

> the most intellectually honest [answer], is because we can drop a [European] student and replace him or her with one from [a local English region] and it's the same fee and since we have 40,000 applicants, I mean, it's not an existential issue for us. (Senior Executive, Mid-sized Russell Group University)

> so whilst the university might see its income and its student numbers maintained, actually it won't necessarily be in the same bits of the institution. (Senior Executive, Mid-sized Post-1992 University)

Threat to programmes and departments

In contrast to institutional leadership's bird's eye view, staff members closer to 'boots-on-the-ground' daily activity were more concerned with the risk to individual departments and programmes.

> cause European students tend to come for specific courses (. . .) without those European students, you know, not all the modules would be viable, so it's not just something you can sort of say, 'that's all, we'll put a border around that'. (Academic leader, Mid-sized Post-1992 University)

As the distribution of EU students is not even across an institution, the effects of a significant reduction in student enrolments could disproportionately affect a certain number of faculties or academic units. In one of the potentially affected faculties, the anxiety was palpable:

> Financially for me it threatens quite a lot, to be honest, because income that we currently derive from European students in my faculty is about £1.3 million, so without that, that leaves a fairly sizable hole to fill. (Academic leader, Mid-sized Post-1992 University)

In some institutions, participants referred to a *wide number of vulnerable disciplines*, such as Arts and Media, Business and Management, Computing/ Computer sciences, Engineering, Law, Languages and Literature, Life Sciences and Politics. Although there are patterns of subject areas with high EU student enrolments at a national level, the broad range of subjects highlighted by our participants indicated that no subject area was categorically immune. As such, the specific vulnerabilities could be unique to each institution and their particular distribution of students across subjects and departments.

> I can't speak for others, but our EU students tend to crop up in STEM subjects a lot and Management is very popular with them, Economics, Modern Languages, the Sciences generally, but it depends whether it's undergraduate or postgraduate, etc, but broadly, that's where there's a clump. (Governing Body, Small Pre-1992 University)

In some cases, participants were aware of potential disciplinary vulnerabilities but did not have firm knowledge or statistics on hand to describe them, or decided not to reveal sensitive details.

Participants linked programme viability directly to student demand. As such, they feared for programmes with high proportions of EU student numbers – when faced with the prospect of losing these students, these participants simply concluded 'some programmes may not be sustainable anymore'. This framing of students as the customers of higher education highlighted the power of student demand and preferences within the UK higher education system.

> for us as a business, that makes that school or unit not sustainable perhaps, so we might have to change quite fundamentally what we do as a university because

> the student demographics will change and what they want to study will change. (Senior Administrator, Mid-sized Pre-1992 University)

Shifts in student demand have the potential to either facilitate or impede knowledge diversification and disciplinary growth, making them subject to market forces. In addition to the human cost that seems unaccounted for, there is also a sense that participants did not defend universities as bastions of academic knowledge, nor did they discuss disciplinary offerings as determined by any intrinsic value.

Some participants pointed out that *courses with an international orientation could decline* as a result of reduced demand from UK students who do not show an inclination towards course content with an international or global focus. The declining EU student numbers leading to a decline in the number of courses EU students gravitate towards could threaten their individual viability but could also act as a decreased incentive for overseas students to seek out education in the UK:

> Yeah, well, there we are. We've got things like, you know, International Enterprise and things like that and often it's the overseas students who are interested in this sort of thing, British students, again, are more insular, less outward looking, yeah. (Academic Leader, Large Post-1992 University)

> if no students are signing up to do the module in European Law, then it's better, from an institutional standpoint, that the person who teaches that teaches something else, you know. (Academic Leader, Mid-sized Post-1992 University)

These ideas emphasize the appeal of having a broad corpus of intellectual and academic study within UK universities. A narrower range of subject areas reduces both student choice and the ability of universities to curate and pass on important bodies of knowledge. Some participants mentioned that home student choice and experience will be affected as a result of programmes discontinuing.

> The risk of destabilisation (. . .) we deliver obviously a full range of courses at the moment across the Scottish universities, it would be a shame if we were no longer able to deliver some for Scottish students or UK students. (Senior Executive, Mid-sized Pre-1992 University)

Disruptions to EU involvement impacts the organic growth of EU students

As explained earlier, the increase in EU student enrolments was often attributed to the parallel growth of European professional networks and research collaborations driven by EU staff.

> there's just a lot of organic involvement with Europe generally because we have a very high proportion of European staff, [. . .], so there's just a very organic relationship building, I think, with other institutions and with the European Union and research funding and so on. (Senior Administrator, Mid-sized Pre-1992 University)

This 'organic' growth of EU student numbers is used here to contrast with 'top down' approaches and is a key finding. It highlights not only discrete areas of activity but also how academic environments are composed of elements that build on one another with staff, students and research funding becoming a whole (e.g. staff coming to the UK have relationships with their previous HEIs and colleagues in Europe, they continue to collaborate actively, they get students to come and also put funding bids with their European counterparts, gain funding, recruit research assistants, etc). EU research students or postdocs, in particular, are very appreciated because of their qualifications (doctoral training is often longer in European countries).

> In terms of students, my involvement with that is I have Erasmus students coming from European countries into my research laboratory, I don't know whether that'll continue or not. (Senior Academic, Mid-sized Russell Group University)

> I think particularly our European staff, who have had much more exposure to Erasmus than our staff have, again, I think it took us quite a lot of time to get really embedded in the Erasmus programme, those European staff who come really drive our bids for the Erasmus programmes and then, you know, we have lots of European students coming and vice versa going over there and I've been really impressed by what the students get out of those programmes. (Academic Leader, Mid-sized Russell Group University)

Disruptions in student exchanges – The fate of Erasmus

As was noted in Chapter 3, within the UK there has been an ambivalence towards Erasmus, often attributed to the imbalance in the exchange, with more incoming than outgoing students.

> if we come back to the question of student mobility, then obviously what you notice is there's an asymmetry, in the sense (. . .) that there's much less demand for people to travel away from the UK (. . .) than there is for students coming in the other direction. That asymmetry is just, you can't get around that. (Senior Executive, Mid-sized Russell Group University)

However, the steady and consistent recognition of the benefit of Erasmus to the student experience shifted opinions closer towards wider acceptance. Universities in the study took a stance in favour of retaining participation:

> we do want to continue (. . .) Erasmus placements as long as possible, despite Brexit, because it's such a valuable thing for the students. (Senior Academic, Mid-sized Pre-1992 University)

> the attractiveness of study abroad is immense (. . .) so it's not just UK students who avail themselves on Erasmus (. . .) it's European students, EU domicile, who then can come to us and avail themselves of Erasmus and that's very popular. (Senior Executive, Small Pre-1992 University)

Most participants did not consider Erasmus to be a divisive political subject, as one stated: 'we do believe that politicians on all sides of the agenda support Erasmus'.

Few considered the possibility of losing Erasmus to be a significant risk. This could partly be attributed to the fact that participation in Erasmus was acknowledged not to be contingent on EU membership. As such, it was somewhat considered protected from the intricacies of the protracted withdrawal negotiations and their uncertain outcome at the time of the interviews:

> We're working on the assumption that that will continue pretty much as is and even if we left, you know, even when we leave the EU, there are non-EU States that are members of the Erasmus scheme. (Academic Leader, Mid-sized Russell Group University)

Some participants referred to its broader educational scope, which extended well beyond higher education and also highlighted the scale and efficiencies it had achieved. They noted how Erasmus had facilitated school, teacher and youth exchanges and, therefore, provided an effective mechanism for intercultural connections and experiences within the broader educational sector. As one participant noted:

> Erasmus isn't just about student mobility, it includes an enormous amount of opportunities for schools, particularly in England. (Senior Executive, Mid-sized Pre-1992 University)

Its good standing within the education sector was acknowledged by the consistent interest in Erasmus from prospective students, as a head of department admitted.

> I can't think of an open day I've done in the last, since I've been head of department, where somebody has not asked about the future of the Erasmus scheme. (Academic Leader, Mid-sized Russell Group University)

While acknowledging the popularity of Erasmus towards student mobility, and although participants tended to view the experience of studying abroad as unequivocally beneficial for students, Erasmus was often treated as a means of making study abroad affordable. One participant plainly stated: 'it is important because, you know, it does provide the funding'.

Beyond its contribution to student finances towards a period of study abroad, there was a relative complacency surrounding perceptions of Erasmus when measured against the existential threat of declining income from EU enrolments. Erasmus was never at the top of any institution's priorities:

> Erasmus is hugely popular, we've made no bones about our desire to keep Erasmus and the importance we attach to it or some kind of replacement, but it's not, I mean, people aren't tearing their hair out and weeping in the streets as a result of it. (Senior Administrator, Small Pre-1992 University)

Because of the difficulty of prolonged diplomatic discussions around the nature and scope of the withdrawal agreement, there was fear that Erasmus would not compete with larger issues affecting research, or key sectors of the economy and society. Those who did consider the risk to Erasmus feared that it would lack sufficient support in negotiations, as a result of its low priority within the national agenda and the long-standing UK concern about student flow imbalances.

While the majority of participants did not anticipate that the UK would lose access to Erasmus, the small number that did emphasize the significance of change. One participant framed Erasmus as one of the mechanisms that defined the close interrelation between UK and EU HE:

> The fact that Europe was so integrated and so connected meant that there are sort of, there is machinery that looks after it's working, so at the point where you remove a cog [Erasmus], obviously that cog can spin on its own but it doesn't move the whole machine, so you have to build further frameworks in order to connect the cog back in. (Senior Administrator, Small Pre-1992 University)

The difficulty of replacing or substituting Erasmus with other policies or frameworks that mimic the benefits to student mobility was further highlighted by participants who took time to recognize the sizable dedication of time and academic capital that they had already invested into Erasmus:

> I think it took us quite a lot of time to get really embedded in the Erasmus programme. (Academic Leader, Mid-sized Russell Group University)

As such, there was some indication that any attempt at a replacement would require an equal commitment of time and resources in order to achieve the same level of success:

> The scenario where [Erasmus] is not in existence, and even in the event of the UK deciding to do its own thing, that would take time to get up and going. (Senior Executive, Small Pre-1992 University)

The exact significance of Erasmus differed by institution – depending on levels of participation in Erasmus and in alternative programmes aimed at supporting student mobility.

In one context, a participant pointed to long-standing agreements that date back '30, 40 years' that have resulted in the formation of strong, involved and trusting relationships with specific institutions that have endured to the present day. Others report an ongoing, vigorous commitment to engage in Erasmus agreements as part of an explicit recognition of the value of Erasmus to students and to the university more broadly.

> we continue to sign ongoing Erasmus agreements in my post on a fortnightly basis, I guess, so it's still very much seeing that the European link is very important, both for the students and for the staff and for our ongoing research. (Senior Executive, Mid-sized Pre-1992 University)

However, in another context, a participant described Erasmus as a 'mixed blessing' because a significant proportion of their student body remains local as a function of life-course and geography. As a result, this participant anticipated a disproportionate disadvantage 'for those who do use it', noting: 'if it was taken away it would be really detrimental'.

Other institutions recognized that Erasmus is not irreplaceable or unique, but rather that it serves as one tool to support student mobility within a wide portfolio of other viable options:

> we have a range of mobility and Erasmus isn't the biggest. For some departments, it's a large proportion, you know, it is the largest proportion, but as a university, more students participate in non-Erasmus mobility schemes than Erasmus mobility schemes. It doesn't mean to say that it isn't important, but the students know that there are a whole variety of mobility opportunities outside of Erasmus. (Senior Executive, Small Pre-1992 University)

These broader and more comprehensive student exchange portfolios were discussed most extensively in prestigious universities. Expectedly, these institutions have more resources and greater visibility to overseas institutions that desire to forge collaborative relationships with reputable UK institutions.

Participants noted how universities will have to return to the increased complexity of bilateral agreements with individual countries or universities, and when contemplating this prospect, strongly favoured a possible replacement for Erasmus to prevent the UK from becoming 'cut off' from the global community:

> [Losing out on Erasmus] is a massive loss in terms of the ability of the university, our students and the country to look externally and to see themselves as part of a global scene, a global business scene, and having that international mind-set, it can be replaced, I guess there could be a programme to replace it, we'd very much like to see something along those lines, because we do risk, as an island, having an island mentality, if we don't have programmes that actively promote international collaborations. (Senior Administrator, Large Post-1992 University)

Regional impacts on devolved higher education systems

Following devolution in 2000, the UK implemented diverse student fee regimes across its constituent countries. Each nation gained the authority to establish its own fee structure, resulting in significant variations. Prior to Brexit, home and EU students were treated identically within each country, but the fees differed between nations.

Between 2017 and 2019, when the study took place and participants referred to tuition fees, the situation was as follows:

In England, both home and EU students paid £9,250 annually. Scotland took a different approach, abolishing fees entirely for home and EU students after devolution. Wales and Northern Ireland initially set lower fees, with Wales charging a maximum of £3,810 per annum in 2017–18, and Northern Ireland capping fees at £3,805. However, in subsequent years, fees in Wales gradually increased, aligning more closely with England's £9,250 by 2018–19 and beyond. Northern Ireland continued to charge about half of the English tuition fees, reaching £4,750 in 2024–25.

In the Scottish, Welsh and Northern Irish contexts, as in England, there was significant concern that the change in fee status of EU students from home to international would deter applicants. EU applicants were highly valued for their

cultural contributions to both the campus and surrounding communities, while simultaneously being praised for their academic preparedness and abilities. Their presence was considered instrumental in sustaining a diverse range of educational offerings. This sentiment was particularly pronounced in Scotland, Wales and Northern Ireland.

Scotland

Following devolution in 2000 and the abolition of fees, both home and EU students in Scotland were not required to pay any tuition fees. The Scottish government provides funding for student places, and universities are responsible for filling them. This included both home and EU students under the number controls policy. Following the UK's withdrawal from the EU, European students lost their home-equivalent fee status. Starting from the 2021–22 academic year, EU students beginning new courses are now subject to international student fees, with each university determining its own fee structure for these students.

Participants in Scottish universities expressed significant apprehension about Brexit's impact on EU student fees, potentially raising them to full international rates. This change, now implemented, was felt to compel Scottish institutions to compete with English universities for the shrinking pool of European students able to afford UK tuition.

> Universities now have to move from selecting European students in a competition with Scottish students to recruiting European students who will likely have to pay fees. It's a really difficult position and it puts the Scottish universities, I would suggest, (. . .) in competition with the English universities for the scarce European students who wish to pay fees to come to the UK. (Senior Executive, Mid-sized Pre-1992 University)

Due to the expected decline in the number of EU students, participants felt that increasing the number of Scottish students was one of the few viable options left. However, they expressed concern that there might not be enough suitably qualified Scottish students to fill all the available places in universities across Scotland. This potential shortage could lead to unintended consequences, especially in terms of quality. If universities aim to attract more home students, they may need to compete more aggressively and potentially lower their admission criteria. This adjustment could potentially lead to retention issues down the line and affect the overall academic standards of Scottish institutions.

This situation was often described as a collateral impact of Brexit on Scottish higher education.

> They [the scenarios] are all challenging, 'cause they all involve increasing our number of Scottish students, for example and well, at least two of the scenarios do and of course, depending on the Government's decision, we'll be in competition with the other Scottish universities with that pool of students, so then you have to think about, well, do you lower your entry tariffs to get more students in, so if you do that, what's the impact on retention, for example, which we're very keen to keep retention figures very high, so there's quite a lot of room for collateral effects here, depending on what decisions are made by Government. (Senior Executive, Mid-sized Pre-1992 University)

However, for some participants, especially in the higher echelons of the university, one of the advantages of the Scottish higher education system is that it recruits students to the degree, rather than the subject. This may contribute to the restructuring of individual programmes with more ease, as numbers can be balanced at the study level across the institution.

> Because of the Scottish system, where we recruit to the degree and not the subject, so we recruit to BSc, MA or BEng, you know, there is probably more institutional responsibility than perhaps in the English universities, or most English universities, but it is a bit of both. (Academic Leader, Mid-sized Pre-1992 University)

However, this alludes to the scope for top-down restructuring at an institution-wide level, which university executives are responsible for. This approach could leave academic units more heavily and individually affected, as changes in student numbers or programme offerings might disproportionately impact certain departments or faculties.

There was a general perception that student caps put a break on competition through regulation, whereas unregulated student numbers put no limit on competition. If policy changes lead to more competition within Scottish higher education, teaching-intensive universities will feel the impact of those changes relative to an institution like St Andrews. It was therefore expected that the impact on EU students coming out of that Scottish system will be very different on the different institutions. Certain institutions will be able to deal with these consequences better than others. There would be a need to replace EU students, or universities could face financial difficulties.

> In Scotland, the impact on the EU students coming out of that Scottish system will be very different on the different institutions, so the 19 institutions in

> Scotland are extremely diverse and some of them would have serious financial difficulties (. . .) if they can't replace them, then they will have significant issues. So, that means that in Scotland, for example, there will be differing views as to what a solution or a good outcome would look like. (Senior Executive, Small Pre-1992 University)

Wales

The problems that Brexit introduces to EU students, owing to a predicted increase in tuition fees, were discussed alongside the impending changes to national higher education finances following a high-level policy review in Wales. The Diamond Review of Higher Education Funding in Wales (Diamond, 2016) called the same student recruitment concerns into question with more immediacy, promising shifts to the fee regimes without the assurance of a transition period for EU students. Between Brexit and the Diamond Review, participants found themselves caught up in the middle of two important policy drivers for drastic change in student finance. Although there was great uncertainty and the exact implications were unknown, it was felt that the potential impact of changes in student finance policies on EU students would be significant. This made the planning of mitigating or other strategies complex.

> at the moment in Wales the fee is £9,000 and the Welsh Government, up until September '18, have paid nearly 5,000 of that, so Welsh students and EU students have been able to borrow from the student loan company the remaining 4,000. From September '18 that's all set to change, so Welsh students will all get £1,000 towards their fees and then it'll be means tested (. . .) our strategy will differ if EU students are still treated the same as Welsh students (. . .) that makes a very different action plan to what you might do if they're not going to be allowed to access anything, which is the bigger worry. (Senior Executive, Large Post-1992 University)

Participants expected either Brexit or a domestic change in fee policy following the Diamond Report to remove easy student-loan access, and many perceived 'a great deal of angst' from existing EU students and partner institutions uncertain of future arrangements and possibilities.

Furthermore, comparisons were usually made between the different national higher education systems, mainly between England and Wales or Scotland, owing to the specific national arrangements for student finance. A few participants raised the issue of higher education funding in Wales and the advantageous rate that both home and EU students were once able to access. They compared their

situation to that of Scotland and contrasted it with the student funding regime in England. The tuition fees in Wales and Scotland were state subsidized for home and EU students, and so EU students accessing Welsh Higher Education did pay a reduced rate (we were given the figure of approximately £3,800), as opposed to the far higher fees in England (£9,250).

Pre-Brexit, this presented a competitive advantage for universities in Wales over English universities. However, as EU students become considered international students, the prospective fees will undergo a far sharper rise to the full rate for international students (£10,000–£38,000~). While the specifics of the exact costs differ slightly, participants did note the circumstances were 'similar' to Scotland – in both cases, future study for EU students holds a substantially higher price tag, leaving them to ponder potential remedial actions that they couldn't envision.

> to go from £3,800 to potentially 12, 13,000 pounds for an overseas student, it's a huge jump, so we've got to do something about that. (Senior Executive, Large Post-1992 University)

Generally, participants expressed uncertainty about effective solutions, given the magnitude of the changes. The combination of a national review of higher education funding and the UK-wide Brexit shifts created a complex landscape that made it difficult to formulate clear strategies.

Northern Ireland

Higher education funding in Northern Ireland places a limit on both student intake and tuition fees, often referred to as the 'student cap'. In essence, this means that student intake follows a predefined number of government-subsidized places for home students who pay a discounted or 'capped' tuition fee. For full-time undergraduate students, this was set at £4,395 for the 2020–21 academic year, which is nearly half the equivalent English tuition fees. Government grants contribute a significant proportion of funding for higher education institutions. Pre-Brexit, EU students counted towards student caps and paid home fees, so attracting more students was not primarily about increasing income.

The main concern regarding the future of EU students in Northern Ireland was the potential impact of Brexit on mobility flows, particularly across the land border between Northern Ireland and the Republic of Ireland. Historically, students from the Republic have formed the largest group of EU students in Northern Ireland, thanks to the ease of cross-border movement. The emphasis

on ease of mobility and the sensitivity to any potential obstacles, given Ireland's historical context between North and South, underscores the profound constitutional, political, cultural and historical significance of this border.

Brexit and its implications for Northern Ireland caused considerable diplomatic conundrums and friction between the UK and the EU. The resulting uncertainty about citizen rights, among other important issues, caused anxiety about participation in higher education and student status. Citizen rights are constitutionally linked to the Belfast or Good Friday Agreement, according to which the people of Northern Ireland may choose to have British citizenship, Irish citizenship or both. In terms of higher education, this has the potential to create a politically sensitive imbalance in how mobile students on either side of the island could be charged tuition fees in Northern Ireland and the Republic of Ireland. As one participant stated:

> So the difficulty in Northern Ireland, of course, is that the Good Friday Agreement allows people in Northern Ireland to be both British or Irish citizens, and or both, and the question then is, if you're Irish and you live in the north, then you could go to university in the south and pay the local home rate because you are technically Irish and yet you live in the UK, but a Republic of Ireland student in the south, who's an Irish citizen coming to the north, we don't have the clarity on what we would be required to charge them and whether or not there would have be a UK-wide position on that, or whether we would have something different because of the Good Friday Agreement. (Senior Executive 1*, Large Pre-1992 University)

Underlying the financial uncertainty regarding the fee status of students from the Republic of Ireland was a deeper concern. Participants expressed apprehension about any changes that might evoke difficult historical memories or potentially reignite past conflicts. The delicate nature of this situation was evident in their comments about the challenges of reclassifying Republic of Ireland students post-Brexit. As one participant noted:

> Republic of Ireland students are EU applicants at the moment and there would be difficulties in identifying them as international students, for political reasons, as much as anything else, post-Brexit, so you can see a sort of a fissure beginning to develop. (Senior Executive 1, Large Pre-1992 University)

Participants also observed that Brexit could lead to EU students no longer counting towards national student caps. This shift, some speculated, could potentially free up places for home students and increase revenue from EU students being charged international fees.

> How we see European students as a part of our non-regulated income, is something that would be on our radar, so there's the student income generation piece. (Senior Executive 2, Large Pre-1992 University)

There were mixed assessments in relation to competition. For some, Brexit changes were seen as an opportunity to compete for 'Southern Irish' students. However, there were also concerns about competition with English universities; 'Southern Irish' students were attracted to England rather than Northern Ireland, despite the higher tuition fees. Others focused on appealing to more international students. Northern Ireland's unique position was viewed as a potential advantage, allowing Northern Irish universities to leverage their location within the UK while being part of the island of Ireland. A contrasting view emerged suggesting that the Republic of Ireland, as an English-speaking EU country, could instead become an attractive study destination post-Brexit. Some considered this a strategic opportunity for Northern Ireland, believing that Ireland had limited capacity to accommodate increased student numbers.

> If those European students who are studying in Great Britain at the moment, England, Scotland and Wales, if many of those decide that they no longer want to come to the UK but they want to go to an English speaking country, then the English speaking country they may target is Ireland, or the south of Ireland. The south of Ireland does not have the capacity to take the numbers, so I think there's a real opportunity for us then to try and capture that, but being 100 miles up the road from Dublin, yeah and that is one of the strategic opportunities, I think, that arises. (Senior Executive 3, Large Pre-1992 University)

Despite these potential advantages and efforts to project a positive outlook, participants valued the openness and collaboration afforded by EU membership more highly. The overall impact of Brexit was still expected to be negative compared to the pre-Brexit situation of open borders and collaborative relationships with Europe.

Response to the loss of EU students: University strategies

As the above quotations indicate, the referendum and the subsequent prospect of leaving the EU constituted a threat to universities that had enjoyed popularity with EU students, researchers and academics and were net beneficiaries of EU-funded research and leadership of consortia. This danger was the instigating

factor that prompted institutions to re-evaluate their ties to Europe and acknowledge existing issues and tensions within the sector.

With the general consensus being that EU student numbers will inevitably drop, some participants confronted the narrative of a seamless transition post-Brexit by virtue of international students replacing European students. Notwithstanding their focus on expanding their TNE provision, migration barriers and the hindrances they introduce to student mobility were lamented.

> Well, we've got tier 4 restrictions which prohibit that and if you look for my faculty then, we had a big overseas contingent, particularly from places like the Indian subcontinent actually, we had cohorts on Masters courses of 60, no longer, so you know, if you look at our overseas student recruitment, it's on a real slippery slope because of the tier 4 restrictions, so unless there's some change to the visa requirements, I think we've got a bit of an issue really. (Academic Leader, Large Post-1992 University)

While a couple of participants did dismiss the risk of Brexit, most agreed the situation was certainly a disruption worth addressing and attempting to remedy. To that end, several raised the idea of 'targeted bursaries and scholarships': 'to protect income', but also preserve 'that rich mix of students' and 'the richness of the student experience'.

Beginning the close-up monitoring of EU enrolments

Many institutions had not monitored data on the number of EU students and staff as there was no impetus to do so prior to the referendum. With the residence rights and tuition status of EU students being nearly equivalent to that of domestic UK citizens, institutions did not have any specific compliance or financial rationale for such monitoring.

However, the referendum outcome necessitated a strategic reassessment by institutions, requiring them to pay closer attention to the distinction between home and EU students. This analysis was crucial for institutions to gauge their level of 'EU exposure' and develop informed, forward-looking strategies to navigate the impending changes.

> but I think until we did this piece of work [identifying the number and distribution of EU students across the university], sort of which started in November time, we didn't have a clear picture, we sort of had an inkling that. (Senior Administrator, Mid-sized Pre-1992 University)

There was one institution that had been reporting the breakdown of UK and EU students 'years prior' to the referendum. 'We've been monitoring that since Brexit was first mooted.' The participant went on to explain how this was couched in terms of broader ongoing internationalization strategy.

Marketing and recruitment: Toolkits and artillery

The broader framework of cooperation between the UK and EU had led to a substantial number of EU student enrolments in UK institutions – without those institutions having to resort to active and targeted marketing strategies, or mobilize their 'recruitment machinery' as they do within the international student recruitment arena (Financial Times, 2021). Reputation, word-of-mouth and 'organic growth' had contributed to that steady influx of EU students.

The Withdrawal Agreement prompted consideration of the change in status should EU students become akin to international students, rather than UK-domiciled students. This was directly connected to the international fee regime that was seen as a newly erected barrier to EU student enrolments, yet presented a strong incentive for institutions to redouble their recruitment efforts.

> EU students become international students, of course, there's no question there about what level of fees they might end up having to pay. (. . .) I think actually the institution will take more interest perhaps than it has done hitherto, 'cause in a sense, what's the interest in recruiting EU students at the moment? They pay home fees, you know, they're not so obviously international. (Senior Executive, Mid-sized Russell Group University)

Within a sector that has undergone substantial marketization, the responses to enrolment fluctuations are expectedly from the same toolkit that is designed to generate income, boost reputation and fix any economic resource issues for the institution. HEIs increasingly behave as businesses that have to target their 'markets', gain market intelligence about customer preferences and review their 'product development' and 'value proposition' in order to appeal to those markets and successfully compete and survive.

> there's still quite a lot of work we need to do to understand what is going to influence European students' choices in the future, you know? Why would they still want to come to the UK if they had to pay fees – so that you can align the recruitment stuff due to that. (Senior Administrator, Mid-sized Pre-1992 University)

Zoom in and zoom out from Europe: Maintaining relations in Europe or newer pastures?

Two dominant strategies

When participants were prompted to discuss how universities are responding to, and preparing for, the anticipated changes in EU student status and its implications for enrolments, two dominant strategies emerged in the data. Firstly, there was a set of universities where participants argued for maintaining EU student numbers using a range of approaches, such as scholarships, campuses in Europe and close ties with EU counterparts. Secondly, and in some cases concomitantly, participants acknowledged strategic directions involving new 'markets' to make up for lost EU numbers and income. International students were the primary prospective target to make up for the drop in EU students. 'Doubling down' on the UK market was entertained by some, yet dismissed by others who often referred to a finite number of suitably qualified UK-domiciled students.

In this section, we will focus on the nascent EU-related strategies without delving into broader internationalization strategies. The broad-brush picture presented here acknowledges both the commercial sensitivity of the topic and the significant political ambiguity that made strategizing challenging as the post-Brexit parameters were both uncertain and difficult to predict.

Seeking to maintain EU students enrolments

In early discussions about maintaining engagement with European students post-Brexit, UK universities contemplated a range of potential strategies, including a shift from bloc-wide to country-specific approaches, the introduction of targeted scholarship programmes, the possibility of establishing European campuses and partnerships and the expansion of online and hybrid learning options.

In institutions where there was an apparent desire to maintain a strong engagement with the EU, several approaches were explored. In some cases, the EU was no longer a homogeneous block but was apprehended through the lens of its constituent parts and their higher education system specificities. Discussion centred on different countries' higher education systems and tuition arrangements. A natural strategy to attract students would be identifying system similarities and 'targeting those countries where students are used to paying fees', so developing tailored approaches for different European countries. Leaving the EU bloc appeared to shift focus from the supranational to individual national

levels, anticipating more bilateral approaches in EU student recruitment. Such a shift could lead to more tailored marketing efforts and partnerships, moving away from the standardized EU framework approach. Scholarships were also considered an option able to correct some of the downward trend. Usually, participants approached a potential introduction of scholarships as a proposition that could soften the impact of international fees on student finances: 'What kind of scholarship(s) can we put in place to mitigate the increase of the fees and that is something we could do easily.'

Offsetting the risk of losing European students post-Brexit also included seeking to maintain ties with the EU by developing joint teaching programmes with other European countries or investing in and setting up campuses in Europe. The latter option, although seriously considered, appeared to have drawbacks as universities realized that

> the fees that we can attract are less in Europe, for obvious reasons, than the fees that we can attract from European students coming to the UK. (Governing body, Large post-1992 University)

Additionally, universities were looking to offer more online provisions and joint ventures to make it easier for European students to obtain a degree from the UK without having to come to the UK.

Finally, many universities expressed a commitment to maintaining their European connections and identity, actively reaching out to partners across the continent. As one participant emphasized, 'We're still here and going to be here and still very much a European university and interested in maintaining those contacts'. This sentiment underscores the value placed on European collaborations and the desire to preserve a sense of shared academic culture despite the changing political landscape.

New international pastures

During our interviews, participants briefly mentioned the appointment of regional officers to promote universities in various global markets. Occasionally, it was noted that Europe was just another region and that the institution had not treated it any differently. Brexit changes have raised questions about the legitimacy of Europe as a special approach, suggesting a shift in the approach to global engagement.

Additionally, the conversation delved into the topic of TNE. It was noted that some UK universities were collaborating with European universities to establish TNE agreements as a way to increase broader international student numbers

while students study in their own country. Overall, discussions centred around the impact of Brexit on UK universities' international recruitment efforts and the measures being taken to mitigate this impact. The participants emphasized the need for UK universities to remain globally engaged and to build relationships with universities from diverse regions.

Balancing act and broader implications

Adapting to the changes brought by Brexit and the anticipated drop in EU student numbers led universities to consider a range of strategies to maintain student enrolments and secure their financial sustainability. These included identifying system similarities with different EU countries and targeting those where students are used to paying fees, considering scholarships to mitigate the impact of international fees on student finances and investing in and setting up campuses in Europe. Additionally, universities considered increasing online provisions and joint ventures to make it easier for European students to obtain a degree from the UK without having to come to the UK or to appeal to international cohorts more widely.

Overall, universities were grappling with a dual strategy: on one hand, they were actively seeking to preserve and strengthen relationships with European partners, emphasizing their academic ties while aligning and subsuming their European strategy within their broader internationalization frameworks, reflecting their drive to remain globally relevant and competitive. On the other hand, they were exploring new markets and opportunities beyond Europe to make up for lost EU student numbers, with international students being the primary prospective target. Others were 'doubling down' on the UK market, though this strategy had its limitations due to reservations about the finite number of suitably qualified UK-domiciled students.

Within the devolved higher education systems, participants highlighted that the collateral impact of Brexit on higher education within each nation extends beyond the immediate loss of EU students. It encompasses a potential reshaping of the student body composition, changes in admission standards and possible long-term effects on academic quality and student retention. Additionally, there was unease about Scottish and Welsh universities potentially losing their competitive advantage within the UK and seeing their international standing diminish. Finally, it is important to note that in Northern Ireland, Scotland and Wales, there was an emphasis on EU students and staff as integral to institutional

culture and identity, and this diversity was framed as beneficial for academic quality and cultural richness.

Lohse's (2024) study conducted in 2020–21 confirms that during the Brexit transition period universities actively worked to maintain European ties. This was evident through participation in European University alliances, the creation of EU-focused scholarships and the development of bilateral partnerships with European institutions. Furthermore, early plans to strengthen online provision that would enable EU students to study at UK universities without physical relocation were accelerated and solidified following the global pivot to online learning during the pandemic. UK universities, already advanced in their technological capabilities before the pandemic, were able to make this transition swiftly and effectively. While Lohse (2024) observes a divergence in the earlier phases of Brexit between the UK government's 'Global Britain' agenda of moving away from Europe and institutional actions exhibiting a degree of renewed European commitment – a divergence also observed in our research – the limited sample size in Lohse's study (nine interviews with university internationalization directors/officers), and the focus on selective institutional initiatives, means that it is impossible to definitively conclude that the sector as a whole has strengthened its commitment to European engagement in a way that is likely to be enduring, at scale, and less dependent on individual inclinations and contextual circumstances. At present, the UK university sector faces a severe financial crisis, with several institutions confronting existential threats. In this context, and with the Department for Education and Department for International Trade taking the lead and setting the direction for post-Brexit higher education internationalization, universities are increasingly prioritizing revenue-generating activities, especially through TNE. This shift raises significant concerns about institutions' capacity to participate sustainably in collaborative European schemes – initiatives that, while valuable, require substantial resource investment without immediate financial returns.

Conclusion

This chapter has traced how Brexit compelled UK universities to scrutinize their EU student numbers with unprecedented intensity, revealing the dominance of quantitative and resource-oriented framings in institutional responses. The anticipated changes in EU student status, from home to international fee-paying student, triggered anxious monitoring of enrolment data and careful scenario

planning across the sector. While this administrative and economic focus was perhaps inevitable given the financial implications of Brexit, it highlighted a profound shift in the way that many in the universities had come to conceptualize their relationship with EU students.

The regional variations across the UK's devolved higher education systems demonstrated how national policy contexts shaped institutional responses to Brexit. Scottish, Welsh and Northern Irish institutions faced distinct challenges related to their unique fee structures and historical relationships with EU students. These differences underscored how Brexit's impact on student numbers could not be understood in isolation from broader political and policy contexts. However, across all contexts, the dominance of market-oriented thinking raises fundamental questions about whether market-based governance has reached a point where it crowds out other institutional logics and values.

Universities' strategic responses revealed a complex balancing act between maintaining European connections and seeking new international markets. While many institutions expressed commitment to preserving their European identity and student diversity, their practical strategies often focused on replacing lost revenue streams – whether through increased international recruitment, online provision or European campus developments. This duality reflected the tension between educational and sociocultural values and financial imperatives that characterized institutional responses to Brexit throughout our study.

The reduction of EU students to units of resource signals a significant moment in a trajectory of deeper transformation in UK higher education. What was once primarily an educational relationship has increasingly become subject to market logic and financial calculations. This shift reflects the broader marketization of the sector since 2012, where considerations of institutional survival have come to overshadow traditional educational missions. Brexit has not created this tendency, but it has accelerated and legitimized it, potentially reshaping how UK universities approach international student recruitment and engagement for years to come.

5

Diversity

"*It's about our being as a university.*"

Introduction

This chapter examines how university leaders, faced with the prospect of losing EU students following Brexit, articulated, with new urgency and clarity, the contributions that EU students make to their institutions. While diversity has long been a cornerstone of UK higher education policy – traditionally focused on widening participation and ensuring equitable access for under-represented domestic groups – Brexit catalysed a broader conversation about diversity's role in defining what makes a university.

Our interviews revealed how EU students had become integral to institutional conceptions of diversity, which extended far beyond simple demographic representation to encompass fundamental questions about institutional identity, educational quality and the mission of universities in an interconnected world. Through our analysis, university leaders framed diversity in relation to EU students through three distinct but overlapping lenses: as a defining characteristic of international universities, as a catalyst for educational enrichment and as an institutional asset in global competition.

Drawing on interviews with eighty-three participants who specifically addressed diversity, we explore how the potential loss of EU students challenged institutional assumptions about what constitutes a 'proper' university. The data reveal a complex interplay between idealistic visions of universities as cosmopolitan spaces of learning and more instrumental views of diversity as a marketable commodity in international higher education. Diversity as a concept has a long history within UK higher education policy and has undergone substantial transformation, yet it has remained rooted within essential issues pertaining to inclusivity and equitable access to higher education for under-represented social and cultural groups. Equality of opportunity has been

a long-standing tenet of diversity concerns. It has also been translated into a range of institutional policies, organizational strategies and compliance-driven accountability. Concomitantly, and notwithstanding a degree of tension, access to higher education has also traditionally been imbued with notions of meritocracy. The latter rests on a belief that those who are willing to commit the necessary effort and demonstrate merit, regardless of their social and ethnic backgrounds, can enter, progress in and achieve through and beyond higher education.

The data that we have examined focuses on the fundamental importance of diversity to the purpose and nature of universities – rather than a term denoting policy compliance concerned with equality institutional initiatives and targets.

Diversity in our data? Internationalism, quality and status symbol

Our participants stressed the role that universities can play in forging exchange and beneficial relationships with universities and students outside the national borders. They tended towards linking diversity to notions of internationalism and the development of global communities of students and academics – a unique learning environment that nurtures a fuller student experience. They extended these notions of beneficial exchange and interaction to include local communities to which UK domicile students belong and interact with. Furthermore, they brought together two dimensions of diversity that are less frequently considered in their interaction: socio-economic disadvantage, mostly of UK-domiciled students, and academic merit that defies perceptions of linguistic and cultural deficits. EU students as a cohort of international students tended to represent the latter, and their presence was seen as beneficial to home students, especially those who might not have had the opportunity to travel and interact with people from other cultural backgrounds. By extrapolation, these effects can carry through and benefit the broader communities to which students belong.

The discussion of diversity within our data also entailed ideas that converge around the intersection of openness, excellence and world-class standing. Diversity implies both a larger pool of ability, and an environment to support generative relationships and interactions between people who hold different perspectives. It is also framed as 'openness' or 'plurality' which, when coupled with international standing, becomes a performative signal of quality and excellence.

Brexit instigates an evaluation of the scale and nature of diversity loss, especially that associated with the prospect of significantly fewer European students in UK higher education. A foreseeable decline in diversity affirms its present value; regardless of their focus or choice of framing, participants widely lament that institutions will be 'poorer for it'.

Brief quantitative overview of diversity

When using NVivo to analyse, we discovered that 83 (of 127) participants, 65 per cent of the sample, referred to diversity and its associated notions. Of these, thirty-nine participants talked about diversity explicitly, using the word 'diversity'; this is 31 per cent of the sample. A further forty-four referred to diversity using terms such as 'student mix', 'cultural mix', 'multiculturalism' or 'cosmopolitanism'.

The slight majority (forty-four of eighty-three) of these references could best be characterized as 'mentions'; they are brief, 'off the cuff' remarks or otherwise do not delve into significant exposition on the topic. This is understandable within the context of the interviews that sought to explore the comprehensive range of implications and consequences of Brexit for institutions.

Of the eighty-three participants who spoke on diversity, we identified thirty-nine (31 per cent) who explored diversity in a more involved manner: their comments provided nuance or novelty we believed worthy of further analysis, or they spent a substantial portion of their interview contemplating diversity. Most explored the consequences of changing student demographics and declining student diversity within their institution, while many pondered wider implications for the sector. Participants also contributed broader reflections with a social justice dimension as well as questioning the systemic responsibilities of higher education institutions when severing ties with European institutions and entering partnerships with institutions from less liberal countries.

An English University (Durham) was the only institution to have no members of staff speak on diversity. Geographically, participants from Scotland, Wales and Northern Ireland proportionally discussed diversity far more than their counterparts in England.

While we would perhaps expect a correlation between the number of EU/international students at an institution and the frequency of discussions of diversity, this was not always the case. While some institutions with high EU/international student numbers were home to participants who discussed

diversity extensively (notably in Scotland; Aberdeen and St Andrews), other high-number institutions (notably in England) could be characterized by a conspicuous lack of discussion (Coventry, UCL). Not drawing on the register of 'diversity' to discuss the role of EU students does not imply an absence of interest in traditional socio-economic and ethnic understandings of diversity, such as those with reference to under-represented groups of UK-domiciled students. It simply indicates that there are institutional differences in how otherwise 'stretchable' and imprecise policy concepts such as 'diversity' have become. In some contexts, diversity has become a shorthand to explore a wide set of abstract ideas pertaining to plurality and difference – whereas in other contexts, diversity remains more grounded in the legacy of widening participation and ethnic representation.

International universities: Diversity as a defining characteristic

Participants used diversity as a 'catch-all' term to try to communicate ideas of difference within the university context; ideas of the value of different languages and cultures, and of different ways of being and living. They positioned diversity as integral and fundamental to their understanding of what universities are, and what they do, their role in society: as bastions for cultural exchange, borderless sites of knowledge production and collaborative social projects with a duty to a common good.

> we're talking about making the university, about allowing it to retain its kind of uniqueness as a centre for learning and you really can't do that easily without having that rich mix of staff and students from around the world and certainly right across Europe. (Senior Executive, Mid-sized Pre-1992 University)

> It's very difficult, I think, in presenting to the world that the UK is a place that welcomes people from other cultures, whether from EU or international and I find it's an utter tragedy actually for the UK and the way that we see ourselves as an open, transparent, welcoming culture, where we welcome diversity because that's how we get the best discovery. (Senior Executive, Mid-sized Russell Group University)

The participants characterized universities as being defined by their internationalism, which was associated with the idealistic, universal pursuit of knowledge alongside a global community of scholarship. These notions were positioned as the antipode of the idea of the university as a nationalist project.

> The nature of a university is to look out, it's not to look in, to be a little Englander, to be regional, that's not who we are. We survive and thrive through those international networks and collaborations, most of which happen organically, some of which happen through strategic steer relationships . . . and if that begins to reduce, then, you know, what does that say about the future of a university? Not very healthy. (Senior Administrator, Mid-sized Russell Group University)

> having a diverse (. . .) campus, with loads of different people from different places, which is just our basic sense of what a good international university should be. (Senior Executive, Large Russell Group University)

Retaining student diversity was framed as being constitutive of any successful attempt to pursue the collaborative international mission of universities:

> I think it's so important that this university goes on identifying itself as profoundly international, in the fullest sense of the word and welcoming to people from wherever they come from. (Senior Executive, Small Pre-1992 University)

When faced with the prospect of severing existing ties with Europe, participants related this to losing a valued section of their global network. They projected a deficit in those international connections that had become essential to the universities' aims and functioning. When participants discussed their European involvement, the prospect of discontinuity presented a threat to activity, which then constituted a threat to institutional identity.

> it's been a significant part of our being, it's not just about our growth, it's about our being as a university. (Senior Executive, Mid-sized Post-1992 University)

This type of framing draws from similar connotations to the perception and evaluation of existential threats we observed when examining the risks to institutions (see section Is Brexit an 'existential' threat (to financial institutional viability)?), almost as if the institution was a living organism that had been attacked: its 'being' was under threat and a projected diminished state was bound to replace a fuller present.

This threat was further characterized by participants as something tangible; they described diversity as something audible and visible or something they could 'feel'.

> we know that it [losing EU students] would diminish the kind of international atmosphere on the campus. (Senior executive, Small Pre-1992 University)

> I think our campus and our student body will change, I mean, if you do get a chance to go up and down the campus. . . . You walk around and you hear

> many students with many different languages and I think it's really diverse and cosmopolitan. (Senior Administrator, Small Pre-1992 University)

Participants leaned on sensory descriptions, evocative of images of difference:

> you'll see some international faces and you'll hear some international accents, but in the locale, where a lot of our students come from, that isn't the case, so. (Senior Academic, Mid-sized Post-1992 University)

These descriptions seemed to be attempts to ground the former more abstract and idealized notions of institutional purpose and mission in the more concrete and tangible images of peoples from a wide variety of backgrounds interacting, chatting and mingling.

The participants who constructed these ideas quickly went on to confront what the loss of EU students would mean:

> I think the campus will change, the feel of it, I think, what we offer will change and I think it'll probably change for the worse. (Senior Administrator, Mid-sized Pre-1992 University)

> over the last sort of, well, 20 years really, there's been big steps forward in internationalisation and you walk around this campus actually and you know, there's students from countries other than the UK but there's a significant number of EU students. I think we may end up with a situation where we have less of an international feel around the university. (Senior academic, Small Pre-1992 University)

We come back to this idea that EU students have become an integral part of UK universities and that an erosion of their numbers is unavoidably a deficit; not just in terms of numbers, but in terms of identity, definition, purpose and mission. These UK academics perceive the removal of EU students as a damaging and disfiguring change that will leave institutions incomplete.

Finally, when contemplating the loss of diversity, participants juxtaposed becoming or being less diverse with the idea of insularity, which was something they found unappealing and undesirable. This was underpinned by notions of being 'cut off', turning inwards, being sidelined and, in some contexts, losing their central position as a locus of international contact and collaboration. Severing ties with Europe implied insularity resulting from diminished connectivity and separation, but also implied a risk of national self-centredness and complacency.

> There's a risk, isn't there, that we become quite insular, that we find alternative ways of working, that we lose sight of the benefits of collaborating and offering different opportunities to the citizens of Europe and then you just, you know,

> you slow down at that point, don't you, you lose sight of the greater good and you focus, it's almost like looking inwardly, rather than outwardly. (Senior Academic, Large Post-1992 University)

The risk of increased insularity was directly related to a potential reduction in European student numbers.

> I think there's a risk we'll become more parochial and insular, particularly if there's a drop-off in EU applications. (Senior Administrator, Small Pre-1992 University)

With this focus on the link between diversity and notions of global connectedness, inevitably some participants considered the educational value of diversity and the concomitant boon to the student experience.

> I think there's a risk that we could become a bit more insular and we really want our students to have a global outlook, so we need to work to mitigate against that possibility. (Senior Administrator, Small Pre-1992 University)

Diversity and student experience

Diversity was characterized by the vast majority of participants to have an overriding educational value and to be intrinsically good for the student experience. Although the precise meaning of 'student experience' was often left vague or implicit, when connected to diversity, it had broad connotations of situated interacting and learning with others who are different from oneself. Many participants expressed that diversity enabled students to gain greater access to cultural exchange, widened social networks, greater opportunities for social mobility as well as a wider outlook on life and broader aspirations.

> I think the campus will be a poorer place for it and I think having all those different mix of students, I think even for the students themselves, being able to, you know, to have friendships, communications with people from all over the world, a fantastic thing and the more diverse we are, the much better it is, I think, for the student experience. I think we will be a poorer university for it, I think, unfortunately, but that's where we are. (Senior Administrator, Mid-sized Pre-1992 University)

Interactions, relational learning and 'de-centring' the curriculum

One observation was that a beneficial plurality of perspectives on disciplinary content enriches discussions. European students' contributions to intellectual

discussions as part of their studies were held up by some participants who welcomed the 'different perspectives' brought into academic courses from EU students:

> they had a different education, so that is also good, because then when they come into the cohort they ask different questions (. . .) so for us, they are really important. (Senior Administrator, Small Pre-1992 University)

In a university learning context, diversity enhances dialogue and creates rich 'spaces' where the interaction among different ways of perceiving and knowing becomes a unique pathway to higher learning and a window into the world. Participants often expressed an explicit concern about local students or students from under-represented backgrounds missing out the most from the resulting reduced diversity.

> from a pedagogy point of view, I think we'll have, you know, proportionately far more local students, we're a local university anyway, so you know, the experience of students will be a bit more insular than it was – and it was already insular, so the student experience will be changed and it won't be enriched as a consequence of that. (Academic Leader, Mid-Sized Post 1992 University)

Some additional attention was devoted to how a diverse community of students enhanced learning. A predominant argument was that having a student body with a greater range of different backgrounds from around the world provides an impetus for the creation of curricula that reflect global perspectives and engage with global issues more purposefully compared to curricula addressed to more homogeneous, home student bodies.

> We're also doing some work about ensuring that there are global aspects of the curriculum and you know, we have global study fairs and all sorts, so giving our students a global perspective is an important aspect of what we do here. (Senior Executive, Large Post-1992 University)

Participants called attention to how diversity impacts the courses, methods and curricula used in teaching.

> When you've got international students, it kind of drives your curriculum, to some extent and you have to think about internationalisation, you need some examples which are not Wales, England, UK-centric. (Academic Leader, Large Post-1992 University)

The value of including international perspectives in the curriculum was acknowledged by the student representatives interviewed:

> Some courses are really focussed on different cultures, so if you've only got one culture, which is just us from the UK, it might mean that it's not as interesting in that sense, 'cause you've not got the people there, sat right next to you, telling you how it is, so it might change some dynamics on some courses, if that's what they rely on and that's what gets them through it, it makes it more interesting, it might change the interest levels of them. (Student representative, Large Post-1992 University)

Broader experiences from other contexts increase the levels of student engagement with content. It was also thought that this engagement allowed for the development of views and skills related to employability in the global context. An international curriculum prepares students for work involving international contact and collaboration, which improves their job prospects in a world that is continually more interconnected and globalized.

> how do you get our students to understand there's an international and global context? They could be working for a small and medium sized company, they could be working for a large company, they could be working internationally, but there'll be an international global dimension and I think we could have a potential where we're losing that focus within our own UK student body. (Senior Executive, Large Post-1992 University)

Additional examples include exposure to other cultures improving awareness of the world and preparedness to work internationally, as well as the possibility for developing 'global graduates'. Self-formation of students becomes more about their future roles as employees and global citizens, with awareness of global issues and a concomitant expansion of their area of social responsibility that comes with that knowledge.

Disadvantaged students and cultural diversity as a relational and pedagogical space

In order to justify the value of learning, participants emphasized the importance of encountering global standpoints as well as de-centring ways of knowing. This was framed as one of the key ways universities perform their role as the bridge between their local and global missions and cater to the needs of local communities.

> I would say, also, a university like this, a university that is rooted in the region forms a very important role in linking the region to the world and the world to the region. (Senior Executive, Large Post-1992 University)

The presence of European students in UK universities had enriched those generative relational spaces of living and learning with diversity. The day-to-day practice of interaction between local and foreign students had become a new normal, and EU students stood as an established cohort that contributed substantially to those interactions. As explained earlier, the discussions quickly centred on the importance of their presence to UK students, particularly those from 'disadvantaged' or 'lower participation' neighbourhoods.

> this could be really detrimental to student experience because we're living in a disadvantaged area, but if you look around campus yourself, you'll see some international faces and you'll hear some international accents, but in the locale, where a lot of our students come from, that isn't the case, so by having European students, we give a real university experience. So, you know, Brexit, if you like, threatens that. (Senior Academic, Mid-Sized Post 1992 University)

Diversity, sociocultural capital and social mobility

Interaction with students from other cultures, and European backgrounds in this case, is implied to be a valuable pathway that UK universities can uniquely exploit to support upward social mobility during a significant moment in a young person's trajectory. This suggests that UK students' experience of diversity amplifies their social and cultural capital, which has significant implications for their access to social mobility.

> Well, we enjoy having European students as part of our international cohort (. . .) some of the very few opportunities that some of our students may have to engage with people from another culture, from another country. (Senior Executive, Large Pre-1992 University)

Participants acknowledged that, in certain geographical areas, their students were unlikely to engage with opportunities for international exchange. However, universities stood out to them as notable spaces in which this form of exchange was enabled and encouraged. This was perceived as part of universities' contribution to enhancing individual students' life chances but also broader regional engagement and service to society at large.

> those students from the most disadvantaged backgrounds are, I mean, basically the [international] exchange is put beyond their reach. I think, for me, that is the biggest thing because, you know, university, secondary education offers young

> people who are bright the opportunity to be socially mobile and if you don't have that social mobility, if they don't have that opportunity to kind of broaden their minds and develop their self-confidence, then actually that's a disservice to the society as a whole. (Senior Executive, Large Pre-1992 University)

Diversity as a gateway to broadening one's horizons and to better futures

Within these discussions, participants framed the local mission of universities as a mission to provide students with opportunities to 'broaden their horizons' and open up the space of what is 'possible' for them. Diversity becomes a gateway to enriching and widening the range of one's knowledge, understanding or experience. This was sometimes framed as raising aspirations, but also as a process whereby universities and higher level study enable better futures for young people, in ways that are not solely instrumental or measured in a narrow or time-bound utilitarian way.

> particularly in some of our demographics, their aspiration to study or work internationally can be quite low, so meeting students from other countries is massive, so it's not just financial, it's a much broader benefit. (Senior Executive, Mid-Sized Post-1992 University)

In some geographical contexts, the aforementioned rare relational and pedagogical experience of different cultures was thought to enable UK students to develop a broader understanding of the world. This regional de-centring had concomitant impacts on their approach to studies, their perspectives and their goals in life beyond university.

> I think all our students should get that sense of living in a much broader world, particularly in the university, sorry, I'm getting a little bit philosophical like this, but a university like this, that has I think more students than just about any other university coming from low participation neighbourhoods and you know, there, the ability for a higher education to broaden horizons and open possibilities is critically important and I think they're really in danger of restricting the abilities of our students to do that. (Senior Executive, Large Post-1992 University)

Students themselves shared recognition of this same value:

> the prospect of not having people from around the world, that worries me, because I think you don't just come to university to get a degree, to come to learn

> about all kinds of things, like developing as a person and you can't do that unless you're in a diverse group, so that worries me. (Student representative, Mid-sized Russell Group University)

EU students were seen as essential to universities retaining their full global outlook. Visions of the future without that complete community of learners were unavoidably a more impoverished version of UK universities.

As such, many conceptions were characterized by a sense of lack, or by loss:

> I think our own students, in terms of the UK born students, would really miss that very vibrant multicultural experience. (Senior Academic, Large Russell Group University)

> it reduces diversity of our population, which, one of the things we think we're offering to, in the undergraduate experience here. (Senior Executive, Small Pre-1992 University)

> the European students add a lot to the diversity of the population, to the student experience for our [local] students, that interaction is really important. (Senior Administrator, Mid-sized Pre-1992 University)

Expectedly, the focus largely remained on UK students. However, rarely, participants acknowledged that EU students benefit from diversity reciprocally.

> The benefit for us is obviously both in terms of student numbers but actually it's much bigger than that. It's the cultural, the richness that students from Europe bring, hopefully, and it's an exchanged richness. (Senior Executive, Mid-Sized Post-1992 University)

Participants highlighted that the possibility for UK universities to provide such experiences to their students was not a coincidence or random outcome of organic growth, but rather the result of continual and focused development of academic quality and 'richness'. Brexit, as a threat to academic mobility, thus constitutes a threat to the student experience.

> the closed door kind of philosophy and the way that that might project is already having a difference, you know, and trying to recruit people from Europe, people going back to Europe, people not renewing contracts, that ambiguity about who can stay, who might not be able to stay is I think tremendously damaging for the academic richness of any organisation within the UK. (Senior Executive, Large Pre-1992 University)

Student quality

In the recurring discussions on diversity, participants emphasized the idea of student quality. A drop in numbers was feared for its impact on academic quality, even in situations where participants explicitly pointed out the potential for a financial gain from the changing status of EU students:

> I wouldn't regard that as a positive because you would lose the diversity and the really, really brilliant students. (Senior Executive, Large Russel Group University)

The language used by participants to describe EU students included frequent acknowledgement of their ability, akin to glowing praise. Some of the terms used included: '*really high-achieving students*', '*very, very good*', '*really able students*', '*wonderful students*', '*just really bright*', '*fantastic qualifications*', '*more mature*' and so on.

This attitude was not exceptional. Multiple participants made the effort to highlight the intellectual value of having European students at the institutions:

> so intellectually they really enrich us and culturally they do as well, so losing the students is a big issue. (Senior Executive, Small Pre-1992 University)

They highlighted how well prepared EU students were for university study and contemplated with sadness any potential loss:

> they're fabulous students, they're really clever, they're very highly trained, they come from school systems that have them trained to a really high level before they come into university and losing those students from our cohort would be a big loss. (Senior Executive, Small Pre-1992 University)

Participants also associated this level of preparation with an increased tendency to be actively engaged with different aspects of university life. This reflected an underlying understanding of academic 'quality' that is not limited to subject knowledge or the formal curriculum. These extracurricular activities requiring 'engagement' and being proactive become opportunities for furthering one's education and employability.

> and our European students tend to be good students, you know and very proactive and very active in taking up all the opportunities that are available to them within the university, so typically if we offer any sorts of internships or any additional training opportunities, it's European students who tend to take them up in greater proportion than [home] students, which is interesting. (Senior Administrator, Mid-sized Pre-1992 University)

Behind these ideas, we interpreted participants to be speaking as if to argue against or respond to the assumed deficit view of diversity – that traditionally wider diversity accompanies lower average student quality, at least at the point of entry. We saw this in the wide consideration of recruitment from widening participation backgrounds in order to make up the shortfall in numbers. When forced to examine the loss of EU students, participants recognized that their diversity and inclusion were correlated with higher student quality, and as such, expanding into alternative student demographics was seen as a threat to that diversity, but also a threat to academic quality. When faced with this realization, participants felt the need to stress the importance of EU students to UK institutions, heavily using vocabulary of 'richness' – EU students serve to 'enrich' UK universities, and in their absence, the UK will be 'poorer without'.

Prohibitive costs: Questions of equity and access

The cost of university studies has been a traditional issue affecting students of all origins. The problem has been discussed widely within social justice conversations and within academic literature. However, Brexit repositions EU students: by eroding their pre-existing rights, they enter a competitive arena alongside non-EU international students, where only those with the financial capital are able to access UK higher education.

This change in status for EU students triggers consideration of geopolitical social inequalities, some of which existed prior to Brexit, and others which have been newly created. A wider variety of justice concerns returns to the forefront of discussion, in terms of various dualisms: wealthy versus impoverished, East versus Western European, Golden triangle (i.e. Cambridge, Oxford and London) versus 'provinces' (see Chapter 6 on competition).

Several participants acknowledged that student demographics would change concomitantly following a change in fee status. The impact of any changes was predicted to be less on EU students from wealthier backgrounds.

> we think that we will still attract very good EU students to be frank, we think we will attract EU students who can afford to come here. (Senior Executive, Small Pre-1992 University)

Participants from more prestigious institutions felt assured that the specific social demographics they attract would still be able to afford the increased costs of UK higher education.

> a lot of London EU students pay their own way and therefore may be able to scale up to international fees. (Senior Administrator, Large Russell Group University)

Notably, student representatives were among these participants:

> a very large proportion of our (. . .) European students come from a higher socioeconomic band and so (. . .) even if fees go up for them to the level that they are for international students (. . .) we will still have a very large number of them [coming] because they can afford to study here. (Student representative, Small Pre-1992 University)

Student representatives were also aware and critical of the differential access to UK higher education based on international students' power of purchase and noted how EU students would become subjected to the same financial pressure in the event of a change in fee status.

> [The institution is not] so concerned is that a very large proportion of our international students come from a higher socioeconomic band and so therefore there is a sense that (. . .) even if these [fees] go up for them [European students] to the level that they are for international students, (. . .) we will still have a very large number of them [studying] because they can afford to study here. (Student representative, Small Pre-1992 University)

As a result, the wealthier students who are already disproportionately present in some more prestigious institutions will also be the students with the easiest access to future participation.

When pursuing this logic further, inequality was framed as existing along geographic lines in accordance with the wealth of various EU nations; participants highlighted an East versus West divide among European students. Eastern European students were identified as being more dependent on the UK loan system to subsidize their tuition and living costs.

> I think we will end up with a lower number of students, mainly dropping off from Eastern Europe. (Senior Executive, Large Russell Group University)

Without access to the UK loan system, many participants expected fewer Eastern European students to be able to come and study in the UK, with affordability placed beyond their reach.

> one of the things we've looked at from the Brexit mitigation group was, of our EU students, which nationalities seek access to the student loan book and which don't and there's a very clear pattern that German, French, Italian don't, and

> Eastern European do, and if you think about distribution of income, it makes sense. (Senior Executive, Large Russell Group University)

The UCAS data on EU student enrolments for 2021 were to validate these concerns. Eastern European nations, such as Poland, Bulgaria, Romania, Lithuania and the Czech Republic, all witnessed more substantial drops than every Western European country (note that Irish students continued to benefit from home fee status under the Common Travel Area arrangements). While all European nations witnessed a drop in student enrolment figures, Western European nations observed a general drop to around half the previous number. Meanwhile, the majority of Eastern European nations witnessed drops of a factor of 5–6, which left some Eastern European nations virtually absent from the UK HE sector. The fear that many participants had of losing their Eastern European student base has been evidently validated.

Geopolitical concerns, equity and global meritocracy

When confronting the rising barriers that EU students were likely to encounter following a change in fee status, many participants considered the reasons why certain demographics may struggle to access UK higher education. Frequently, they identified the barriers as being geopolitical rather than simply socio-economic. They also recognized the importance of how domestic support systems specific to each country enable international participation in HE:

> you also need to think about, you know, can they afford it, is there a loan book equivalent in their country that allows them to go abroad and maybe, you know, get support for fees and maintenance when studying abroad and then thinking about which, you know, is there a concentration of students from particular countries wanting to come and study particular subjects. (Senior Administrator, Mid-sized Pre-1992 University)

It was expected that the removal of access to financial and other types of support would have a more significant effect on EU students from less affluent nations. Again, Eastern European countries are highlighted in the data.

> widening participation programme is literally about home students, you know, so there is no targets to hit, so there's nothing like that and in the end, that that's always pretty much been their policy with non-EU international students, or they're the only ones who'll be able to get here, there are no scholarships

> for them, or very few scholarships for them, certainly at undergraduate level. (Student representative, Small Pre-1992 University)

Consequently, participants confronted the reality that student selection for UK HE would increasingly become dependent upon the financial power of prospective international students, rather than any notion of quality or merit. While participants still expected EU students to aspire to UK higher education, the prohibitive cost was expected to impact their decision-making.

> The cohort of people from Europe who can afford to pay our international fees will be slightly different from the cohort who come because it's a great place to come and study and love and grow up. (Senior Executive, Small Pre-1992 University)

They framed potentially desirable and academically able EU students unable to access UK HE, with places only for the wealthy and affluent, heralding consequences for student demographics and academic quality.

> I think there's also a risk that we'll become more elitist, because if we start charging international level tuition fees, so that only the kind of kids who come to us from China or The States can come from Europe, because they can afford large annual fees, then that means that we won't be getting the kind of ordinary, middle class, bright, ambitious kids with an international outlook that we get at the moment from European countries and so I think there's a risk that it will change the dynamics of the student cohort. (Senior Administrator, Small Pre-1992 University)

These changes in student demographics are conceptualized as pushing UK universities towards becoming service providers for the wealthy globally who are able to fund their studies without support. This is thematically contrasted to the academic ideal of universities as meritocratic sites of knowledge production.

Even within the meritocratic ideal espoused by some participants, there was an observed tension between national meritocracy for the good of UK citizens and global meritocracy as a social justice pursuit that transcends borders. Consequently, a participant pointed out that a decrease in EU students may improve the odds of local students successfully being able to gain a place at certain oversubscribed institutions.

> On the other hand, there has been the worry and I'm sure you've heard about it from other people, that getting into [this institution] for [local] students is phenomenally difficult, because they come in the same tranche of students as

> the EU ones and some rebalancing of that might not be considered bad. (Senior Academic, Small Pre-1992 University)

However, they lament that such a circumstance would involve a trade-off between widening access and academic quality.

> It would slightly depress the quality of the students, or the quality of students' entry level. (Senior Academic, Small Pre-1992 University)

A small number of participants critized European students' unrestricted access to national welfare institutions. While they acknowledged that restricting this access could raise global social justice concerns, they suggested it might benefit the UK in undefined ways.

> it's actually all about effectively giving free higher education in a Scottish university to people from Eastern Europe (. . .) they're not the ones who can afford it mostly, so they'll not come – so we're aware that'll be a change, but is it a good change or a bad change, well. (Senior Academic (type of university redacted to preserve anonymity)

One of the concerns raised was that there would be a more limited geography of international students should EU students be replaced by international students from a narrow range of countries. There are specific nations with the resources, infrastructure and investment mindset to send their students abroad for international study. This inevitably means the nations with the impulse to invest in human capital become over-represented within the UK HE system.

> We do have a large cohort of students from China at the moment, so that could increase, particularly with the introduction potentially of new courses, you know, if they have to adapt and potentially add more business courses, which are attractive to Chinese students, like, they've got to bring in the fees somewhere, so is that what they'll do, you know, it's hard to say, so yeah, we could see that kind of lack of diversity on campus. (Student representative, Mid-sized Russell Group University)

Diversity as accolade and selling point

Many participants made time to highlight that being an internationally reputed institution indicates quality and excellence to potential students, staff and collaborative partners. Within this framing, diversity is appropriated and reinscribed as a branding tool and a marketing strategy with a performative

intent. Maintaining a healthy diversity of students becomes key to projecting prestige and status into the world. In contradiction to the more gratuitous or idealized conceptions of diversity as an intrinsic, defining feature of a university, here diversity becomes a symbolic resource for higher education institutions to survive and thrive in a very competitive international arena.

> any modern university who aspires to have a worldwide reputation, it is incredibly important to have a diverse student population and by diverse I don't mean [local] and international, I mean it needs to have European students as well. (Senior Academic, Mid-sized Pre-1992 University)

In a more marketized global higher education sector, international reputation becomes an intangible asset that is universally coveted.

> I'm sure you're finding as you go to every university that they have international ambitions. (Senior Executive, Small Pre-1992 University)

Holding on to a strong global reputation is assumed to translate into a stronger financial position while opening up a wider range of opportunities for universities.

These boons translate into a greater ability for universities to engage in high-quality and widely recognized research. As a result, participants highlighted the contribution European students make to the UK's research performance and its image as a global research powerhouse.

> At the moment, we have wonderful students coming from the European Union and there's an ability for people to move around Europe, whereas if we become very isolated, I think it will be to our loss and I think that will impact on our scientific credentials. (Senior Academic, Large Russell Group University)

Here diversity is framed as not only having intrinsic value, but also impacting the long-term health and successful activity of the institution.

Part of this impact is the contribution diversity makes towards the image and branding of institutions:

> So, it means a lot to us, it makes us outward looking and I would say much more attractive as an institution, when you're shown to be engaged both in EU terms and internationally, it's a big pull for students and academia, so very important to us. (Governing Body, Small Pre-1992 University)

Competing discourses within diversity

Within the discussion on diversity, we came upon two competing discourses about valuing diversity and maintaining EU student presence. Within one framing, diversity was presented as something fundamental to university and defining of their identity as a social institution, best captured in the idealized view of international scholarly communities. Within these ideas, EU students were represented and recognized as a core component of institutional identities, integral to their worldwide missions and responsibilities.

However, another framing was also widely observed: a neoliberal discourse that framed diversity as a proxy for quality – a finite symbolic resource – that all universities desire to accumulate and brand in order to secure their competitive advantage. Within this framing, the presence of EU students was valued, engaged and leveraged for market potential and international prestige. Within the marketing logic, the search for good selling points converted diversity into a tradeable object that elevates both the institution and the future student. It became a worthy cause for the institution to defend and promote, as well as a mark of virtue for the future student as a purchaser. Expectedly, these framings often appeared alongside each other within the same interviews, with the same participants espousing idealized notions of diversity, as well as the more instrumental and commodified ideas.

Conclusion

Within the framing of diversity, UK universities grapple with complex and often conflicting perspectives that highlight its fundamental importance to their mission and identity. Diversity in general, and especially that embodied by the EU students, is viewed as essential for enriching the learning environment, broadening horizons and preparing students for a globalized world. However, Brexit has introduced concerns about maintaining this diversity, especially regarding equity and access for less affluent EU students. Simultaneously, diversity is positioned as a marketable asset contributing to institutional reputation and global standing. These coexisting viewpoints reveal a tension between idealistic conceptions of diversity as inherently valuable and more instrumental, market-driven approaches. For our participants, the potential loss or reduction of EU students post-Brexit is thus perceived as a threat to institutional identity and function, underscoring their significance not merely in terms of numbers but as key contributors to the academic, cultural and social fabric of universities as well as their vital role in maintaining the UK's global competitiveness in higher education.

6

Competition

"*Universities will be almost poaching potential students off one another.*"

Introduction

This chapter examines how university leaders conceptualized and responded to the intensifying competitive pressures in the wake of Brexit. Drawing on interviews with seventy-two participants who specifically addressed competition, we explore how Brexit disrupts established competitive hierarchies while potentially exacerbating existing inequalities within the sector. Brexit implies a drastic reordering of the UK's geopolitical and economic relationships, especially with many of its geographically closest and historically significant partners. The scale of future change prompted participants to examine both UK higher education's overall competitiveness and their own institution's competitive strength in gaining EU research funding and attracting European and international students. While many assessed their individual institution's readiness to respond, they consistently placed this within broader considerations about the sector as a whole. Brexit also triggered a more in-depth look into the role of universities as geopolitical actors, competing and collaborating across various geographical scales.

What emerges is a portrait of universities as geopolitical actors navigating multiple tensions: between collaboration and competition, between maintaining European connections and pursuing new global partnerships and between their educational missions and market imperatives. While increased competition among universities might be expected to drive greater diversity, our findings suggest otherwise. The data shows that heightened competition can actually restrict both institutional missions and student demographics, as universities focus on certain profitable markets rather than maintaining broader accessibility and varied educational approaches. The chapter also reveals how Brexit not only intensified existing competitive dynamics but also prompted a fundamental reassessment of the UK's assumed advantages in global higher education.

UK universities entangled in different scales of competition

While institutional competition within the sector already occupies a familiar and central role within UK HE, Brexit resurfaced and heightened anxieties about the prospect of intensified national and international competition. Despite their vastly different positions of status and power within the sector, no university expected Brexit to provide a passive benefit to either physical or symbolic resources. Most confronted the genuine risk of Brexit disrupting structure and operations while also worsening competitive pressures. The latter were feared to erode the higher education ecosystem rather than buttress it.

The predictions participants made were often formed from their initial reactions, opinions and assumptions. One reason for this was the timing of the interviews. There was an absence of hard evidence on the exact impacts of Brexit, as the terms for the UK's departure from the EU were not yet finalized. Another key reason was limited access to sector-wide analytics and specific intelligence. While participants readily had plentiful information about their own institution's vulnerabilities and future plans, they either lacked such complete information on their competitors or were unwilling to reveal it. Lacking detailed evidence, participants drew upon conventional wisdom and established assumptions about the sector to assess risks and forecast future trends. Yet, despite participants not being forensic in their predictions, the fact that their outlook and attitudes were imbued with competitive considerations is highly reflective of their operational contexts and the way their future-oriented actions were (and are) likely to present.

Within their predictions, participants focused heavily on competition for students as a unit of resource and insisted on the implications of that competition for academic quality. The scope of discussion also expanded to include concerns pertaining to abstracted ideas of geopolitical power and the UK's standing within networks of international influence. Participants anticipated that these factors would impact the reputation and quality of UK universities. Any potential diminution of the UK's attractiveness as a prime higher education provider and research powerhouse was bound to affect individual institutions' competitiveness. Such an undesirable prospect directly hit participants' competitive nerves. Many predicted that competition for both resources and academic standing would intensify.

Brief quantitative overview of competition

All participants discussed competition in some form, although different participants focused on different aspects of university activity and used different vernaculars to highlight their topics of interest.

In total, 72 (of the 127) participants referred directly to how competition for EU students, or the places left behind by EU students, would impact their institution or the wider sector. Participants were not directly asked to speak on competition, but were asked questions on subjects or departments enrolling high numbers of EU students, and overall recruitment strategy.

A total of fifty-three participants discussed competition directly using the words 'competition' or 'competitiveness', and 'competitor', while a further fourteen participants used the verb 'compete'. Among the interviewees, sixty-seven participants used the word 'challenge', and remarkably, 106 participants used the word 'attractive', 'attract' or 'attractiveness'. Notably, forty participants used the word 'damage', thirteen participants used the term 'insular', with a further twenty using the word 'isolated'.

There were 113 participants using the word 'reputation' and 118 using the word 'collaboration', although notably, unlike the majority of the language highlighted here, these two words were introduced through the interview questions.

Brexit intensifies sector competition

Alongside concerns of global competition, there were many discussions that touched on the familiar competitive pressures often discussed in the marketized UK sector. Chief among these concerns was the acknowledgement that there would be winners and losers emerging from the uncertainty, with few in the former category but many more in the latter. Most participants acknowledged the stratified nature of the sector and recognized different impacts based on institutional position and status within the hierarchy. Notably, participants seemed hesitant to expose their own institution's vulnerabilities and instead tended to detach the discussion from their own context. As a result, they projected the risks and attributed them to other institutions or the sector as a whole.

Competition for students is already an integrated pressure within the UK HE sector, which relies on tuition fees as one of its main streams of income. Some participants acknowledged competition as a matter of fact, an unavoidable operational reality. They used this as a point of reference to establish the risks

arising from Brexit. They called attention to the significant demographic shift in students and the instability that follows Brexit as something novel – that nevertheless serves to intensify existing pressures:

> I think [Brexit] will potentially create increased competition between our universities, because we'll have capacity to fill if EU students don't come and you know, then potentially universities will be, you know, almost poaching potential students off one another to fill the spaces that would before have been, you know, quite happily gone externally. (Academic Leadership, Mid-sized Pre-1992 University)

Within many of these assessments involving student numbers, participants created an imagery of theft: 'stealing', 'poaching'. This framing characterizes students as resources and commodities to be owned by universities. This bitter language also serves as an acknowledgement of the harsh reality of competition for students, in its dimensions of both quality and income. If there was a limited pool of students that UK HEs had access to – when faced with shortage, the avenues for growth or even maintenance would become restricted and competition for students would become a necessary game of winners and losers.

> [we're always trying to evaluate and mitigate risks] to ensure we can continue to get the students of the quality we want, at the quantity we're looking for, to maintain normal business. (Academic Leadership, Large Post-1992 University)

A zero-sum game? Winners and losers in the competition for students

Expectedly, most participants anticipated the 'winners' to come from places of traditional advantage. When presenting these ideas, participants seemed keen to disentangle their personal opinions from institutional positions:

> it is entirely my own personal view is that I think universities in the top 50 of the world, the global ranking, so Oxford, Cambridge, Edinburgh, Imperial, Manchester possibly, universities like that will always attract because (. . .) of the status that they have in terms of global standing, so they will likely see very little impact. (Academic Leadership, Mid-sized Pre-1992 University)

Participants assumed that Oxford and Cambridge were untouchable, totally immune from negative impacts. Once again, these attitudes seemed to arise from individually held yet collectively shared beliefs but also prejudices about the stratification of the sector.

> people like Oxford and Cambridge have got so much money that it probably, you know, their reaction to this is just like, 'lose a few, it makes no odds really, does it?' They can go back to their armchairs and eat their roasted swan. (Senior Administrator, Mid-sized Russell Group University)

Among places of privilege, London often entered the discussion shortly after Oxford and Cambridge, although here the discussions tended towards highlighting the significance of geography. London was picked out as the powerhouse of the UK; 'high ranking' London universities were described as too grand to 'go under the radar' on the world stage.

> if you're going to come to the UK, you're going to want to come to London generally, both for EU and international students . . . and who wants to come to the middle of . . . you know, what's a very pleasant campus environment in the middle of England somewhere, but doesn't have the attractions of London. (Senior Executive, Mid-sized Russell Group University)

Participants highlighted the amplifying effect of being a highly respected university within a highly desirable and connected location, but also the value of study destinations as attractive and enjoyable places to live. London, as a leading global hub and nexus for finance and culture, attracts prospective students and staff for reasons beyond higher education. This competitive advantage would shield London-based universities from destabilization and deleterious effects, as their geographic location and prestige allow them to maintain strong enrolments despite market pressures.

> the highly ranked universities in London, are not seeing the same trend as the national trend and there are two reasons, one is, I think, universities of global standing will be robust because there are other reasons why people choose to go there and then London is also robust, so I think the fact that you've got global universities based in London means that they will become increasingly attractive, relative to less prestigious universities in provincial towns. (Senior Executive, Large Russell Group University)

The central location of London was also singled out in relation to the proximity that its universities enjoy to policy networks and government. This was contrasted with the less connected, influential and reputable institutions in 'provincial towns'.

> I think it's rather more, being a provincial university, as opposed to a London university, it does, like, I've noticed a difference in terms, you know, the kind of connections to the corridors of power, as compared to, even in Edinburgh, by virtue of the kind of devolved Government there and you feel much more

> connected to governance than you do in a provincial university. (Senior Academic, Large Post-1992 University)

Generally, reputable universities leaned on their position of traditional advantage, their heritage as elite cultural institutions or gained security from their unique subject provisions.

> Both staff and students as well, because some of them will still come here because, you know, it's a world class education offering, they want to come and do a particular course and either they can pay the higher fees or they'll give a scholarship, bursaries, whatever else it is, so people will still come here. (Senior Administrator, Small Pre-1992 University)

> [they will still come] because [this university] is the only place that they can study the thing they want to study. (Student representative, Small Pre-1992 University)

High-ranking institutions took solace in their size, activity and reputation as dominant research institutions to protect them from negative impacts.

> we turn away people, you know, we've got good candidates who we don't take on 'cause we're full (. . .) but there would be a dash for quality perhaps and therefore that would threaten someone down the food chain.(Senior Executive, Large Russell Group University)

A small number saw the shifts as an opportunity to 'win' and make full use of the instability to reposition themselves higher up within the hierarchy of the sector.

> but the level of impact for us, we would see that as opportunities, rather than a problem, the opportunity being it would really heavily impact a lot of our competitor universities, particularly the slow moving ones, who think they've got a right to a living. (Governing Body, Large Post-1992 University)

As a result of heavily ingrained perceptions of advantage, with very few exceptions as the quote above indicates, anyone who did not belong to one of the predefined categories of strength was framed as being in a deficit position by comparison.

> one of the challenges we have is our geographical location, so we're not in a major conurbation and international staff often like being near London, being near Manchester, being elsewhere, where they can integrate into the broader community. (Senior Academic, Small Pre-1992 University)

Lower-ranked, less prestigious universities were considered likely to be hit hardest by the compound impacts of Brexit alongside pre-existing issues within the hierarchical sector.

> We haven't got large numbers of EU students, we do have reasonably significant numbers, but the worry is that there are certainly other universities that are much more dependent and if they lose some of that, then the competition for UK students becomes even more intense than it is at the moment, so there's a direct consequence, but there's also the indirect consequence as well. (Senior Executive, Small Pre-1992 University)

Here, this participant pointed to the 'direct consequence' of not having EU students but also the 'indirect consequence' of increased competition for home students.

Participants highlighted that the varying nature of the potential challenges that Brexit posed for universities across the sector would lead to necessary differentiation. Universities with differing access to resources would vary the scale of their activities and their approach to international engagement.

> when you look at the wider sector, I think you will probably see division around local and global, so you'll see some institutions that maybe pull back more towards a local UK regional market and then I think globally you're going to see that increasing global competition, I think the more developed universities, you'll see networks, campuses abroad, so I think you will start to see a differentiation in the sector, in terms of how they look at international and global connections. (Senior Executive, Large Post-1992 University)

While the framing around competition focused on winners and losers, the vast majority of institutions projected themselves as winners, while making sure to identify the losers as 'other institutions', someone 'less agile', 'slower', 'more exposed' or 'further down the food chain'.

Competition for student quantity and quality

Any competition for student numbers was expected to translate into a competition in relation to student quality, as a decline in EU student enrolments would open up more places for home and international students.

The best home and international students were predicted to be more likely to gain access to universities higher up in the traditional hierarchy.

> we were assuming (. . .) there would be a drift of quality (. . .) you'd just get a drift of the students up the line. (. . .) We would potentially lose some of our best students to, let's say, Oxford and Cambridge. (Senior Executive, Large Russell Group University)

This indicated a simultaneous 'trickle down' of negative impacts as high-ranking institutions 'hoovered up' the most able students to recoup numbers.

> The further down the food chain in the [regional] universities the worse that'll be, so obviously the weaker universities will probably have to recruit at a much, slightly lower standard. (Senior Academic, Mid-sized Pre-1992 University)

A fall in student quality was framed as being damaging to institutional attractiveness in a way that might lead to compounding deficits in quality over the long term.

> it's not easy to attract more undergraduates (. . .) without reducing the quality on entry, and the danger with that is that it's self-fulfilling – that then the better students don't apply. (Governing Body, Small Pre-1992 University)

As the participant above highlights, any fluctuation in student quality also impacts the reputation or prestige of an institution in the eyes of prospective students. The most able students identify with the institutions that can provide them with the best learning and career opportunities and the presence of other academically strong students becomes a clear indicator of that strength. Students endeavour to find the best-fitting institution for their needs and aspirations – within the web of factors influencing their choices, notions of a quality learning environment are particularly important. Therefore, prospective students who perceive a drop in quality and gain a sense that a particular institution may not be 'for them' are expected to seek more suitable alternatives. This would lead to an overall weakened learning environment for that particular institution, and thus, an increased likelihood of strong students looking elsewhere in the future. EU students were perceived as able students who were attracted by notions of quality but also directly contributed to that quality in the teaching and research provision of the institution.

> European students come in part because it has a high reputation, if that reputation is damaged by financial pressures or in any other way, that makes it harder to attract really good European students. (Governing Body, Small Pre-1992 University)

Participants made the association that a lack of EU students would impact academic quality, as it would be difficult to replace EU students, who were widely seen as highly able and desirable. In the absence of EU students, the finite pool of home student talent would become further constricted as the result of competition. The resulting shortage or lack of supply of strong students implied consequences for retention and institutional reputation.

This was echoed by other participants who pointed to a link between declining student quality and student retention. The latter has become an issue of policy

attention in the search for additional proxies of quality. Non-completion rates have been held up as the objects of international comparison. In the UK, student retention data have been used in the Teaching Excellence and Student Outcomes Framework, and discussions were underway for this metric to be included in quality assessments by the Office for Students (OfS). In this context, participants' concerns about student 'quality' are to be understood in terms of their implications for institutional 'quality' via metrics and formalized assessment.

> you have to think about, well, do you lower your entry tariffs to get more students in, so if you do that, what's the impact on retention (. . .) we're very keen to keep retention figures very high, so there's quite a lot of room for collateral effects here. (Senior Executive, Mid-sized Pre-1992 University)

Brexit and (competition) business as usual?

Some participants normalized Brexit alongside many other hazards and disruptions within the sector:

> we see various risks and Brexit is just one risk, you know, there's enough competition between universities trying to steal students from each other, if you like, if you want to phrase it that way. (Academic Leadership, Large Post-1992 University)

In some cases, a response to Brexit was framed as being a part of normal day-to-day operations, or subsumed within existing priorities and strategies:

> [this institution] is in a position of evolution, not necessarily driven by Brexit in any way, because we've had quite some significant changes in the organisation of our research and research support over the last three, four years while I've been here. (Senior Executive, Small Pre-1992 University)

In four universities, we recognized a trend to attempt to minimize the specific effects and consequences of Brexit. Either Brexit was given equal weight to pre-existing or continuing operational risks, or it was depoliticized and dismissed as a minor disruption. Within these conceptions, national policy developments such as changes to fees and student loans were held up as more significant and direct impacts relative to Brexit. It might be significant that these universities were located in dominantly Brexit-voting regions.

It is conceivable that the public-facing responses of some universities were cautious or heavily mediated to avoid potential 'vitriol', as one participant confessed:

> There's a lot of right wing Brexiteers in this region who delight in pointing out that we're only doing it. . . . I mean, if I say anything locally, the local paper columns are always, 'he would say that, that's who pays him', you know? (. . .) But the really bad stuff is the kind of, the Little Englander, the kind of 'Brexit and proud', you know. I mean, [a colleague] made this comment yesterday about the UK falling maybe to 20th and he's been castigated by all these . . . you know, 'liar' – and I've done similar things – but it's touched the vitriol. (Senior Executive, Mid-sized Russell Group University)

Global competition

When confronting the prospect of intensified competition, most participants anticipated that one of the dominant emerging strategies to remedy a shortage of EU and home students would be to 'double down' on international student recruitment. As a result, the intensification of competition anticipated to occur within the sector was expected to be mirrored on the world stage.

Asserting that the UK would need to compete for EU and international students with other HE systems across the world, many participants confronted the role of value, reputation and language in predicting UK HE's future 'brand' position.

> I think actually it will damage the reputation of UK HE plc. We have a good reputation and that's around quality at the teaching end of things and it's around our research (. . .) and I think, at a very high level, it will damage the reputation of UK HE plc, sadly. (Senior Executive, Mid-sized Post -1992 University)

> The whole way it may undermine UK higher education as a global brand is a significant risk. (Senior Executive, Mid-sized Pre-1992 University)

Some participants anticipated that there would be an erosion of the UK's leadership role in international tertiary education and research as its prominence would diminish. Others acknowledged the strain placed on existing relationships or recognized their potential contraction or loss. A minority of participants courted the idea of an opportunity to reorient and amplify the UK's global reach by looking to forge new international partnerships. A number of participants felt the ubiquity of the English language within global HE networks would allow UK institutions to remain highly valuable prospective partners and attractive destinations for students

and researchers, yet many were more sceptical as they acknowledged the competition they faced from European and other international universities teaching and researching in English.

Competition with European universities as the UK becomes a poorer value option

With the UK introducing international fees and visas for EU students, participants pondered whether UK institutions would remain an attractive proposition when compared directly to their more affordable and accessible European counterparts.

> you know, the reality is in terms of recruitment, the UK is quite an expensive higher education system now (. . .) the things that have happened (. . .) over the last few years, with fees and increased fees, Brexit and where other countries are reducing their fees, student recruitment is going there, rather than to the UK. (Senior Executive, Small Pre-1992 University)

Within many of these expressions was a sense that EU students asking 'where would be the best place to go' was a novel question, as if prior to Brexit the UK had an assumed position as the first choice and prime destination. However, the changes Brexit has brought about have now called that status into question, and when prompted with evaluative considerations about whether or not the UK was truly the 'best' choice, participants were left contemplating doubts.

> we have at the moment quite a lot of French students coming to us, yeah, you know, what does Brexit say to anyone? If you were comparing, I could go to this country, I could go to that country or whatever, and lots of countries are doing this, I notice Ireland is doing this, yeah – why would you come here? So, I think just in terms of students considering where would be the best place to go, I think Brexit just has been incredibly damaging to that. (Academic Leadership, Mid-sized Post-1992 University)

These feelings were shared among many participants, but notably, they were also expressed by student representatives:

> Then, I guess it all ties into, you know, then our reputation for research funding and the rest of it, and you know, why would people feel like coming to Britain? (. . .) especially if the fees are going to go up (. . .) it's probably not worth people forking out the extra, to be quite honest. (Student representative, Mid-sized Russell Group University)

At the time, there were many anxieties about Brexit-related knock-off effects on international students' decision-making. Participants feared that prospective international students might opt to travel to alternative destinations. Some participants highlighted the xenophobic perceptions generated by Brexit as one potential reason why the UK might be seen as less attractive:

> It's not beyond the realms of possibility that we'll continue to lose more and more Asian students, who will see Australia and America as being destinations that they can go to more easily, to get an English language education to a high standard, while not coming to the UK, just because it's perceived to be xenophobic. (Academic Leadership, Mid-sized Pre-1992 University)

Other participants highlighted the Netherlands and the Nordic countries as alternative attractive destinations due to the increasing trend in those countries of providing content in English and their good reputation for quality. This is discussed more in the section titled 'The English language: Not the saving grace?'

Participants picked out Germany as a competitor for international students, highlighting its share in the international higher education 'market':

> you know, whereas Germany has recently changed, hasn't it and it's much cheaper, so interestingly, when I was in China, we found, you know, we started to hear that they're starting to look to German universities now, whereas in the past, the USA was top, then UK, then Germany and then others, now the UK and Germany are balancing out in the China market and that's what we've heard last week from the agents. (Academic Leadership, Mid-sized Post-1992 University)

While this was a notable anxiety at the time, fears of declining international student recruitment have not been validated in the years since the interviews were done (see Chapter 3).

Beyond student recruitment, at the most pessimistic end of the spectrum of responses were the participants who argued that there would be a sharp decline in the UK HEIs' global position in the long term.

> in 50 years' time I'll be dead (. . .) [but the UK] it'll be, you know, absolutely lovely place, where anyone would love to go, great past, but you're not likely to find anything really happening there now. (. . .) In fact, to a large extent, Americans already do think of Britain that way, don't they? You know, terribly charming and there's stately homes, and the Queen and everything, but if you want to get something, you know, promoted and changed and done, then you don't come to Britain for it. (Senior Academic, Small Pre-1992 University)

'Going it alone' – Operating outside a trusted framework

Many participants shared the view that the UK higher education sector had been going from strength to strength and that part of this ongoing success had been a result of opportunities to increase visibility, access talent and resources that had been provided by EU membership. The uncertainty and instability of Brexit, in tandem with a restructuring of its international relations, undermined the UK's position, not only in Europe but potentially on the world stage.

> I think then the more important strategic point for UK plc and the UK's place in the world is that we're, you know (. . .) our position is diminished, people don't see us as influential. (Senior Executive, Large Post-1992 University)

Access to networks and the inflow of resources and EU talent had allowed the UK HE sector to continually gain momentum:

> I think we were just at that stage where, in the last 10 years, you've seen the rise in EU students coming to British universities, which is a really good thing, it's made our universities more international, it's created a new sort of pool of staff and people to have an influence in higher education, so I think becoming less international could happen, struggling to recruit the best staff, diminished international networks. (Academic Leaderships, Large Russell Group University)

This placed UK HE in a position with much at stake and potentially much to lose post-Brexit. With the UK being the most successful recipient of EU grant money and the most attractive destination for EU students and researchers, Europe had served as a new and unique arena for UK HE to increase its advantages, demonstrate its strength and achieve greater distinction. Its advantageous position as a prominent member in a network had been leveraged to gain the most benefit. Any new collaborative partners prefer to look to key players in a network when forging new relationships. The UK losing out on that key positionality within the EU research and higher education landscape surrendered much potential attention and attractiveness. Central and highly connected network positions usually require considerable time investment and human and material resources to attain and/or maintain.

Furthermore, coming under the EU umbrella had provided a continuous assurance of quality, as participation required approval, oversight and regulation. Prospective students, staff and partners had the security of knowing work, and study in UK universities would always meet a high standard of quality.

One participant made a compelling analogy, illustrating the quality guarantee that was established when a single efficient framework linked disparate

institutions without the need to proceed via riskier and more time-consuming bilateral exchanges and transactions:

> Could we fund 'Erasmus-type' activity abroad? Yes. How would we do it? We'd have to negotiate it with every single partner (. . .) but it's like when you order a book from Amazon Marketplace, you don't care that I'm selling it out of my bedroom (. . .) [if] I use eBay to buy old CDs, and I buy from Amazon, there's just no doubt that I prefer Amazon, 'cause there's a guarantee. (. . .) You know what I mean? I'm trying to overdo the analogy but (. . .) the analogy is, is there a portal that I can go through that opens me to Greek universities, you know, to Danish-. (Senior Executive, Mid-sized Russell Group University)

This analogy highlights how there are many more risks in individual transactions compared to the guarantees of dealing with a large coordinating body that is a key connecting node – an overarching scheme for quality that also provides a practical 'one-stop shop' for many individual organizations.

The English language: Not the saving grace?

The dominance of the English language as the global lingua franca of HE and science was a key subject of discussion for participants contemplating increased competition.

Some participants believed the English language would remain a valuable characteristic of UK higher education that would retain the interest of EU students and partner institutions.

> Institutions on the continent have every interest in finding opportunities for their students to come and study in an English speaking environment. (Senior Executive, Mid-sized Russell Group University)

> I think even if you have to pay, it may still be attractive because you're coming to study in our highly respected institution in an English speaking country. (Senior Administrator, Mid-sized Pre-1992 University)

Some participants emphasized how many EU and international students opt to study in the UK primarily to develop their English-language skills, noting: 'well, the global language of education and research is English'.

Given the UK's historical position as a global research hub, many researchers have chosen to relocate there. This has allowed the UK to accumulate talent and expertise from all across the globe. This prominent position has further strengthened the value, prestige and reach of the English language.

> We were almost like the ideal hub to come to Europe because English speaking, for one thing, that's a huge advantage that we have over other EU nations, which means that we've pulled in people from every continent because English is the number one language of research. (Senior Executive, Mid-sized Pre-1992 University)

However, the majority of participants who spoke about the English language recognized that the UK no longer possessed a monopoly on Higher Education delivered in English and contemplated this lack of exclusivity alongside the increasing fees and mobility constraints presented by Brexit.

> If I was an EU student and (. . .) I wanted teaching in English, then I could go to Sweden or Holland. Why would I take the risk of coming to Britain? (Academic Leadership, Mid-sized Pre-1992 University)

> Would the European students consider, if it's difficult to have a visa, if it's more expensive, maybe I should consider another course in English in another European country. (Senior Executive, Large Post-1992 University)

As discussed in relation to competition with European universities, the Netherlands and Scandinavian countries were common examples of alternative nations where HE is provided in English. This would enable these nations to compete with the UK for students seeking provision in English:

> I can see it from the other side of the fence, so I'm a parent sitting in Europe thinking, my kid could end up with a massive debt, but they can go and be taught in English in any of the Scandinavian countries or Holland or whatever, you need to be well off to say, yeah, you can go wherever you want. (Senior Executive, Mid-sized Post-1992 University)

One participant acknowledged the trend that European institutions are offering more English provision, but contended that this development would take time to be established to the extent that it became a strong competitive proposition to prospective European and international students.

> I suppose places such as The Netherlands will probably offer more English language projects and I think it will require quite a long time for these things to take off. (Senior Academic, Small Pre-1992 University)

Other participants emphasized how students able to pay higher fees could choose global alternatives such as the United States, Australia and Canada:

> Yeah, so not only have we got international students looking at the sector and saying, well, 'why would I want to go there'? 'I can go somewhere else and get

> an education which is taught in English', so I think Australia and Canada will probably be quite good beneficiaries of some of this and they've got very good universities to go to. (Senior Administrator, Large Russell Group University)

> Being realistic, probably more will go to The States or Canada, partly because, just the English language speaking, but some would go to France or Germany, Netherlands or Scandinavia. (Senior Executive, Small Pre-1992 University)

As noted, the United States, Australia and the United Kingdom compete with each other as native English-speaking nations with mature, well-developed and good quality higher education systems. The English language is not an asset exclusive to the UK.

Ireland – Future potential?

A handful of participants, disproportionately from institutions in Northern Ireland and Scotland, highlighted how the Republic of Ireland presented an appealing convergence of factors that may allow it to flourish post-Brexit. These discussions focused on the rising advantage of both Northern Ireland and the Republic of Ireland, with assessments that variably favoured either constituency and often combined relationships of cooperation and competition. Within the present theme, we focus on the latter.

Some participants highlighted the opportunity that the Republic of Ireland could seize post-Brexit because of its continuous access to the EU while being an English-speaking country, and its status as an English-speaking country:

> I mean, Ireland, an English speaking country, with the adult population that's highly educated, is very well placed to take up, and favourable tax laws (. . .) if you want access to European funds in an English speaking country, then there's a very obvious choice that you can make. (Senior Executive, Small Pre-1992 University)

> if those European students who are studying in Great Britain at the moment, England, Scotland and Wales, if many of those decide that they no longer want to come to the UK but they want to go to an English speaking country, then the English speaking country they may target is Ireland, or the south of Ireland. (Senior Executive, Mid-sized Pre-1992 University)

Whereas participants noted that (the Republic of) Ireland would be an attractive possibility, some questioned the readiness of 'Southern' Irish institutions to be able to take advantage of the opportunity that the UK's withdrawal from the EU

presents. They then highlighted how this generates a competitive opportunity that Northern Ireland needs to seize:

> The South of Ireland does not have the capacity to take the numbers, so I think there's a real opportunity for us then to try and capture that, but being 100 miles up the road from Dublin, yeah and that is one of the strategic opportunities, I think, that arises. (Senior Executive, Mid-sized Pre-1992 University)

Participants from Northern Ireland were keen to put their best foot forward and advertise the value of the opportunity to international students, leaning on the combined advantage of the English language, UK higher education brand and a stereotypical imagery of Irish culture:

> [Specific institution] is a very attractive proposition to an international student, where obviously they can learn a creative craft within an environment which is English speaking. So you'll have the warmth of Ireland, but also then you've got the benefit of a UK higher education experience. (Senior Executive, Mid-sized Pre-1992 University)

> being on the island of Ireland, may [confer] some differential advantage to us, compared to the rest of the UK, but even with that differential advantage, I think the overall impact will be negative, even if we can, if there is such an advantage to leverage, it still wouldn't be as good, I don't think, as the starting position of an open border with Europe and seen as being within that kind of collaborative space. (Senior Executive, Large Pre-1992 University)

Soft power and tensions within changing international relations

When examining the complex nature of the UK's existing global relations, participants positioned universities as geopolitical actors engaging in wider international social, economic and cultural relations through the practice of higher education and research. Universities form students from various cultures and social backgrounds by providing access to educational resources, opportunities to interact with academics and peers and the potential to develop new skills and knowledge which prepare them to occupy various professions and roles in society. As institutions that possess intangible resources of power, universities occupy a strategic position in international relations and are generators of knowledge diplomacy, one of the main components of soft power. Brexit redefines the international relationships of the UK and, in doing so, directly

affects those policies, practices and resources that produce and have implications for soft power. As part of the Brexit process, the UK has to examine its existing global relationships in order to assess their impact on the country's soft power. Universities play a crucial role in this process, as the quality and reputation of their education and research form part of the country's image on the international stage. Through their educational programmes and research collaborations, universities demonstrate the UK's commitment to international dialogue and cooperation.

A key observation in relation to EU students is the framing of international student mobility as an instrument of knowledge diplomacy with soft power-enhancing potential. Soft power is contingent on an institution's (and country's) attractiveness, making UK universities' popularity a key quality and resource that can be mobilized within a public diplomacy orientation. Participants noted the risk of Brexit curtailing this role for universities or hampering the progress achieved thus far.

> You know, it is helpful that people [who] studied in the UK, they then go back and are leaders in industry or in policy and politics, you know, they've got connections with us. Everything to make that less likely is retrograde, in my view. (Academic Leadership, Large Post-1992 University)

The potential loss of EU students jeopardizes many close international relationships between institutions that had been forged over decades, creating distance between the UK and its EU counterparts who are the most geographically immediate global partners. The implications of this distancing have been further explored in the section on 'Diversity and student experience'.

Interestingly, participants observed that any dent in the attractiveness of UK universities as central players in internationalization and bastions of democratic values and culture could negatively affect their potential as vehicles for soft power.

> and that's even particularly so in relation to internationalisation of higher education, whether it be teaching or research, (. . .), if we make it less attractive for people to come and start their academic studies here and then their careers, then we'll be less influential in the future. (Academic Leader, Large Post-1992 University)

Some participants highlighted the potential turmoil in strengthening relations with international partners who perhaps do not share the UK's foundational principles and core values based on academic autonomy and the cultivation of debate and deliberation.

> the intrinsic value of UK liberal education type stuff, which I think we do it well, it is a liberal democratic framework, it is one that is based on critique, as opposed to just fact and rote learning and all that sort of stuff, so I'm sure we want that to continue to have a space, a place. (Academic Leader, Large Post-1992 University)

Within these expressions, participants highlighted the value of universities in the UK as places that espouse democratic ideals and enable free thought and discussion to an extent that is not necessarily present globally, especially in nations with authoritarian political regimes. This points to participants' sensitivity to broader matters relating to academic autonomy and the role of government control, and their understanding of the former being contingent on public authorities' faith in democratic principles and respect for the fundamental values of higher education.

> I mean, maybe we will have better links with China, India, Canada, Australia, New Zealand and so forth and that will be a good thing, but I sort of think our future is really in the EU. I still think our future in terms of the big trading relationships, the big intellectual histories, is with the E. So it makes me very worried. Maybe I'm just a pessimist . . ., if it becomes that we, rather than having a relationship with Germany, we have a relationship with Saudi Arabia as our sort of biggest ally, I don't think that's, to me, that's not necessarily a healthy part of higher education. (Participant from Large Russell Group University – Complete anonymization on participant's request)

In light of these concerns and the recognition of shared values with European partners, some participants still believed the UK remained better engaged in Europe through its connections to EU partners, despite Brexit:

> [we are trying to retain access to the EU partners] by trying to cement those relationships that we already have, so that we're building on a platform of relationship and mutual trust and respect. (Governing Body, Mid-sized Pre-1992 University)

> So, in summary then, there's stuff about income, there's some around communities of practice and there's aspects of quality that are shared and I don't see that the aspects of quality on either side would diverge after Brexit, they just perhaps won't be as interconnected, but they'll still reflect the same values because the whole sector, I think, European-wide, agrees on what good quality in higher education looks like. (Senior Executive, Mid-sized Pre-1992 University)

Participants recognized these political considerations were sensitive and treaded carefully between the imperative of marketization and their

attachment to academic ideals of quality, critique and deliberation. Cooperative relationships created between nations carry an assumption and expectation of shared mutual values, trust and respect. The potential discordance of the values in play aggravates existing geopolitical tensions and raises questions of domestic politics, democracy and governance, and ongoing concerns about human rights.

Occasionally, participants pointed to the impact of the kind of political socialization that went beyond merely preparing EU students to be more favourably predisposed towards the UK, and referred to global citizenship and the spread of democratic ideals.

> It [Brexit] has the potential to make things, to make us all smaller. It will impact global citizenship and the way that we develop our students and you know, through research or learning, teaching, Erasmus, whatever it is, we need that two way traffic and I think that will be damaged. (Senior Executive, Mid-sized Post-1992 University)

Finally, in addition to issues of global equity and meritocracy discussed in Chapter 5, there were concerns about the risk of sidelining quality-related criteria amid the rising costs of UK higher education in the competitive setting in which business logic was a powerful influence. If universities end up admitting essentially those who can pay, UK institutions might face the prospect of no longer shaping world leaders.

> I think that's my greatest fear, that UK universities will, in many cases, revert to what they once were, maybe teaching institutions for people who may, or may not, go on to do something in the world – and I think that will be a really bad outcome. (Senior Academic, Small Pre-1992 University)

Insularity and openness: The balancing act

The pro-Brexit discourse advocated an expansion of international linkages, towards new international partnerships and relations. Arguably, during the decades of EU membership, priorities were restrictively focused on Europe as a primary partner. The premise was that Brexit would mark a shift towards a sovereign entity engaging in a wider, more global network. This argument was frequently criticized, with concerns raised about intractable complications affecting the UK's reputation, discouraging potential future collaborations and leading to undesired isolation and insularity.

> I think there is the risk of, you know, of a negative image we project, by being portrayed as, well, actually, actively promoting the feeling that, you know, we are hostile towards others and foreigners, we want to be like ourselves on our own, want to control our borders, that has very negative implications for people who want to come here and spend a lot of time, a lot of intellectual capital, a lot of, you know, early years in their life, to train and to research and to study and they, I think, you know, they want to hear that they're welcome and you know, it's an open society, it's something that actually values them. (Academic Leader, Small Pre-1992 University)

In the interviews, the potential expansion of global collaborations and networks was hypothesized and weighed against a foreseeable diminished connectivity with European partners. Rather than expressing optimism, participants talked about and feared the risk of the UK becoming more 'insular', institutions becoming more 'insular', the student experience becoming more 'insular' and research and collaboration becoming more 'insular'. This was perceived in its cultural rather than strictly material dimensions.

> you need to have the bigger market to compete on the international stage. (. . .) The money's less [important] 'cause you can get the money and people can do it, but unless you get the collaboration cross thinking, it becomes very insular. (Senior Administrator, Mid-sized Pre-1992 University)

It was proposed that the shift to a more peripheral position within EU networks of research and teaching would contract the sphere of influence that UK universities had been able to exercise as geopolitical actors (as discussed in the previous section). Study participants also cast doubt on whether universities would be able to project and 'broadcast' a positive image of an outward-looking country in line with the Brexit narrative.

> I think that's one of the biggest concerns about the Brexit vote and the sort of narrative that's developing subsequent to the Brexit vote is that we are seen to be more inward looking and less internationally welcoming. (Senior Executive, Mid-sized Russell Group University)

Insularity was seen as a natural danger of being an island with its geophysical specificity; however, this was now to be compounded by severing ties with the continent that had developed via an enabling EU framework. Reinforcing geophysical discontinuity instead of connecting to the mainland, remoteness instead of closeness, were sources of anxiety, generating feelings of loss rather than a sense of security or self-determination. 'Insularity' became the collective term used by participants when they located their fears for the future.

Having in mind the undesirable prospect of insularity at the antipode of a variety of aspects of participation with the EU, participants considered how this new national condition could affect their reputation, the intercultural experience for students and finally the role of the university as an institution connected to society and the professions via the provision of internationally minded graduates and active citizens.

> Universities by their nature, you know, are a collaboration, about engaging many people, you know, being open, providing access to people and you know, both economic problems and these sort of external relation problems are not very good for that, so I think it doesn't look very good. (Academic Leader, Small Pre-1992 University)

Insularity and reputation

Some participants noted the negative effects of Brexit on the UK's and UK higher education's reputation as an open and welcoming environment. Their assessment was that Brexit triggered perceptions of the UK choosing to retreat and becoming a self-centred, closed system. For universities, the pursuit of excellence necessitates the pursuit of connection and collaboration; it is not surprising that connotations of insularity and self-centredness were held up as dangers that would affect their standing.

> at least in terms of atmosphere, maybe even practical terms, there'll be more border hassle, more of a sense of, you know, we're an isolated, insulated community and for a place like [this institution], which so strongly looks outside and needs that sort of collaboration, that makes all that much harder and also it undermines our credibility, (. . .) you know, I mean, everyone knows it's not my responsibility but as an institution it's just not good. (Academic Leader, Small Pre-1992 University)

Participants shared the feedback they had received from partners and collaborators outside the UK. They pointed out that Brexit was generally and primarily perceived as an act of the UK choosing to retreat and isolate. It was their belief that the external perception of a (foreign) policy matters equally to, if not more than, the actual intention of that policy. International relations and partnerships are mutually constituted and not the prerogative of one party alone. For those participants, collaboration was a two-way street and depended on perceptions, dispositions and the willingness of all parties involved.

> the sentiment is that the UK is isolating itself. The reality (. . .) doesn't matter, it's kind of what the sentiment thing is and then the sentiment becomes reality, so the more the UK becomes kind of Fortress Britain, we don't like foreigners, we're going our own way, we're trying to cut off the ties to Europe, the more it's going to be an isolated university community and it won't do irreparable or mega damage, but you'll see some falling back, I think. Now, all parties, including those who favour Brexit, have said we don't want this to be a retreat into a closed system in the UK, it's (. . .) regardless of whether you want it or not, others see us as having retreated and act accordingly. (Senior Executive, Large Post-1992 University)

Participants, who considered that Brexit had sent a signal to the outside world of the UK making a move that amounted to withdrawal and insular demarcation, highlighted the possible emerging constraints and barriers to collaboration, with implications for UK universities' reputation.

> if universities in the UK become more insular, not as open to collaboration from abroad, not the same opportunities to go and interact with other universities and be part of international research, then yes, I think it will impact on UK reputation. (Senior Administrator, Mid-sized Pre-1992 University)

Some participants linked reputation to mobility, recognizing 'open', 'engaged' and 'dynamic' as indicators of quality and attractiveness, highlighting that insularity stood as the opposite of these desirable traits.

> [being unable to apply for research funding and no mobility exchanges for students] makes you very boring and insular. (. . .) I think if you can promote the university, promote your faculty, promote your courses to potential applicants, potential PhD students, that there are opportunities for movement, global experiences, whether they're in Europe or elsewhere, gives you I think a better profile, makes you more interesting, makes the application more likely to follow through. (Academic Leadership, Large Post-1992 University)

Insularity and the student experience

When discussing their fears of insularity, many participants focused on the student experience. One described a student who had expressed reservations about her studies following the referendum:

> I think it's more just not wanting to be in an insular kind of country, that's become inward looking and isn't very, you know, it's not a hospitable environment, she wants to be, so it is a little oasis of cosmopolitanism, but if she doesn't feel like

> London or the UK as a whole is quite so hospitable, she wants to be somewhere else, but we've had very few cases of that. (Senior Executive, Small Pre-1992 University)

Other participants focused on the future potential for engagement with international students and the resulting installation of a 'global outlook' in home students:

> I think there's a risk that we could become a bit more insular and we really want our students to have a global outlook, so we need to work to mitigate against that possibility. (Senior Administrator, Small Pre-1992 University)

As could be expected, these considerations overlapped with discussions of diversity, emphasizing the value of a student experience that enables engagement with a diverse culture and a plurality of outlooks and experiences. This is discussed further in the section titled 'Diversity as a gateway to broadening one's horizons and to better futures'.

> I think the diversity of students is probably going to change quite a lot if deals aren't right and EU students can't meet overheads, they can't afford it, it's going to change drastically the culture that we have in, what university means to people. A lot of people come to university for the wide culture, to see how other people live, what it's like to meet loads of people from all over the world, so I think that's going to change what university actually means to people, yeah. (Student representative, Mid-sized Post-1992 University)

Insular higher education, insular nation?

Some participants looked beyond HE and feared insularity would have deeper consequences for the wider society based on the developments they anticipated within universities:

> Well, we've benefited from having lots of European students over the years. My worry is that if we see a huge cut in the number of European students coming to Northern Ireland, that would have a detrimental effect on the wider society, 'cause obviously they're interfacing with the local communities, our local students aren't able to kind of get different perspectives as much or European perspectives. (Senior Executive, Mid-sized Pre-1992 University)

The ending of free mobility was assumed to result in decreased possibility for communities in the UK to engage in cultural exchange with 'others', as fewer EU students would see the UK as a viable destination to study and settle.

Participants emphasized that these impacts would affect both UK and EU communities, as the interactions enabled by free mobility had provided a mutual enrichment that stretched beyond culture, into the job market and global workforce.

> People [EU citizens] are going to be stuck at home with fewer opportunities and it just all feels like, you know, you're just coming to this awful dead end of great stuff that's happening, flexibility of movement, then moving to universities, then moving to the workforce will just grind to a real halt and there'll be crises all over the place because of it. (Academic Leader, Large Post-1992 University)

Within this framing, participants positioned the university not as an isolated body, but as a part of the progression of people's life trajectories and as a social institution interconnected with other important sectors. It was feared that barriers to student mobility would have far-reaching consequences in wider society, as Brexit threatened to curtail the role of the university as an essential space which prepares graduates for key global issues.

While some participants feared the prospect of insularity, they took the time to highlight their hopes that the UK would persevere through as a matter of necessity.

> I'm sure there will be practical arrangements for people to get access to visas and work in the UK ultimately, but if they conclude that the UK is not the open, hospitable place that they thought it was, then we might, at least temporarily, face some barriers. (Governing Body, Large Post-1992 University)

> I suspect most people will try and find a way through it and we'll try and work together and we'll be sensible and logical and we won't end up being an isolated island, we'll be an island that's invited into the mainland, that's what I kind of hope, but I do feel like we would need to be invited in and you know, as a country, we've got some great universities that are looked to, not just from Europe but, you know, globally, so hopefully that will then sustain that learning, that environment. (Academic Leader, Large Post-1992 University)

Within these depictions, universities were held up as connecting social institutions, their activity unavoidably dependent upon collaboration and cooperation.

> Would there be other barriers? Possibly – insofar as the UK was seen to be separated, was seen to be driving in a different direction, then I think that there might be a cultural issue, but I think that that probably, over time, would be able to be addressed through, you know, universities simply reaching out and being

> the open, international, global organisations that we are at the moment. (Senior Executive, Large Post-1992 University)

Some participants related the danger of being cut off to the probable economic damage resulting from Brexit and noted how these may present compounding effects:

> at least some people say that it will be bad for the economy, rather than not only less growth, but there might actually be a decline and that, of course, would have negative effects in all kinds of ways on universities, with fewer people being able to afford university education, fewer jobs, fewer qualified jobs, less money, less tax money to support universities, so the shrinking economy is not good for anyone. (Academic Leader, Small Pre-1992 University)

Fuller global engagement?

Despite a general fear of cutting off ties and retreating into insularity, many participants saw the pursuit of fuller global engagement as a necessary path forward.

In some instances, participants aligned this goal with their existing institutional strategies, emphasizing that Brexit did not prompt a drastic response or reorientation. Their pre-existing intentions happened to align well with the challenges posed.

> it's incumbent upon us to stress the fact that nothing has changed for us, our outlook, what they refer to, I understand, as 'international posture'. (. . .) In other words, you know, do you think internationally? Do you think beyond your own borders? Well, obviously, you do, because you want to recruit the best talent wherever it's found, whether that's staff or whether that's students, you want to pursue your work in the best possible context. (Senior Executive, Mid-sized Russell Group University)

Actively pursuing the development of international ties aligned with universities' historical narratives as outward-facing, collaborative and meritocratic academic communities, combined with the responsiveness of agile organizations that embraced current market imperatives to invest in global opportunities in an entrepreneurial fashion.

> We've always, for some time now, we've seen ourselves as a global institution and I think that the Brexit stuff has meant that we think so even more, as it were, that

> we, you know, you spread your risk really. (Senior Executive, Large Post-1992 University)

However, other participants responded more stoically and framed further international collaboration as more of an unavoidable effort. This was seen as the only sensible path forward in the absence of logical alternatives. Their expression of hope was akin to an instrumental necessity; one must hope because that is the only recourse.

> So, I think it's a complete bloomin' disaster, but we'll have to show how good we are at recovering by creating relationships elsewhere and moving it forward, I mean, that's it, I don't think there's anything else we can do. Maybe after a bit, we'll be welcomed back into the fold, so we shouldn't lose any of the relationships that we have. (Governing Body, Mid-sized Russell Group University)

More rarely, participants criticized the ongoing 'Europhile' discourse within universities and instead tried to stress the opportunity of global repositioning that Brexit may provide.

> part of the opportunity for me is how do you then look at things like global trade deals (. . .) what's the position of higher education and universities within that? From a mobility point of view? From a research point of view? (. . .) I think policy to date has been more about continuation of the same and actually not recognition that we're changing and actually we need to start a narrative that's talking about a post-Brexit environment, where we have got global, you know, enhanced global connections that we need to pursue, as well as the European connections that we've had historically. (Senior Executive, Large Post-1992 University)

This view was more aligned with the government position, including the discursive device of severing old ties to allow focus and energy for new ones, including traditional allies in the so-called Anglosphere.

> I think in terms of the institution, there will have been conversations about having collaborators further afield, about perhaps wanting to shift collaboration more to perhaps across the Atlantic, to the United States, in terms of collaborators, if collaborating with Europe doesn't necessarily give you the added value of access to European funds and indeed, I think we know that where you co-publish and have citations with American institutions, citations go up quite a lot because of the readership that there is within an American market. So, there will be some distinctions about how we might mitigate access to some of those European frameworks. (Senior Executive, Mid-sized Pre-1992 University)

In this framing, the 'old' represented the recent historical connections with the EU, perhaps the UK's 'European moment', whereas the new and fully fledged international relationships were with the wider world, and this was in line with the UK's repositioning of its global trajectory. The 'global' becomes the broad, sunlit uplands of the UK's future when contrasted with the narrower collaboration with just the EU, a collaboration that was lower down in the hierarchy of openness.

Repeatedly though, these arguments were criticized, for example when participants brought an external perspective to bear on these internal UK narratives of the future.

> I know that those who would support the Brexit vote say, 'no, no, it makes us more international in outlook because we're not just focused on Europe', but my sense is that's not the way it's perceived outside of the UK. (Senior Executive, Mid-sized Russell Group University)

Oddly, no one suggested that their prior engagement with Europe had prevented them from engaging (or made them less likely to engage) with regions further afield. Some stated the opposite:

> I don't think there's anything, you know, there's nothing which we cannot do now which would be then easier after Brexit. (. . .) I don't think there's something which we'd be able to do later which we can't do now. (Academic Leader, Small Pre-1992 University)

Some participants explicitly stated that they did not consider their participation in Europe to be an obstacle to broader international participation. There was scepticism that severing relationships with Europe would provide more space, energy or resources to pursue broader or 'fuller' global engagement, instead predicting more insularity, as explored in the previous section.

Some participants appeared hopeful about UK universities' global future from a place of confidence and security. This projection drew on their faith in UK academia offering a superior opportunity to those looking to access quality education and 'world class' research. Within this framing, participants minimized the threat of politics and the prospects of it prevailing over deep-rooted professional rationales.

> I think, fundamentally, the UK is an attractor, as a place to work, in academia, in terms of the quality, 'cause that generally is what will attract good academics to uproot themselves and move abroad and to the UK, ultimately that beacon will shine through, whatever barriers are put in the way by Government and politicians. (Senior Administrator, Mid-sized Russell Group University)

Other participants acknowledged the outcome of such efforts would not be guaranteed, but instead highly dependent on the government's policy responses and future stance on immigration and collaboration.

> so the good way to respond to [Brexit], [for] a small island nation that wants to be a trading state with strong global links, is open immigration, establishing trade and other relationships with as many other states as possible, making Britain the most welcoming destination you can, so that lots of people come here, want to work here, want to travel here. (Senior Executive, Small Pre-1992 University)

Conclusion

The impact of Brexit on competition in UK higher education is multilayered and far-reaching. Engrained in the sector's ordinary *modus operandi*, competition is a familiar feature of UK higher education, albeit one not universally celebrated as desirable or effective. Brexit not only intensifies these existing competitive pressures within the hierarchical sector but also introduces new dynamics on the global stage. Participants across various institutions anticipated a reshuffling of competitive advantages, with some universities potentially benefiting from their established reputations or geographic locations, while others face steeper challenges, especially the less prestigious institutions. Insularity looms large, threatening to undermine the UK's attractiveness to international students and researchers. This tension between insularity and openness would play out differently across the sector, with the traditional UK elite of higher education located in the Golden Triangle of Cambridge, Oxford and London emerging as the clear winners.

The potential retreat from European engagement could hinder those forms of competition that are considered expressions of excellence and quality standards in higher education. Yet, some participants see Brexit as an impetus to broaden their global engagement, even as they grapple with the potential loss of EU partnerships and funding. The English language, once seen as a unique selling point, is now recognized as an asset shared by competing nations within and beyond the Anglo-Saxon sphere.

The geopolitical implications of Brexit for UK higher education extend far beyond immediate competitive concerns narrowly linked to revenue, touching on broader issues of soft power and global influence. Universities have long served UK's soft power ambitions, attracting future global leaders, fostering

international research collaborations and cultivating influential alumni networks. Brexit potentially threatens this role, as it may diminish the UK's ability to attract international talent and participate in key global research networks that amplify visibility and key positioning. Participants expressed concern that a perceived retreat from European engagement could weaken the UK's position in science and knowledge diplomacy, potentially ceding ground to competing nations keen to enhance their own global influence through higher education. This shift could have long-lasting effects on the UK's cultural and economic ties with other countries, as well as its ability to shape global academic discourse and policy debates.

7

Case Studies of Twelve Individual Universities

In this part of the book, we provide a summary of the twelve case studies of universities in England, Scotland, Wales and Northern Ireland.[1] We distil discrete contextual issues, approaches and responses to Brexit, weaving them through the three overarching, cross-cutting framings identified through the analysis of 127 interviews across all institutional cases: EU student numbers, diversity and competition. By consistently addressing these themes for each institution, we allow for comparison between cases and triangulation with the analysis presented in earlier chapters.

The case studies offer a comprehensive overview of how various UK universities anticipated and prepared for Brexit's impacts, particularly concerning EU student numbers, diversity and competition. Notably, the unique circumstances of universities in Northern Ireland, Scotland and Wales are explored, providing valuable, contextual insights into UK higher education beyond the often-dominant English perspective.

Case 1: The University of Aberdeen: 'We are exposed across the institution'

Background data

The University of Aberdeen is a university located in Aberdeen in the North-East of Scotland. Established in 1495, it is the fifth oldest in the UK and the third oldest in Scotland. It is the 76th largest HEI in the UK out of a total of 169, with 15,185 students (2019–20). On their website, the University of Aberdeen espoused inclusion: 'Our university is open to all. We will welcome staff and students of all backgrounds, and will connect with our communities and partners, locally, nationally and internationally.' They further highlighted their credentials as 'ranked in the top 160 universities in the world' according to *THE*

[1] Ethics approval was obtained to name the universities in this study. However, to maintain confidentiality, all interview quotations are fully anonymized in the presentation of each university case.

World Rankings 2022, with 'over 75 per cent of the University's research being classified as "world leading" or "internationally excellent" in REF 2014'.

Between 2016–17 and 2019–20, Aberdeen experienced a 7.3 per cent increase in overall student numbers, rising from 14,150 to 15,185. However, during the same period, the proportion of EU students declined by over 2 percentage points, from 2,715 students (19.2 per cent of the total student population) to 2,600 (17.1 per cent). HESA student data, which categorizes students by their permanent home address before study (domicile), shows that this trend continued in 2020–21, when total student enrolments increased to 16,080, while EU student numbers dropped further to 2,160 (13.4 per cent). Following the change in fee status for EU students, the decline accelerated in 2021–22, with EU student numbers falling to 1,525 (9.2 per cent), despite the university's overall student population increasing to 16,565. By 2022–23, Aberdeen had 15,455 students in total, with EU students numbering only 1,000, representing just 6.47 per cent of the student body. This marks a continued decline in the proportion of EU students, down from 9.2 per cent in 2021–22 and significantly lower than the 19.2 per cent recorded in 2016–17.

Within the body of findings, the University of Aberdeen has been categorized as a 'Mid-sized Pre-1992 University'. Relative to the other universities in the study, it is the ninth largest (out of twelve). It contributed twelve participants to the study: five members of executive leadership and seven senior academics, of whom five occupied leadership roles such as head of department.

EU student numbers: Aberdeen braces for loss of EU students

At Aberdeen, there was widespread acknowledgement of the importance of EU students to the institution. Most participants referred to the large proportion of EU students studying at Aberdeen (19.1 per cent in 2017) and expressed their concern at the potential of losing these students. One participant identified '9 out of 12 disciplines at risk'; others named specific subjects, including: 'Arts and Social Sciences', 'Computing', 'Medicine', 'Anthropology', 'Languages', 'History of Art, Film and Visual Culture'. In some programmes, the drop in EU students was perceived as a threat to their sustainability. Notably, one participant in the faculty of Medical Sciences noted that 'up to 25 per cent of our PhD students are of European origin'. It was also acknowledged that the challenge was for the institution as a whole, and addressing it necessitated an institution-wide response.

> we are exposed across the institution really, so for us, I think we have the highest proportion, for example, of students, EU students in Scotland, whilst we've got a

> sort of an exposure, you know, it's not concentrated in one area, so for us it is an institutional-wide policy.

This threat was considered seriously and extensively by Aberdeen participants, in large part due to the particulars of the Scottish higher education funding model. The participants outlined how they expected Brexit to result in a change to the fee status of EU students within Scotland, so they would go from paying no fees, like Scottish home students, to paying the full international rate. Most participants said they expected a loss of EU students who may be unwilling, or simply unable, to take on the financial burden to study at Aberdeen.

Diversity: Celebrating EU involvement and identity

Diversity was a key concern at Aberdeen: many participants framed EU students and staff as integral to their institution's culture and identity. One participant pointed to how the European presence at Aberdeen had grown organically:

> but then I think there's just a lot of organic involvement with Europe generally because we have a very high proportion of European staff, (. . .), so there's just a very organic relationship building, I think, with other institutions and with the European Union and research funding, EU students, so on.

Many participants expressed distaste at the thought of Aberdeen becoming 'less diverse' and 'less open'. There was a perception that this may impact negatively on the home student experience due to a lack of cultural exchange, as well as reduce the 'richness' of the university 'culture'.

> I think it'll reduce the richness of the higher education culture, both staff and students. I think Scotland in general are quite European and just outward facing, not just European, we're quite internationally facing and actually really, see it as an advantage to have that very cultural mix.

Importantly, diversity was framed as a benefit to academic quality, with European students held up as 'good', 'proactive' students who take 'advantage of the opportunities presented to them'.

Competition: Struggles with increasing competition for the discerning student

Alongside discussion of declining numbers, there was substantial consideration of the increased competition for students between Aberdeen, other Scottish universities and universities in the rest of the UK.

> it puts the Scottish universities in competition with the English universities for the scarce European students who wish to pay fees to come to the UK. There is no longer for those European students a comparative advantage to go to Scotland because they'll have to pay fees, so I don't know what will happen.

The competition for numbers was expected to translate into a competition for student quality. One participant illustrated the possibilities: 'do you lower your entry tariffs to get more students in . . . if you do that, what's the impact on retention?' '. . . there's a lot of room for collateral effects here'.

Case 2: Coventry University: 'We've got a reputation for being quick to react to changes in the market'

Background data

Coventry University is a multidisciplinary institution located in Coventry, in the Midlands of England. It was established as Coventry University following the Further and Higher Education Act 1992, being formerly known as Coventry Polytechnic. With 38,430 students, Coventry University was the fourth largest university in the UK in 2019–20. On their website (https://www.coventry.ac.uk/the-university/) Coventry presented themselves as 'first in the Midlands amongst modern universities' according to *The Guardian University Guide 2021*.

Coventry University experienced significant fluctuations in student enrolment from 2016–17 to 2022–23. Between 2016–17 and 2019–20, the university witnessed substantial growth, increasing overall student numbers by 21.3 per cent from 31,690 to 38,430. This growth was primarily driven by non-EU international student enrolments, whereas UK places decreased by more than 1,500. Notably too, Coventry was one of only two universities in the study to experience a small growth in EU student intake following the Brexit referendum, with EU students increasing from 8.9 per cent (2,805) to 9.9 per cent (3,820) of the student population. The 2020–21 academic year saw continued growth, with total student numbers reaching 39,145 (a 1.9 per cent increase), although EU student numbers slightly decreased to 3,800 (a 0.5 per cent decrease).

However, the trend reversed in subsequent years. In the 2021–22 academic year, EU student numbers dropped significantly to 2,355, representing only 6.2 per cent of the entire student population. This downward trend continued into 2022–23, with EU student enrolment further decreasing to 1,260 (3.6 per cent of the total) and the total student population contracting to 35,405. Notably, a

significant portion – 15,025 students (42.4 per cent) – were non-EU international students.

Coventry is the third-largest university in the study, and within the presentation of the study findings, it has been categorized as a 'Large Post-1992 University'. It contributed eight participants to the study: four senior executives, three academics (two in leadership roles) and one member of the governing body.

EU student numbers: Doubling down on recruitment strategies

When asked about Coventry's EU engagement, most of the eight participants brought up EU students first: 'they're an important part of our student body and therefore also of our income'.

This recognition was most frequently based on student numbers: 'I think probably between 10 and 15 per cent of our undergrads over the last couple of years have been students from the EU' – figures like this were very consistent among the participants who shared them; several discussed the analytical dashboard at Coventry that made this information available to them. The overwhelming majority of discussion on EU students referred to EU students as a unit of resource and an aspect of the university's business strategy.

Some noted that Coventry University's Eastern European student applications were markedly high and consequently expected to see the most decline from those nations 'when they lose access to the loan book'. Participants discussed proactive approaches that Coventry was considering undertaking in response to anticipated changes in student enrolments, such as scaling up by putting additional resources into creating a 'bigger machine' to 'recruit' and 'look after' EU students – similar to their efforts in other international student recruitment.

Diversity: Neglect of European students in diversity discourse

At Coventry, there was very sparse discussion of diversity as an area that could be potentially affected by a reduced EU student enrolment. Only one participant commented that the 'European element' of student diversity at the university might be 'under threat'. When the concept of 'diversity' was raised overtly, it was largely framed as something desirable to Coventry but rarely articulated in terms of EU students.

Coventry being a university within a locality of ethnic diversity and social deprivation suggests that the concept of diversity had not expanded to include

European students, who might be seen on the more privileged end of diversity when compared to UK-domiciled students suffering socio-economic or ethnic prejudices. However, Eastern European students stood out as a possible exception and were occasionally given special consideration distinct from other European students.

Competition: Getting ahead of the curve and thriving post-Brexit

There was a widespread assumption that Brexit would not lead to significant changes to Coventry's circumstances or rather that the challenges posed by Brexit were already accounted for by Coventry's pre-existing institutional strategies. Participants were keen to highlight the entrepreneurial or 'agile' nature of the institution, arguing it did not need to rely on a position of traditional advantage to successfully navigate the coming uncertainty. Participants asserted confidently that Coventry's internal governance structure provided decisive leadership that allows rapid responses to sector challenges and a competitive edge.

> I think we've got a reputation for being quick to react to changes in the market and doing things differently and you know, there's been a lot of work put into our, and we're in a further process where we're looking at how we become more agile as an institution and again, that's not just Brexit, that's just the full range of pressures on HE.

Doubling down on recruitment strategy and operations was the most frequent response to the anticipated harshening of the student recruitment landscape. Some participants pointed to existing TNE agreements with specific EU universities (none named directly) as possible avenues for further EU engagement. Several discussed the possibility of opening campuses within continental Europe but were understandably cagey with specific details. One participant discussed a renewed focus on 'Western European' nations in direct response to this, while another bided on the expansion of their marketing strategy in Eastern Europe.

Case 3: Durham University: 'We're currently in a very fortunate position'

Background data

Durham University is a collegiate public research university located in Durham, in the Northeast of England. Founded in 1832 and incorporated by royal charter

in 1837, it is one of the universities which claims to be the 'third oldest in England'. It was the forty-eighth largest university in the UK in 2019–20. On their website, Durham University describe themselves as '[a] globally outstanding centre of teaching and research excellence, a collegiate community of extraordinary people, a unique and historic setting – Durham is a university like no other', highlighting their position as ranked eighty-second in the QS World University Rankings in 2022.

Between 2016–17 and 2019–20, Durham's student population grew 6.2 per cent from 18,385 to 19,520. In the same period, their EU student intake proportionally decreased by 1 percentage point from 1,095 students (5.9 per cent of the total) to 965 students (4.9 per cent). Similarly, in 2020–21, Durham's overall student population continued to increase (by 5.8 per cent to 20,645); however, their EU student intake continued to decline to 915. In 2021–22, while the total student population increased by 7.7 per cent to 22,230, Durham's EU student intake continued to decline to 780 students, representing 3.5 per cent of Durham's student population. In 2022–23, the total student population remained relatively stable at 22,365 students, but there was a further decrease in EU student enrolments to 685 students. So, in 2022–23, EU students made up approximately 3 per cent of the total student population at Durham University, down from 6 per cent in 2016–17.

Durham is the eighth largest university in the study with 19,520 students and has been categorized as a 'Mid-sized Russell Group University'. It contributed nine participants to the study: three senior executives, three senior administrators, two senior academics (with one being a university leader) and one student representative.

EU student numbers: Internationalization strategy, recruiting and marketing to EU students post-Brexit

All participants that touched on the subject described EU students as playing a role in the institution, but not necessarily a major role. This was often discussed alongside talk of numbers. As one participant explained: 'About 7 per cent at the moment are non-UK but EU, so it's a relatively small amount.' Despite this, some participants described EU students as being 'reasonably important' due to their role in Durham's future internationalization strategy:

> The university as a whole is looking to internationalise its student body and there's a kind of target figure of 29 per cent-ish . . . at the moment, that international

> student community equals non-EU – there's a recognition that as of 29th March next year, we will be recalculating what that target means.

Within this discussion, there was the idea that pursuing more EU student enrolments may be more worthwhile following Brexit: 'what's the interest in recruiting EU students at the moment? They pay home fees, you know, they're not so obviously international'.

Likewise, another participant expressed that they may need to begin recruitment and marketing efforts explicitly within Europe, something they had yet to do.

Diversity and EU students: A non-issue

Of the institutions in the study, there was the least discussion of diversity at Durham; one of the only references to 'diversity' directly came from a student rep:

> I think you don't just come to university to get a degree, you come to learn about all kinds of things, like developing as a person, and you can't do that unless you're in a diverse group, so that worries me. (Student representative)

Another participant perceived uncertainty among the current students about what Brexit would mean to them, whether it would interfere with their studies or limit their mobility, and that the university presently 'didn't have the answers'.

Competition: Striving to maintain its strong position post-Brexit

There was some discussion of EU students in relation to talk of the intensified competition within UK HE, and how the saturation of the home student market had triggered a rush for international students across the sector. Despite this, most participants who touched on these areas described Durham as being insulated from a lot of potential fallout of Brexit. Durham appears through these descriptions like a safe haven in the eye of the Brexit storm:

> We're currently in a very fortunate position, we need to try and stay in the very fortunate position that we have a substantial over-supply of very well qualified undergraduate applicants.

Although most participants approached the anticipated changes from a place of confidence and security, there was occasionally attention directed to the hierarchy within UK higher education, noting: 'we don't have the international

representation that Oxford and Cambridge do'. This participant expanded with doubts about whether or not Durham could 'manage' solely by depending on word-of-mouth and a good reputation.

Case 4: University of Exeter: 'We have been Europeans for the last 50 years . . . we won't have any Europeans at this university and then we lose all that'

Background data

The University of Exeter is a public research university in Exeter, Devon, in the South-West of England. It was established in 1955 by royal charter as a merger of St Luke's College, the Exeter School of Science, the Exeter School of Art and the Camborne School of Mines. On their website, Exeter describe themselves as 'combining world-class research with excellent student satisfaction, from our campuses in the South West of England, in Exeter and Cornwall'. The website highlights that they are one of 'very few universities to be both a member of the Russell Group and have a Gold award from the Teaching Excellence Framework (TEF)' (https://www.exeter.ac.uk/about/facts/profile/). Overall, it is the twenty-third-largest university in the UK, enrolling 26,935 students in 2020–21.

Among the institutions in the study, Exeter experienced the second-largest growth in overall student numbers between 2016–17 and 2019–20, with an increase of 16.2 per cent from 23,175 to 26,935 students. During this period, EU student numbers underwent a slight decrease of 1 per cent, dropping from 1,490 (6.4 per cent of the total) to 1,450 (5.4 per cent of the total).

The overall growth continued in 2020–21 as both their overall student numbers and EU student numbers increased to 30,250 (an increase of 12.3 per cent) and 1,565 (an increase of 7.9 per cent), respectively. In 2021–22, Exeter's growth persisted, attracting a total of 32,465 students – an increase of 7.3 per cent. However, EU student numbers decreased by 18.5 per cent to 1,275, reflecting broader trends following changes in EU student fee status.

Finally, in 2022–23, a total of 32,825 students enrolled at Exeter (a 1.11 per cent increase from the previous year), while EU student numbers declined further to 1,010 (a 20.78 per cent decrease compared to 2021–22), representing 3.08 per cent of the total student population.

Exeter contributed twelve participants to the study: five senior executives, three senior administrators, two members of academic leadership, one member of the governing body and one student representative. It occupies the middle point in terms of size relative to the other institutions in the study and was classified as Mid-sized Russell Group University.

EU student numbers: Confidence despite expected decline

Many participants described Exeter as being 'not especially vulnerable', owing to their 'relatively low proportions' of EU students compared to London-based institutions. Participants cited EU student numbers in a tight range between 5 per cent and 6 per cent, although one claimed '8 per cent this year', in one department, indicating some variability across the institution. One participant explained: 'We don't have a huge reliance on EU student numbers, we've never been that proactive in recruiting in that particular market.' This view was consistent, another participant adding: 'We've deliberately never pursued high numbers of EU students.' There was some broad criticism directed towards institutions that had followed a greedy approach to EU recruitment and now had to deal with the consequences of what had since become a higher-risk strategy.

All participants expected a drop in the number of EU applicants, with some pointing to 'politics and politics related programmes' as having relatively high numbers of EU students. Different participants provided a variety of reasons for the anticipated overall decline of EU applications, including the removal of EU student access to the 'loan book', uncertainty over fees and changes to the UK's reputation. While one participant was concerned and voiced tentative plans to consider targeted scholarships as a means to retain EU students, another phrased their possible decline as 'not a disaster'. Another two participants clearly stated a decline in EU student numbers did not represent 'an existential issue' for Exeter.

Diversity, the value of openness and cultural exchange for knowledge generation

Diversity at Exeter was often presented in terms of openness and culture. One participant directly connected diversity to the distinctive role of the university as a site of knowledge generation:

> I find it's an utter tragedy actually for the UK and the way that we see ourselves as an open, transparent, welcoming culture, where we welcome diversity because that's how we get the best discovery.

Generally, diversity was seen as an implicit good that, in most cases, needed no justification. However, where it was justified, it was framed as a boon for scholarship and for the home student experience. European students were seen as 'bring[ing] a different culture and different thinking and I think that will be a huge loss, to not have them here'.

While explicit references to diversity were rare, many participants emphasized the need to retain EU students for reasons that extended beyond the financial, frequently referencing the university culture:

> we are and have been Europeans for the last 50 years (. . .) my fear is that we won't have any Europeans at this university and then we lose all that, you know, culture, this, that and the other.

Competition: Uncertainty and opportunity in the wake of Brexit

There was a perception that institutions would be in stronger or weaker positions when forced to respond to the maladies brought about by Brexit, dependent upon their competitive ambition within the hierarchy of UK higher education:

> It's like saying, if you're a football team and you lost your goalkeeper with a bad injury, it may not matter too much if you're in the middle, but if you're going for the champions league or you're in for relegation, I mean, that's the context in which the hit happens.

Direct comparisons were made with universities in London or the Russell Group and its stronger members.

Some pointed to intensified international competition, noting that EU students may avoid the UK due to the 'hostile environment' that had emerged post-referendum:

> They will not come and I don't blame them, why should you? Most students are looking at leaving home for the first time, they want to go to a place where they feel welcome.

There was some sentiment that the uncertainty of Brexit was stifling decision-making. With a wide array of parameters unclear, unpredictable developments likely to occur and compounding effects difficult to account for, the future appeared resistant to rational forethought and forward planning:

> I believe that the best approach at the moment is to place a chicken on a table and split its guts open, because that's how clear it is, what's actually going to happen, it is anybody's guess what actually will happen.

Among this uncertainty, some participants anticipated they would need to take any viable opportunity out of fear that those opportunities would not necessarily come again.

Case 5: Keele University: 'We feel it's not going to be a traumatic impact, even if things change'

Background data

Keele University is a public research university located just outside Newcastle-under-Lyme, a town in the East Midlands of England. It was founded in 1949 as the University College of North Staffordshire and incorporated by the royal charter in 1962. On their website, Keele describe themselves as: 'world-renowned for its breadth of teaching and research that tackles the world's most urgent problems', noting that they were shortlisted for University of the Year by Times Higher Education in 2020 (https://www.keele.ac.uk/). It is the ninety-sixth largest university in the UK with 10,880 students.

Keele University experienced modest student growth of 2.6 per cent from 2016–17 to 2019–20, increasing their overall intake from 10,600 to 10,880. Across the same period, there was no substantial change in the number of EU students at Keele (from 205 to 225 students), remaining steady at about 2 per cent of the student body. However, in 2020–21, Keele's total student population grew further to 11,505 (by 5.7 per cent), with an EU student population of 245 (representing 2.1 per cent of the total student population). In 2021–22, the student population increased to 12,235 (by 6.3 per cent), while EU student numbers decreased by 12.2 per cent to reach 215 students. In 2022–23, Keele saw another significant increase in total students, growing by 7.0 per cent to reach 13,090. EU students decreased further to 185 (1.4 per cent of the student body), while home students accounted for 11,665 of the total enrolment, representing a highly significant 89.11 per cent of the student population that year.

Among the institutions in the study, Keele is the third smallest and was categorized as a 'Small Pre-1992 University'. It contributed twelve participants to the study: six senior executives, two senior administrators, two senior academics (one being a university leader), one member of the governing body and one student representative.

EU student numbers: Low EU student intake eases concerns over Brexit

At Keele University, particpants generally viewed fluctuations in EU student enrollment as a secondary concern compared to other institutional priorities: 'we're not massively exposed to a high number of EU students, it's not a really high proportion of our intake', said one, and other participants described concerns around EU students as 'really not significant'. Another emphasized that 'we feel it's not going to be a traumatic impact, even if things change'.

> [EU students are] a pretty small percentage and they're spread, you know, they're not concentrated, really, in any particular subject.
>
> We always saw our low EU student base as a bit of a problem, but actually at the moment it feels a bit like a good problem to have.

One participant stated that their 'strategy to address a shortfall in EU applications' could be considered a broad approach, with no intention to target specific demographics: 'it is about doing our utmost to encourage students, postgraduate and undergraduate, from outside the EU and inside the UK, to come'.

Overall, participants explained that they were in a situation that did not demand an extensive response simply due to their low exposure to EU students, and that this would allow them to recover more quickly from any potential disruptions. One participant pointed to universities with more EU students as an illustration of how the impacts would be more severe and require a more concerted response:

> a university I know has a very high proportion of EU students, so it would be much, much more traumatic for them, but I'm sure they're doing a lot more contingency planning than we probably are or they should be anyway.

Diversity: A diminished international atmosphere

Despite this, some participants were worried about losing Keele's EU students:

> It concerns us, as I say, because of the effect that it would have on the international dimension of the campus.
>
> We know that it would diminish that kind of international atmosphere.
>
> European students coming here, that kind of cultural exchange that happens, there's a risk of losing that.

One participant expressed concerns around mobility: students being unable to 'travel around' and the negative impact that may have on their student experience.

Competition: Worries over the indirect effects of Brexit

Some participants raised anxieties about 'indirect effects' and fallout from sector-wide changes then impacting upon Keele. One said: '[considering] a collapse of EU applications across the sector, other competitor universities would be looking to fill those spaces, which would then affect us'. Another participant voiced similar concerns:

> The worry is that there are certainly other universities that are much more dependent [on EU recruitment] and if they lose some of that, then the competition for UK students becomes even more intense than it is at the moment.

When considering intensified competition, most participants framed Keele as being at a geographic disadvantage: 'if you're going to come to the UK, you're going to want to come to London generally, both for EU and international students.'

Case 6: The University of Manchester: 'In Science, almost half of our postgraduate students come from European institutions and they are often the best'

Background data

The University of Manchester is a public research university located in the city of Manchester in the North West of England. It was formed in 2004 as the result of a merger between Victoria University of Manchester and the University of Manchester Institute of Science and Technology, founded in 1851 and 1824, respectively. On their website, Manchester describe themselves as aiming to 'be recognised globally for the excellence of our people, research, learning and innovation, and for the benefits we bring to society and the environment'. In particular, they highlight that they are 'placed 33rd in the Academic Ranking of World Universities' and 27th in the QS World University Rankings. With a student population of 40,485, the University of Manchester is the third-largest university in the UK overall.

From 2016–17 to 2019–20, Manchester's student population experienced no substantial changes, moving from 40,490 to 40,485. During the same period, the number of EU students studying at Manchester increased from 2,595 (6.4 per cent) to 3,060 (7.6 per cent). In 2020–21, Manchester's total student population experienced substantial growth, increasing by 10.3 per cent from 40,485 to 44,635.

Manchester's EU population also increased; however, this growth was not as substantial, increasing by 3.3 per cent from 3,060 to 3,160. The 2022–23 academic year saw a further modest increase in total students to 46,860 (a 1.0 per cent growth), while EU student numbers declined to 1,920, now comprising only 4.1 per cent of the student body, down from 7.6 per cent for EU students in 2020–21.

The University of Manchester is the second-largest institution in the study (of twelve) and has been categorized as a 'Large Russell Group University'. The University of Manchester contributed nine participants: two senior executives; five senior academics, with four occupying leadership roles; one senior administrator; and one member of the governing body.

EU student numbers: Reduced quality of research with a reduced EU students presence

Most participants described EU students as quite important to Manchester, usually with reference to student numbers. Attention was called to the variations in student numbers across different subject areas and departments. Computer Science stood out, with 40 per cent EU students. One participant noted: 'the potential impact will be very high in these schools if they [EU students] start to pay international fees.'

Despite this, the vast majority of participants did not expect any significant financial impact at Manchester. Almost all participants believed a drop in EU student numbers could easily be made up with UK students. One participant weighed the calculation regarding falling numbers against the income effects of changing fee status:

> we don't know whether you might see a shrinking, but the ones that still come then pay international fees, so the financial hit might not actually be so great.

There was some confidence that the UK HE sector as a whole would retain a competitive advantage due to its prestige and the ubiquity of the English language in global research networks. However, some participants considered these ideas as signifying an 'optimistic' outlook; another described them as 'a bullish set of assumptions'. Nevertheless, one participant said their department had begun looking for 'alternative sources' of students in anticipation of a drop in EU applications.

Two participants were notably worried that a drop in EU postgraduate research (PGR) students would trigger a decline in the quality of research being produced in their schools:

> One of the big problems for us is in PhD students (. . .) in Science, almost half of our postgraduate students come from European institutions and they are often the best.

One considered the mitigating role that scholarships and additional funding could play in supporting the uptake of PhD study by EU students:

> I think what we will try to do is offer funding schemes, actually rather similar to the funding schemes we have for people who are not in the EU at the moment, to allow more, or to try to keep some of those students coming.

Diversity: A vital component of an internationalist university and its international reputation

Several participants were very concerned about the impact falling EU student numbers may have on diversity in the student body. One argued there was a threat to 'our basic sense of what a good international university should be'.

The internationalist spirit of the university was at odds with the post-Brexit prospect of 'going it alone', which amounts to a potentially less prominent part to play on the international stage of higher education and research and more isolation.

> At the moment, we have wonderful students coming from the European Union and there's an ability for people to move around Europe, whereas if we become very isolated, I think it will be to our loss and I think that will impact on our scientific credentials.

There was some sentiment that Manchester's European involvement took shape in many different aspects of the institution's activity. The executive focused on a holistic view of how those aspects interrelate:

> It's really trying to look at the whole picture, so we have students, staff, research, alumni as well, we have a lot of alumni in Europe.

Consistent with the notion of being a good international university, considerations around EU students were not treated as purely distinct matters or isolated from other dimensions of institutional life. Students, staff, activities, networks, mindsets and influence were all treated as a whole:

> I think we were just at that stage where, in the last 10 years, you've seen the rise in EU students coming to British universities, which is a really good thing, it's made our universities more international, it's created a new sort of pool of staff and people to have an influence in higher education, so I think becoming

> less international could happen, struggling to recruit the best staff, diminished international networks.

Several participants at Manchester linked ideas about student diversity to student quality. One picked out EU students as 'really high achieving students, like, you know, very, very good students'. As a result, a drop in diversity was linked to the academic mission of the institution and its teaching and research quality:

> [EU postgraduate research students] are often the best (. . .) the dedication and creativity from that cohort is high.

> I think that strong number of European students has really enhanced our undergraduate courses, so I think it would be a big sadness if those students stop coming.

Within this framing, student diversity was seen as a contributing factor in the health of a prominent academic environment that relies on the circulation of talent and open collaborative endeavours with networks and partnerships. It was felt that a subsequent fall in EU student diversity could make these exchanges more difficult to establish.

Competition: The race for quality

Manchester took some solace in the assumption that size, reputation and activity as a prominent research institution would protect them from the negative effects of increased competition. However, there was anxiety about quality. One participant feared there would be a drop in quality applicants as the best students 'drift up the line towards Oxford and Cambridge'. One participant recognized this might be a danger but did not seem to feel like Manchester was particularly at risk, arguing that there would be a 'dash for quality' that would 'threaten someone down the food chain'.

> The future, 10 years out, is potentially extremely different. (. . .) I don't think the sector's been through such a challenging environment.

Similar to diversity being considered holistically through the interaction of students, staff, collaborations and networks, consideration of competition exhibited a broad perspective that encompassed interactions and negotiations between competitors. When discussing competition, participants tended to focus on broader trends within the UK higher education sector rather than specifically addressing the University of Manchester and its direct competitors. Even when asked pointed questions about Manchester's competitive position,

respondents maintained this wider sector perspective. They emphasized overall competitive dynamics and potential impacts on the sector as a whole, rather than delving into institution-specific analyses.

Case 7: Sheffield Hallam University: 'There's a risk that we become quite insular, that we find alternative ways of working, that we lose sight of the benefits of collaborating'

Background data

Sheffield Hallam University is a public research university in the city of Sheffield, South Yorkshire, England. Formerly known as Sheffield City Polytechnic, it was established as Sheffield Hallam University following the Further and Higher Education Act 1992. On their website, Sheffield Hallam state: 'As one of the UK's largest and most progressive universities, our teaching, research and partnerships are characterised by a focus on real world impact – addressing the health, economic and social challenges facing society today.' They present *The Times* and *The Sunday Times* University of the Year for Teaching Quality 2020 at the top of their list of accolades. With a student population of 30,960, Sheffield Hallam is the fourteenth largest university in the UK.

Between 2016–17 and 2019–20, Sheffield Hallam University experienced minimal changes in its overall student population, with a slight increase from 30,815 to 30,960. During this period, the proportion of EU students remained relatively stable, showing a marginal increase from 450 (1.4 per cent) to 535 (1.7 per cent).

The 2020–21 academic year marked a significant shift, with the university's total student population growing considerably to 33,270, representing a 7.5 per cent increase. However, this growth did not extend to EU student numbers, which actually decreased slightly to 475. This diverging trend continued in 2021–22. While overall student numbers rose to 34,535 (a further 3.8 per cent increase), EU student enrolment continued to decline, dropping to 345 and representing only 1 per cent of the total student body. The most recent data for 2022–23 shows a continuation of these trends. Total student enrolment reached 35,340, but EU student numbers fell further to 270, now comprising less than 0.8 per cent of the student population.

Sheffield Hallam is the fourth largest university represented within this study and contributed twelve participants. Among them were four senior executives,

four senior academics with three in leadership roles, two senior administrators, one member of the governing body and one student representative.

EU students: Low numbers, but should we worry about vocational degrees?

Overwhelmingly, participants framed EU students as a relatively minor element within the institution owing to the low numbers of EU students studying at Sheffield Hallam. One described the role of EU students in their department by saying: 'our numbers are so low and they come from the islands [Jersey, Guernsey, Isle of Mann, Eire, Gibraltar] and the territories, as opposed to, you know, Europe mainland countries'. Another clarified: 'you maybe only get seven EU applications or, you know, really tiny numbers'.

One participant described it as 'a moderate issue'. Several schools at Sheffield Hallam were not certain of exactly how many EU students they had, expressing strong doubts about committing to firm numbers. One provided the tentative figure of 2 per cent university wide, adding: 'EU students are a relatively small proportion, so again, I don't think it [their loss] would impact adversely on us.'

To one participant, replacing lost EU funding was 'more of a concern', while another said they were 'more concerned with home applicants'.

The low EU numbers had a concomitant effect on preparation and risk assessments. Two participants noted that their schools' monitoring systems were not set up to actively track EU applications as a distinct category: 'they just aren't pulled out'. Another participant explained that the issue was not something on the radar within her department: 'it's not something I've been made aware of as a risk from a staff perspective'.

Health sciences stood out as an exception, noting that a number of trainee nurses were of European origin and pointing to this demographic as a substantial priority. One participant went into great detail in locating the university within other important socio-economic sectors and describing how Brexit would impact the pathways from health training to the UK workforce:

> Quite often we're training the European nurses, 'cause there's free movement, we've got a regional airport that's mostly got flights to Poland, in and out of Poland, (. . .) and a lot of the Polish people come in and they'll work as healthcare assistants in the health sector, care home sector, and then they'll go into nurse training and that's going to stop (. . .) and it just all feels like, you know, you're just coming to this awful dead end of great stuff that's happening,

> flexibility of movement, then moving to universities, then moving to the workforce will just grind to a real halt and there'll be crises all over the place because of it.

Ensuring diversity and international collaboration: The aftermath of decreased EU student numbers

Few participants anticipated student diversity would be impacted by a decrease in the already small EU student numbers. As a result, in the interviews, participants from Sheffield Hallam spent more time considering the implications for the wider sector and the UK as a nation:

> My concern is more sort of philosophical, to some extent, about the message that prospective students get about the country, I suppose and both international students, there is a risk that they perceive us as being a much more isolated country and it's not just Brexit but there are other things, such as the visa regulations and so forth, we are starting to feel like a much less welcoming nation, I think and the impact it has on UK students as well.

Participants feared that if international collaboration was not actively encouraged and supported, there would be a regression towards regional thinking and regional activity. There was a sense that their engagement with the EU programmes had given them the opportunity to expand their international profile and activity. Without the incentive of keeping their scope and outlook broad and turned towards European collaborations, there could be withdrawal and regression into the comfort zone of the familiar.

> There's a risk, isn't there, that we become quite insular, that we find alternative ways of working, that we lose sight of the benefits of collaborating and offering different opportunities to the citizens of Europe and then you just, you know, you slow down at that point, don't you, you lose sight of the greater good and you focus, it's almost like looking inwardly, rather than outwardly.

Some participants placed increased value on diversity and international collaboration as a result:

> I think what we do around our equality, our diversity, our inclusion is going to be incredibly important and that's not just about what we have now, it's about where we look to the horizon, to collaborate and work together.

Competition: International students' contributions to the local economy

At Sheffield Hallam, there were very few considerations that were framed through the lens of competition. One notable exception was a discussion about how Brexit has impacted the range of Hallam's content provision, as programmes had been adjusted to EU and international students.

> One of the things that we've seen in terms of students is that pre-Brexit, some of the programmes that we were wanting to market, for example, on international human rights law and developing, you know, programmes of that type, whether they be traditional Masters programmes, whether they be CPD programmes, were attracting quite a lot of interest and students. We're seeing a decline in that, we're seeing EU students thinking twice.

However, the majority of participants recognized that the main hazards of Brexit did not present threats directly to Sheffield Hallam as an institution, but to the economy of the city where the university is located:

> The university will survive, you know, I'm not worried about that. We are 32,000 students, we can survive at 20,000 students. In 1992, we were 8,000. We'll be smaller, it'll be very different. Suck that money out of the city economy and you have a devastating impact on the lives of the shopkeepers and the cleaners and the bus drivers and the taxi drivers. It's that, the knock-on. Brexit is an enormous, enormous risk with the economy.

In consideration of these risks, Sheffield Hallam focused on higher education's somewhat limited effectiveness in addressing the economic risks and highlighted more generally what universities can do to help individual students:

> What we have to do is to stick to the knitting, we have to get the basics right, we have to make sure we're recruiting students, we're educating them well, we're teaching them well, we're giving them opportunities, we're widening their horizons, we're putting them into jobs and life chances that they wouldn't otherwise have.

Case 8: SOAS University of London: 'We've always thought of EU students as a very large factor here'

Background data

SOAS University of London is a public research university in the Bloomsbury area of central London, England. Established by royal charter in 1916 as the

School of Oriental Studies, it is also a constituent college of the federal University of London. Through the University of London Act 2018, SOAS gained full university status while remaining within the federation. The website describes SOAS as 'the leading Higher Education institution in Europe specialising in the study of Asia, Africa and the Near and Middle East'. With 5,795 students, SOAS is the 125th largest university in the UK, which places it towards the lower end of institutional size distribution.

SOAS was one of only two institutions in our case study universities to have a substantial decrease in student numbers between 2016–17 and 2019–20 (the other institution was the University of South Wales). SOAS saw a decline from 6,360 to 5,795 students, a decrease of 8.9 per cent. During this period, EU student numbers at SOAS also fell slightly from 890 to 790, representing a shift from 13.9 per cent to 13.6 per cent of the total student population. In 2020–21, student enrolments stabilized at 5,865 students in total whereas there was a small decrease in EU registrations, down to 730 EU students (12.4 per cent). In 2021–22, total student numbers recovered, rising to 6,295 (a 7.3 per cent increase). However, EU student numbers reached their lowest point with only 530 registered, accounting for 8.4 per cent of the student population. The downward trend in EU student enrolments persisted in 2022–23, with just 370 EU students enrolled out of a total student body of 6,075. This represents a significant drop from 14 per cent EU students in 2016–17 to only 6.1 per cent in 2022–23, highlighting the substantial impact of recent changes on EU student recruitment at SOAS.

In terms of student numbers, SOAS is the smallest university in the study and contributed nine participants. Among them were: one senior executive; one senior administrator; four senior academics, two of who held leadership roles; two members of the governing body; and one student representative. We categorized SOAS as a Small Pre-1992 University.

EU student numbers: Confidence but also financial and student quality concerns post-Brexit

Within the interviews, many SOAS participants framed EU students as being a major focus of the institution. Most referred to student numbers in support of this: 'in terms of percentage of EU students, we have one of the highest in the country'. Of additional significance was the high proportion of postgraduate students: 'it's roughly half postgraduate (. . .) coming here to do specialist Masters'. Law and Politics were picked out as subjects with 'the greatest level

of exposure'; Languages were named by another participant as being 'especially vulnerable'. Generally, there seemed to be a wide, institutional consensus about the relative importance of EU students: 'we've always thought of EU students as a very large factor here, both pros and cons with Brexit'.

Almost all participants contemplated a potential drop in numbers. Executives noted they were actively and closely monitoring EU admissions on a department-by-department basis. Splitting out EU students from the admissions data was a relatively new practice employed since the Brexit vote. Several participants did not anticipate a drop in income regardless of a fall in EU student numbers, attesting: 'if the fees go up to international levels, the numbers will drop, but roughly (. . .) our overall fee income from EU students would stay the same'.

One participant noted that EU students often come from a 'higher socio-economic band' arguing that if fees do increase 'they can afford to study here' or '[they] feel that it's actually worth the investment'. This may have contributed to the perception that income from EU students would not change: 'our working assumption is half the number of students but twice the fees'. Although a small minority of participants were more reserved and described their stance as being 'guardedly confident about what will happen', the majority said they were 'confident' about the future in some form, owing to the exclusivity and specificity of their disciplinary subject provision. In their view, the nature of SOAS as an institution that offers unique courses that cannot be found elsewhere in the UK – they were the only UK-based choice for EU students with a keen interest in those specializations – provided some protection.

> It's a world class education offering, they want to come and do a particular course and either they can pay the higher fees or they'll give a scholarship, bursaries, whatever else it is, so people will still come here.

One exception to this picture was the thought that student quality might be affected. Financial pressures could be detrimental to academic reputation and culture:

> It's not easy to attract more undergraduates, whether they be from Europe or from the UK, without reducing the quality on entry. The danger with that is that it's self-fulfilling that then the better students don't apply (. . .), European students come in part because it has a high reputation. If that reputation is damaged by financial pressures or in any other way, that makes it harder to attract really good European students.

Even if income were to be protected by an increase in fees, any decrease in numbers could lead to SOAS losing some of their 'best students'. A short to medium-term impact on the quality of the student body was predicted:

> I've said many of our best students are EU based. Now, there's no reason why that trend would have naturally continued. I think there's going to be a certain decline in numbers, so I think the short to medium term effect of the quality of the student body won't be positive.

Overall, SOAS's participants demonstrated confidence in their quality provision, but expressed concerns that financial pressures may lead them to endure a temporary reduction in quality further down the line.

Diversity: Ending of freedom of movement and the 'hostile environment'

SOAS focuses on the study of other cultures, and as such diversity and international collaboration are core parts of institutional identity and practice. As such, EU students were seen to play a pivotal role in SOAS's institutional mission. Participants widely lamented their potential loss.

> We might, at some point, see a disappearance of a certain kind of student, which are very enriching, which is other European people who want to work on Asia and Africa.

> I think the absence of European students, that has negative implications because we like them, they diversify. There's the financial element of fees as well.

Participants discussed the constraints of migration policy and future permissions given to EU students opting to study in the UK. The ending of freedom of movement has created the need for EU students to contemplate their mobility options as substantial life decisions. The lack of flexibility that comes with the introduction of a visa regime has increased the gravity of any eventual choice.

> It's not just the fee regime, it's the ease of travel, it's the visas . . . at the moment people just move around without two thoughts for it really.

The consequences of the ending of freedom of movement extended further, into the implications for collaboration and moving from higher education into the world of work:

> the big concern is (. . .) there'll be slightly more negative views to collaborations or working, travelling, studying, whatever it is, in the UK, even if the legislation is actually relatively similar, there may just be a perception.

Participants at SOAS also spent substantial portions of their interviews contemplating the impact of the potential 'hostile environment' created by the vote. These participants feared the UK was becoming, or at least being perceived as, a place hostile to people of different origins.

> feedback from students that they feel that, to use the phrase 'hostile environment', certainly for international students, but even for EU students, there have been conversations around that, and about that, merely the fact the vote happened makes them feel unwelcome.

The ultimate outcome of the 'hostile environment' was seen to be the idea heard in other institutions: that of the UK becoming more insular:

> I think it's more just not wanting to be in an insular kind of country, that's become inward looking and isn't very, you know, it's not a hospitable environment.

Competition: Leveraging international reputation to combat negative Brexit impacts

Many expected the specific programmes offered by SOAS and their high-ranked positioning to provide an insulating effect, reducing the need to prepare for the negative impacts of Brexit: 'we're reasonably confident, with that kind of international reputation and brand, that we will still be able to recruit students from within the EU'. As noted, participants argued that if EU students wanted to study particular cultures and languages with the commitment and depth that SOAS offers, then 'they can't go anywhere else in Britain'. However, there was brief acknowledgement that there was potential competition for SOAS from universities in Paris and Berlin that have similar disciplinary specializations. Furthermore, several participants anticipated greater competition with overseas universities, especially with those already teaching, or prepared to shift towards teaching content in English. Ireland and the Netherlands were named most frequently.

Different participants leaned on different reasons for feeling secure about SOAS's position. One felt assured that any negative impacts would be dealt with appropriately by their 'extraordinarily talented' Pro-Vice Chancellor, while another had confidence in London serving as a powerful draw, allowing SOAS to retain a competitive advantage. A third pointed to the weakening of the British currency, stating that this improved the desirability of the UK as a destination: '[the] drop in the pound will make it actually better for them and for young people'. One participant made an effort to separate the national political sphere

from the desirability of the particular city, London: 'you can hate Trump, it doesn't mean to say I refuse to go to New York'.

There was faith in the security of ancient and prodigious institutions, especially those in London, alongside concomitant fears for more provincial institutions that did not have that widely known, international brand to lean on.

As noted, there were sensitivities expressed about a potential drop in student quality, and concerns about how to continue to attract high-quality postgraduates. One participant discussed the idea of targeted scholarships for students from specific nations. Another participant went on to relate this to possible longer-term consequences, alluding to cyclic impacts whereby EU student participation would weaken research quality, and declining research quality would then impact the reputation of the institution, making it harder to attract EU students and so on.

Another participant had fears of some UK universities adjusting their focus from 'cutting edge' research 'back' to a teaching focus, taking on high numbers of 'relatively poor overseas students' in order to bolster income.

Case 9: University of South Wales: 'Full time undergraduate students from Europe are a big issue for us'

Background data

The University of South Wales is a public university in Wales, with campuses in Cardiff, Newport and Pontypridd. It was formed on 11 April 2013 from the merger of the University of Glamorgan and the University of Wales, Newport. With 23,090 students (2019–20), it is the second-largest university in Wales (behind Cardiff University) and thirty-fourth largest in the UK. On the website, the University of South Wales describe themselves as 'one of Britain's most exciting and ambitious universities'. They emphasize that they are a 'vocationally-focused university' preparing students for employment in 'key industries' (https://www.southwales.ac.uk/about/).

Between 2016–17 and 2019–20, South Wales's overall student numbers fell from 23,465 to 23,090 – a drop of 1.6 per cent. During this same period, EU student enrolment fell from 1,385 (5.9 per cent of the total) to 1,100 (4.8 per cent). In 2020–21, the university saw a slight increase in overall student numbers, growing by 0.3 per cent to 23,150. However, EU student numbers continued to decline, falling by 15 per cent to 935. The trend persisted in 2021–22. In 2022–23,

the university experienced a significant surge in total enrolment, reaching 26,180 students – a 12.5 per cent increase from the previous year. This growth was primarily driven by a rise in non-EU international student enrolments, which jumped from 3,765 in 2021–22 to 6,380, representing an impressive increase of 69.5 per cent. However, EU student numbers continued to decline sharply, with only 470 EU students enrolled. This represents 1.8 per cent of the total student population, a further decrease in both absolute numbers and percentage of the student body, down from 5.9 per cent in 2016–17.

In terms of student numbers, South Wales is the seventh largest university in the study. It contributed eleven participants. Among them were four senior executives; four senior academics, with three occupying leadership roles; one senior administrator; one member of the governing body; and one student representative. We categorized the University of South Wales as a Large Post-1992 University. Given that our sample contains only one university in Wales, we develop the corresponding case study in more detail than most of the others in this chapter.

EU student numbers: Assessing the financial vulnerabilities post-Brexit

While no participants referred to EU student numbers as a proportion, several offered absolute figures in the 1,200–1,300 range, one noting 'there will be issues in the future' caused by the drop in income should those students be lost. Generally, participants highlighted that 'full time undergraduate students from Europe are a big issue for us', with some outlining Business, Law, Finance and Humanities as having the greatest number of EU students. Others noted Computing and Engineering as possible areas of vulnerability.

> Financially (. . .) it threatens quite lot, to be honest, because income that we currently derive from European students in my faculty [Business and Society] is about £1.3 million, so without that, that leaves a fairly sizeable hole to fill.

Although the expectation of losing EU students and the concern it raised were palpable across the university, the financial threat was not considered severely critical to the future of the institution:

> it would cause us problems if we didn't have the number of European students we do, of course it does, but again, it wouldn't mean the university had to close, so it's that sort of balance really.

Institutional collaboration agreements with European partners were of notable importance. All participants were working with the assumption that Brexit would threaten the transnational agreements through which most of South Wales' EU students came to study. Many participants explored the long-term engagement with the EU that had been undertaken by South Wales through exchange programmes and bilateral partnerships. Participants stated that this commitment was the root cause of their successful recruitment of EU students and their significant EU student numbers.

> we've been more than 30 years working at the European exchange and that's why we have, I think, the number of European students we have here now.

Many participants did not think such agreements could be easily replaced with 'shortcuts' and feared the undoing of many decades of work. Additionally, as was explored further in Chapter 4, the Diamond Report threatened to compound the existing fears surrounding Brexit in the Welsh context.

Diversity: The sociocultural value of EU students and pedagogical benefits of cultural diversity in higher education

Many participants framed the social and cultural value of EU students as integral to the institution's international and European identity:

> We're one of the UK's most international universities and so European students form a very large part of our student body, our academic body, our staff body, so you know, we regard ourselves as fundamentally European and international in outlook.

They were keen to distinguish the importance of EU students and dissociate it from purely financial notions of income and growth:

> They're [EU students] a significant part of our being, it's not just about our growth, it's about our being as a university.

There were recurring references to pedagogy and curriculum and how cultural diversity was not only a feature of campus life but was integral to teaching and learning practices. Several participants associated diversity with notions of good global citizens, international perspectives within a globalized curriculum, meaningful interactions between international and home students and also international student engagement with local communities. They often referred to their local student demographics with attention to social justice issues and their inadequate opportunities to project themselves and act internationally.

Integrating experiences and knowledge of both international students and local students from diverse backgrounds often arose in discussion. Relatively more participants at South Wales made these points when compared to the majority of case studies.

To some participants, the potential loss of diversity was evocative of insularity, as discussed further in Chapter 5.

Competition: Sector-wide potential solutions

The participants' approach to competition in relation to EU students was characterized by the relative absence of direct references to competitor universities. Sometimes participants referred to 'comparable institutions'. Yet, competition can be constructed at different scales and to different degrees and its manifestation can take different forms. At South Wales, a broader sector approach prevailed:

> I think on a broader basis, the university's challenge is one that is met all across the sector in Wales. In terms of attracting and retaining not just students from Europe, but retaining staff from Europe, I think that's a real issue, not just for us, of course, but for every comparable institution.

Similarly, other participants considered the issue too big to be tackled by institutions individually and called for a sector or membership approach:

> Why shouldn't there be a sector-wide, a University UK-wide approach to financial support or a framework of financial support to allow European students to continue to study, for example, I mean, I don't know why we couldn't do that.

Some participants pointed towards a possible negative feedback loop in certain subject areas if the content of the study programmes becomes less international: the main draw to EU students, these specific programs, may become unviable if modules that depend on EU students are unable to go ahead. Without these programmes that were popular with EU students, South Wales would have a still harder time attracting them, and so the problem would be further exacerbated.

Finally, there were also attempts to strike a note of optimism by focusing on the potential of university communication with existing partners and prospective students. When making these occasional comments, participants tried to distance UK universities on the whole from the political motives underpinning the Brexit vote.

Case 10: University of St Andrews: 'We regard ourselves as fundamentally European and international in outlook'

Background data

The University of St Andrews is a collegiate public university in St Andrews, Fife, Scotland. St Andrews was founded in 1413 when the Avignon 'Antipope' Benedict XIII issued a papal bull to a small founding group of Augustinian clergy. As such, it is the third oldest university in the UK. With 10,535 students, it is the 104th largest in the UK. On their website, the University of St Andrews state that they offer 'gold-standard teaching and cutting-edge research'. They also emphasize their rankings, stating that they have been 'ranked number one in the UK' by The Times and Sunday Times Good University Guide 2022 and as 'the best University in Scotland' according to The Guardian University Guide 2022 (https://www.st-andrews.ac.uk/).

Between 2016–17 and 2019–20, the number of students at St Andrews increased slightly from 10,330 to 10,535, a gain of 2.0 per cent. Over the same period the number of EU students attending St Andrews fell from 1,210 (11.7 per cent of the total) to 975 (9.2 per cent), a drop of 2.5 per cent, which was the largest drop among institutions in the study. However, the 2020–21 academic year saw growth in both total student enrolments and EU student numbers. The overall student population rose by 9.0 per cent to 11,485, while EU student enrolments increased by 6.7 per cent to 1,040. In 2021–22, EU student numbers declined once again to 985, out of a total student population of 11,820. This meant that EU students represented only 8.3 per cent of the student body, the lowest proportion since the Brexit referendum. In the most recent academic year, 2022–23, there was a slight recovery. Total enrolment reached 12,160 students, with EU student numbers increasing marginally to 1,045, accounting for 8.6 per cent of the student body. Despite this small improvement, the proportion of EU students remains lower than pre-Brexit levels, falling from 11.7 per cent in 2016–17 to 8.6 per cent in 2022–23.

In terms of student numbers, St Andrews is the second smallest institution among the twelve in the study. It has been categorized as a 'Small Pre-1992 University'. There were fourteen study participants from St Andrews: five senior executives; four senior academics, including one occupying a leadership role; three senior administrators; one member of the governing body; and one student representative.

EU student numbers: Insulated from risks of losing EU students

When looking at the interviews, almost all participants framed EU students as important to St Andrews. The sentiment that St Andrews is 'one of the UK's most international universities' was shared almost word for word by several participants, with the general mood of the idea spreading further still; one participant added: 'we regard ourselves as fundamentally European and international in outlook'.

It was surprisingly rare for St Andrews participants to refer to EU student numbers; on the occasions when they did, the specifics were kept quite vague. One participant said that there was a high density in management and related subjects; another pointed towards STEM subjects, as well as languages.

The light-on-detail approach continued when participants were confronted with potentially losing out on EU students. Most were quite relaxed and moderate in their responses. One stated that it 'wouldn't cause much concern', another likewise made clear that 'we are not too concerned'. There was wide recognition that changes to the fee status of EU students may lead to decreased EU student numbers, depending on where the Scottish Funding Council eventually decided how EU students would contribute towards quotas, and whether the previously capped places that went to EU students would be added back or removed from the pool of funded places. Despite this, most St Andrews participants appeared to feel insulated from these risks for a variety of reasons, mainly because of being a selecting institution that is able to pick from the highest-achieving applicants.

One participant shared that they felt EU students could afford tuition fees if needed, that it would not be the factor to affect their decision to come; another called attention to the reputation of the institution: 'we have a particularly international student body and I think that reputation carries'. Others thought that EU student numbers may fall off, but that the significance of the change would be minimal: 'I don't think that we're in a situation where any of our courses would actually be jeopardised by the tailing off of EU students.'

One participant notably and uniquely highlighted that the change in regime may allow universities to pick out EU students as a separate cohort and adapt to their specific needs, a possibility that did not previously exist when EU students were subsumed within the category of home students:

> if they come out of the student number cap, then we can actually turn to them a bit more and put specific scholarships in place – do things that address their needs for the cohort that they are.

Diversity: Sociocultural and academic perspectives on EU student access in UK higher education

Participants widely praised the academic quality of EU students and the cultural richness they bring to the university. Participants valued a notion of difference within the academic space where ideas and cultural backgrounds come together for the benefit of learning and student formation.

> There is a diversity of thought that comes from having students from really different backgrounds and different opportunities and different languages.

The discussion of diversity often prompted references to academic merit and selection; diversity in UK HE discourse sometimes carries with it notions of cultural or academic deficit. The way participants from St Andrews chose to present EU students as a category of diversity seemed to be either in tacit acknowledgement or resistance to this association between diversity and deficit. Insisting on the enriching effects of having EU students was an implicit assertion of understanding diversity in a more positive way. Perhaps this reflects that additional socio-economic factors are at work. Most participants expressed awareness of the privileged backgrounds of their students.

One participant called attention to how changing access to the institution may impact on the make-up of the student population, the population able to access St Andrews. The question of who would be able to afford the increased fees precipitated fears of becoming more elitist, losing out on the 'ordinary, middle class, bright, ambitious kids with an international outlook that we get at the moment from European countries'.

In addition to those occasional concerns around *relative* socio-economic diversity and cultural diversity, participants also noted how the loss of these EU students may open up increased capacity for Scottish home students, who previously struggled to secure places at St Andrews in proportionate numbers:

> there has been the worry, and I'm sure you've heard about it from other people, that getting into St Andrews for Scottish students is phenomenally difficult, because they come in the same tranche of students as the EU ones and some rebalancing of that might not be considered bad.

Competition: Security in the face of Brexit uncertainty

Security and confidence exuded from the interviews, evoking St Andrews' long history and position of traditional advantage within the UK higher education

sector, and its prominent international profile. A participant was pleased to point out that:

> We probably are in a strong position, in that we are the university that is, at the moment, 22nd in the world for international outlook, which, for a small university, shows us punching above our weight.

St Andrews leans on its heritage as an elite cultural institution, '600 years of history', 'first Scottish University', and its international appeal to easily overcome any challenges that Brexit could present, especially with regard to competition pressures within the sector.

> We also are strongly identified as being highly international, nearly half our student body is international, so we feel that at the moment, also because we're very strongly identified with quality and excellence, we're not seeing the kind of effects on our recruitment and retention of staff or the students that other universities are seeing. But we're not complacent about this.

Brexit-induced competition was not given any particular emphasis but was rather considered in relation to its potential to affect other parts of the sector. The latter effects are based on the place they occupy in the hierarchy of institutional prestige and their specific student market. Participants at St Andrews tended to assume a position of agency and confidence, attempting to look for 'whatever silver linings there can be', looking for possibilities, taking a proactive stance in order to find advantages within the new conditions of the sector. Their small size was considered advantageous in helping the institution to manoeuvre quickly and strategically in response to the political uncertainties.

Confidence also emerged with regard to the support that current students could offer in relaying the strong brands of tradition, internationalization and excellence associated with the university, to potential student markets within their national and professional environments. Students were invested with a diplomacy mission and were seen as the ambassadors of the university

> we have a lot of students from Europe and you know, lots of countries from Europe, they actually offered to be ambassadors for the university in those countries and to look after the links, so it's been a really positive discussion, where people kind of joined in.

Case 11: UCL: 'My biggest worry is the pipeline of talent at PhD and postdoctoral level'

Background data

UCL, which operates as UCL, is a public research university located in London. It is a member institution of the federal University of London. It was established in 1826, making it the oldest university in London, as well as one of the universities with a contested claim to being the third oldest university in the UK. With 41,095 students in 2019–20, it is the second-largest university in the UK by enrolment, behind the Open University. On the website, UCL promotes its progressive and innovative ethos, 'we are a diverse community with the freedom and courage to challenge, to question and to think differently' (https://www.ucl.ac.uk/about/?utm_source=homepage&utm_medium=click&utm_campaign=homepage_about).

Between 2016–17 and 2019–20, the number of students at UCL increased from 37,905 to 41,095, a change of 8.4 per cent. Across the same period the number of EU students at UCL grew from 4,485 (11.8 per cent of the student body) to 4,880 (again 11.8 per cent), showing no significant change relative to the wider student body.

Between 2016–17 and 2019–20, UCL experienced significant growth in its student population, increasing from 37,905 to 41,095 students, a rise of 8.4 per cent. During this period, UCL maintained a consistent proportion of EU students, with numbers growing from 4,485 to 4,880, representing 11.8 per cent of the total student body in both years.

Student enrolments continued to grow in 2020–21 with a total of 45,715 students studying at UCL (an increase of 11.2 per cent). The same trend can be observed with EU students who accounted for 5,410 registrations in the same academic year, leaving their proportion of 11.8 per cent unchanged. However, the 2021–22 academic year saw a significant drop in EU student numbers to 4,400, while the overall student population continued to grow to 46,830. The 2022–23 academic year saw further changes. UCL's total student population surged to 51,810, a remarkable 10.6 per cent increase from the previous year. However, EU student numbers continued to decline, falling to 4,175. This further reduced the proportion of EU students to approximately 8.1 per cent of the total student body.

Despite these declines, it's worth noting that UCL has consistently maintained the highest number of EU students among UK universities throughout this

period. This suggests that while Brexit has had an impact, UCL's strong reputation and its London location appeal to European students have helped mitigate some of the potential losses.

In student numbers, UCL is the largest university among those in the sample. In total, eight study participants were from UCL: three senior executives; two senior administrators; and three senior academics, with two of the last occupying leadership roles.

EU student numbers: Strategies for securing the future and the London effect

UCL participants described EU students as highly significant to the institution and recognized the threat posed to their participation post-Brexit.

> We're completely reliant on EU students. I suppose the worry as a university, in an increasingly competitive environment, is if you take those out of the pool, are there enough students in the UK currently who will fill the places?

Competition for increasing student numbers and therefore revenue was an important consideration for UCL due to a major building programme it had undertaken. Capital projects of this kind were justified in light of projected student growth, but Brexit was now putting that in doubt.

> Universities are making huge investments – Imperial, ourselves – huge ambitious building programmes. But if the students don't come, those investments are going to be a cost, rather than an asset.

Questions about the viability and return on investment from these major capital projects for individual universities were accentuated when considering the broader economic effects of Brexit and the possibility for the economy to slow down, driving downwards government investment in higher education: 'if it's an adverse economic climate, that generally doesn't help for any business. We are a business too, so that's my main worry'.

Looking into EU numbers more specifically, one participant explained they were distributed somewhat evenly throughout the institution, yet another pointed out academic departments with a focus on European languages, politics or regional studies: 'The student recruitment risk is in areas with a large number of EU students.' The participant added that the risk is notably high for departments with a high proportion of East European students.

Although there was no decline in EU student applications and registrations in the period that followed the Brexit referendum, all participants expected a drop in the number of EU students if their fee status were to change: 'we don't expect that's going to continue post-Brexit'. Yet none showed significant concern over the financial implications:

> Student numbers will go down but the income will still remain reasonably buoyant.
>
> We haven't really developed a strategy on that. We haven't done it yet because the figures are still looking good.

More detail was volunteered by some participants in the Medical and Health sciences Faculty. Concern was expressed about EU recruitment to their Masters programmes.

> We're down in terms of European students by around 15 per cent, (. . .) we started to see that last year and we've seen it again this year.

These programmes often provide pathways to doctoral studies and early research careers:

> My biggest worry is the pipeline of talent at PhD and post-Doctoral level.

Generally, though, a confident approach emerged, with a participant noting that although they could 'potentially' lose a lot of money, this would not represent 'a life threatening amount'. Another stated that they did not think 'we would suffer too much from attracting fewer European students'. The reasons for this outlook largely boiled down to two significant factors, UCL's 'world-class' reputation limiting negative effects, and 'the London effect':

> Well, it's a major concern, for sure and I think our view is that student numbers will go down, perhaps not as badly as in other places.

One participant went so far as to argue UCL may be in 'a very good position' from a business perspective, as students paying double the fees would be a net gain even if fewer students came. This possibility seemed likely to another two participants, both noting how at UCL a high proportion (60–70 per cent) of the EU cohort was self-funding rather than depending on loans. With this in consideration, one participant doubted whether or not Brexit would deter EU students from seeking 'an Anglophonic education in a world leading university'.

One participant considered that most of the loan-free students were from Western Europe: 'Germany, France, Italy, Spain and Greece' adding that 'only

about 30 per cent [of those students] take out a student loan'. Loan-taking students were largely from Eastern Europe. This would likely mean a drop in the number of students from Eastern Europe, but not perhaps so much from Western Europe. This participant's response to such a change was to suggest intensifying recruitment efforts in Western Europe's student market.

Diversity and quality suffering from Brexit

Given a potential fall in students from Eastern Europe, participants expressed concerns for student diversity:

> I do think there's an issue of diversity there, if it does prove that we're becoming really unattractive for students on the continent, I would worry about sort of diversity of our student body, because I think people from Europe have something to offer.

As with concerns expressed at the second London-based institution included within the study (SOAS), Eastern European students were specifically identified due to the socio-economic disparity between Western and Eastern Europe. The high costs of living and studying in London meant that Brexit could make the prospect of studying at UCL untenable for Eastern European students.

As in some other institutions, diversity was strongly linked with notions of academic quality: a potential drop in quality was weighed against possible financial gains by one participant, who felt that any monetary benefits would not offset the losses from a decline in diversity and quality:

> if there is a move for EU students not to pay home student fees, we might get fewer of them and there might be higher fees, so it might either break even or even be financially positive, but I wouldn't regard that as a positive because you would lose the diversity and the really, really brilliant students.

The praise of European students as 'brilliant' matched sentiments such as 'good', 'bright', 'some of our best' and so on, in other institutions.

In addition to the effects on institutional diversity within UCL, participants projected a significant risk to the 'UK higher education sector as a whole becom[ing] less diverse and less lively, less academically varied'. As we explain in the next section on competition, at UCL it was expected that those UK universities with stronger reputations and international standing would increase their share of EU students coming to the UK, amid and overall decrease in EU student interest in the UK as a study destination.

> The second big risk is that universities that aren't, you know, in the top ranks of universities, will do relatively worse, so some EU students will continue to come to the top ranked universities and we take market share . . . and that is at the expense [of the former].

Competition: Maintaining its brand of excellence in a post-Brexit environment

UCL portrayed itself as being a 'leading, global university' whose brand of a research powerhouse will be fully able to withstand the pressure of intensified competition within both the UK sector and internationally.

> I think the brand of UCL, the excellence side of it is, both from branding and obviously in terms of our capabilities, will continue.

London's attraction as a vibrant, economic and sociocultural metropolis was expected to continue mostly unfettered. London, being a 'magnet' for both national and international students, was seen as capable of limiting potential negative effects.

> I think London is going to be an attractor for international students and inward migration for a number of years because it's still a global city and for students, the attraction is that, with the drop of the pound, it's a cheaper place to live as an international student.

As explained earlier, no participants harboured great anxieties about the financial impact of EU student numbers falling, but several expressed concern about a drop in the quality of students overall with fewer EU students in the mix. Participants articulated clearly that continuing to attract talent was key to ensuring the future of the institution as a top global research university and therefore viewed the impediment to people's mobility post-Brexit as a risk factor.

> You could have the best infrastructure an, huge amounts of funding, but if you haven't got the best people, then there isn't much point really, so I think the risk that we have is around being open and us being able to attract open European and global talent into London at UCL.

Considerations of competition centred on UCL being a major global research university whose competitors are US and European institutions, rather than other UK universities. Participants were sensitive to recent changes in the rankings and other indicators of academic performance and reputation. While they praised universities in Germany, the Netherlands and Switzerland –

'the Dutch and the Germans and the Swiss are doing very well indeed' – the UK's positioning in rankings was of some concern. The visibility of academic performance through league tables influences what students might consider as worthy study destinations globally and played to the UK's disadvantage.

> It's quite interesting speaking to students. They have a lot of choice now in the UK and in Europe they have a lot of choice and they can choose very good institutions in the US or other parts of Europe. It's interesting to see some of the metrics: German universities are doing very well, Swiss universities are going up in terms of many of their metric, UK is either staying the same or going down in many of the metrics.

Awareness of the rising position of China was also expressed. Overall, UCL participants showed a perception of competitive stakes for the whole of the UK higher education sector at the international level, and to an extent that made UCL stand out within our case study institutions.

> We are fortunate that we have many of the top 20 universities in the world, but there are many other universities going up those rankings very, very quickly. We're staying pretty static, if anything, you know, if you look carefully, we're just dipping down just one point each year, which nobody kind of notices, 'cause nobody wants to make any big deal of it. . . . China haven't really broke in yet but they will.

This was causing concern and made 'Brexit add to the challenges'. As explained, this perspective was not unique to UCL but existed at the sector level. The lack of increase in state-sponsored funding for higher education and research was deplored and contrasted with more generous national funding allocations elsewhere. Participants raised concerns about academic quality and research leadership arising from 'a kind of flat investment over the years, whereas others are investing'. It was feared this would 'just gradually' lead the UK to 'a kind of insidious year on year decline in standing'.

Furthermore, a complex visa scheme would see 'the UK losing market share [to] Canada, Australia, and the US'. A few participants considered longer-term effects, such as fewer European students coming to the UK, alongside additional barriers to migration resulting in fewer continuing beyond their first degree and/or deciding to settle in the UK.

Related to the above, and equally notable, was the anxiety about the broader impact of Brexit on the UK as one of the most popular destinations for international students and an active collaborator and research leader. Participants made repeated references to the UK being seen as less open, less

friendly, more inward-looking and even more hostile to foreigners. They felt that higher education and research would be affected by these perceptions.

> This will be regarded as a, you know, a very sort of inward looking step for the UK to take, it will be seen in the light of us taking a harder stance relating to immigration and I think it, you know, my worry is that it would damage our international reputation (. . .) that actually that would cause some damage to our ability to be able to continue to attract students and staff and research collaborations.

Case 12: Ulster University[2]: 'Anything that could impact upon mobility would be an adverse outcome'

Background data

Ulster University, legally the University of Ulster, is a public university located in Northern Ireland. It has campuses in Belfast, Coleraine, Jordanstown and Magee. Established in 1968 as the New University of Ulster, it merged with Ulster Polytechnic in 1984, incorporating its four Northern Irish campuses under the University of Ulster banner. On the website, Ulster describe themselves as: 'a university with a national and international reputation for excellence, innovation and regional engagement, making a major contribution to the economic, social and cultural development of Northern Ireland' (https://www.ulster.ac.uk/about). Ulster University is one of the two universities in Northern Ireland, the other being Queen's University Belfast. With 27,680 students in 2019–20, Ulster University is the largest university in Northern Ireland, the second-largest on the island of Ireland behind the National University of Ireland, as well as the twenty-first largest in the UK.

Between 2016–17 and 2019–20, the number of students at Ulster University grew from 24,640 to 27,680 – an increase of 12.3 per cent. During the same period, the number of EU students went from 1,510 (6.1 per cent of all students) to 1,375 (4.9 per cent), a drop of 1.2 per cent. By 2020–21, absolute EU student numbers had remained relatively stable at 1,400; however, their proportionality

[2] Our presentation of this case study university is more extended due to the fact that Northern Ireland is the only part of the UK to share a land border with the EU, in addition to specific devolution arrangements in place regulating its Higher Education. A highly complex constitutional agreement, established by the 1998 Good Friday Agreement, governs the power-sharing within Northern Ireland, cooperation between Ireland and Northern Ireland and the relationships between Northern Ireland and other parts of the UK.

declined because there was an overall growth of 19.4 per cent in student enrolments, taking the total number of students studying at Ulster to 33,045.

By 2020–21, total student enrolments had grown by 19.4 per cent to 33,045, while EU student numbers remained relatively stable at 1,400, meaning their proportionality continued to decline due to the overall growth in the student body. In 2021–22, EU student numbers dropped further to 1,300 out of a total student population of 34,550, representing just 3.8 per cent of the student body. This marked the lowest proportion of EU students at the university since the Brexit referendum, a trend particularly concerning given Ulster University's location on the island of Ireland. Despite the decline in EU students, the university significantly expanded its overall student population, growing by an impressive 40.2 per cent between 2016–17 and 2021–22. However, the 2022–23 academic year saw a slight reversal in trends. The total student population decreased to 32,085, a 7.1 per cent reduction from the previous year, whereas EU student numbers increased to 1,615, a 24.2 per cent increase from the previous year. EU students now comprise 5.0 per cent of the total student body, up from 3.8 per cent in 2021–22 but still down compared to 2016–17.

Ulster is the fifth-largest institution in the study and contributed ten participants. Among them were five senior executives, two senior administrators, one member of the academic leadership, one member of the governing body and one student representative.

EU student numbers: Challenges of Brexit for student mobility

When student numbers were discussed at Ulster, this did not pivot around monetary concerns or representations of students as units of resource. Changes in EU student numbers were expressed as a concern for changes in mobility flows, often implied as the unrestricted crossing of the land border between Northern Ireland and the Republic of Ireland: 'anything that could impact upon mobility would be an adverse outcome'. In contrast to the other case study institutions in England, Scotland and Wales, at Ulster matters of student numbers were not central to participants' considerations of the financial implications of Brexit. The frequent reference to mobility flows pinpoints the vast constitutional, political, cultural and historical significance of the shared land border between the two constituencies and the requirement for it to be an 'invisible, seamless, and frictionless border', as one participant put it.

Most participants noted that the largest category of EU students attending Ulster was from the Republic of Ireland. They discussed mainland (continental)

EU students and Republic of Ireland EU students separately as distinct categories, with specific issues surrounding the participation of each.

Several participants emphasized that a large number of students commute regularly across the Northern Ireland border: 'we have a campus which is five miles from the Irish border, so we already have about 1,400 students who cross the border daily to come here'. Of the 1,510 EU students in 2017, the vast majority come from the Republic of Ireland. There was a significant amount of anxiety about the future state of affairs, especially the possibilities for the transfer of students between the two jurisdictions and their higher education rights. One participant pondered:

> you can see a sort of a fissure beginning to develop between the rights of Irish citizens in the North, who would logically then be entitled to pay home status fees in the South and whether or not that would be extended to Irish citizens in the South if they wanted to come North.

This deeper and broader issue of citizen rights is constitutionally linked to the Belfast or Good Friday Agreement, according to which the people of Northern Ireland may choose to have British citizenship or Irish citizenship, or both. In terms of higher education, this has the potential to create a politically sensitive imbalance in how mobile students on either side of the island could be charged tuition fees in Northern Ireland and the Republic of Ireland. As another participant stated:

> If you're Irish and you live in the North, then you could go to university in the South and pay the local home rate because you are technically Irish and yet you live in the UK. But a Republic of Ireland student, who's an Irish citizen coming to the North, we don't have the clarity on what we would be required to charge them and whether or not there would have be a UK-wide position on that, or whether we would have something different because of the Good Friday Agreement.

As EU students counted towards the student caps pre-Brexit, attracting more students to Northern Ireland during that period was not primarily led by quantity and income objectives. However, a couple of participants did suggest that Brexit could change this:

> How we see European students as a part of our non-regulated income, is something that would be on our radar, so there's the student income generation piece.

Expanding recruitment and income from fees could only occur through international student intake. One participant explained that Ulster University

was looking to expand the international student community within the next five years and gave a target of '20 per cent of the university to be constituted by international students'. More detail was volunteered by another participant who explained that:

> We will be certainly looking to expand our recruitment in terms of the Republic of Ireland students, which are part of the European Union (. . .) so Republic of Ireland, definitely, but not the rest of the European Union.

This suggests that future recruitment strategy would target both all international students for fee revenue purposes and Republic of Ireland students in particular due to constitutional arrangements and political sensitivities.

Participants were concerned about Brexit potentially obstructing interested Republic of Ireland students from enrolling at Ulster and in Northern Ireland more generally. As indicated, the uncertainty about the status of Republic of Ireland students, that is, whether these students would count as home students or international students for fee purposes post-Brexit, and its implications for student caps and student finance in Northern Ireland, was causing anxiety.

> Republic of Ireland students are EU applicants at the moment and there would be difficulties in identifying them as international students, for political reasons, as much as anything else, post-Brexit.

Although there were a few participants who saw an income generation opportunity for Ulster, and Northern Irish universities more generally, there was also concern that study abroad options for students from Northern Ireland would narrow, especially for those who would not be able to afford the fees of studying elsewhere without reciprocal financial agreements in place.

> If we're charging European students the full fee, well, they will then start to charge us the full fee and if that then happens then Europe becomes a very unattractive proposition for many of our students and it also means that the whole thing becomes monetary based, so that those students from the most disadvantaged backgrounds are, I mean, basically the exchange is put beyond their reach.

To sum up, the discussion of student numbers dovetailed more notably with civic concerns around the flow of people, the consideration of the border and the difficulties posed to free movement, particularly focusing upon the consequences for future citizen rights and collaboration.

Diversity: Bridging tensions across and within – Social mobility, cultural exchange and Erasmus in Northern Ireland

Notably, substantial time and attention were devoted to discussing the relationships between Ulster and the EU that had been forged over long-standing partnerships such as Erasmus, and the collaborations of staff members. Erasmus, in particular, was considered a major mediator of political tension.

> One of my first encounters with successes of the Erasmus programme was the fact that Northern Ireland, many years ago, was not necessarily seen as a destination, in a sense, because of the troubles. But actually, those students who did come got a very warm welcome and really helped to bring a different kind of European perspective into the [name of the programme].

The role of Erasmus in smoothing over geopolitical tensions that existed in previous decades was notable. This highlighted the potential for higher education institutions to act as sites of connection and understanding between states and peoples. Several participants pointed to European exchange agreements in Ulster as an important avenue of cultural exchange.

> we're talking about making the university, about allowing it to retain its kind of uniqueness as a centre for learning and you really can't do that easily without having that rich mix of staff and students from around the world and certainly right across Europe.

Participants expected Brexit to drive down opportunities for study abroad experiences and cultural exchange for less privileged students. This concern highlights the intersection between cultural exchanges and social mobility, a relationship that was not frequently discussed in other case studies:

> Obviously they're [European students] interfacing with the local communities, our local students aren't able to get different perspectives as much, or European perspectives.

Seen through this lens, study abroad experiences and cultural diversity on campus could contribute to social mobility. Universities provide opportunities for cultural interactions that play a key role in reducing cultural barriers and social determinism. Participants envisaged these beneficial effects as both individual and collective and warned that a lasting disruption of cultural exchanges would amount to 'a disservice to the society as a whole'.

One participant charged that 'Northern Ireland is slightly parochial' and another pointed to a risk of developing a 'silo mentality' should EU participation drop. This unenviable prospect was reminiscent of a difficult past still fresh in memories, the

period of 'troubles' in Northern Ireland. The conflict that society had experienced then made participants wary of any potential break in communication, exchange and understanding of people and communities. Insularity was to be avoided at all costs as the following participant explained: universities were points of connection whose work was to break down barriers and silos:

> Insularity is, I suppose, the enemy of any university and not least, a university which has been an integral part of a community that has gone through the violence and the sectarianism of this society, so insularity is something we have to be very much aware on and the risks and the dangers associated with it.

Competition, collaboration and internationalization post-Brexit

Some participants noted that there would be increased competition, not only between Ulster and other UK or Republic of Ireland universities, but also between Belfast and other cities. One participant saw a real need to 'boost the attractiveness of Belfast as a destination'. Another argued Brexit could force Ulster to rethink their collaborations and seek new partners in the United States, China and elsewhere internationally.

Three participants noted that pre-Brexit, Republic of Ireland students counted towards the strict student caps, but post-Brexit: 'we may be able to recruit students from the Republic of Ireland, without them counting as part of our student number cap', therefore counting as an additional source of income and a possible area for growth.

However, another noted that the border, combined with the introduction of the current funding regime with high tuition fees, had previously caused 'Southern Irish' students to go to England to study, rather than move north of the border. Some anticipated Brexit might contribute to this happening again, forcing Ulster into competition with England.

Some participants supported a counterview according to which the Republic of Ireland, as a native English-speaking country within the EU, would become an attractive place to study post-Brexit. One noted that there was a strategic opportunity for Ulster within that situation:

> The South of Ireland does not have the capacity to take the numbers, so I think there's a real opportunity for us then to try and capture that.

The duality of Northern Ireland's position could present Ulster with an advantage to be seized post-Brexit if it was able to 'optimise the opportunities that arise from being located in a part of the UK but (. . .) being part of the same island

[of Ireland]'. This was often discussed alongside talk of Ulster's ongoing efforts towards greater internationalization.

However, despite adopting a competition framework, alongside efforts to project a positive future in which there were global opportunities to be recognized and captured, the openness and collaboration afforded by EU membership appeared more valued by the various participants.

> In a comparative marketplace, Ulster University, being on the island of Ireland, may have some differential advantage to us, compared to the rest of the UK, but even with that differential advantage, I think the overall impact will be negative, even if we can, if there is such an advantage to leverage, it still wouldn't be as good, I don't think, as the starting position of an open border with Europe and seen as being within that kind of collaborative space.

This chapter delves deeper into the three major framings explored earlier in the book: concerns about EU student numbers, the value placed on diversity and shifting competitive landscapes. By examining these framings within each case study university, we provide a more nuanced analysis that complements and triangulates our earlier cross-case findings.

Our investigation reveals significant variations in how institutions perceive and respond to Brexit-related challenges. Although Brexit was not expected to benefit any institutions, and its rationale and effects were generally deplored, more prestigious universities often expressed greater confidence in their ability to navigate the post-Brexit landscape. These institutions, bolstered by their international reputations and research excellence, frequently cited their global standing as a buffer against potential negative impacts.

In contrast, less established universities or those in more geographically isolated regions tended to voice greater apprehension about their future prospects. For these institutions, Brexit, even if not necessarily seen as a direct threat, was rather as a catalyst accelerating existing worrying trends in the higher education sector. Their concerns often centred on issues of regional development, social mobility and maintaining a diverse student body in the face of potentially reduced EU student numbers.

Finally, the unique situations of universities in Scotland, Wales and Northern Ireland were explored, providing much-needed insight into UK higher education. This perspective is valuable, as discussions of UK higher education are often dominated by the English case, with other national higher education systems being overlooked.

8

Discussion and Conclusions

Brexit and after

Conducted on the cusp of an important political change in the UK's international relations, our research provides a unique vantage point through which to consider how higher education, as one of the UK's most internationally connected institutions, perceived and responded to the geopolitical change that Brexit instigated. Researching in twelve diverse universities across the four countries of the UK yielded unique knowledge into the specific implications of Brexit for Higher Education and how university leadership teams were making sense of and preparing to lead through Brexit-related uncertainty and turbulence. While financial anxiety, competition, institutional standing, excellence, and inclusion are not new challenges in higher education, Brexit crystallized these long-standing concerns, transforming what were once primarily management-level preoccupations into widely recognized challenges facing the sector. These anxieties have now entered broader public discourse about the future of UK higher education.

Events since the interviews were conducted have largely confirmed the concerns of participants – the decline in EU student numbers in British degrees, the reduced throughput of EU doctoral students in UK research, the downward pressures on the quality of talent and of cultural diversity on campus, the subtle shift to a more insular and bordered national system consequent on weaker European ties. Most participants had considered the UK's withdrawal from the Erasmus programme less likely, given that Erasmus participation was not strictly tied to EU membership. Prime Minister Boris Johnson had explicitly assured Parliament that the UK's participation in Erasmus was secure. Speaking to the House of Commons on 15 January 2020, he declared unequivocally that 'there is no threat to the Erasmus scheme, and we will continue to participate in it' (Hansard, 2020, col. 1021). This categorical assurance would later prove to be misleading, as contrary to both the political promises and academic expectations, the UK did ultimately withdraw from Erasmus, leading to its effective vanishing from the UK higher education landscape. This development, which highlighted

the complex interplay between political decisions and educational opportunities, left a significant void in student mobility.

The higher education environment within the UK has also become more competitive, as most participants expected. The chief factors, however, have not been competition for EU students as these are now a diminished financial factor in most institutions. Instead, the focus has shifted to overall student numbers, with institutions striving to compensate for the decline in EU enrolment through increased recruitment from other demographics. Since the introduction of tuition fees, the sector's finances have heavily relied on student volume – more students equating to more revenue – and the cross-subsidization provided by international student fees. HESA data reveals a significant shift in the composition of teaching income for the higher education sector. While tuition fees accounted for 64 per cent of total teaching revenue in 2011–12, this proportion had grown dramatically to 93 per cent by 2022–23 (UK Parliament, 2024). Simultaneously, international student fees in 2022–23 represented 23 per cent of total income, up from around 5 per cent in the mid-1990s.

The sector's increasing reliance on student fees as its primary source of teaching-related funding results in the imperative to maintain or increase overall student numbers. This creates a tension with the desire to preserve educational quality and attract high-quality talent. Universities find themselves in a delicate balancing act. This challenge intensifies in a crowded market, where institutions must strive to attract high-calibre students while recognizing that the composition of their student body directly impacts institutional standing and reputation. Trying to reconcile financial, bottom-line necessities with academic aspirations – rooted in both the legacy of elite higher education and the contemporary drive to brand universities as world class (Scott, 2019) – further entrenches a competitive mindset across the sector and deepens the competitive nature of UK higher education in the post-Brexit landscape.

Post-Brexit, the competitive pressure falls mainly on domestic student recruitment and the recruitment of full-fee students from outside the EU. The competition is more fraught because it is taking place in the context of a declining unit of resource (the domestic student fee) and growing policy constraints on international full-fee recruitment. Universities find themselves in a predicament. They must maintain or increase student numbers to remain financially viable, yet each domestic student represents a growing financial burden due to stagnant fees within a marked inflationary environment. Simultaneously, universities face limitations on their ability to offset these losses through international recruitment, constrained by international competition, geopolitics and national migration policies. Consequently, the current funding model is under significant strain.

As noted in Chapter 2, domestic student fees have not increased since 2017 and have fallen well behind inflation. The gravity of the financial situation in UK higher education and its short to medium-term outlook are starkly presented by a recent report commissioned by UUK:

> Funding per student is at its lowest level in over 25 years and, without any additional investment, is expected to fall to £5,590 in England by 2025/26 (in 2012 prices), and in Scotland it is estimated that per student funding has already been cut by 39 per cent per student in real terms since 2014. (PwC, 2024, p. 8)

In 2024, universities face an average loss of £2,500 (in real terms) for each home student they educate. To put this in perspective, the current tuition fees, when adjusted for inflation, are equivalent to just £5,900 in 2012 terms (Financial Times, 2024; Brackley et al., 2024). This substantial devaluation of tuition income has forced universities to grapple with difficult financial decisions and seek alternative revenue streams to maintain educational quality and institutional sustainability. The risk of financial insolvency for one or more universities is no longer merely hypothetical but has become a distinct possibility.

International student revenues from full-fee paying students are more crucial than ever for UK universities. However, there is growing tension between this financial imperative and recent policy shifts. Downward pressure on student visas and rhetoric framing international students as contributors to unhealthy and unsustainable migration levels send potentially unwelcoming signals to prospective students and their families.

This concern is not new. As early as the 1980s, before significant changes in international student enrolment patterns had materialized, Williams (1987) noted a deep-rooted apprehension within UK universities towards policies that could portray UK higher education as unwelcoming. He highlighted the concerns and resistance that emerged among universities when the first policy change in 1965 recommended raising fees for overseas students to cover 20 per cent of their cost of study, as opposed to the previous 5 per cent. This proposal encountered strong opposition both domestically and internationally. Universities argued that this contradicted Britain's long-standing open-door and non-discriminatory policy, expressing worries about the country's reputation as a global centre for academic excellence. Despite the initial resistance, most universities eventually complied with the revised fee structure to recover lost income, resulting in only a temporary halt in the growth of international student numbers. However, a few universities, notably Bradford, demonstrated their principled stance by refusing to implement the higher fees for several years, even at the expense of significant financial losses. Williams insightfully predicted that

the economic rationale behind international student enrolment would not only strengthen but also come to dominate, as the attractiveness of the UK as a study destination increased.

Today, this tension between financial needs and policy messaging has become even more pronounced, potentially jeopardizing the UK's attractiveness as a study destination.

The participants from the twelve institutions anticipated a more difficult financial setting post-Brexit but could not have known how bad the position would get. The confidence in some in the case study universities that they could ride out Brexit without major issues now seems misplaced. At the time of finalizing this book in the second half of 2024, the financial position of UK universities was at its lowest point since the 1990s; and all universities in this study, without exception, faced financial challenges – though, as all participants in the study were well aware, high-reputation selective institutions were best placed to meet those challenges.

All of this means that at the system level, the more important consequences of the decline in EU student numbers have not been the direct loss of income, but the weakening of the cultural experiences and quality drivers that EU students provided, the narrowing of horizons in UK universities and the long-term reductions in talent flows. Nevertheless, universities and programmes more dependent than most on EU students have taken a significant financial hit from reduced EU student numbers, compounding their overall financial problems.

Navigating Brexit uncertainty and Brexit futures: Making the best of a bad situation

On the whole, regardless of the particular area of institutional activity, universities did not expect to derive any benefits from Brexit, including even passive benefits, either in relation to students or to research. The stance taken by the study participants, one common to the sector then and after, and the only possible stance in the circumstances, was that they were trying to make the best for higher education out of a bad situation. Participants' responses amounted to risk mitigation or damage limitation, regardless of the well-told scripts about confidence in the strengths of the institution, having a good strategy in place, the speculative future opportunities and the institutional capacity and alertness to seize them.

As reported in an earlier paper (Marginson et al., 2020), 96 per cent of our participants expressed negative feelings about the effects of Brexit in higher

education: 'Uncalled for, interviewees displayed a range of strong and mostly negative emotional responses, including pain, anguish, confusion and a sense of loss' (p. 68). Although at some point in the interviews, 60 per cent of participants also expressed hope, this seemed to function more as a grit-the-teeth necessity when forging the path through an externally challenging environment, rather than as a confident assessment of future prospects. Moreover, it is important to recognize that during turbulent periods, effective leadership teams must convincingly demonstrate both hope and resolve (Luthans and Avolio, 2003).

Relinquishing EU membership has created substantial uncertainty in a long list of key areas of importance to higher education, such as the UK's future role in research leadership in Europe and in general; the replacement of EU funding for research, student mobility and infrastructure; UK universities' future international appeal to students and potential academic staff recruits; and UK institutions' commitment to openness and exchange (see Chapter 3). A recurring, cross-cutting theme brought up directly in the interviews, and also apparent through the use of rich figurative language in Papatsiba and Koller's (2025) study of metaphors from the same dataset, was 'interconnectedness' and the perceived threat posed by Brexit:

> For academic communities, interconnectedness is viewed as crucial, encompassing cross-border collaborations, the exchange of knowledge and ideas, individual academic mobility, and the cultivation of an open and global mindset. It is a concept that lies at the heart of their understanding of the purpose and role of universities, highlighting the identity challenge posed to UK institutions by Brexit. (Ibid., no page yet)

The study of Brexit metaphors triangulates with earlier findings that pointed out 'the possibility that UK higher education would become less diverse, more "insular" and "isolated" and less collaborative than before' (Marginson, Papatsiba and Xu, 2020, p. 79).

European students in UK higher education: A distinctive demographic with an important educational role that has not been sufficiently considered

As explained in the opening chapter of this book, we have focused our analysis on EU students for three reasons. Firstly, in the interviews in twelve universities about the effects of Brexit and university responses to those effects, issues related to students were as quantitatively important as research, though research and

Brexit have received far more attention in the public sphere. All 127 participants referred to EU students. The EU students node in isolation contained about 50,000 words, roughly 10 per cent of the greater dataset.

Secondly, perhaps the most visible direct effect of Brexit has been the change in fee and residence status of EU students, which, as noted throughout this book, triggered a significant decrease in EU student enrolments post-Brexit. This direct effect became evident quickly, as predicted by our participants, whereas in relation to the UK's association with the European Horizon programmes for research, matters have been more ambiguous. The UK left Horizon between 2020 and 2023 and has now rejoined on less favourable terms than were the case when it was an EU member. It is still not clear how much of the UK's research relationship in Europe has been lost as a result of Brexit, and how much has survived or can be rebuilt. There is no doubt about EU students. Erasmus is gone, no inward student mobility scheme has replaced it and the number of EU students in British degrees was halved when the full effects of Brexit were implemented in the tuition-fee structure.

Thirdly, there is a dearth of research on European students in UK universities, whereas literature on full-fee-paying international students is relatively abundant, as noted in Chapter 2. European students represented a large and distinctive demographic in the UK whose specific circumstances were rarely considered. They shared with other international students the experiences of living and studying in a different country, but during the UK's EU membership, they enjoyed similar rights to those of UK students. EU membership provided them with a degree of security, protection and agency to exercise their rights, potentially leading to higher levels of inclusion in the host society than was the case for other international students. Perhaps the comparative neglect of EU students in UK research simply reflects the fact that those focused on international student mobility in the UK are especially exercised by the full-fee commercial market, either seeking to increase 'export' revenues (Higher Education Commission, 2018) or to critique the market-driven logics and students imagined as 'cash cows' (Tannock, 2013; Stein and Andreotti, 2016; Lomer, 2017a).

It seems that whether because they were less lucrative in revenue terms, or less crudely exploited, EU students paying home country fees have been less exciting for research and policy. But the character of the pre-Brexit EU students, as a less marketized international cohort, enabled universities to give priority to the educational and cultural benefits they offered. Those benefits are apparent in the interviews reported in this book. Now they represent a lost opportunity

in the UK, but they indicate what would be possible if a future UK government began to use scholarships and other subsidies to shape student mobility on the basis of educational goals and cosmopolitan international objectives, rather than revenues.

Brexit through the lens of the loss of European students

Chapter 3 records the decline in the enrolment of EU students in UK degrees following Brexit. This decline took effect from 2021 to 2022 onwards when EU students were required to pay full international fees. The status change of EU students was predicted well before the Withdrawal Agreement was finalized. Most participants in this study knew that, as a consequence, fewer European students would attend UK universities post-Brexit. In its 2022 financial sustainability report, the Office for Students forecast that EU student numbers would decrease by 37.3 per cent (43,000 FTEs) in the period between 2020–21 and 2024–25 (OfS, 2022, p. 9).

Across our twelve case study institutions, participants were clear about the future reduced attractiveness of UK higher education to EU students. The reasons were obvious: the economic obstacles of much higher fees due in the year of study, with no access to income-contingent tuition loans; the disincentive of bureaucratic processes and new migration rules following Brexit, such as visa regulations; and the more negative images created in an environment seen as more unwelcoming, perhaps hostile towards foreigners. The consensus across the study was that enrolments were certain to fall, though there was variation in judgements of the extent of the problem and the relative weight of the factors expected to discourage EU students. University leadership teams in all institutions considered the prospect of having fewer European students enrolled in UK universities as a significant loss.

Brexit has created uncertainty about the branding of universities as international and open to collaboration; about the make-up of their subject provision, given that some programmes were especially dependent on EU student enrolments; their reputation for quality; the cosmopolitan 'feel' of the campus; and revenues from tuition fees. These education-related consequences of Brexit for UK higher education are apparent whether we focus on the entire sector, groups of universities, individual institutions or academic fields of study.

Discursive framings of EU students

As discussed in Chapter 1, EU students were discussed in this study through three major discursive framings: firstly, as numbers representing *units of resource*; secondly, as *desirable diversity and quality*; and finally, as *an object of competition*. This triad has framed the presentation of the evidence in this book. Below, we draw together ideas, concerns and notable points associated with these three main institutional representations of EU students and their broader implications for UK higher education post-Brexit.

Numbers representing *units of resource*

The way EU students were discussed reveals a predominant focus on administrative and economic concerns over educational ones. In part, this reflected our selection of participants, but the fact that many were institutional leaders makes their perspective more significant. The brute fact is that rather than being seen as learners, future professionals or aspiring young people, EU students were often referred to as numbers. They were reduced to units of resource that were tightly linked to institutional income and policy regulation. This objectification of students is not new. Numbers and quantification have long been used as policy and governance tools; there is a large literature in the topic domain (e.g. Rose, 1991; Miller, 2001). Numbers are prevalent in public service management (Hood, 2007). However, such a decontextualized and reductionist representation of students as units of resource obscures their individuality and contributions and also diminishes the fundamental educational mission of universities to that of a transactional and self-serving business operation. Units of resource are interchangeable and can be easily replaced by anything equivalent in accountancy terms, reducing students to spreadsheet values.

Is a shift in EU student numbers an existential threat to universities in the UK?

The discursive framing around EU student numbers in UK higher education centres on the potential impact, on institutional income and financial health, of demographic shifts between home, EU and international students within UK HEIs. Some raised concerns about whether such shifts could pose an 'existential' threat to universities. While most institutions did not anticipate a significant financial shock from the predicted decrease in EU student numbers, the fact that they were appraising changes in enrolment as a key issue of the 'size and

shape' of the sector revealed the underlying anxieties. Ultimately, student numbers are linked to the financial viability of individual institutions. Leaders and administrators in middle- and lower-tier institutions, especially, know that changes in enrolment can so affect them as to undermine the business and, in extreme cases, lead to financial failure.

The vocabulary of business failure is not unfamiliar to UK higher education. Drawing on audited financial data from 2019–20 and 2020–21, as well as forecasts up to 2024–25, the OfS (2022) unequivocally presents university closures due to financial reasons as a possibility, albeit one of relatively low risk: 'With the information currently available, we consider that the likelihood of multiple providers exiting the sector in a disorderly way due to *financial failure* remains low at this time and in the short term' (p. 3, emphasis added). The concern was particularly noticeable among English universities that relied directly on tuition fees from enrolled students. Most student places in England were solely funded by the students themselves, albeit in the case of domestic students with the support of publicly backed income-contingent loans, with no public subsidies for teaching. As explained, in 2017–19 when the interviews were conducted, different undergraduate fee regimes applied in the four UK nations, with no student fees in Scotland. While financial anxiety in higher education is not a new phenomenon, what is striking is the proliferation of this discourse. What was once primarily an internal management concern has now permeated public consciousness, stirring broader debates about the future of higher education in the UK.

For UK leadership teams, especially in England, higher education as a market has become a normalized state of affairs, along with the running of higher education institutions as businesses, which prioritize generating revenue, customer satisfaction and competition (e.g. Molesworth et al., 2011; McCaig, 2018). As a result, university leaders perceive their roles and responsibilities as centring on the organization's 'bottom line' (Kirp, 2003). Universities-as-businesses are vulnerable to market fluctuations and customers' purchasing capacity and choice, like standard high street businesses. As many commentators have observed, this situation has significantly accelerated since tuition fees of up to £9,000 per year for undergraduates at English universities were introduced in 2012, a policy change that McGettigan (2013, p. 9) views as the manifestation of a 'new wave of public sector privatisation', and Brown and Carasso (2013, p. 1) charge as 'the most radical [changes] in the history of UK higher education, and amongst the most radical anywhere'. It is worth pointing out that in 2011, universities were overwhelmingly in a financially strong position, with seventy

institutions running operating surpluses, only ten having deficits and sector-wide cash reserves of £6.5 billion (McGettigan, 2013).

Student choice shapes disciplinary growth and decline, impacting academic units' fate

With the institutional leadership's priority being the institution's capacity to balance its books, it is unsurprising that participants in the study directly linked study programmes and their viability to issues of student demand and preferences. Again, this was more pronounced in the English case study. This highlights the power of student choice in the UK higher education system, in line with government policy supporting the commodification of higher education (Naidoo and Jamieson, 2005; Marginson and Yang, 2023) as well as the policy framing of students as customers of higher education (Tomlinson, 2017).

However, leadership adoption of the market vision misrecognizes the educational power of academic knowledge and the role of universities as prime knowledge-forming institutions. The consumer model hands to student demand the scope to facilitate or impede knowledge diversification and disciplinary growth, by submitting them both to market forces (Collini, 2012). The study participants generally did not defend universities as bastions of academic knowledge, nor did they discuss disciplinary offerings as determined by any intrinsic value. However, staff with closer involvement in on-the-ground academic activity were more concerned with the risk to individual departments and programmes. Those participants referred to a wide number of vulnerable disciplines, such as Arts and Media, Business and Management, Computing/Computer Sciences, Engineering, Law, Languages and Literature, Life Sciences and Politics. This broad range of subjects indicates that no subject area was categorically immune to Brexit-induced shifts in student enrolments.

There were specific vulnerabilities unique to each institution and their particular distribution of students across subjects and departments. However, the leadership teams appeared rather impassive in relation to these more localized negative effects of potential shifts in student demographics. This implies that deleterious consequences for individual departments and subject areas could perhaps be tolerated, or would constitute an acceptable level of disturbance, for leadership whose priority was the institution as a whole.

Academic environments and intersecting forms of EU involvement

Within the quantified representation of EU students, there was a reference to key intersections with staff-related issues that should not go unnoticed. The

increase in EU student enrolments during the previous years of steady growth was often attributed to the parallel growth of European professional networks and collaborations driven by EU staff. This perception of the organic growth of EU student numbers highlights not only discrete areas of activity, such as student recruitment or the generation of research income but also how academic environments are composed of elements that build on one another.

Previous success in universities' forms of EU involvement, including research funding and attracting EU academics, had a positive effect on EU student enrolment. Therefore, any disruptions to these forms of EU involvement, potentially affecting the attractiveness of the UK higher education for EU researchers and academics, could be expected to have a concomitant impact on the number of EU students coming to study in the UK. Within this administrative and economic framing of EU students, it was nevertheless possible for participants to articulate distinct but also compounding effects on academic cultures, performance and quality that were not limited to the immediate quantitative change in student numbers and institutional finances. This suggests that demographic changes in the academic mobility of staff and students are likely to lead to future changes in teaching content and research orientations, which taken together are likely to lead to shrinkage overall.

The framing of EU students as numbers and units of resource reveals how deeply market logic and its quantification have become embedded in UK higher education governance. Our analysis shows university leaders primarily processing Brexit's implications through a commercial rather than educational lens, focusing on revenue impacts, competitive positioning and resource management. This reflects what scholars like Brown and Carasso (2013) identify as the increasing marketization of higher education, where market-based thinking has become so normalized that even major political disruptions are primarily evaluated in financial terms.

Drawing on Rose's (1991) and Miller's (2001) work on governance through numbers, we see how the reduction of EU students to quantifiable units serves both as a technical tool for institutional planning and as a way of thinking that shapes institutional behaviour. This quantification operates at multiple levels – from national policy forecasts to departmental viability assessments – though participants acknowledged its limitations in capturing EU students' qualitative contributions to academic life.

The data reveals universities as complex systems where changes in EU student numbers ripple through entire institutions, affecting research networks, staff recruitment and institutional culture. This 'tight coupling' often unacknowledged

and misrecognized more broadly, helps explain why Brexit's impact extends beyond enrolment figures to reshape institutional identities and knowledge production. Through resource dependence theory (Pfeffer and Salancik, 1978), we can understand how institutions – especially those in middle and lower tiers – experience varying levels of vulnerability based on their dependence on EU student enrolment, leading to different strategic responses across the sector.

Desirable diversity and quality

Whereas business growth and financial viability were the core concerns in the first discursive framing of the EU students as units of resource, participants also felt anxious about maintaining diversity on campus, especially the kind of diversity that links academic merit, educational quality and international reputation together and then relates it to the growth of local students and their communities. This second discursive framing provides valuable insights into why the vast majority of the participants felt that having fewer EU students attending UK higher education would constitute a significant loss.

Diversity and valuing diversity was a prominent topic of discussion, with 83 of 127 participants speaking about the desirability of having EU students on campuses and framing this as a 'diversity' issue, even though the research interview schedule did not include questions probing into the matter. Participants did not attempt to define 'diversity', nor did they elaborate on why they were approaching a future decline in EU student enrolments as a diversity issue. The topic of diversity in UK higher education has traditionally focused mostly on the participation of domestic students in higher education in relation to ethnic and socio-economic characteristics. Lohse's (2024) research, conducted in 2020–21, provides independent validation of the framing of international students in terms of numbers, diversity and competition that emerged in this study. While initial fears about declining international enrolments proved unfounded – with numbers actually increasing – institutional narratives evolved during the period of the pandemic. As enrolment anxieties subsided, the focus shifted more explicitly towards diversity concerns, though competitive behaviours intensified as we show in the discussion of competition later in this chapter. The diversity discourse became more firmly articulated, with senior international officers expressing particular concern about 'the make-up of the student body and the very likely loss of diversity in national student backgrounds' (p. 132), which they deemed detrimental to the overall learning environment. In our interviews diversity appeared as a shorthand, a floating signifier that assembled a wide set

of ideas pertaining to cultural, academic and linguistic variety. It was an abstract notion that could be best thought of as a 'cluster concept' (Halliday, 1988, p. 188). Cluster concepts have no single core meaning. Archer (2007, p. 637) argues that diversity belongs to those concepts that in higher education environments are part of a rhetoric 'used to bolt together conflicting and contrasting motivations and interests'. Ahmed (2007a) points out that the appeal of the word 'diversity' in higher education environments hinges upon four things. Firstly, its meaning is 'mobile'. This means it can project different meanings depending on actors' complex biographical and institutional histories. Secondly, it has a softer edge compared to more critical notions, such as equity, which unambiguously counter privilege. Thirdly, it provides a new vehicle for social justice talk and action to continue after what was felt as a phase of 'equity fatigue'. Finally, it appeals to inclusivity values.

Despite diversity's semantic imprecision in our data, using the notion signals a normative assertion on the part of the participants, of a phenomenon that should be welcomed and defended. Diversity is a value-laden notion in general, but also in the context of our research sites. Multiple participants made the effort to highlight the academic and sociocultural value of having European students at the institutions. Drawing on the register of 'diversity' for conveying these ideas, our participants' framing of 'diversity' confirms that 'diversity is a strong and emotive term that operates as an unquestionable proposition (. . .) already known as "good"/desirable within western liberal discourse' (Archer 2007, p. 638).

EU students were portrayed as *desirable diversity and quality*, a kind of diversity that 'enriches' the intellectual and social life of UK universities and provides for a richer academic curriculum and a fuller student experience. They were presented as a cohort that belongs to a cosmopolitan campus. The latter was not only assumed to be desirable in all sorts of ways and beneficial to everyone but was also taken to be foundational to the very notion of being a university. In this idealized view of the university, diversity is a core characteristic of international and cosmopolitan institutions. As Ahmed (2007a, pp. 244–45) reminds us, 'the term "diversity" gets stuck to the ideal-image of the university as "being global". (. . .) Diversity work appeals to the ideal image universities have of themselves'.

University leadership teams and senior academics and administrations presented EU students as integral to UK universities, and an erosion of numbers as unavoidably a deficit, not just in numbers, but in terms of identity, definition, purpose and mission. They saw the removal of EU students as a damaging and disfiguring change that would leave institutions incomplete. This richer

understanding of EU students to some extent compensated for the reification of those students as units of resource, the first discursive framing.

Intercultural understanding and mutual enrichment of EU students and local students and communities

Participants defended the value of having EU students inside the classrooms, on campuses and also in the surrounding community, lamenting the prospect of fewer attending UK higher education post-Brexit. Their foreseeable decline would make universities 'poorer for it' and would also socioculturally affect the communities beyond the university walls. EU students, as a cohort of international students, were seen as benefiting the experience of home students, especially those who might not have had the opportunity to travel and interact with people from other national-cultural backgrounds.

Many participants stated that diversity enabled students to gain greater access to cultural exchange, wider social networks, opportunities for social mobility and encouraged broader aspirations and a more outspread perspective on life. By extrapolation, these effects carried through and benefited the broader communities to which students belonged.

This continuum from the classroom to the university campus, and then to broader communities, especially present within the case study institutions in Northern Ireland, Scotland and Wales, provides an initial scaffold on which to locate the positioning of EU students, and understand how their diversity was valued. Stretching beyond the limits of the university indicates that EU students were included within an imagined practice of internationalization as socioculturally beneficial to universities' surrounding communities. The role of the Erasmus programme in that respect was highlighted and its value was particularly underlined, especially in Northern Ireland, where Erasmus contributed to smoothing over political tensions that existed in previous decades. Again, in Scotland and Wales, interactions between Erasmus students and local communities were positive.

Considering the broader contribution of university internationalization in local communities breaks with the more polarized student body formed by neoliberal globalization and its marketization of higher education. The latter separates international students, who are often seen as 'paying their way in', from equity concerns about national and local communities' access to and success in higher education. Traditional questions of justice raised within the national context overlook international students (Tannock, 2018) as an equity-seeking group that faces structural barriers (Tavares, 2021).

Universities' international engagement is sometimes charged with being antagonistic to their social engagement and local responsibility (see Brandenburg et al., 2019; Jones et al., 2021 arguing for 'Internationalisation in Higher Education for Society') because it draws resources and time commitment away from local concerns and lacks geographical and social embeddedness. However, internationalization through the lens of EU students in this study points to a different understanding, aligning with intercultural understanding and mutual enrichment of EU students and local students, including the local communities.

EU students were discussed by participants as acting as bridges in universities' relationships with their communities, notably in relation to home students from disadvantaged backgrounds. Interactions among students from different cultures were seen to support both the cosmopolitan learning and upward social mobility of home students. In this framing, the experience of diversity amplifies the social and cultural capital of local students, which has significant implications for their access to social mobility.

In this view, internationalism (or internationalization) cuts across the university to link with community engagement by creating the possibility of a relational space constructed through interaction. This becomes a space for social relations to grow and for identity work to unfold through student self-formation (Marginson, 2024). This space is neither the local nor the international in essentialist terms, but following Massey (2005, p. 9), it is a 'sphere of the possibility of the existence of multiplicity in the sense of contemporaneous plurality; as the sphere in which distinct trajectories coexist; as the sphere of coexisting heterogeneity'.

Internationalization through EU students evades extensive commodification

For the period of UK's membership in the EU, internationalization associated with EU students escaped the more extensive neoliberal and marketized co-optation of international activities in higher education (e.g. Bamberger et al., 2019; Tannock, 2018; Su-ming Khoo, 2011) and showed the possibility for a more socially and ethically responsible practice.

EU students, although a distinct demographic and therefore a form of otherness within the participants' perceptions, were nevertheless placed within the less transactional and commodified end of internationalization involving international students, as was discussed in Chapter 2. Su-ming Khoo (2011, p. 388) points out the complexity, ambivalence and contradiction of discourses of 'the local and/or national "Self" versus the international

"Other"" and how conceptions of access and equity to higher education hinge upon diverse understandings of citizenship, nation and internationalism. This may have allowed participants to contemplate beneficial intercultural and social relationships between university internationalization and communities that align better with the 'public good' mission of universities rather than the revenue-driven form of internationalization with its narrower instrumentality.

Yet, EU students can also be considered as a relatively familiar or privileged figure of the culturally and linguistically 'other', who is bestowed with Western sociocultural capital, and whose diversity of perspectives and knowledge is therefore more readily seen as desirable than in the case of students coming from the global East or global South. As such, it can be argued that this form of internationalization in higher education does not constitute a radical alternative form of global justice. It constitutes a privileged group, grounded in principles of justice (e.g. access and financing of higher education studies) that apply exclusively within the EU polity and its membership. It also values the Western episteme, which excludes the majority of the world's knowledge (Marginson and Xu, 2023).

Nevertheless, this kind of justice is more plural in its conception than the bordered statism epitomized by the nation-state (Wollner, 2013; Mulvey, 2022). It suggests that, over time, political membership can begin to foster more inclusive forms of justice that do not solely arise from single-nation or ethnocentric conceptions of membership. In that sense, it sides with the enlargement of inclusion and a cosmopolitan tendency, which offers hope. Abandoning these relative equity gains, which has been the effect of Brexit, does not redress inequity, nor does it confer new spaces for broader inclusion.

EU political membership provided integration pathways to EU students, which included practices of social justice and equity usually reserved for nationals. The EU tuition-fee status, equivalent to that of home students, together with residency rights and unrestricted access to welfare (e.g. healthcare provision) are prime examples of this structurally mediated integration, and they were recognized by our participants. Policy shapes to a great extent the conditions of membership but also exerts in parallel a significant influence on perceptions of legitimate access to membership entitlements. Likewise, international regulatory agreements provide blueprints for policies that structure conditions and experiences. They are not to be viewed as an inactive backdrop, nor as a nuisance that once ignored goes away. The formal arrangements matter a great deal.

That fact contradicts some dominant agency-centred (and facilely optimistic) narratives in universities, in which structural barriers and regulatory

infrastructures, such as those newly introduced by Brexit, are seen as factors that can easily be countervailed by institutional and individual agency. Papatsiba and Koller's (2025) in-depth analysis of the everyday metaphors used by the participants in the complete dataset sheds further light on this latter concept. They emphasize that the agency described by participants is fundamentally relational in nature. This relational agency manifests in the widely held belief that academic collaborations, long-standing personal relationships within academia and established professional networks possess the resilience to transcend political barriers. This perspective underscores the faith many in universities place in the power of intellectual connections and shared research pursuits to overcome geopolitical obstacles. This sense of agency also stems from a notion that participants expressed about politics and science/research being different realms that do not overlap or intermingle. They perceived a clear boundary – there's tension, but they don't mix. In cases of conflict, these participants espoused an idealized narrative of science or research prevailing, as an activity insulated from the threat of politics.

This perspective reflects a long-standing ideal in academic circles of scientific autonomy and the universality of knowledge. However, it may also represent a form of wishful thinking or strategic optimism in the face of Brexit's challenges. While personal academic relationships and collaborations can indeed transcend political barriers to some extent, the reality is that science and politics are often deeply intertwined and influenced by geopolitics, especially in matters of funding, policy and international cooperation.

Brexit entrenches inequalities between Western and Eastern European students

The cost of university studies has been a traditional issue affecting students of all origins – the problem has been discussed widely within social justice conversations and within the academic and policy literature on higher education. Brexit repositions EU students: by eroding their pre-existing rights, participants felt that it placed their power of purchase in the driver's seat, relegating issues of academic merit to the back seat.

This change in status for EU students has triggered a broader consideration of geopolitical social inequalities, some of which existed prior to Brexit, and others which have been newly created. As with non-EU international students, only those EU students with the financial capital will be able to access UK higher education post-Brexit. The impact of any changes was predicted to be least for EU students from wealthier backgrounds who, in their majority, tend to be

drawn from Western Europe. Many participants expected that for many Eastern European students, affordability would be placed beyond their reach. Without access to the UK loan system and facing international tuition fees, few Eastern European students would be able to study in the UK. In this manner, the cost of access to UK higher education post-Brexit was likely to further entrench international higher education as a social instrument for selecting the most privileged members of society and perpetuating existing privilege (Brennan and Naidoo, 2008; Netz et al., 2020).

EU student diversity enhances quality

Participants heavily used the vocabulary of 'richness': EU students serve to 'enrich' UK universities, and in their absence, the UK will be 'poorer without'. This discourse is an unambiguously positive representation of EU student-mediated internationalization. Brown and Jones (2007, p. 2) aptly summarize this view according to which international students are 'a source of cultural capital and intentional diversity, enriching the learning experience both for home students and for one other, expanding staff horizons, building a more powerful learning community and thus deepening the HE experience as a whole'.

A drop in numbers was feared for its impact on academic quality, even in situations where participants explicitly pointed out the potential for financial gain from the changing fee status of EU students. The language used by participants to describe EU students included frequent acknowledgements of their ability, akin to glowing praise. Some of the terms used included: 'really high-achieving students'; 'very, very good'; 'really able students'; 'wonderful students'; 'just really bright'; 'fantastic qualifications'; 'more mature' and so on. Associating diversity with academic quality breaks with ubiquitous deficit assumptions attached to international students and their supposed lack of readiness to perform academically while studying in other higher education systems.

Participants from more prestigious institutions felt assured that the specific social demographics they would attract in future would still be able to afford the increased costs of UK higher education, yet they pointed to the potential reduction of socio-economic diversity within their institutions. However, when examining the expected future decline of EU students, even in universities with very competitive entry, participants felt the need to repeatedly stress that EU student diversity and inclusion were correlated with higher student quality. Across all institutions, expanding into alternative student demographics of domestic or high-fee paying international students was seen as a threat to academic quality as well as espoused values of academic merit.

Eliding notions of diversity with quality indicates, however, that diversity can also operate 'vertically', that is, 'as a means for driving up standards and "quality"' (Archer, 2007, p. 639). By doing so, it could become less concerned with redressing socio-economic disadvantage. This resonates with our earlier definitional clarifications, which highlighted that the term diversity is aptly 'mobile' (Ahmed, 2007a) and can contextually associate with, or dissociate from, the more critical understandings of privilege in social justice and equity discourses.

The research also sheds light on the regional specificity of 'quality'. In some interviews, while quality was unambiguously associated with European students, it was implied that other international students had less of it, so that the loss of European students would drive down student quality overall. Were students from the rest of the world seen as of lesser quality because the financial factor was larger in their enrolment, and intellectual merit less, than was the case with students from Europe who entered on the basis of home country tuition and did not pay at the point of enrolment? Or were Europeans simply seen as more culturally and intellectually 'advanced'? There is no extant evidence that would suggest that students entering the UK from East Asia are weaker in terms of educational foundations than European students, though arguably, non-Europeans face a larger language barrier. East Asia is the world region with the highest scores in the OECD's cross-country PISA studies. However, it was apparent that many UK-based interviewees (some of whom were migrants from non-UK Europe) felt a strong cultural affinity with students from Europe.

EU diversity bolsters the image of the 'world-class' university

Internationally oriented universities with a competitive outlook seek to appeal to certain kinds of students and staff. By proposing a mutually supportive relationship between diversity and quality and forging a distinctive coupling between the two notions, the language of diversity takes on a certain cachet that does image work, or 'image management' (Ahmed, 2007b, p. 605) and even becomes domesticated as a marketing tool. The concurrent connection of diversity and quality serves institutional competitiveness in the global higher education marketplace while advancing the core missions of universities related to international reputation. Maintaining a diverse student body is crucial for projecting institutional prestige and competitive advantage, as it demonstrates the university's ability to prepare graduates with the sociocultural skills necessary for global communication and operation. This discourse of diversity is often co-opted as a tool for enhancing institutional reputation, which can

translate into a greater ability to engage in high-quality and widely recognized research.

As such, participants in the study highlighted the contribution of European students to the UK's research performance and its image as a global research powerhouse. This suggests that academic environments are composed of overlapping elements that compound on one another, with interactions between teaching and research, staff and students contributing to those indicators of quality that translate into reputation. The participants expected that a reduction in connectivity would undermine the international reputation of UK universities and threaten their central position as a hub for international contact and collaboration, as well as hinder the delicate balance between collaboration and competition. They were not wrong.

Concluding thoughts

In conclusion, the discourse of diversity regarding EU students emerges as a complex theoretical terrain where multiple frameworks intersect to illuminate various understandings, tensions and contradictions. Through Bourdieu's (1986) forms of capital theory, we can understand how diversity functions simultaneously as cultural, social and symbolic capital that institutions seek to accumulate and convert. EU students represent a particularly valued form of cultural capital that enhances institutional prestige while facilitating social mobility for domestic students through the transmission of cosmopolitan dispositions and international networks.

Postcolonial theory reveals how this valuing of EU students reflects deeper power structures and cultural hierarchies in global higher education. The privileging of European diversity over other forms of international diversity suggests what Said (1978) would recognize as the persistence of colonial mindsets that position Western knowledge and cultural capital as inherently more valuable. This creates an 'othering' process that distinguishes between desirable and less desirable forms of diversity based on geopolitical power relations.

Through the lens of cosmopolitanism, we see how universities position themselves as spaces for cultivating global citizenship and cross-cultural understanding. However, this cosmopolitan ideal exists in tension with what Beck (2007) terms 'methodological nationalism' – the tendency in our study to frame benefits primarily in terms of advantages for domestic students and communities. The promotion of '*good*' internationalism reflects this tension between universal aspirations and national interests.

Massey's (2005) spatial theory helps us understand how universities function as relational spaces where different forms of diversity interact and create what she terms 'spheres of coexisting heterogeneity'. The fear of post-Brexit insularity reflects anxiety about losing these spaces of interaction and returning to more bounded, less dynamic institutional environments. This spatial understanding illuminates why participants saw EU student diversity as fundamental to institutional identity and mission.

Finally, critical internationalization theory helps explain how these various conceptions of diversity reflect competing liberal, neoliberal and critical paradigms of internationalization (Haapakoski and Pashby, 2017; de Wit and Hunter, 2015). The pursuit of global competitive positioning through diversity as a quality marker demonstrates how market logics have become entangled with educational ideals. Yet participants' concerns about insularity and declining connectivity suggest a resistance to purely market-driven approaches.

These theoretical perspectives together reveal how Brexit threatens not just numerical diversity but the complex ecology of relationships, capital exchanges and spatial dynamics that EU students helped facilitate. The anticipated loss of these students catalysed reflection on competing conceptualizations of diversity – as educational philosophy, market asset and geopolitical relationship. This multi-theoretical analysis suggests that diversity in UK higher education operates as both ideal and strategy, with its meaning and value constructed through multiple, sometimes contradictory, frameworks of understanding.

Competition: The system effect

Collaborating and competing in a post-Brexit higher education landscape

Seventy-two out of 127 participants openly discussed the competitive outlook for the UK higher education sector. They were concerned about the effects of Brexit on revenues, on people (students and staff) and on reputation. They saw these factors as intensifying the competitive pressure between UK higher education institutions within each of the UK nations, among UK nations and between the UK and other parts of the world, including EU countries or traditionally English-speaking study destinations. Changes to reputation are more difficult to discern than changes in revenue or the composition of people in institutions, and

are more long term in character, but might be just as important as resources in positioning higher education institutions in the UK and shaping their potentials.

The interview conversations highlighted many participants' understanding that the competitive setting of higher education was changing, from the Anglophone-centric model of higher education internationalization that had prevailed since the Second World War, in which the UK enjoyed an unquestionable advantage, to a more diverse and polycentric model. This mirrored the growing multipolarity in political economy (see Chapter 2). Higher education in Europe, through the initiatives of the EHEA and the large-scale collaborative European Research Area programmes, was now a more important factor on the world stage; and China and other non-Western systems were rising (Marginson, 2011, 2022). This shift threatened to sideline a less connected UK, should an insular Britain emerge (and be seen to emerge) after Brexit. It was precisely the wrong time to become increasingly nation-bound. The participants emphasized the importance of reputational management to remain competitive in the future. Reinforcing the public-facing message that UK higher education was open for business and a welcoming environment of opportunity, learning and development was regarded as a key priority.

The participants also recognized that international geopolitical tensions could play a significant part in reorienting patterns of student demand or dampening the inclination for international education. Collaboration and competition dynamics change accordingly. In interviews, the participants pointed out that the EU framework enabled greater collaboration and expanded interconnectivity between institutions that shared standards and academic ethos. It also created new opportunities to compete. The long-established EU alliances and partnerships provided protection and strengthened the competitive attractiveness of UK universities. The UK's success in building a leadership role in Europe, in research and as a magnet for talented students, researchers and academic staff, had become a strong platform for sustaining UK universities' global role. This has proven to be a viable way forward and there was no alternative strategy on offer. A strategy of going it alone, attempting to exercise global leadership as a quasi-imperial power, was not viable. It was no longer the mid-nineteenth century. Given the UK's material resources, its university sector was simply not strong enough to do this in a multipolar higher education world that included the much larger systems and blocs of North America, Europe and China.

Notions of forging a new leadership role for 'Global Britain' by replacing Europe as a sphere of activity with the former British Empire countries, or

rising Asia and the global South, lacked real substance. Nevertheless, Brexit implied such a strategic shift, and this had been articulated openly by some of its advocates. As the participants saw it, growing reliance on non-EU cooperation and alliances rested on access to an ill-defined new set of resources and capabilities and implied increased exposure to non-democratic partners. The latter was contentious, raising ethical and security issues. New collaborative strategies that strengthen competitive positioning must account for not only the economic dynamics but also the cultural and political trade-offs that are involved in international relationships.

Participants sought to identify how the UK could maintain its strengths and competitive edge so as to stay at the forefront of international education and research. They emphasized that as part of a competition strategy in the aftermath of Brexit, the UK should seek to remain plugged into European and broader international networks, especially given its already extensive political, economic and cultural ties around the world. By and large, participants approached the Brexit-related uncertainties and future outlook as a factor that exacerbated an already harsh reality for UK higher education whereby competition was ubiquitous and permeated all geographical scales.

The interplay between national and global competition

Competition in higher education plays out not only at the global and regional levels but within the UK itself, more so given the deliberate organization of the sector as a system-market since the full-fee reforms of 2012 and the creation of the Office for Students as a competition regulator. The Higher Education and Research Act 2017 (BIS, 2016) expressly aimed to 'deliver greater competition'. Participants in the study acknowledged the existence of competition and perhaps acquiesced to its inevitability. Despite their pragmatic approach, they did not portray institutional competition as a force for improvement in general, nor as a driving force for academic quality, or a mechanism through which higher education institutions could become the best that they could be. Rather, most participants viewed competition in UK higher education as something to be continually aware of and manage as best they could. There was some distance between their understanding and government rhetoric of the beneficial role of competition in higher education environments.

Brexit's anticipated effects on competition provide an illustration of Marginson's (2006) observations about the overlap between national and global competition, which 'are distinct, but feed into each other' (p. 1). The

study participants spoke about competition at different scales: within and among the four UK nations; between the UK and Europe, including Ireland; and competition from traditionally strong players in higher education internationalization, such as the United States, Australia and Canada. The global-national-local nexus consists of interdependent scales that have to be apprehended through relational thinking in the sense that 'events at a particular scale are shaped by their relationships with different scales' (Sheppard, 2002). Facing competition dynamics as higher education institutions, traversing Brexit and foreseeing a post-Brexit era, required a holistic, joined-up approach without assuming a specific direction of influence or unidirectionality. It was (and is) a complex setting in which there are multiple and interrelated objective factors and also actor strategies and relational positionality. The interview conversations showed the complexity but also the sensitivity of the topic. On several occasions, we detected worried undertones while at the same time individuals volunteered little detail about the position of their individual universities.

Competition post-Brexit will exacerbate existing inequality in UK higher education

National competition for students, for the 'quantity we need and the quality we want', was underpinned by a representation of UK universities placed on a hierarchy of status (Tight, 2007; Huisman et al., 2007; Boliver, 2015). Despite recognizing their vastly different positions of status and financial strength, no university in the study expected Brexit to provide a passive advantage to either their own physical or symbolic resources, nor to any other UK university. Rather, participants expressed anxieties about potential damaging effects caused by the reduced attractiveness of a part of the sector. The analogy of institutions placed 'further down the food chain' was used more than once. These were the institutions that were more likely to directly feel the impact of Brexit. Brexit was seen to accentuate existing stratification and vulnerabilities in the sector while introducing new uncertainties about collaboration and competition with EU partners and beyond that affected many institutions at different levels of status and resources. Participants generally believed that only the elite UK universities would remain largely unaffected by future changes in EU student recruitment, EU research funding and staff employment. This was apparent not only in interviews among institutions 'further down the food chain' but in the relative confidence about the post-Brexit environment expressed by some participants in selective institutions, though the latter were concerned about their global position.

The Covid crisis intensified competition among universities to unprecedented levels, with Lohse's (2024) interviews reporting institutions 'poaching' domestic students through unconditional offers – a practice condemned as 'unacceptable and unscrupulous' (p. 163). One university leader captured this worsening competitive environment by likening collaboration during the pandemic to 'being in a room with friends with daggers' (p. 176), vividly illustrating how, despite surface-level cooperation, competitive pressures actually intensified during this public health emergency. The current deep financial crisis affecting the higher education sector suggests this competitive trend is unlikely to reverse in the near future.

Maintaining student quality was a key concern for all twelve universities, regardless of characteristics and positioning. Expanding into alternative student demographics, both home and international, in order to make up for the shortfall in EU students, was presenting a potential threat to the notions of academic quality held by our study participants. Quality was a relative, contextualized notion rather than an absolute judgement. Their expressions of student quality revealed relationships of competitive interdependence, inflected along a hierarchical dominance, where universities depended on each other for the flow of student quality. This dependency was predetermined in our participants' perceptions by the traditional advantage of Oxford and Cambridge, followed by the attractiveness of universities in London, owing to their proximity to finance and culture. Brexit was feared to trigger a 'dash for quality' with students opting for a narrow set of selective universities that would leave many other institutions at risk of unsustainable entry requirements, thus threatening not only their academic standards but also cherished and marketable notions of quality.

Competitive alternatives to UK: The international higher education market

Prior to Brexit, the UK had assumed a position as the first-choice study destination for EU students (European Migration Network, 2019). It 'has historically been the single most popular destination [for EU students], ahead of Germany and the US' (UUKi and StudyPortals, 2022, p. 6). Brexit called that advantage into question. Post-Brexit, EU students would have to contend with visa restrictions, residency requirements and increased tuition fees. Participants had doubts about the UK's ability to maintain its attractiveness in the face of these new conditions, in the context also of the broader changing landscape for international higher education provision. They highlighted the Netherlands,

Germany and the Nordic countries as alternative attractive destinations for EU students due to the increased provision of study programmes in English in those countries and their good reputations for academic quality. Some participants singled out Germany as a competitor for international students beyond the EU, noting its large 'market share' of international higher education enrolments. Other participants stated that students willing and able to pay higher fees had global Anglophone alternatives such as Canada, Australia or the United States. Discussions often considered the potential advantages of both Northern Ireland and the Republic of Ireland, with assessments that variably favoured one or the other and often combined issues of cooperation and competition.

A report by UUKi and Studyportals (2022) validates the then speculative readings of future EU student study destinations and the anticipated shifts. In that report, Germany, the Netherlands and Canada are confirmed as increasingly attractive destinations for EU students. This report sounds the alarm for the UK higher education sector to act quickly if it wants to attract EU students back to UK universities in significant numbers. The report forecasts a further slowdown in EU student flows to the UK over the coming academic years based on the search behaviour data of prospective students. 'European students' attention has turned to courses in EU countries with large established higher education systems offering high numbers of courses in English, such as the Netherlands, Germany, Italy, Ireland and France', rather than Anglophone destinations such as the United States, Canada or Australia (UUKi & Studyportals, 2022, p. 3). However, Canada has seen a relative increase in EU student numbers since 2021. Correspondingly, the ICEF Monitor (2022) reports that

> Seven out of the top 10 rapidly-growing foreign student populations in Canada last year are European citizens. (. . .) France, Canada's third sending market after India and China, grew significantly in 2021 (up 46 per cent to 26,630), and 240 per cent more study visas were issued to German students in 2021 compared to the year before. (. . .) Data also shows that the number of students from smaller European markets for Canada – including Belgium, Austria, Bosnia, Denmark, Italy, and Spain – more than doubled between 2020 and 2021.

Many observers initially suggested that Canada was reaping the benefit of Brexit (*THE*, 6 April 2022). However, whether this trend will continue remains uncertain or even unlikely, as both Canada and Australia have implemented strict ceilings on international student numbers for 2024. Recent data shows that Canada's international study permit rates fell by 45 per cent in 2024, dropping to 280,000 from 515,880 in 2023 – a more dramatic decrease than initially

projected. This policy shift was primarily driven by concerns about the housing affordability crisis.

At the time of the fieldwork (2017–19), most participants anticipated correctly that a dominant strategy to remedy a shortage of EU students would be to 'double down' on international student recruitment. There was notable anxiety that because Brexit might be seen as a hostile message to all prospective international students, the enrolment of those students would be affected. As yet, there is no evidence that this has happened.

In 2021–22, as noted in Chapter 2, there were 663,355 non-EU fee-paying international students in the UK, 22.6 per cent of all students. There were 555,285 such students in England, constituting 23.7 per cent of all students. Figure 8.1 refers to England, where more than four-fifths of all UK students are enrolled, because there trends in the level of financial dependence can be tracked (Scotland does not charge domestic student fees).

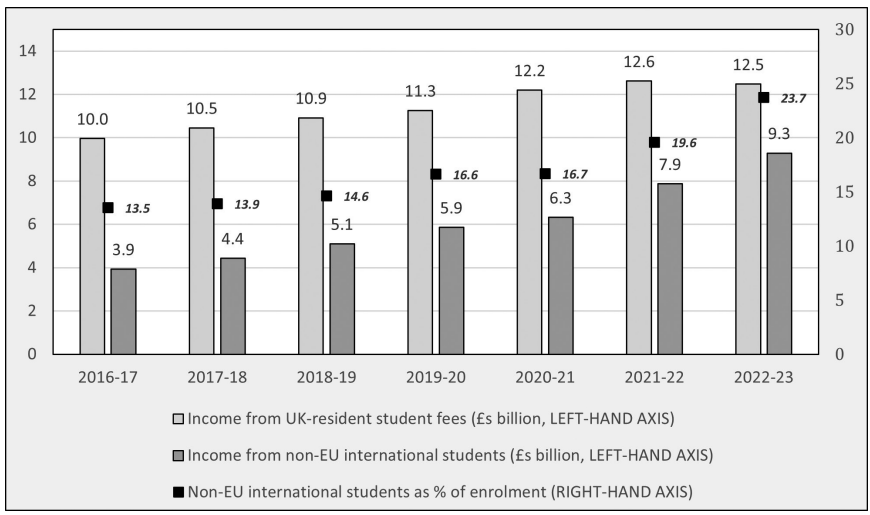

Figure 8.1 Income from non-EU international students compared to income from UK-resident student fees (left-hand axis), and proportion (per cent) of enrolled students that were non-EU international, higher education (right-hand axis), England, 2016–17 to 2022–23 (£s billion). *Source*: Authors, based on data from HESA (2024).

In 2022–23, non-EU student fees in England amounted to £9.294 billion, 21.1 per cent of the income of institutions in England. Whereas in 2016–17 non-EU international student income was 0.39 of income from domestic student fees, by 2022–23 that ratio was 0.74 (HESA, 2024). Yet the ratio in terms of student numbers in 2021–22 was only 0.26 (Figure 8.1). In financial terms, the tail was wagging the dog. The total number of international student visas is not open but

set by the Home Office. The growing dependence on international student fees has ramped up the competitive pressure between institutions, while the effect of Brexit has been to reduce the potential to secure income from other sources, including European students' tuition, EU structural funds and bank loans, and research funding through Horizon Europe where the UK is now an associate member with more limited grant potentials (see Chapter 3).

Doubts about the UK's dominance of English-Language higher education

The monopoly position of the English language as the global lingua franca of HE and science was a key subject of discussion for participants contemplating increased competition. They anticipated that the UK would face increasing competition for students as other nations, especially European countries, improve their ability to offer higher education studies in English with competitive fees and lower mobility constraints. Although most participants were confident that the UK's native English-speaking provision would remain a strong asset, they also acknowledged the growing popularity of English-language higher education across Europe. While this was not seen as an immediate threat to the UK's brand top position, the non-exclusivity of the English language was a concern. Participants considered this lack of exclusivity alongside the increasing fees and mobility constraints resulting from Brexit.

As discussed, the Netherlands and Scandinavian countries were commonly given as examples of alternative nations where HE was partly provided in English, mainly at the taught Masters level. Canada, Australia and the United States all presented as strong competitors because they were native English-speaking nations with mature, well-developed and quality higher education systems.

Subsequent developments

Fears of declining international student demand and recruitment post-Brexit were not validated in the early years after the interviews for this study. There was robust growth, with a surge in students from South Asia along with the maintenance of high numbers from China. Though the number of new EU students halved, the total proportion of institutional income that derived from international students climbed rapidly (see Chapter 2).

The number of international students in the UK continued to grow at the same time that there was substantial growth, both before and after the Covid-19 pandemic, in Australia and Canada (UNESCO, 2024), and international student numbers also returned to growth in the United States, mitigating fears of a zero-sum trade-off between the major English language providers. In addition,

competition for UK institutions from English-language programmes in Europe proved to be a modest issue, at least in the early years after Brexit. In both Denmark and the Netherlands, there was strong nativist opposition to English-language programmes, inhibiting that sector and leading to policy reductions in incoming international students in Denmark, as noted in Chapter 2.

However, in 2023–24, the number of full-fee international student applications to the UK began to trend downwards. This was not due to a fall in student demand per se, whether triggered by Brexit or any other factor, but to changes on the supply side; specifically, policy-instigated changes in the conditions governing student visas, including the denial of visas to the family members of all international students other than doctoral students (see Chapter 2). Those policy changes, which coincided with new restrictions on international student numbers in Canada and Australia, were presented in the UK as designed to reduce net immigration levels. Prior to the July 2024 election, polls demonstrated the continuing widespread view in the UK that immigration was too high. Cuts to international education were seen as a means of reducing total migration numbers.

That is, Brexit itself did not visibly deter international students, as many study participants had feared, but the same nativist UK politics that had triggered Brexit in 2016 led directly to the constraints placed on the number of international students in the UK in 2024.

Given the growing economic dependence of UK higher education institutions on international student fees, the reduction in international student applications placed many institutions, especially those positioned 'down the food chain', in a very difficult financial position. With the funding for both home country and international students constrained, and less funding from European funding sources for research compared to the pre-Brexit situation, most had few other levers to pull. At the time of writing in mid-2024, the new Labour government had not declared its policy intentions in relation to either the restrictions on international student visas imposed by the previous government or the base funding of institutions, and there was media speculation about university bankruptcies.

Compounding effects and misrecognized interdependencies: The role of EU doctoral students/early career researchers (ECRs)

In the interviews, the theme of competition for students sometimes invoked bitter language when participants predicted that competition for able students and academic and research standing would intensify. One reason why able students

are strongly valued at the institutional level is that these students supplement activities and thereby help institutions succeed in a range of competitive arenas such as research grants, prestigious awards, knowledge exchange and research impact. This highlights the compounding effects of Brexit in relation to the UK's broader attractiveness to EU students, researchers and academics; the often overlooked interdependencies between student applications, student selection, research culture, performance, quality and reputation.

Postgraduate and research students, and ECRs, play key roles in the efficiency and performance of higher education and research. These roles extend beyond individual research and expertise to broader impacts on the characteristics and assets of research ecosystems. Universities use both student selectivity and research performance to maximize their institutional prestige and enhance their positionality. Both strategies drive university status, which in turn allows universities to produce 'positional goods' for their graduates. These status goods are instrumental in helping graduates gain symbolic and material benefits, such as social prestige and higher income (Marginson, 2006).

The effects of Brexit on student numbers showed earlier in postgraduate research than in relation to EU students in first degrees in the UK. Between 2016–17 and 2020–21 there was a 21 per cent drop in EU PGR student numbers (UUKi, 2022). This number is expected to drop further as international tuition fees and visa requirements come into full effect from 2022 onwards (the two and a half-year lag in the availability of HESA data means that these figures were not known at the time of writing). ECR mobility to the UK from EU countries has also decreased, as analysis of HESA data for 2020–21 has shown (Locke and Marini, 2021). The *Times Higher Education* reports 'a definite trend for fewer younger academics to enter the system: the proportion of staff in their thirties from the EU has fallen for the fourth year in succession' (*THE*, 2022). This decrease in EU research students and ECR mobility is a significant constraint for the UK's higher education and research system, although its wider impact on the system is difficult to disentangle and it could be a decade before it is fully apparent.

Competition for quality and status

Competition in the context of universities is essentially about vying for social status (Marginson, 2004) or striving for quality (Musselin, 2018) which in terms of reputation for quality might be little different from social status. Although both status and quality are intangible and therefore symbolic in nature, they are

nonetheless intricately linked to existing and future resources, both human and financial, and they are increasingly regulated and calibrated by calculations. In the last two decades, higher education rankings and league tables have come to play a significant role in quantifying these immeasurable aspects, further entrenching the stratification of the higher education system. Drawing on Podolny's (1993) sociological analysis of status competition in economic markets, we can gain insights that also apply to competition within higher education: quality is difficult to assess due to its experiential or post-experiential nature, status serves as an indicator of quality and relationships with other universities can transfer status and signal quality.

For competition to arise, there must be a perception of a desirable but limited resource that multiple parties aspire to obtain. The gains for the winner can be either symbolic, material or psychological, or a combination of these. Arora-Jonsson et al. (2021, p. 1) define competition as 'a social construction that comprises four core elements: actors, their relationships, desire, and scarcity'. They assert that all four factors must co-occur for competition to emerge. In terms of actors and relationships, Brexit has altered the relationships between state actors, that is, the UK and the rest of Europe, as well as resetting the wider international relationships beyond Europe. This, in turn, has placed universities, as geopolitical actors, in a new macro-context, with different policy regulations (such as those governing visas and fees) as well as new quasi-market dynamics for attracting students and staff. Due to the interconnected local and global scales at which universities operate and because Brexit has prompted distinct university internationalization strategies, there are implications for their positioning within the national system. For many institutions, national positions have been destabilized and must be remade on the basis of the new rules. The modified and new interactions shape the changing allocation of resources, opportunities and rewards. Changes in actors' relationships at the macro-level in the competitive setting have implications for the flow of people and funding, especially when those changes affect factors that are known to be desirable and limited, such as quality and status.

By associating EU students with loosely defined notions of quality, and anticipating declining incoming numbers, two key conditions for actors to engage in competition emerge: desirability and scarcity. Quality is inherently desirable in the academic context, while the projected decline in EU student numbers post-Brexit signifies the perception of relative scarcity. The combination of these factors heightens the perceived value of EU students, potentially intensifying competition to attract them or aiming to replace them

with other students of equivalent merit, as the objectified framing of students as a unit of resource suggests.

This intensified competition for attracting EU students especially may not have materialized as anticipated or feared. Universities might have considered pursuing EU students as a futile endeavour in the short term, opting instead to allocate their resources to marketing efforts in other regions. This strategy could potentially yield better results, particularly in terms of enrolment numbers and associated revenue, especially when the majority of UK universities have been grappling with financial challenges and negative enrolment trends.

With the EU recruitment pool diminishing and the financial situation of the sector worsening, competition for students becomes primarily about quantity, leaving fewer institutions able to access the 'quality that we want'. Consequently, quality becomes a scarce commodity, automatically increasing the pressure to compete for fewer well-qualified students across various demographics.

Whenever faced with a shortage, competition necessarily becomes a game of winners and losers. Marginson (2004) discusses this competition among institutions to attract students, and competition among students to secure places in the best universities, as a 'status competition' (p. 186) or 'race for status'. Frølich and Stensaker (2010, p. 360) explain that higher education institutions

> compete for students, especially talented ones. Student recruitment is essential to boosting excellence and enhancing diversity. Students represent potential future researchers. Graduates are not only holders of society's diversified body of knowledge, they are ambassadors of their alma mater as well, playing a crucial role in shaping an HEI's reputation.

As we see it, the Brexit-generated uncertainty in the UK, and the prospect of discontinuing collaborations with EU partners, has unsettled 'nested competition' dynamics (Marginson, 2006) within the national, European and global higher education landscape. Through the lens of resource dependence theory (Pfeffer and Salancik, 1978), we can see how new barriers for collaboration with the EU and the disruption of established collaborative relationships and the subsequent struggle to maintain social capital in international partnerships have narrowed the pool of potential collaborators and intensified competition for increasingly scarce resources.

By gravely reducing the strategic resources and opportunities available to institutions in the UK, Brexit has tilted an already tense and stretched UK higher

education system towards an outcome many participants in this study deplored – a race to the bottom, an ever-intensifying struggle over an ever-diminishing totality of resources, status, prospects and market shares. This threatens to reduce the status of UK higher education within global knowledge networks. In this race to the bottom, institutional theory (DiMaggio and Powell, 1983) suggests all parties lose as they struggle to maintain legitimacy with diminishing resources: the only questions are how much they lose and whether they go under altogether.

Through a political economy framework (Brown and Carasso, 2013), we can understand how bankruptcy, once unthinkable for public institutions that service large populations and sustain cities, comes onto the agenda as market imperatives overwhelm public good functions. The once unthinkable becomes conceivable and perhaps even probable. What emerges is 'compound competition' where multiple competitive pressures interact and intensify each other. Surviving rather than thriving becomes the name of the game, marking a profound shift in how UK higher education institutions must navigate an increasingly complex and challenging competitive environment.

Conclusions: Brexit's unravelling impact on higher education and research: A continuing story

Brexit's impact on universities in a changing global order

In 2017–19, the participants in this study saw Brexit as presenting a number of threats to the UK higher education sector. They particularly referred to its potential to disrupt or limit the supply of EU students and staff, with direct consequences for universities' quality and reputational capital in a global context. This was expected to make institutions more vulnerable in an increasingly competitive environment in which the nation-state provided less support than it once did, prior to the marketization of higher education in the UK. Nevertheless, participants also pointed to the possible emergence of new opportunities, such as more lucrative international student recruitment, though it was then difficult to assess the extent to which such possibilities could bring significant benefits across the sector. Participants predicted that traditional advantages of some institutions would strengthen and Brexit was likely to make the pre-existing disparities between institutions more significant and even further entrenched.

These anticipations have proven to be generally correct. They were in part educated projections based on a combination of factors: a sound understanding of the sector's trajectory and direction, the evolving political landscape, awareness of other institutions' strategic approaches and institutions' own responses and intended actions. International student recruitment trended upwards dramatically, masking the direct effects of reductions in EU student numbers except in particular institutions and programmes where the dependence on EU students paying home country fees had been especially high.

Of course, not everything could be predicted, as the future is always inherently uncertain. Matters in higher education have panned out worse than the interviewees could have expected. This is because of the way the negative effects of Brexit in higher education outlined in Chapter 3, most of which were anticipated by the participants, have interacted and compounded with an increasingly difficult economic, political and policy context – one marked by stagnant economic growth undermined by the weakening of trade in Europe; continued austerity policies; the near collapse of local government and the universal public health system; severe problems in the privatized transport, energy and water sectors; the challenge of a global pandemic; inflation; an increasingly regressive housing market; all combining into severe downward pressures on the living standards of many – not to mention reduced government support for higher education despite continuing social demand; the near collapse of the 2012 funding system; the continued undermining of social consensus and inclusion by burgeoning nativist agitation; and the collapse of UK politics into culture wars that replicate the divisions entrenched by the 2016 referendum.

In short, matters have worsened since the interviews. Nevertheless, it is important to recognize that many of these problems are Brexit-related, either catalysed and exacerbated by Brexit or fuelling its emergence in the first place.

Brexit was and is a critical juncture in the history of the UK. The UK decided in 2016 to leave the European Union by a small margin of 51.9 per cent to 48.1 per cent. It is fair to say that the decision, departing as it did from the status quo, was more surprising than otherwise. Eurosceptic UK policy elites and think tanks, allied with hyperglobalist neoliberalism and nativist economic nationalism (Finlayson, 2016; Rosamond, 2018; Cornelissen, 2022), drove the idea of Brexit, although advocates of Brexit lacked a well-thought-out plan for national development and economic growth after Brexit. Neither was there a robust assessment of state capabilities for disentangling the UK from several decades of regulatory and economic European integration. Glencross and McCourt (2018, p. 853) assert that the 'necessary administrative resources,

public expenditure, and elite consensus' for realizing the envisioned foreign policy stance underpinning Brexit have been inadequate.

Negotiations over Brexit continued for an extended period of time, eventually resulting in the Withdrawal Agreement taking effect on 1 February 2020. However, the implementation of the agreement posed a challenge in the aftermath of the UK's departure from the EU. This entire policy process was associated with much uncertainty. It was unclear how much of the UK's links into Europe would continue in relation to research and Erasmus. This made it difficult for universities and other sectors that did not stand to benefit from Brexit.

Nominally, higher education institutions were compelled to put in place, as soon as and as effectively as possible, mitigation policies and alternative strategies for medium-term survival and development. However, the pervasive uncertainty surrounding Brexit significantly impacted institutional planning and strategizing. Many processes slowed down, stalled or were hindered in the face of this unprecedented high-level political 'divorce', all while UK-EU relationships remained in a state of constant flux. The lack of established international legal procedures for such a separation deepened and prolonged these challenges. Moreover, the acrimonious nature of UK-EU relations during this period, coupled with a broader 'status anxiety' (Glencross and McCourt, p. 583) regarding the UK's place in the international system, further complicated decision-making for higher education institutions.

Brexit, beyond its direct UK-EU ramifications, reignited a deep-seated status anxiety about national standing and global influence that has long permeated British foreign policy. In this context, Glencross and McCourt (2018, p. 583) aptly describe the situation as involving 'billiard-ball geopolitical considerations about Brexit's impact on alliances, as well as on what the bargaining logic of how to leave the EU implies for British influence in the world'. This game metaphor conveys the complex interplay of changing diplomatic relationships and the ripple effects of Brexit on the UK's global standing, all of which were crucially important to universities as internationalized and world-class institutions. Brexit not only was redrawing Britain's economic and civil society boundaries, but was 'create[ing] uncertainty about international cooperation and global order' (Adler-Nissen et al., 2017, p. 579) more broadly.

University actors recognized that Brexit was disrupting established diplomatic and international relations. They anticipated increased challenges in academic mobility, exchanges and research collaboration, but the all-important detail, which shaped the practical options, remained frustratingly undefined. This

delayed the launching of new proactive strategies and installed a 'wait and see and muddle through' environment that has further postponed the evolution of a positive post-Brexit era. How universities will chart a path post-Brexit to maintain the productive intersection between openness, excellence and world-standing was, and still is, a perplexing conundrum. For our study participants, openness and diversity, when combined with international standing, serve as a signifier of quality and excellence in higher education. Despite the growing weight of nativist pressures in the Western world and the disruptive effects of geopolitics, that same combination of openness, international connectivity and academic/research standing still serves as the worldwide benchmark in higher education.

Global Britain or Insular England?

In terms of the UK's trajectory as a country, Brexit was a monumental error of historic proportions, yet its deepest impact is hidden. That is, the long-term effects in narrowing the perception and blinkering the imagination of UK citizens and institutions, despite the fact that they are located in an increasingly interdependent world in which every country is increasingly visible to every other country.

While the impact of Brexit on higher education has been obfuscated by the multi-crisis that has engulfed both the country and higher education, an abiding issue is that of the 'insularity' mentioned by many study participants. The objective material conditions for insularity are the lack of financial support from international organizations after the severance from the EU, the attenuation of research networks in Europe, the reduced circulation of academic talent and the incapacity to incorporate external views that comes from the severance of practical links, including the many UK leadership roles in Europe. As noted, Brexit has impacted on existing multilateral and European-focused collaborations, with the loss of access to the Erasmus+ programme being the most obvious example.

In early 2024, the then Conservative government rebuffed EU overtures to put a new two-way mobility scheme in place. The Labour government, newly elected in July 2024, was quick to repeat the rebuff, to the surprise of many in Europe who saw Brexit as a Tory-specific event. UK participation in Horizon Europe was restored in an agreement signed in 2023, but as noted in Chapter 3, participation as a non-member weakens the scope to exercise research leadership and attract talent and eliminates the potential for drawing net financial benefits

from Horizon on the basis of UK scientific merit. The six-year period of uncertainty regarding UK participation led to a significant reduction in active grant collaborations and caused research networks to evolve or, in some cases, dissolve. During this hiatus, other countries seized the opportunity to enhance their positioning and increase their levels of activity and funding share within the programme.

Meanwhile, the post-Brexit era has not been associated with a marked increase in productive agreements with non-European governments and universities nor marked growth in research collaborations outside Europe. In net terms, Brexit has led to a weaker global presence overall.

Brexit supporters argued that Brexit would have the opposite effect. Far from fostering parochialism in a shrinking Britain, it would free the country to take (return to?) a great global role. They argued that the country had been too narrowly focused on the EU as a primary partner. Brexit would grant the UK the authority to expand its international presence, unencumbered by its subordination to the European Commission and its trade rules. It would allow the UK to independently choose which nations to form new connections and partnerships with, as a sovereign nation. However, the discursive construction of Brexit Britain as a Global Britain during Theresa May's premiership (2016–19), the one coherent expression of a post-Brexit imaginary that nevertheless was ill-defined, has yet to be accomplished as an effective policy vision and, even more so, as a policy outcome.

Importantly, Britain's global power pretentions depend in part on how these are perceived from the outside. The options are neither boundless nor inexhaustible. According to Adler-Nissen et al. (2017, p. 578), these options build on three different and divergent sets of geopolitical relations: multilateralism (liberal world order, security communities), post-imperialism (Commonwealth, Anglosphere) and bilateralism (special relationships and partnerships). Universities' internationalization approaches, collaborations and partnerships post-Brexit map onto these three broader types of international relations. In the case of UK universities post-Brexit, with the UK having repudiated EU multilateralism, that left the formation of particular 'special relationships' with countries or universities, or an increased presence in Commonwealth networks and the Anglosphere in hopes of forming new research networks, programmes and funding opportunities. It became clear in the years after 2016 that there could be only limited economic and educational gains in forging closer ties with the Commonwealth. India, in particular, would not welcome the resumption of a relationship highly advantageous to the UK like the former colonial tie; nor

was there likely to be mileage in the creation of a Commonwealth free-trade zone, returning to the pre-Second World War regime of imperial preference. The former Imperial countries had other options.

Our research indicated that the Brexiters' notion of a Global Britain free to do more on the world stage in higher education was met with scepticism. The 'global' idea had some appeal to university people for whom internationalism was a central principle, but what was the pathway to the new era? Far from seeing Brexit as a golden opportunity to broaden national horizons, participants were deeply concerned that Brexit might give rise to, or at least appear to give rise to, an era of insularity, damaging the UK's standing and curtailing its ability to develop strong collaborative ties with its geographically closest partners, and at worst, making the UK appear hostile or xenophobic to potential collaborators and students. This could lead to the UK losing its status as a research and higher education leader in the global landscape. Disconnecting the UK from the mainland of Europe, Brexit could create a sense of remoteness and going it alone, a more closed-off and self-focused system, rather than a nation that had restored control of its own self-determination.

In a discourse analysis of government documents referencing Global Britain following Brexit, Parnell (2022) observes a deterioration of positive sentiment around the future UK-EU relationship under the previous Conservative government. The increasingly adversarial stance adopted by the government of the time not only made the prospect of strengthening UK-EU partnerships improbable but also came to undermine the Global Britain narrative, threatening to position Britain as an international 'outsider' rather than the global player the government purported to envision.

It is crucial that the potential risk of insularity is monitored by government and national organizations such as UUK, which carry special responsibilities for the sector as a whole. The UK government, its main national agency such as the research councils and the individual institutions need to work deliberately on new ways of bringing in external lenses.

The future

Contemporary higher education systems are more politicized than those of the past. This is partly the consequence of the growth of participation in tertiary education to half or more of the age group in all high-income and many other countries (Cantwell et al., 2018). Correspondingly, the sector cannot escape

engagement in major policy debates and political crises, and Brexit has been a primary example of both. Further, Brexit particularly affects higher education because the sector is highly internationalized and prior to the referendum was also highly Europeanized. Along with the finance sector in the City of London, it was one of the two UK sectors that was outstandingly successful in leveraging an intensively networked leadership role in Europe as the basis of its global role and a significant source of the national and local resources employed across the full range of its activities.

Not all has been lost or transformed by Brexit. UK universities continue to be among the most globally interconnected and outward-looking sectors in the country. Despite its post-Brexit problems, the sector remains central to British society, is led by capable professionals with expertise built up through generations of high performance and has a major presence in global research and international education. Its leading institutions continue to be household names worldwide, and all of its universities carry international reputations for high academic quality. Post-Brexit strategies and actions will need to find new ways of forging and sustaining the open connections and collaborations on the regional and world scale that are central to the flourishing of the institutions. They will need to emphasize collaboration even more than competition if they are to re-engage effectively.

This means moving decisively beyond isolationism and self-centredness, and finding ways back into higher education and research in Europe, which continues to go from strength to strength. The sector and its institutions need to consider how their past internationalization could have been better. It should have been less self-serving and more focused on broadly distributing the public benefits. Higher education's internationalization has been largely an elite affair and this makes it vulnerable in a highly stratified society. Here we agree with the conclusions reached in the other book on UK higher education and Brexit, Mike Finn's *British universities in the Brexit moment* (2018). Finn says that the universities must address the 'gulf' between them and much of the UK. He states:

> In the immediate future, the tasks remain two-fold. First, to rebuild trust between academic citizens, their institutions and the broader public they serve. Finally, to preserve as much as possible of the European and international dimension of higher education in the vein of a genuine republic of science; otherwise the Brexit moment will not merely impoverish the culture of Britain's universities, but the culture and democracy of Britain as a whole. (Finn, 2018, p. 146)

The task is to more deeply entrench cross-border higher education in British society by drawing cities and regions closely into the international agenda. That way, not only will those international activities be more effectively legitimated, but higher education can make an important contribution to counteracting a conception of Global Britain rooted in its colonial past, breaking down the isolationist parochialism that made the disaster of Brexit possible, and fostering the open and constructive mindset that can reopen a more European future.

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Index