

European demand for UK transnational education

Opportunities
and challenges

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Executive Summary

This research shows that while the demand for UK transnational education (TNE) in Europe is buoyant, the supply side is facing systemic challenges.

On the demand side

- There is continued student interest in UK TNE programmes from the studied European Union (EU) countries, which included Cyprus, Germany, Greece, Malta, Portugal and Spain.
- The profile of the surveyed 352 TNE students shows a high level of intra-European mobility. 45 per cent of the surveyed TNE students were international, mainly nationals of another EU country. The countries with the highest proportions of global student mobility in TNE were Germany, Italy, and France.
- The high proportion of international students on TNE programmes indicates that these programmes are likely to have a higher share of international students compared with local programmes, including those taught in the UK. This finding needs to be treated with caution, given the small survey sample. More research is needed to establish its validity.
- TNE students bring a significant language capital, both to the host institution and the location of delivery. In addition to their native language, 37 per cent of the surveyed TNE students speak three or more languages; 32 per cent speak two foreign languages, and 26 per cent speak one foreign language.
- Almost a fifth of the students have a mobility component as part of their TNE programme. This mainly includes study in the UK, which typically takes place in the final year of the students' programme. Half of the students with a mobility component were studying online, and the other half with local partners and other types of TNE.

TNE programmes have a significant impact on students' professional lives

- Programmes had a high impact on enhancing students' skill sets and deepening their knowledge and expertise (87 per cent of students agreed with both propositions).
- 56 per cent reported that their course had a positive impact on their professional networks.
- The free text feedback from students shows a high level of appreciation of these programmes – for many, TNE was the only means to acquire a higher education degree.
- Over three-quarters of the students (78 per cent) said that the degree was recognised by the country they intended to work in; 12 per cent said that there were some issues, but they didn't expect them to cause significant difficulty; and 6 per cent said their degree was not recognised.
- Predominant among students' intentions upon completion of their TNE degree was further study, which was the plan for 37 per cent of respondents, followed by students seeking employment, 26 per cent of students. 11 per cent intended to 'take some time off', and 7 per cent mentioned they would take on responsibilities as a carer.

On the supply side, there are significant systemic challenges

Most are related to difficulties experienced by UK higher education institutions (HEIs) when, after the end of the transition period on 31 December 2020, they started to operate as non-EU entities. Most of the challenges listed below relate to instances where the students study in the UK as part of their degree. Similar challenges were reported by their EU partners:

- Visa and immigration barriers are widely seen as the primary challenge. For example, 64 per cent of Spanish universities highlighted visas as the main difficulty in a survey for the Spanish Autonomous Service for the Internationalisation of Education with 28 HEIs. These students can no longer travel seamlessly for study, including those on top-up degrees. The latter are students who started their TNE programme in Spain (in this instance), and are completing the final year of the programme with the relevant UK university. Visas for internships are a particular challenge. HEIs are navigating complex work regulations for their UK staff teaching TNE courses in European countries.
- Losing access to EU higher education infrastructures (e.g. Erasmus and Horizon) has negatively impacted partnerships. Erasmus no longer drives mobility between the UK and Europe. This has mainly impacted TNE programmes that had student mobility to the UK as part of the arrangement. Also, UK HEIs are no longer covered by its framework agreements, which means separate agreements with partners – and increased management costs to operate these.
- Affordability is a significant challenge. This particularly affects students who are studying in the UK as part of their programme. Since EU students are now classified as ‘international’, this means more complex negotiations on tuition fees between UK HEIs and their partners. Erasmus no longer funds the mobility components of programmes.
- Some EU HEIs have significant knowledge and information gaps, not only about regulations, processes, and pathways, but also about the values, drivers and strengths of UK HEIs, as well as their continued interest in collaboration in Europe.
- This is often exacerbated by political messaging from the UK, resulting in negative perceptions among European partners. UK HEIs currently spend time ‘firefighting’, counteracting messages from the UK that are potentially damaging to essential relationships with their European partners.

The research identifies long-term opportunities

- With Brexit now realised, European countries constitute an international student market with more than 18 million students.
- EU and European Economic Area (EAA) countries are entering a mature state of transnational education, shifting from a one-directional, mainly independent model of TNE partnerships (e.g., franchise, validation) to multidirectional collaboration (e.g., double, joint or dual degrees, top-up degrees, split PhDs). UK HEIs are at the top of European universities’ preference list for establishing these types of multidirectional partnerships.

There is a need for an EU-wide TNE strategy that

1. Establishes a strategic shift in the way that UK HEIs and policymakers approach EU and EEA markets.
2. Has a coherent and comprehensive action plan that focuses on addressing systemic challenges as a matter of urgency, as well as building firm foundations to seize the longer-term opportunities identified.
3. Is a collaboration between policymakers, national agencies and HEIs, each with defined roles and responsibilities.
4. As an immediate priority, addresses challenges currently threatening collaboration between UK HEIs and their European partners. Only by doing this can the UK secure a level of engagement in the EU from which future growth can be built. The research recommends urgent action by policymakers, national agencies supporting UK-EU TNE partnerships and HEIs, as follows:

a. Policy makers should pursue:

- i. A bilateral framework agreement for cooperation to replace EU frameworks, agreeing on mutual recognition degrees, qualifications and credits.
- ii. Funding for student and staff mobility and exchanges, e.g., by pursuing reciprocal agreements for Turing.
- iii. Consideration of how to align UK interests with those of the European partner. Mutual benefit unlocks many more opportunities for UK TNE than one-party benefit.

“ Europe constitutes an international student market in excess of 18 million students. That market needs to be targeted with the same effort and resources as other major international markets for UK HE. ”

b. National agencies should:

- i. Make much greater use of market intelligence to underpin strategy and targeting of resources.
- ii. Ensure coherent UK brand messaging, communications and promotion.
- iii. Build influence with decision-makers in European countries.
- iv. Facilitate and support networks.

c. Higher Education Institutions should:

- i. Consider the development of Europe strategy with a dedicated delivery team.
- ii. Target influence and network-building with the same effort and resources as in major non-EU international markets.
- iii. Strategic leveraging of research and other networks to compete successfully in a maturing TNE market.
- iv. Proactively build networks between the UK and European HEIs. This is critically important after Brexit – there is clear evidence that connections have already been lost. If this continues, the UK's networks in Europe will be severely diminished and challenging to restore.

Rationale

1

The British Council commissioned this study to update the survey findings with TNE students as presented in the ‘Local impact of transnational education: A pilot study in selected European countries’ from 2021¹. This research focused on six EU countries: Cyprus, Germany, Greece, Malta, Portugal and Spain.

In addition to the demand for UK TNE, the research also explored some of the opportunities and challenges for UK HEIs delivering TNE programmes in Europe.

¹ <https://www.britishcouncil.org/education/he-science/knowledge-centre/transnational-education/local-impact-TNE-Europe>.

Research aims and methodology

2

2.1 Research aims and objectives

The current study had a twofold objective:

1. To study the demand for UK TNE in Europe and build a profile of the European TNE student. More specifically, the study attempted to understand the following:

- The impact of TNE programmes on students' employment prospects.
- Whether the TNE course had any impact on students' engagement with their local community.
- Students' intentions upon the completion of the TNE course.

This section of the study attempted to reach students in Cyprus, Germany, Greece, Malta, Portugal and Spain.

2. To explore challenges and opportunities in the operating environment for UK TNE providers in Europe.

This section of the study involved focus groups with UK and EU HEIs, and is complemented by two case studies on TNE in Spain and Greece.

2.2 Methodology

The research took place between March and June 2022. The study used qualitative and quantitative data-collection techniques.

An online survey was administered to students enrolled on UK TNE courses. The survey was sent to TNE students, focusing on those in Cyprus, Germany, Greece, Malta, Portugal and Spain. There were 30 questions, and the survey yielded 408 responses; of those, 352 answers were analysable. 70 per cent of the respondents were online students. While online study was the main type of UK TNE in Europe in 2020-21, it accounted for 40 per cent of the overall TNE delivery. Accordingly, the online survey respondents are overrepresented in this study.

In addition, an open call was issued to UK HEIs and agencies active in TNE in the selected European countries, inviting them to participate in a focus group. Seven institutions and organisations from the UK and Spain joined the focus group.

European demand for UK TNE

3

This section presents the survey findings from students on TNE courses in selected European countries. While the focus was on the six countries shortlisted by the British Council, students engaged in online education from a broader range of countries responded.

3.1 The profile of the TNE students in Europe

The most significant number of TNE students were studying in Germany and Greece (16 per cent each), followed by Spain and Malta (9 per cent each). Collectively, these four countries accounted for half of the respondents.

Over half of the students (55 per cent) were of the same nationality as the country of study, while the remaining 45 per cent had a different nationality. This showed a significantly higher proportion of international students on UK TNE courses in Europe compared with the previous British Council study from 2020, when the ratio of international students was found to be 35 per cent.

Figure 1: Country of the TNE programme
(n = 352 respondents)

Which is the country you are currently studying in?

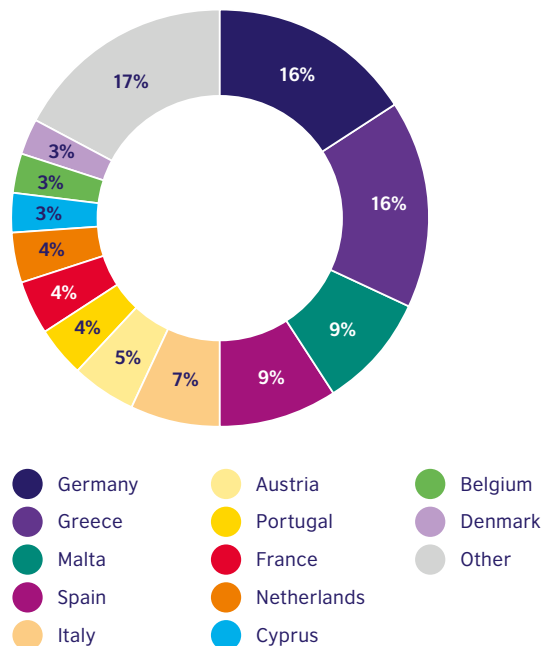


Table 1: Shows the countries with the highest proportion of international students on the TNE programmes.

Country	The proportion of international students on UK TNE courses in Europe 2021-22 academic year
Germany	17%
Portugal	10%
Malta	10%
Austria	8%
Spain	7%
France	6%

The countries that were most popular with international students were slightly different from those with the highest numbers of learners.

The 45 per cent of international TNE learners indicates that these programmes are likely to have a greater proportion of international students than many other local programmes. With the exception of Luxembourg, the UK has the highest proportion of international learners in the EU. International students in the UK accounted for 22 per cent of higher education enrolments in 2020². International students accounted for 7 per cent of total tertiary enrolments across the countries of the Organisation for Economic Co-Operation and Development (OECD) in 2020 (OECD 2022)³. Most of the TNE students are at the undergraduate level, where the proportion of international learners is the lowest (5 per cent on average in OECD).

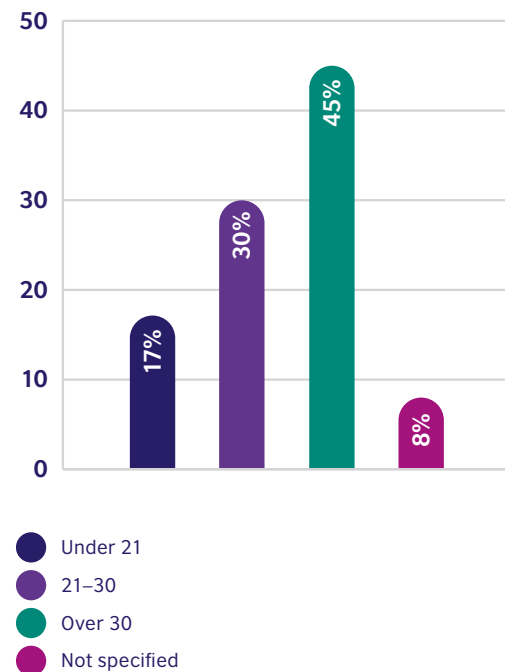
While a more extensive student survey is required to test whether TNE degrees are a strong driver for European students to study abroad, it is evident that they attract many international students. Another possible explanation for the high proportion of international students may be related to the EU students' fee status change after Brexit. A UK degree delivered in another EU country may be more attractive and affordable.

The high proportion of international students on TNE programmes indicates that these programmes are likely to be more international in terms of student demand than many local programmes.

Almost half of the respondents were over 30 years old (45 per cent of the sample). Under a third (30 per cent) were between 21 and 30. Students under 21 accounted for 17 per cent. An estimated 46 per cent of the respondents to the survey were female and 54 per cent were male.

Figure 2: Students' ages
(n = 352 respondents)

How old are you?



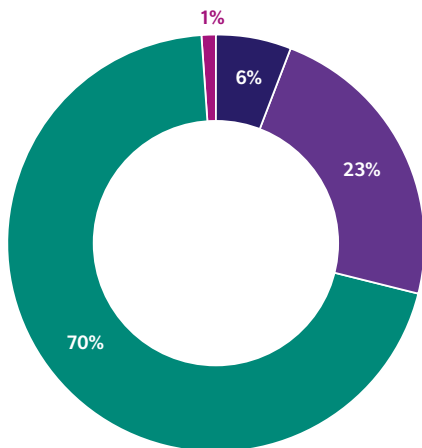
Most students were studying online or distance learning courses – they accounted for 70 per cent of the learners. The next largest group, accounting for 23 per cent, was studying at a local partner of a UK university, followed by 6 per cent who were studying at the branch campus of a UK university.

² <https://www.hesa.ac.uk/data-and-analysis/students/where-from>.

³ https://www.oecd-ilibrary.org/sites/3197152b-en/1/3/3/6/index.html?itemId=/content/publication/3197152b-en&csp_=7702d7a2844b0c49180e6b095bf85459&itemIGO=oecd&itemContentType=book.

Figure 3: Type of TNE programme
(n = 305 respondents)

What is the delivery method for your current course?



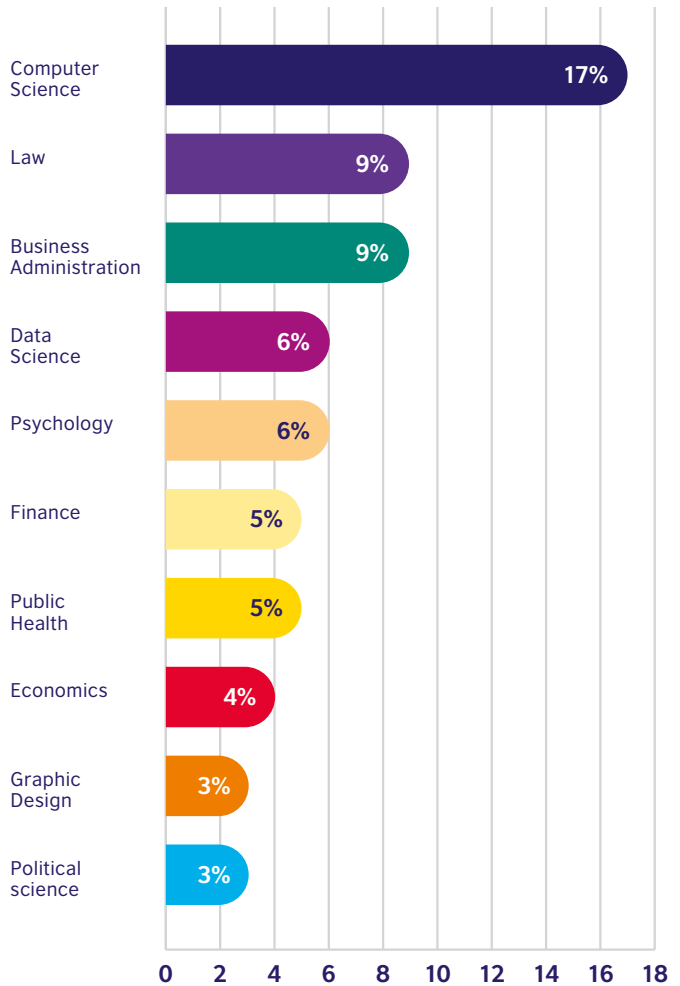
- Campus of a UK university
- Local partner of UK university
- Online or distance learning
- Other

Computer science was the most common subject for respondents, attracting 17 per cent of the students. The second most popular subjects were law and business administration, with 9 per cent each. Data science ranked fourth and attracted 6 per cent of the students.

Figure 4 shows the most popular subjects with TNE students in Europe.

Figure 4: Top 10 most popular subjects of study for TNE students
(n = 305 respondents)

What is the main subject of your study?

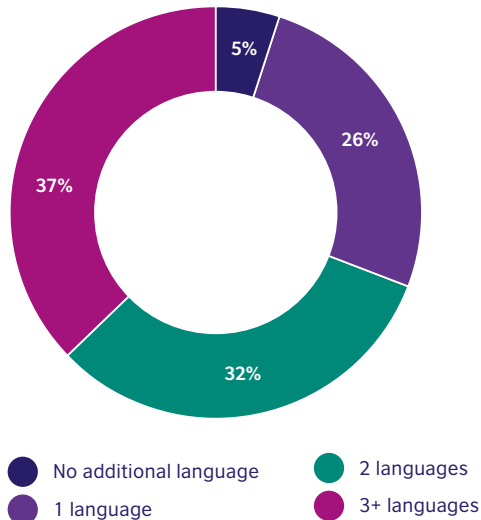


Almost half of the students (49 per cent) lived independently, followed by those living with their parents (18 per cent).

Most students were enrolled on undergraduate programmes (57 per cent), followed by 38 per cent in postgraduate courses. A small proportion, 4 per cent, were studying professional qualifications.

Figure 5: Number of spoken foreign languages
(n = 323 respondents)

Number of languages spoken in addition to mother tongue



This study agrees with earlier research and finds that TNE students bring substantial language capital to their institution and the location of their TNE programme.

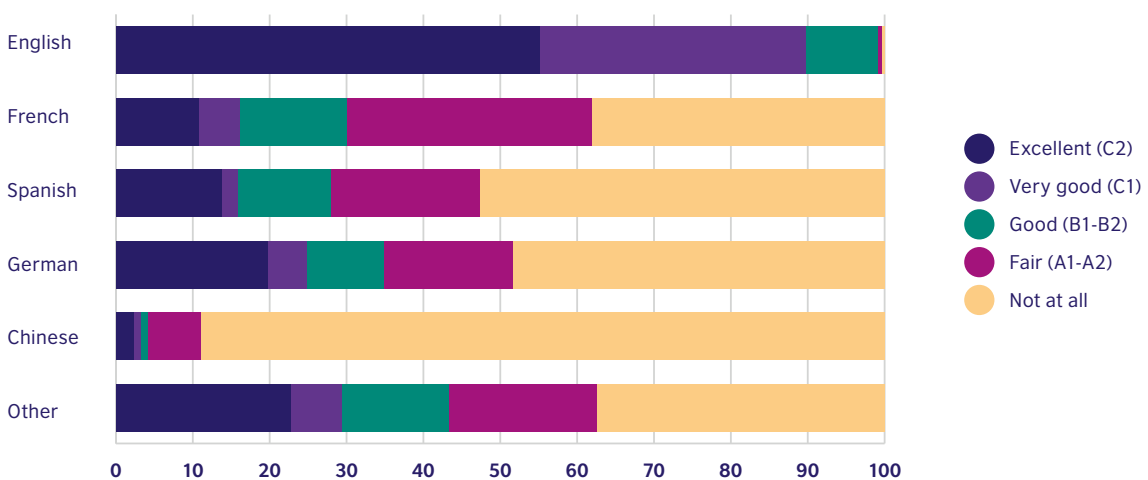
In addition to their mother tongue, 37 per cent of the students speak three or more languages, 32 per cent speak two languages, and 26 per cent speak one foreign language.

All students speak English and, of these, 90 per cent specified that their English was either 'excellent' or 'very good'. This compares with 16 per cent for French and Spanish, 25 per cent for German and 3 per cent for Chinese. For other languages in general, 29 per cent were either 'excellent' or 'very good'. When respondents were asked to list languages that they were at least 'Fair' at, these included Italian, Dutch, Arabic, Greek and Japanese.

In addition, almost a fifth of the students (19 per cent) had participated in international student mobility as part of their course. Most of the students were based in Portugal (19 per cent), Germany (14 per cent) and Spain (11 per cent). Half were studying online, and the other half were on courses delivered by a local partner HEI or other modes of delivery.

Figure 6: Foreign language proficiency
(n = 323 respondents)

In addition to your mother tongue, what other languages can you speak?

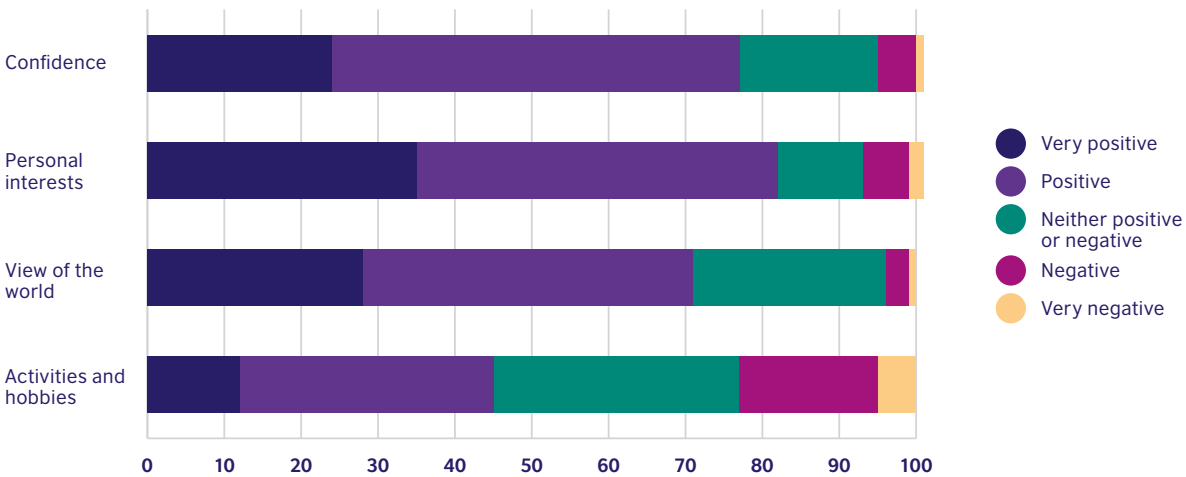


3.2 Impact of the TNE programme

3.2.1 Impact of the TNE programme on students' personal life

Figure 7: Impact of TNE on students' personal life (n = 352 respondents)

How would you rate the impact of your course on your personal life?

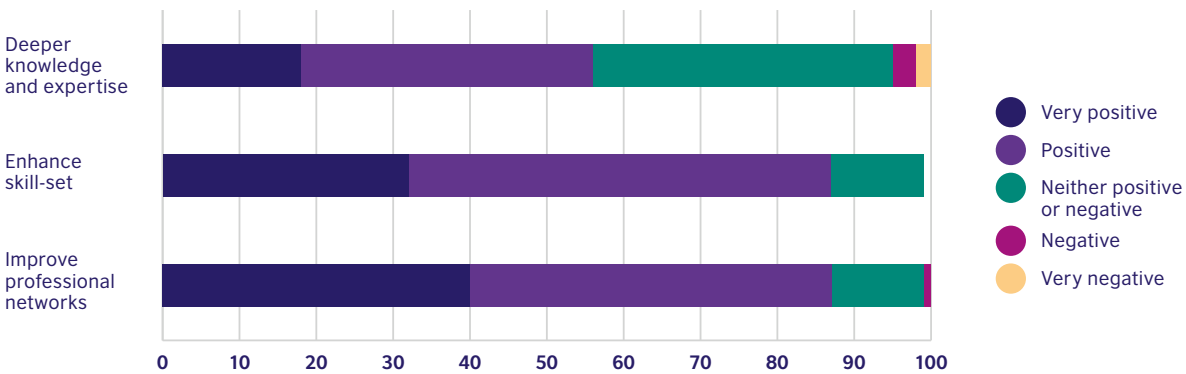


Over three-quarters (76 per cent) of the surveyed TNE students rated their course as having a very positive or positive impact on their confidence. 81 per cent thought it had been positive for their personal interests, 71 per cent said it had been positive for their view of the world, and 45 per cent said it was favourable for their activities and hobbies. The latter was also an area where 23 per cent of the students reported negative impacts – presumably, reflecting that their studies reduced the time available for hobbies and leisure activities.

3.2.2 Impact of the TNE programme on students' professional life

Figure 8: Impact of TNE on students' professional life and networking (n = 352 respondents)

How would you rate the impact of the course on your professional life?

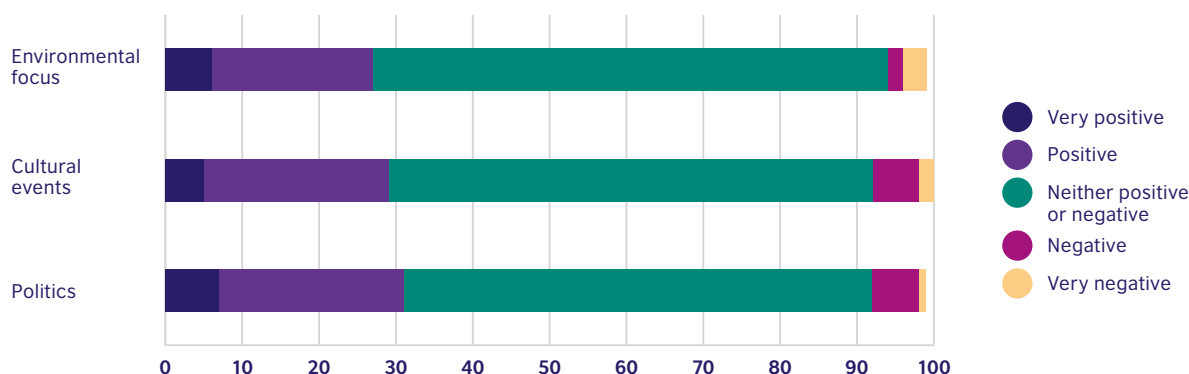


56 per cent of TNE students reported that their course positively impacted their professional networks. Higher impacts were reported on enhancing their skill sets and deepening their knowledge and expertise (87 per cent each).

3.2.3 Impact of TNE on students' public life

Figure 9: Impact on public life
(n = 352 respondents)

How would you rate the impact of your course on your public life?



Compared to the impact on professional life, TNE studies had less impact on students' public life. Just under a third of the students thought their TNE course gave them an environmental focus (31 per cent). This may reflect the lower carbon footprint associated with an international degree delivered in the students' place of domicile.

27 per cent of respondents said that their course positively impacted their engagement with politics and 29 per cent of respondents said it was positive for cultural events.

22 per cent of respondents reported that their TNE study impacted how they engage with their local community. When asked to expand on this, the respondents used the free text facility in the survey to mention the following:

- Improved skills for work
- Improved awareness of politics
- Relationships with employers, colleagues, friends and family
- Better understanding of communities
- Expertise development
- Broader world view.

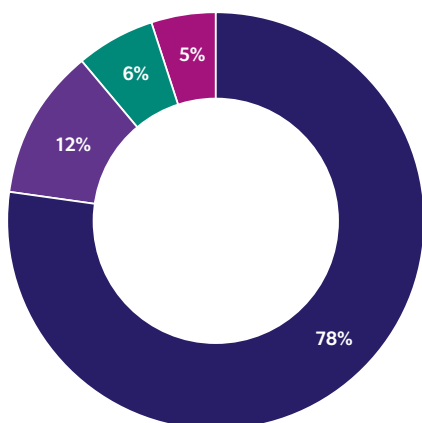
“ Maybe one of the most impactful things in my life. ”

3.2.4 International recognition of TNE degrees

Over three-quarters of the students (78 per cent) said that their degree was recognised by the country they intended to work in, and a further 12 per cent said that there were some issues, but they didn't expect them to cause significant difficulty. 6 per cent said their degree was not recognised. The open text entries to the survey suggest students are aware of the benefits double degrees bring, and were surprised to find recognition issues. An area students admitted they had recently been made aware of was recognition issues in some of the regulated professions. A few students intended to use their qualifications outside the country of study and were hopeful they would not face recognition issues.

Figure 10: Recognition of UK TNE degrees
(n = 352 respondents)

Is the degree you are currently studying for, recognised in the country you intend to work?



- Yes
- There are some issues
- No
- Other

3.2.5 Other impacts

Seventeen per cent of respondents also thought their course impacted other areas of their life. Some of the areas they specified include:

- A strengthened connection with their family
- An impact on their finances
- Their ability to work
- Supported their career
- Reduction in free time
- Challenges in their work-life-study balance.

Students were also asked why they had chosen to study for a UK higher education course offered in their country (rather than the UK). 237 students answered this question. The most frequently mentioned areas were as follows:

- 25 respondents mentioned the reputation of the course or university (11 per cent).
- The course's appropriateness to their career plans was mentioned by 12 respondents (5 per cent).
- The lower costs associated with this mode of the study were mentioned by seven respondents (3 per cent).
- Increased career prospects were mentioned by five respondents (2 per cent),
- Five respondents mentioned time and flexibility of the study methods (2 per cent).

3.2.6 Intentions after graduation

Respondents were asked what they intended to do six months after completing their course. The most popular response was further study, which was the plan for 37 per cent of respondents. The second most popular was seeking employment, for 26 per cent of students, followed by 'Take some time off' for 11 per cent, and 7 per cent who mentioned they would take on responsibilities as a carer.

Of those who responded 'Other', the following responses were given:

- 23 respondents were already working.
- Six respondents didn't have any plans.

Figure 11: Plans upon completion
(n=352 respondents)

What are your intentions within the next 6 months upon completion of your TNE degree?



The 92 people who said they intended to seek employment were asked where they intended to seek it. They provided the following responses:

- 40 per cent said they would pursue employment in their home country.
- 26 per cent said it would be in their country of study.
- Just over a third (34 per cent) of the students intended to work in a country that was neither their home country nor their country of study.

Most students had no fixed plans, given the wide recognition of their UK degree. The countries that received the most mentions were the USA (four students), the UK (four students), Switzerland and Italy (three students each).

Of the students with further study intentions (37 per cent of all students):

- 38 per cent intended to study in their home country.
- 35 per cent intended to do so in the country of study.
- 27 per cent said they intended to study in another country.

Students used the opportunity to share feedback on their TNE experiences; there were 91 open-text comments on impact. These included the following:

‘Boost of confidence and greater understanding of business-related issues.’

‘It has helped me to build habits for the future.’

‘Helps me better understand society’s needs, allows me to have access and watch seminars more easily and keep notes that I can use in my lectures, and helps me contribute to volunteering via media.’

‘It made a positive impact and enhanced my ability to do research.’

‘Maybe one of the most impactful things in my life.’

‘It really helped me to see and view life from a new perspective. It brings out the humanity in me and keeps me on my toes to deliver more.’

‘I hope there will be more collaborations between online educational organisations in the UK and local service providers to bring more opportunities for tailored and higher-quality education to overseas students. Thank you.’

‘The content of the modules is excellent to apply in different areas of work.’

‘They have opened the possibility of obtaining university-level studies.’

“ It helped me see life from a new perspective. ”

Delivering TNE in Europe: challenges and opportunities

4

This section sets out the main challenges and opportunities that UK HEIs are experiencing in the EU. For some HEIs, there was an expectation that TNE might cushion declines in European students' demand to study in the UK following Brexit. For others, there was an expectation that losing access to EU infrastructures and programmes (Erasmus + and Horizon Europe) and new visa requirements might mean TNE was becoming significantly more challenging. To better understand the impacts of the new operating environment for TNE, the views of UK HEIs and their international partners were sought.

4.1 Challenges

HEIs' views on challenges are grouped below in two main areas: firstly, affordability and secondly, challenges relating specifically to the UK's exit from the EU.

“ The UK's change to non-EU member presents significant challenges. ”

4.1.1 Affordability

While affordability is a recognised challenge for study in the UK, it is also a challenge for UK TNE courses in Europe. Challenges identified were:

- **Tuition fees** – The fact that European students are expected to pay international tuition fees for dual degrees requires much more complex negotiations and agreements with partners. This was seen as particularly problematic where students were from countries with no culture of paying for higher education. HEIs identified particular challenges for TNE courses in English language areas and those that were more vocationally oriented. Students attending these courses were not students for whom studying in the UK was affordable. The attraction of UK TNE for many was that courses provided the opportunity to develop or improve their English language skills which, in turn, significantly enhanced their career prospects. However, HEIs noted that if tuition fees rose, this was likely to push students to investigate courses from other countries (such as the Nordic countries), which were taught in the English language at a lower price.
- **Funding mobility** – Where Erasmus had previously been used to fund the mobility components of TNE programmes, this was no longer available. Turing was not reciprocal and could not be used to support European students or staff coming to the UK. There was also a fear that, since Turing funded UK mobility to many countries outside Europe, this would reduce the funding for UK student mobility to Europe.

4.1.2. Challenges stemming from the change in the UK's status

The UK's change in status from EU country member to non-EU member presented significant challenges, some of which were immediate and some seen as long-term. HEIs identified difficulties, such as:

- **Visas and immigration** – Student visas had been an immediate challenge for any mobility components of courses. Generally, HEIs noted there was confusion about what was required, and processing delays in both the UK and European countries. There were particular problems with internship visas, both because of the length of work placements in companies and because of subsistence and other payments made to students (which might have tax implications). The issue of internship visas is unresolved (and has resulted in some European partners looking for non-UK partners for the future).

The legislation on work regulations was identified as a significant challenge affecting UK university staff teaching UK courses in different countries. HEIs' experience was that this is highly complex and differs across countries. Untangling this is time-consuming and expensive; e.g., one university described hiring specialist lawyers to investigate and provide advice. Not being able to use UK academic experts to teach courses was seen as a reputational risk.

- **Management and administration costs** – These are higher for UK and European HEIs because the EU framework agreements no longer cover the UK. HEIs identified particular challenges in setting up new courses or locations with partners. For example, respondents reported that regulatory processes for franchised and validated programmes in Spain are particularly unclear, so obtaining authorisation can be lengthy and complex. Quality assurance requirements are also often unclear, and regions and states may interpret these differently from one another and the federal government. (Germany was noted as an example where the different länder had different interpretations of requirements.) The confusion has already led to some courses being discontinued.

The fact that the EU framework no longer covers UK HEIs makes the legal requirements for partnership agreements more complex. Agreements may need to be negotiated on an individual basis with each institution. This is time-consuming and adds to management overheads. In addition, management costs will no longer be funded through EU programmes such as Erasmus+.

- **Knowledge and information gaps** – These exist in all of the areas above. There are 'hard' challenges resulting from regulatory changes, where the processes and pathways are either not worked through, applied inconsistently, or simply unclear. There are also 'soft' challenges, where the knowledge and information gaps result in misinformed (usually negative) perceptions.
- **Perceptions management** – UK HEIs and agencies reported that managing relationships with partners is becoming more challenging because of UK political messaging. This messaging can create negative perceptions of the UK and its attitude to Europe. As one example, Spanish universities questioned whether UK universities were still interested in collaborating with them. UK universities report having to invest more time in following and counteracting political messaging with partners in Europe – not just institutions, but also regional governments, businesses, EU agencies etc.
- **Competition** – One of the challenges identified by HEIs is the growing competition to take over the UK's position in the European space by both EU member and non-member countries. Many individual EU member countries are proactively promoting their courses and systems. In addition, EU initiatives such as the European University Alliance also strongly incentivise building transnational networks between EU HEIs.

There is also competition from non-EU countries, particularly the main English-speaking countries (the USA, Canada). The fact that the UK no longer has any of the advantages of being an EU country brings it directly into competition with these.

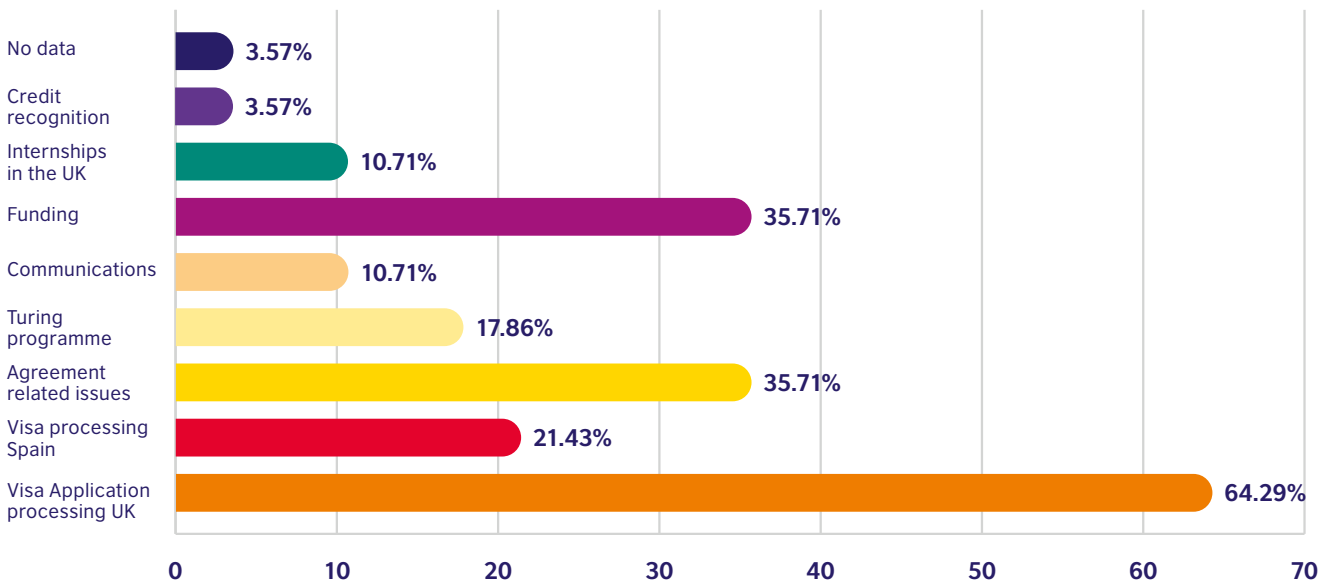


Case study:

Spanish universities' perspectives

In March 2022, the Spanish Autonomous Service for the Internationalisation of Education⁴ surveyed its members to provide feedback for the British Council research project 'Environment for Transnational Partnerships and UK Qualifications: Challenges and Opportunities'. 28 Spanish HEIs responded to the survey's questions. Their responses, summarised below, provide a snapshot of Spanish universities' views of both the challenges and opportunities.

Figure 12: Difficulties in collaboration between Spanish and UK HEIs



What are the main difficulties currently facing collaborations between Spanish and UK universities?

64 per cent of responses noted the visa procedure for entry to the UK as the main difficulty. (21 per cent also reported visa challenges relating to processing or getting an appointment at Spanish consulates in the UK.) Other difficulties are the administrative procedures required to carry out cooperation agreements (36 per cent), and where to obtain funding to implement mobility programs (36 per cent).

⁴ <http://sepie.es/presentacion.html>

Have these difficulties changed over time – and what factors have influenced this?

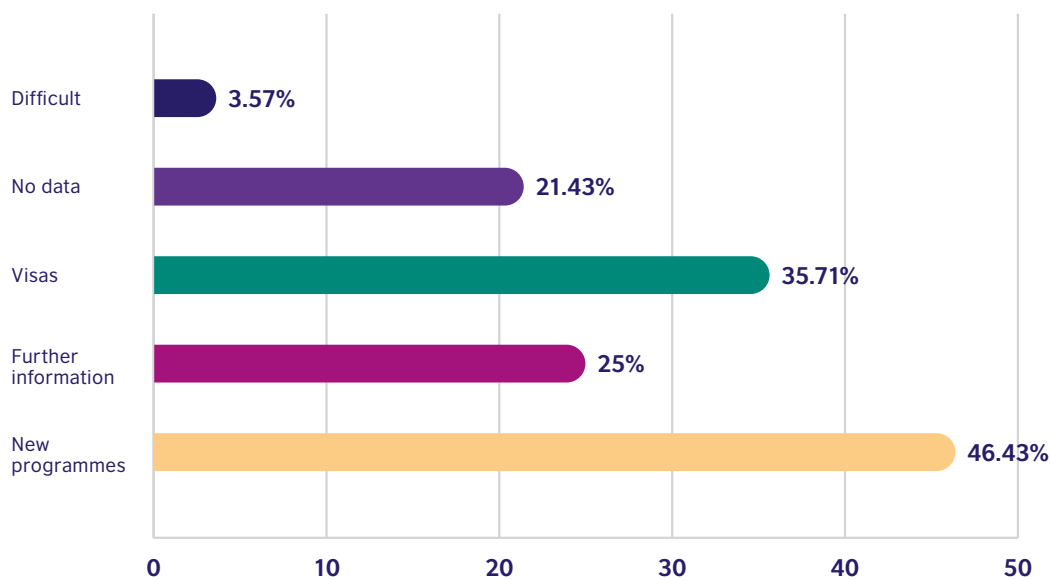
62 per cent of responses identify Brexit as the main factor and negative influence, highlighting difficulties in visa applications (36 per cent). To a lesser extent, they recognise the language requirement for visas (7 per cent) and the health insurance card (4 per cent).

How severe are these difficulties? Could they be overcome, and how?

Most Spanish universities show a great interest in continuing to collaborate with UK universities, and want to find solutions to the difficulties caused by Brexit. They propose the creation of new bilateral programmes to promote mobility (46 per cent). Secondly, they suggest that the UK should streamline or fast-track procedures to obtain a visa (36 per cent). Thirdly, there is a need for clear and accurate information on practices (25 per cent).



Figure 13: Severity of difficulties



4.2 Opportunities

While there are currently significant challenges, there are also potentially important opportunities for the UK. Capturing these, however, will require refocusing strategic interventions as well as making investment for the longer term.

4.2.1 Refocusing on the strategic importance of the EU and EEA market

The impact of Brexit and the end of the local fee period for EU students still need to be fully captured in the available data. However, evidence from UCAS and the sector suggests a decline in applications and the number of EU students studying in UK undergraduate programmes. For example, the UCAS data for 2021 shows a 37 per cent decline in applications for undergraduate entry by EU students, and a drop of 47 per cent in the number of applicants who accepted a place.

EU and EEA prospective students are mainly interested in intra-regional mobility and courses offered in the EU and EEA region. Interest in the UK has declined since 2019. However, it is still early to establish the whether there has been significant growth in EU and EEA students' interest in regions outside the EU and EEA. While demand from Europe to the USA increased by 22 per cent in 2021/22 compared to the previous year, the number of European students is below their pre-pandemic levels.

Recent research suggests students' interest has declined in the top 10 EU sending countries to the UK⁵. At the same time, Germany and the Netherlands appear to be at the top of the preference of EU and EEA students as study destination countries. This reflects several factors that make these countries more appealing to EU and EEA students, including:

- The fee structures, at both undergraduate and postgraduate levels
- The growing supply in programmes offered in the English language
- A stable and favourable policy environment for the integration of international students

- Consistent messaging about the role of international education for the country's economy and society
- More evident post-study employment prospects.

Despite the decline in applications and student numbers, and the negative impact of the political messaging mentioned above, EU and EEA students continue to perceive UK HE as a high-quality study destination. For example, representatives of the private colleges offering international education programmes in Greece suggest that despite the impact of Brexit, the brand of UK HE is in the top three among prospective students in the country. This explains the continued expansion of UK TNE in Greece, even since Brexit.

What comes out from the evidence across all available research is the need for a strategic shift in the way that UK HEIs and policymakers approach EU and EEA markets. More specifically, with Brexit now realised, the EU and EEA countries constitute an international student market in excess of 18 million students. That market needs to be targeted with the same effort and resources as other major international markets for UK HE.

Beyond their prominent direct financial and research contribution, the presence of EU and EEA students in UK higher education has notable indirect benefits. For example, in recent years, there have been instances of UK HEIs over-relying on one or two countries from which to recruit the bulk of their international students. This has created classrooms needing more diversity to create an international student experience. Maintaining a consistent flow of EU and EEA students across all levels of higher education can safeguard a high-quality in-class international student experience.

⁵ <https://www.universitiesuk.ac.uk/universities-uk-international/insights-and-publications/uuki-publications/international-student-recruitment-europe>.

4.2.2 The EU and EEA are entering a mature state of transnational education where the UK can play a crucial role

Historically, the EU and EEA have led the developments in the mobility of students, programmes and institutions. In recent years, national and cross-border initiatives have aimed to expand further the internationalisation of HE systems and institutions. For example, the 'European University' initiative seeks to create transnational networks of universities in the EEA.

At the national level, several EU and EEA governments are aiming to accelerate the internationalisation of their HE systems. For example, Greece has embarked on a strategic initiative to promote the development of international partnerships between Greek and foreign universities.

Across the EU and EEA, there has also been a continuous shift from a one-directional (e.g., franchise validation) to a multidirectional (e.g., double, joint/dual degrees) model of transnational education partnerships.

One-directional TNE refers to provision that involves the export and local delivery of a programme. In this form of TNE, the partner institution has limited or no contribution to the curriculum development and assessment strategy in the host country. In the traditional TNE model, a higher education provider in the home country exports its academic programme, or the validation of an external programme, to a partner country, where this is delivered by a local partner institution. In this model there is a flow in one direction (from home to partner) of academic content, leadership, quality assurance, and validation.

Multidirectional participatory forms of TNE include the collaborative design, delivery, and management of academic programmes. This takes different forms, but is characterised by an equitable contribution and responsibility at all stages of provision on the part of all participating higher education providers.

These definitions build on Knight and McNamara's (2017) definitions of independent and collaborative types of TNE⁶.

Despite the exit of the UK from the EU, UK HEIs continue to be at the top of the preference of EU and EEA universities for establishing this type of multidirectional partnership. This is alongside the accelerated growth and adoption of online and flexible education, where UK HEIs are at the top of the EU and EEA student preferences⁷.

Reflecting on the experience, expertise and infrastructure of the UK HE sector, the UK can play a key role in these EU and EEA cross-border and national initiatives and developments. By doing so, the UK can maintain and expand its engagement with key EU and EEA student sending countries.

UK HEIs can use their existing links with their EU counterparts to support future flows of students and academics and develop innovative study options.

The UK has strong research collaboration links with EU and EEA countries. The recent data from Scival/Scopus suggests that 15 of the top 30 countries by co-authored publications with the UK are in the EU or EEA. Most notably, these countries are also crucial as sending countries of EU and EEA students to the UK. For example, Italy, which is the top sending country for EU and EEA students to the UK, is ranked fourth in co-authored publications with the UK.

⁶ Knight, J. and J. McNamara (2017, p.2), Transnational education: A classification framework and data collection guidelines for international programme and provider mobility. https://www.britishcouncil.org/sites/default/files/tne_classification_framework-final.pdf.

⁷ See page 42 of the UUK International Study Portals report. <https://www.universitiesuk.ac.uk/sites/default/files/field/downloads/2022-11/UUKI%20Studyportals%20International%20student%20recruitment%20from%20Europe.pdf>.

Table 2: UK research partners by publication volume and percentage of co-authorships

	Collaborating country	Number of co-authored publications	% of total co-authored publications in the UK
1	United States	144678	12.4%
2	China	81691	7.0%
3	Germany	75640	6.5%
4	Italy	58610	5.0%
5	Australia	55497	4.8%
6	France	52233	4.5%
7	Netherlands	45852	3.9%
8	Spain	44009	3.8%
9	Canada	41566	3.6%
10	Switzerland	33795	2.9%
11	Sweden	28181	2.4%
12	Belgium	23677	2.0%
13	India	22121	1.9%
14	Denmark	21129	1.8%
15	Japan	20078	1.7%
16	Brazil	19279	1.7%
17	Ireland	16946	1.5%
18	Norway	16225	1.4%
19	Austria	15585	1.3%
20	South Africa	14596	1.3%
21	Greece	14191	1.2%
22	Poland	14077	1.2%
23	Portugal	13292	1.1%
24	Finland	12869	1.1%
25	Russian Federation	12347	1.1%
26	South Korea	10301	0.9%
27	Saudi Arabia	10215	0.9%
28	Singapore	10142	0.9%
29	New Zealand	10141	0.9%
30	Turkey	9486	0.8%

Source: Scival, Countries and regions collaborating with the United Kingdom (2019-2022)

The UK is a strategically important partner for most EU and EEA countries. For example, the UK appears as the first or second research collaborator country for all the top sending countries of EU and EEA students to the UK. This shows the systemic importance and influence of the UK HE on its EU and EEA counterparts.

Table 3: The UK's position as a research collaborator

Country	UK's position as research collaborator country	First position
Italy	2	USA
Germany	2	USA
Netherlands	2	USA
Spain	2	USA
Ireland	1	UK
France	2	USA
Poland	3	USA
Turkey	2	USA
Romania	5	Italy
Greece	1	UK
Portugal	2	Spain
Cyprus	2	Greece

Source: Scival, Countries/Regions collaborating with each of the countries above (2019-2022)

Reflecting on research links and activities outlined in this data, UK HEIs can use their existing connections to enable pathways to student mobility, particularly in relation to postgraduate taught and research programmes. However, considering the exclusion of the UK from EU funding programmes, this will require support from UK policymakers. In particular, this should include establishing funding opportunities and streamlining the visa process for EU and EEA postgraduate research students.



Case study:

UK – Greece Strategic Partnership in Education to foster collaborations between UK and Greek universities

An example of an effective initiative that promotes the engagement between the UK HE sector and EU countries in the post-Brexit era is the 'UK-Greece Strategic Partnership in Education programme'⁸. As outlined below, this initiative provides a good framework of action at the level of systems, institutions, and people to promote bilateral international collaboration in higher education.

This ongoing programme started in 2021 and is delivered in partnership with the Hellenic Ministry of Education and Religious Affairs and the British Embassy in Athens. It is also supported by the UK's International Education Directorate within the Department for Education, by Universities UK International, and by the Hellenic Universities Rectors' Synod, all of which are members of the programme's advisory board.

This initiative aims to enable collaboration between UK and Greek universities. The programme responds to Greece's strategic aspiration to promote Greek universities' international engagement while utilising the UK's HE brand in the region to create collaborative opportunities after Brexit.

The initiative includes the following actions:

- Research involving UK and Greek universities. The research aims to identify subject areas and types of programmes of mutual interest.
- A series of thematic webinars on international collaboration.
- Focused partner-matching events.
- Delegation visits and exchanges.

Action 1: Launch event – March 2021

The launch event of the programme was held virtually, and it was attended, among others, by the Minister of Education, Niki Kerameos; the Undersecretary in charge of Higher Education, Angelos Syrigos; the Secretary General of Higher Education, Apostolos Dimitropoulos; the British Ambassador to Greece, Her Excellency Kate Smith CMG; the Head of UK's International Higher Education Strategy, Gemma Turnbull; the Director of Universities at UK International, Vivienne Stern; the Vice-Chancellor of the University of Liverpool and member of Russell

⁸ <https://www.britishcouncil.gr/en/programmes/education/uk-greece-strategic-partnership-in-education>

Group Universities' Advisory Board, Professor Dame Janet Beer; and the Head of Education, British Council Greece, Maria Tsakali.

Action 2: Thematic webinars – June 2021

A two-day conference took place virtually involving speakers from UK and Greek universities and was introduced by Angelos Syrigos, Greece's Deputy Minister of Education. The event included four webinars:

1. Setting the context. The session provided an overview of the policy, funding and recognition of the qualifications landscape between the UK and Greece.
2. Dual and joint degrees. Reflecting on the high interest of both UK and Greek universities in this type of collaboration, the session aimed to provide examples of good practice in developing sustainable partnerships.
3. Research collaboration. As the UK is Greece's top research collaborator country, and as research collaboration is a precursor of teaching collaboration, this session aimed to provide examples of good practice in setting up research collaboration.
4. Summer and short courses. From the research conducted in the first action of the initiative, summer and short courses emerged as one of the top three types of collaboration preferred by Greek universities. Hence, this section aimed to identify the process through which such collaboration can be established and developed.

This two-day webinar series attracted much participation, having about 150 university representatives registered, from almost all Greek universities and 30 UK universities.

Action 3: Partner-matching events – January 2022

More than 40 British and Greek universities met to discuss opportunities for collaboration in an event opened by Mrs Niki Kerameus, Minister of Education and Religious Affairs of Greece, and the Rt Hon Nadhim Zahawi, Secretary of State for Education, UK. Both ministers affirmed the importance of British-Greek educational relations and their joint commitment to strengthening educational connections and growing institutional collaborations.

Following the meetings, several universities reported their intention to sign memoranda of understanding for wide-ranging collaborations (consisting of one or more of study visits and student and staff exchanges). Others are developing joint and dual degrees in economics, engineering, fine arts, psychology, English language, design and media, and several other subjects.

Action 4: Delegation visits – November 2022

In November 2022, there was a scheduled visit to the UK by a Greek delegation led by Mrs Niki Kerameus, Minister of Education and Religious Affairs of Greece. The visit included in-person meetings between the Greek delegation and senior executives of UK universities. Also, there were meetings with members of the Greek academic community in the UK and other key stakeholders.



Sustainable future for UK TNE: An EU-wide TNE strategy

5

If the UK's higher education partnerships are not only to survive but also to thrive in the European space, the research strongly points to the need for urgent action. Thus must address the significant systemic challenges, build on existing current demand and seize those nascent opportunities emerging, firstly, from the UK's changed status and, secondly, from the changing nature of TNE across Europe.

We conclude that there is an urgent need for an EU-wide TNE strategy. Above all, this must signal a strategic shift in how UK HEIs and policymakers approach EU and EEA markets. Such a strategy should be a collaboration between policymakers, sector and national agencies, and HEIs. It should identify each of these players' contributions and set out a coherent and coordinated action plan over the next five years.

As an immediate priority within that strategy, the UK must address the challenges currently threatening continued collaboration between UK HEIs and their European partners. Only by doing so can the UK secure a level of engagement in the EU from which future growth can be built.

The study draws on a case study of a strategic partnership between the UK and Greek HEIs, which uses a bilateral framework for engagement and is championed at the government level. The framework uses the strengths in UK – Greek HE relations, and furthers them through targeted interventions to stimulate teaching and research collaborations.

The UK is still discussing access to EU infrastructure for research (Horizon). Either way, the UK needs to forge bilateral agreements with each of the EU countries to continue to support long-term partnerships between UK HEIs and their EU collaborators.

The following considerations need to be taken into account for a meaningful engagement: system-to-system framework agreements, infrastructure improvements to stimulate engagement and institutional-level initiatives.

5.1 System-to-system bilateral framework agreements

The UK is the top study destination for most EU students, and the top or second research collaborator for most EU countries. The study highlighted that lack of clear and transparent information on student visas overshadows and distorts the UK provision of TNE in Europe and study in the UK. Clarifying and communicating visa processes is critical. Some areas, such as visas for student internships, need urgent review and clarification if they are not to impede progress.

To counteract negative publicity, the UK needs to consider a streamlined student visa for EU researchers and postgraduate students. This will support many partnerships with EU HEIs that award dual and double degrees. Furthermore, it will counteract long-term declines in global demand for PhD training in the UK and diversify the student body of international doctoral researchers. Support for partnerships leading to the award of collaborative research degrees between UK and EU universities will mitigate challenges related to UK's non-EU status and signal commitment to continued engagement with European universities.

System-to-system-level support for TNE engagement can be shaped as follows:

- A bilateral framework agreement for cooperation to replace EU frameworks – agreeing on mutual recognition degrees, qualifications and credits.
- Funding for student and staff mobility and exchanges, e.g. by pursuing reciprocal agreements for Turing.
- Consideration, where possible, of how to align UK interests with those of the European partner. Mutual benefit unlocks many more opportunities for UK TNE than one-party benefit⁹.

⁹ See 'The value of transnational education partnerships'. <https://www.britishcouncil.org/education/he-science/knowledge-centre/transnational-education/value-transnational-education>.

National agencies can support TNE partnerships in the EU through the following:

- Market intelligence to underpin strategy and targeting of resources.
- Coherent UK brand messaging, communications and promotion.
- Building influence with decision-makers in European countries.
- Facilitating and supporting networks.

5.2 HEI-level initiatives

The UK government, agencies, sectors, and HEIs must work strategically to address challenges successfully and capitalise on opportunities.

EU and EEA countries constitute an international student market above 18 million students. That market needs to be targeted with the same effort and resources as other major international markets for UK HE. A dedicated EU strategy should include the following:

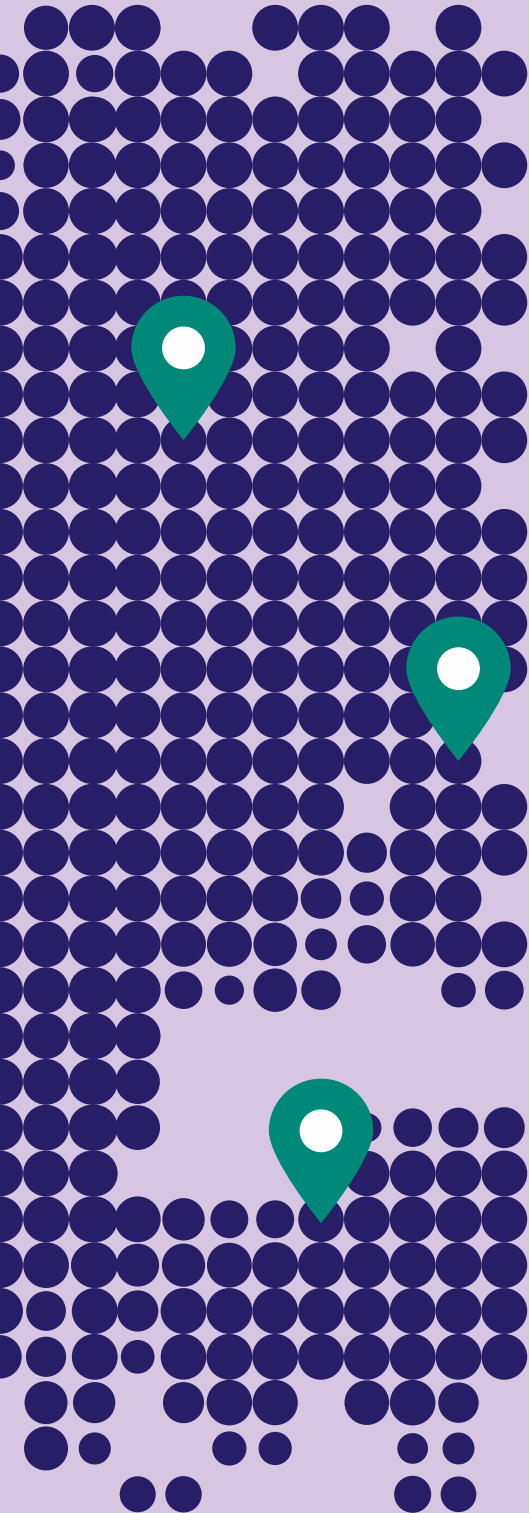
- Consider the development of a Europe strategy with a dedicated delivery team
- Targeted influence and network-building with the same effort and resources as in major non-EU international markets.
- Strategically leveraging research and other networks to compete successfully in a maturing TNE market.
- Proactive network building between UK and European HEIs. This is critically important after Brexit – there is clear evidence that connections have already been lost. If this continues, the UK's networks in Europe will be severely diminished and challenging to restore.

“ A TNE strategy must signal a strategic shift in the UK's approach to EU and EEA markets. ”

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