CHAPTER 9

The Impact of Brexit on the Relations of UK Universities with East Asia

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INTRODUCTION

Since the UK’s European Union membership referendum—or the Brexit referendum—in June 2016, discussions and concerns about the impact of Brexit on the relationship between UK universities and the EU have been widely reported. The importance of this is underlined by the fact that the UK’s higher education sector makes a major contribution to the country’s economy. According to the Department for Education, in 2017 67% of the UK revenue from education (£14.4 billion) was from higher education exports, excluding transnational education (TNE) activities/operations.¹ These discussions and concerns are primarily about student recruitment, student and staff mobility, research funding, contracts and educational operations from the EU.

From the perspective of higher education, therefore, the impact of the UK leaving the EU appears to exclusively concern the involvement of UK universities with the EU, its member states and its market. The question

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M. Reilly and C.-Y. Lee (eds.), A New Beginning or More of the Same?, https://doi.org/10.1007/978-981-15-9841-8_9
of what, if any, effect Brexit will have on the relationship of UK universities with East Asia, an important market for the UK’s higher education sector, has been rarely discussed. The UK Government has been developing and introducing policies to prepare to leave the EU. These policies may also have an impact on UK universities’ involvement with East Asian countries.

This chapter will assess the potential impact of Brexit on the relations of UK universities with East Asia. To do that, it focuses on four areas, namely student recruitment and student and staff mobility, research funding, recognition of qualifications and TNE activities/operations. I have chosen these four impact areas because of their importance to UK universities. Furthermore, apart from focusing on the relationship between UK universities and the People’s Republic of China (PRC)—and also Hong Kong and Macao—occasional references will be made to Japan, South Korea and Taiwan. It is important to note that collaboration between the PRC and UK universities is relatively more significant than those with other East Asian countries. Hence, this chapter singles out the PRC due to evident student mobility, research collaboration and TNE activities/operations between the UK and Chinese academic institutions. This chapter will firstly describe the funding structure of UK universities and current UK policies that are related to UK universities in response to Brexit. The trend of UK universities’ funding structures and UK policies may affect the previously described four impact areas and the connection of UK universities to East Asia. I will then analyse the four impact areas and assess whether or not Brexit will have a significant impact on the relationship between UK universities and East Asia. In conclusion, I will summarise the analysis of the four impact areas.

**The Funding Structure of UK Universities and Current UK Policies in Response to Brexit**

The structure of funding of UK universities has undergone significant changes in the past decade. The Higher Education Statistics Agency (HESA)\(^2\) divides UK universities’ income into the following categories: tuition fees and education contracts; funding body grants; research grants and contracts; other income; investment income and donations and endowments.\(^3\) From 2009/2010 to 2018/2019, as Fig. 9.1 shows, the more significant portion of UK universities’ income shifted towards tuition fees and education contracts from funding body grants. UK
universities’ income from the former two sources more than doubled, while income from funding body grants decreased by 41.1%. Income from research grants and contracts and other income was broadly maintained and grew by 1.5% in the past decade. Since 2012/2013, UK universities have become heavily dependent on tuition fees and education contracts, which have become a greater source of income than the combined income from funding council grants and research grants and contracts. UK universities’ research funding has been primarily from the UK Government. In 2014/2015, 78% of UK universities’ research grants and contracts came from the UK Government, charities and corporations, while 14% came from EU sources. UK universities continue to generate a surplus, despite the introduction of several reforms in the past decade. These reforms include the removal of the cap on the UK and EU student numbers for universities in England in 2012. The tuition fee cap for UK and EU student studying in England increased from £3,000 per year in 2006/2007 to £9,000 per year in 2012/2013 to £9,250 per year with inflation from 2017/2018. Rules for international students studying in the UK have also undergone major change, including tightened work
restrictions, additional NHS surcharge, proof of substantial savings for course fees and living costs and so on.\textsuperscript{6}

Since Brexit, UK universities’ funding has been overshadowed by uncertainties regarding student recruitment, their TNE activities/operations in the EU, along with funding possibilities that would support students, academic mobility and research. Relevant policies have been developed and introduced by the UK Government to respond to Brexit and aim to reduce its impact on the higher education sector in the UK while negotiations are still ongoing.

The transition period (1 February to 31 December 2020) allows students, staff and their family members, who are EU, EEA or Swiss citizens (excluding Irish citizens) to come to or remain in the country until 31 December 2020 and apply for the EU Settlement Scheme. The scheme will enable them to live in the UK after 2021.\textsuperscript{7} Guaranteed home tuition fees in England, Wales and Northern Ireland, free tuition fees in Scotland and financial support will also continue to be available to current EU, EEA and Swiss students, and also to those who wish to study in the UK for the academic year 2020/2021.\textsuperscript{8} The majority of EU funded programmes will continue to receive funding until the end of the programme’s lifetime, and UK universities can also bid for and participate in EU funded programmes. The EU’s Mutual Recognition of Professional Qualification Directive and UK universities’ education services and activities in the EU, including TNE, will continue until 31 December 2020.\textsuperscript{9}

From 1 January 2021, according to an announcement made by the UK Government in February 2020, EU, EEA and Swiss citizens will not need visas to travel as visitors for up to 6 months. However, they will need a visa to work or study in the UK, just like all other immigrants. A points-based immigration system will be introduced to regulate immigration to the UK. Immigrants in the following categories will be able to study or work in the UK:

- students who have an offer from an approved educational institution, and who can speak, read, write and understand English, along with supporting themselves during their studies;
- students who complete a degree in the UK from summer 2021 for up to 2 years via a new graduate route\textsuperscript{10};
- skilled workers who have a job offer from an approved sponsor, meet the required skill level of Regulated Qualifications Framework
(RQF) Level 3 or above, speak English at a required level and earn a minimum salary threshold (£25,600);

- highly skilled workers with a background in STEM subjects (via Global Talent route) or in the shortage occupation list, as designated by the Migration Advisory Committee, or have a PhD relevant to the job.¹²

Other visa routes, such as short-term work visas (Tier 5) and investor, business development and talent visas (Tier 1), will also be available to immigrants to work in the UK.¹³

To boost the UK’s education exports, an “International Education Strategy” has been developed and introduced by the UK Government with the ambition of increasing education exports to £35 billion and the number of international students studying in UK universities to 600,000 by 2030.¹⁴ The UK Government has also set out an “International Research and Innovation Strategy,” which envisages investments of 2.4% of GDP in research and innovation by 2027 and 3% of GDP in the longer term. It aims to facilitate UK universities and research and innovation organisations’ international partnerships and collaborations, to attract international researchers, innovators and entrepreneurs by providing visa arrangements (Global Talent route) and fellowships, to provide financial support for UK universities’ research and development activities and so on.¹⁵ The UK Government has made a significant investment in universities. In July 2019, the universities and science minister confirmed that £2.2 billion research funding had been allocated to English universities for 2019 to 2020 and an additional £91 million had been given to support university-led research.¹⁶

Nevertheless, while the UK and the EU negotiate additional arrangements during the transition period, there is considerable confusion and uncertainty over tuition fees and financial support for EU, EEA and Swiss students in the academic year 2021/2022.¹⁷ Furthermore, there is confusion over the UK’s participation in future EU programmes, along with recognition of professional qualifications between the UK and EU, and also regarding UK universities’ TNE activities/operations within the EU. Given the current structure of UK universities’ funding and UK Governmental policies relating to higher education, what impact, if any, will Brexit have on the relationship of British universities with East Asia, especially with the PRC? What are the wider implications for UK universities?
Impact Area 1: Student Recruitment & Student and Staff Mobility

Student Recruitment

Brexit might have some positive effect on UK universities’ student recruitment in East Asia. The UK has been increasingly attractive to East Asian students. According to HESA’s data, the number of students from East Asian countries continues to grow (Fig. 9.2), and in 2018/2019 (after the Brexit vote) it was 21% higher than in 2014/2015 (before the Brexit vote). In comparison, the number of EU students grew by 12.8% in the same period. The growth in the number of East Asian students is almost entirely attributable to the PRC—the number of PRC students grew by 22.6%, compared to the 2.3% growth of students from Japan, South & North Korea and Taiwan. The number of students from East Asian

![Graph showing student enrolment](https://www.hesa.ac.uk/data-and-analysis/students/table-11)

Fig. 9.2 Student enrolment on undergraduate and postgraduate (taught and research) programmes, including full-time and part-time from the EU, the People’s Republic of China (including Hong Kong & Macao), Japan, South & North Korea and Taiwan plus international students from the rest of the world (Source: The Higher Education Statistics Agency (HESA). ‘HE Student Enrolments by Domicile and Region of HE Provider 2014/15 to 2018/19’. HESA, last updated February 2020, [https://www.hesa.ac.uk/data-and-analysis/students/table-11](https://www.hesa.ac.uk/data-and-analysis/students/table-11))
countries was more than that of students from the EU in 2018/2019. Moreover, it ranged between 37.8 and 43.6% of the total number of international students in the years between 2014/2015 and 2018/2019.

Data from the Universities and Colleges Admissions Services (UCAS)\textsuperscript{18} further verifies the increasing number of East Asian students studying on undergraduate programmes in the UK from 2016 to 2019 (Table 9.1). The number of applicants and accepted applicants from East Asian countries continued to increase following the Brexit vote in 2016 and after the UK invoked Article 50 of the Treaty on European Union in 2017 and began the withdrawal process in 2020. A continuous growing interest in studying in the UK for East Asian students has not been—and possibly will not be—dampened by Brexit.

As explained previously, tuition fees and education contracts were UK universities’ most substantial income in the past decade. This has led to a great reliance on tuition fees from East Asian students. The average tuition fee for international students, in which category East Asian students fall, was about £15,150 in 2016/2017, £16,260 in 2017/2018 and £16,908 in 2018/2019 (Table 9.2). Since the number of students from East Asia has also been increasing year on year, UK universities have become more reliant on fee income from East Asian students. It can be expected to be even more important after Brexit.

Table 9.1 Acceptances from East Asian Countries from 2016 to 2019

|          | China, including Hong Kong and Macao | Japan, S&N Korea and Taiwan | Total     |
|----------|--------------------------------------|-----------------------------|-----------|
| 2019     | Applicants                           | 27,980                      | 2,830     | 30,810    |
|          | Accepted applicants                  | 16,165                      | 1,545     | 17,710    |
| 2018     | Applicants                           | 23,960                      | 2,705     | 26,665    |
|          | Accepted applicants                  | 14,115                      | 1,495     | 15,610    |
| 2017     | Applicants                           | 21,975                      | 2,555     | 24,530    |
|          | Accepted applicants                  | 13,125                      | 1,395     | 14,520    |
| 2016     | Applicants                           | 20,795                      | 2,475     | 23,270    |
|          | Accepted applicants                  | 12,025                      | 1,355     | 13,380    |

\textit{Source} Universities and Colleges Admissions Services (UCAS). ‘UCAS Undergraduate Sector-Level End of Cycle Data Resources 2019’. Accessed 12 April 2020, \url{https://www.ucas.com/data-and-analysis/undergraduate-statistics-and-reports/ucas-undergraduate-sector-level-end-cycle-data-resources-2019}
Table 9.2  Tuition fees and education contracts by domicile

|                     | 2016/2017          | 2017/2018          | 2018/2019          |
|---------------------|--------------------|--------------------|--------------------|
|                     | Total (£ million)  | Average<sup>a</sup> | Total (£ million)  | Average          | Total (£ million) | Average          |
| UK & EU fees        | 12,145             | 6,042              | 12,736             | 6,293            | 13,025            | 6,381            |
| International fees  | 4,659              | 15,150             | 5,193              | 16,260           | 5,793             | 16,908           |
| Research training  | 384                | 390                |                    | 425              |                    |                  |
| support grants      |                    |                    |                    |                  |                    |                  |
| Other course fees   | 570                | 631                | 676                |                  |                    |                  |
| (Non-credit bearing course fees and FE course fees) |                  |                    |                    |                  |                    |                  |
| Total               | 17,757             | 18,950             | 19,919             |                  |                    |                  |

<sup>a</sup>The average UK and EU tuition fee is derived by dividing the total amount income from UK and EU tuition fees by the total number of UK and EU students for year. The average international or non-EU tuition fee is calculated in the same way.

Source: The Higher Education Statistics Agency (HESA). ‘Tuition fees and education contracts analysed by domicile, mode, level and source.’ HESA, last updated April 2020, https://www.hesa.ac.uk/data-and-analysis/finances/table-6

Factors that are related to Brexit and have contributed, or will contribute, to the growth of East Asian students studying in the UK are the devaluation of sterling since the Brexit vote and the regulatory policies in response to Brexit that will apply from 2021. For example, the value of sterling against the Chinese Renminbi (RMB) decreased by almost 10% between June 2014 and March 2020. As a result, tuition fees, costs associated with studying and living in the UK, such as visa, health surcharge, accommodation and living costs, are lower for Chinese students from the PRC. Studying in the UK has become relatively more affordable than studying in other popular English-speaking countries, such as the United States, Australia and Canada, as shown in Table 9.3. This is certainly the case when we also consider that in the UK the length of undergraduate study is generally three years and the length of postgraduate study is one year, which is one year shorter than in those countries. It is even possible that the outcome of the Brexit vote in June 2016 has already contributed
Table 9.3 Annual average exchange rate of GBP, USD, AUD and CAD against RMB between 1 June 2014 to 31 March 2020

|                | Jun 2014/May 2015 | Jun 2015/May 2016 | Jun 2016/May 2017 | Jun 2017/May 2018 | Jun 2018/May 2019 | Jun 2019/15/May 2020 |
|----------------|-------------------|-------------------|-------------------|-------------------|-------------------|---------------------|
| £1 GBP         | 9.818432          | 9.574753          | 8.692400          | 8.768473          | 8.815304          | 8.854488            |
| $1 USD         | 6.190662          | 6.409260          | 6.792954          | 6.792954          | 6.792954          | 7.013516            |
| AUS$1          | 5.259596          | 4.683184          | 5.112243          | 5.180521          | 4.884002          | 4.70524             |
| CA$1           | 5.349220          | 4.852411          | 5.133553          | 5.140406          | 5.132523          | 5.235295            |

Source X-Rates, https://www.x-rates.com/, accessed 15 May 2020

to the increasing number of East Asian students studying in the UK and that this short-term trend may well continue for some time to come.

The immigration policies that the UK Government has introduced in response to Brexit might continue to attract students from East Asian countries from 1 January 2021. Notably, the new graduate route will permit students to work in the UK for two years after they complete a UK degree from summer 2021. East Asian students may study in the UK with the prospect of becoming skilled or highly skilled workers. They also can apply for settlement in the UK after working for five years. With the experience of studying and working abroad, East Asian graduates are more likely to find employment in local and multinational companies in their home countries even if they do not settle in the UK.

There are also other factors that might have encouraged, and will possibly continue to encourage, the growth of UK universities’ international student recruitment in East Asia, especially in the PRC. These factors are not necessarily dependent on or influenced by the relationship that the UK has with the EU. For instance, UK universities have become more active in reaching out to international students and competing for international student recruitment with universities around the world. A variety of pathway programmes have been developed by UK universities, similar to those in the United States, Australia and Canada. They are offered to international students who would like to enrol in undergraduate or postgraduate programmes but have not met the academic or English language requirements. These pathway programmes attract students because some programmes offer guaranteed progression to one
or more specific courses at the providing institution or partner institutions. They are also attractive for universities as a source of income and students with the ability to enrol to and possibly complete undergraduate and postgraduate programmes. UK universities’ admissions have also become more flexible in recent years. They now accept a wider range of diplomas from East Asian countries as qualifications for undergraduate programmes or to enter the second year of undergraduate programmes. These include Vocational Diplomas (Gaozhi, 高職) or 2-year or 5-year Diplomas (Zhuanke, 專科 or Dazhuan, 大專) in China, 20 2-year or 5-year Junior College Diplomas (五專二技) in Taiwan 21 and Associate Degrees/Junior College Diplomas in South Korea. 22 Some UK universities, such as the University of Birmingham, 23 also accept the result of the National College Entrance Examination (Gaokao, 高考), which is the national standardised exam for entering universities in China (like the GCE Advanced Level examination in the UK), for entering undergraduate degree programmes and even the second year of undergraduate degrees. 24 Students who obtain satisfactory results in the National College Entrance Examination do not necessarily need to enrol into 1-year foundation programmes in the UK, which most high or secondary school certificate or diploma holders from East Asian countries need to do.

There are some factors which have affected the number of East Asian students studying in the UK since the Brexit vote, but reflect current global trends and are not Brexit-related. The most important among those are the trade war between the United States and China and COVID-19. The trade war between the United States and China seems to have contributed to the growing number of Chinese students coming to study in the UK in 2019, as several newspapers reported that 20% of Chinese students chose to study in the UK, while 17% chose the United States. This was almost certainly related to the US Government tightening of visa requirements for students, especially those who wish to study science and technology. 25 On the other hand, COVID-19 forced the closure of UK universities from March 2020. This was expected to result in a decline in the number of students from East Asia for the 2020/2021 academic year. The British Council carried out a survey that examined how the study plans and sentiments of 15,000 students from eight East Asia markets might change during the COVID-19 crisis. The likelihood of students from Mainland China,
Hong Kong and Taiwan to cancel or delay their plan to study undergraduate programmes overseas was from 7 to 15%. 1 to 15% of students from Mainland China, Hong and Taiwan have already cancelled their plans to study on undergraduate programmes overseas.26

**Student and Staff Mobility**

It has been estimated that Brexit will have significant effects on student and staff mobility between the UK and the EU.27 It is unknown at present whether the UK will be able to participate in the Erasmus+ programmes or how the UK will participate in them. This will depend on the outcome of the ongoing negotiations on the future relationship between the UK and the EU.

On the other hand, student and staff mobility between East Asian countries and the UK through Erasmus+ has been limited, and Brexit is likely to have little impact on it. This is because East Asian countries have been considered as partner nations and can participate in certain key action programmes under specific criteria or conditions and with a limited budget set by the EU.28 In the 2017 call, 155 UK students and staff went to Asia, and 47 UK students and staff went to industrialised Asia. Furthermore, 219 Asian students and staff went to the UK, and 44 students and staff from industrialised Asia went to the UK.29 China is only one of the 19 countries in Region 6 (Asia); Japan, Taiwan, South Korea, Hong Kong and Macao are five of the 13 countries or Special Administrative Regions in Region 13 (other industrialised countries), according to the categorisations set by the EU.30 In other words, the actual number of students and staff who went to East Asian countries and vice versa via Erasmus+ in the 2017 call is probably even smaller. By comparison, in the 2017 call, 16,868 UK students and 2,974 UK staff went to the EU, while 31,396 EU students and 4,306 EU staff came to the UK via Erasmus+ programmes. Student and staff mobility between East Asian countries and the UK does not depend on the Erasmus+ programmes like that between EU countries and the UK. Therefore, student and staff mobility between East Asian countries and the UK will be considerably less affected by Brexit.

Also, Erasmus+ programmes are not the only sources of funding for supporting student and staff mobility between universities in East Asia and the UK. East Asian governments have initiated projects for internationalising the higher education sector to improve the global
competitiveness of their universities. For example, the Japanese Government has launched the Global 30 Project in 2009, the Re-Inventing Japan Project (2011 to present), the Go Global Japan Project (2012–2016) and the Top Global University Project (2014–2023) that carry out a wide range of programmes to facilitate student, academic and research exchanges with overseas universities. The University Alliance of Silk Road (絲綢之路大學聯盟) was established in 2015 as part of the PRC’s Belt and Road Initiative and promotes student and academic mobility across 38 countries along the Belt and Road route. Another example is the UK-China-BRI Countries Education Partnership Initiative in 2019, which is funded and administered by the British Council. Seed-funding of between £60,000 and £80,000 will be provided to UK institutions to partner with China and BRI countries to facilitate higher education exchanges and create opportunities for students, academics and researchers. Priority areas include manufacturing technologies, engineering design, robotics, material engineering and process systems. We might also mention the international exchange cost-share programmes between the Royal Society in the UK and various East Asian partners. These include the Japanese Society for the Promotion of Science, the Ministry of Science and Technology of Taiwan and the National Natural Science Foundation of China.

Student mobility has also been operating via collaborative provision, such as dual degrees, as part of UK universities’ TNE activities/operations with their partners in East Asia (see below Impact area 4: TNE activities/operations). UK students can also study with their universities’ partners in East Asia, and vice versa, as part of their degree or in short-term or summer courses. Still, students usually have to bear the cost of participating in these exchange programmes or are subjected to the availability and limitation of scholarships or loans. These mobility programmes have not been affected and will not be affected by Brexit as they have been jointly funded and initiated by Britain and governments in East Asia. However, these programmes are limited to a number of universities, students, academics and researchers or are subjected to particular disciplines. They might therefore have less impact on skills and career development than Erasmus+ programmes.

Social and cultural factors have also contributed to the increasing number of East Asian students studying overseas, including in the UK, and have facilitated student and staff mobility. For example, employment prospects, language proficiency, alumni networks, the experience of living
and studying abroad, different learning environment and styles, meeting a diverse range of people, avoiding severe competitive entrance exams for higher education in their home countries, influence from their friends or expectations from their parents.\textsuperscript{36} The expansion of the middle class in East Asian countries, especially in China—to perhaps over 600 million people, many of whom are brought up in families with some English or which focus on English learning for their children—has further amplified these social and cultural factors. Consequently, this has resulted in the flow of East Asian students studying abroad.

\textbf{Impact Areas 2: UK Universities’ Research Funding}

Brexit will not have a direct impact on UK universities’ relations with East Asia in terms of research funding and collaboration. This is because major sources of research funding and research collaborations are established on a bilateral basis and are not dependent on the UK’s membership of the EU. Significant research and innovation collaborations with East Asia, especially with the PRC, happen through joint funding from UK Research and Innovation (UKRI), the Royal Society, the British Academy and the Royal Society of Edinburgh. For example, UKRI China, one of UKRI’s international offices, has facilitated 313 joint research and development programmes with China that have a total combined investment value of £320 million and have involved over 200 partner institutions and businesses.\textsuperscript{37} In 2014, the UK-China Research and Innovation Partnership Fund (Newton Fund) was launched with a 5-year budget of £200 million, to which the UK and China equally contribute.\textsuperscript{38} In 2018, four new interdisciplinary research projects were funded by the UKRI with an £8 million investment and by the National Natural Science Foundation of China (NSFC) with 36 million RMB.\textsuperscript{39} Several collaborative research projects between UK universities and East Asia have also been launched recently through the research councils under the UKRI. For instance, the Medical Research Council (MRC) and the Korea Health Industry Development Institute (KHDI) initiated the MRC-KHDI UK Korea Dementia Research in 2019 with a £600,000 investment from the MRC and around £750,000 from the KHDI.\textsuperscript{40} Collaborative research projects in life sciences and environmental sciences have been jointly funded by UKRI (£5 million) and the Japan Society for the Promotion of Science (JSPS, around £2 million).\textsuperscript{41} With Taiwan, joint projects were funded by the Royal Society of Edinburgh and the Ministry of Science and
Technology in 2019. China was the third of the UK’s most frequent collaborative research partners and Japan was the fourteenth in 2018. The UK is also ranked as the fourth of Japan’s most frequent collaborative research partners. China, Japan and South Korea are in the top five Asian countries in terms of the number of researchers who co-authored publications with UK researchers between 2015 and 2018. It will certainly continue to serve the interest of UK universities to carry out and further explore research collaborations with East Asia and vice versa.

Brexit, however, might have a considerable impact on UK universities’ participation in research funding from the EU. Unless there is an agreement, UK universities will not be eligible to compete for research funding from the EU. This jeopardises, in particular, UK universities’ participation in the next Horizon Europe, for which the European Commission has proposed a €100 billion budget for the years 2021–2027. Given UK universities’ reliance on EU funding, along with academics and scientists from EU countries, the UK Government has created the “International Research and Innovation Strategy,” which supports universities’ research and innovation collaboration. It aims to attract international researchers and research leaders with visa arrangement and financial support. As part of this strategy, the UK has signed far-reaching bilateral research and innovation agreements with China, Japan and South Korea, and we might see this as a response to Brexit that is bringing the UK and East Asia closer together. For example, the UK and China launched the UK-China Joint Strategy for Science, Technology and Innovation Cooperation in December 2017 for supporting academics, researchers and businesses from basic research to commercialisation of innovation. It also set out actions and measures for deepening cooperation, including enhanced cooperative mechanisms, UK-China joint innovation funding, implementation of a flagship challenge programme, mutual access to research infrastructure, and finally, open access to data, and intellectual property rights protection and application. This shows that it is likely that the UK will more actively look for overseas sources of funding and research collaborations. A consequence of this is that the relations between UK universities and East Asia will deepen, which will depend on the relationship that the UK has with individual East Asian countries. If the direct effects of Brexit dominate impact area 1, we might say that impact area 2 might be more influenced by such indirect responses, where Brexit acts as a trigger to responses initiated by the UK.
Impact Area 3: Recognition of Qualifications

Another possible impact on UK universities is the recognition of UK qualifications in the EU and vice versa after Brexit, in particular the recognition of professional qualifications—such as in medicine, nursing, dentistry, law, architecture, accountancy, etc. This is currently being considered as part of the trade deal negotiations between the UK and the EU. UK universities might not be able to attract EU and East Asian students if they cannot work in the professions that are regulated in the EU, EEA and EFTA countries with the qualifications they acquire in the UK. UK universities might also not be able to attract EU academics and researchers in the professions that are regulated in the UK.

Regardless of the precise outcome of negotiations between the UK and the EU, the recognition of academic qualifications provided by UK universities in the EU will not be affected. The UK has been a full member of the Bologna Process. It aims to facilitate transparency, mutual recognition of qualifications and of study periods, quality assurance and the European Credit Transfer System (ECTS) with credits that are based on meeting learning outcomes and led to the creation of the European Higher Education Area (EHEA) under the Lisbon Recognition Convention in 1999. The Bologna Process is a voluntary intergovernmental collaboration on higher education operating outside the framework of the EU. So it is not limited to EU member states, and it does not have the status of EU legislation.

Since East Asian countries are not members of the EU or part of the Bologna Process, the recognition of UK qualifications in East Asian countries, both academic and professional, will not be affected by Brexit. However, the recognition of academic and professional qualifications that are awarded from overseas in East Asian countries varies from country to country. For professional qualifications, in particular, recognition depends on the legal requirements or restrictions on practice concerning licences, certificates or registration with relevant regulatory authorities. These requirements or restrictions are usually unilaterally imposed, although they are sometimes agreed between countries. For example, the International Professional Engineer Agreement (IPEA) governs the mutual recognition of engineering education qualifications and professional competence between members. Regulatory authorities, higher education institutions and employers in East Asian countries have discretion in recognising qualifications from overseas and in laying
down further requirements for working and studying, such as undergoing training or courses, taking exams, meeting language requirements and so on. Similarly, the recognition of East Asian academic and professional qualifications in the UK depends on local legal requirements, restrictions on practice, regulatory authorities, higher education institutions and employers.\textsuperscript{53}

**Impact Area 4: UK Universities’ Transnational Education (TNE) Activities/Operations**

The impact of Brexit on UK universities’ TNE activities/operations in East Asia will be minimal as such are dependent on local regulations in East Asian countries and any trade agreements covering services. On the other hand, there is considerable uncertainty as to whether, and to what extent, UK universities will be able to continue their transnational education (TNE) activities/operations in EU countries after Brexit. This is because UK universities might no longer enjoy protection under the Services Directive and the Treaty on the Functioning of the EU, which allow UK universities to set up branch campuses and franchise operations.\textsuperscript{54} An agreement on the provision of cross-border services between the UK and the EU is currently being negotiated. Since Brexit, the UK has signed trade agreements with South Korea in September 2019,\textsuperscript{55} and it has agreed on a future free trade agreement with Japan by using the EU-Japan Economic Partnership Agreement (EPA) as the basis.\textsuperscript{56} UK universities’ TNEs in East Asia will be subjected to those agreements. The UK has not yet signed any trade agreements with China and Taiwan.

UK universities, like many universities from the United States, Australia, Canada, France, Germany and others, already have considerable TNE activities/operations in East Asia. According to HESA and Universities UK (UUK), in 2017–2018, 139 UK universities delivered different TNE services to 693,695 students in 225 countries and territories around the world,\textsuperscript{57} which is considerably more than the number of all international students (319,340) studying in the UK during the same academic year. Malaysia, China, Sri Lanka, Singapore and Hong Kong are the top five host countries for UK universities’ TNE activities/operations. According to *International Facts and Figures 2019* published by UUK, the number of TNE students was 36,940 in mainland China and it was 18,730 in Hong Kong in 2017/2018. However, this does not include the numbers of three main distance learning and blended
learning providers.\textsuperscript{58} While the value of UK universities’ TNE activities/operations in China and Hong Kong in 2017/2018 is unknown, the value of UK universities’ TNE work overall grew from £350 million in 2010 to £640 million in 2017.\textsuperscript{59}

Given the uncertainties surrounding Brexit and the change of UK universities’ funding structure, it is in the UK universities’ interest to continue to expand their TNE work in East Asia. The UK Government is keen to support this cooperation. The government’s “International Education Strategy,” for example, contains a number of actions relating to TNE. These include: appointing an “international education champion” to stimulate overseas activity and to open up opportunities by developing strong partnerships and helping to overcome challenges and barriers; promoting UK education internationally with the £5 million GREAT Challenge Fund for supporting export activity; supporting and identifying educational opportunities in places like China, Hong Kong and the ASEAN group of nations; providing country-specific guides supplied by UUK, along with the British Council for supporting and facilitating partnership development and opportunities; and identifying the overall value of TNE to the UK economy for providing insights into markets and improving performance.\textsuperscript{60}

So, Brexit might seem to have some positive impact and to stimulate TNE in East Asia further. With the support of the government, UK universities could certainly continue to deploy their rich experience in delivering TNE programmes and knowledge of regulatory environments and markets in East Asia. UK universities could also develop further types of TNE programmes collaborating with institutions in East Asia. Nevertheless, new and existing challenges will persist as TNE activities/operations depend on the legislation, regulations, business practices, political system and social culture of a country.\textsuperscript{61} For example, the PRC, the second-largest host country of the UK’s TNE in Asia, has 23 UK-China joint institutes and 374 UK-China joint programmes according to the China-Foreign Cooperation in Running Schools (中外合作办学, CFCRS) in 2019.\textsuperscript{62} To obtain a CFCRS licence, a UK university is required to provide information such as a detailed implementation plan, a financial model with an analysis of relevant costs and contributions from each partner and tuition fees. All the approved CFCRS are required to submit a self-evaluation document to the CDGDC annually, and 20% of CFCRS programmes will be evaluated every six years via a desk-based
Challenges are not limited to local regulations, since there is a great dependency on Chinese partners in financial and management issues. Both the UK and Chinese institutions find that curriculum design and scheduling are the most challenging areas for delivering TNE programmes. The second most challenging area for UK staff is recruitment and evaluation of academic staff, whereas it is issues relating to the provision of UK teaching resources for Chinese staff. UK universities also bear a high reputational risk of ensuring the quality of programmes and graduates that are fit for the employment market when delivering their TNE programmes overseas.

Another potential challenge for UK universities’ TNE activities/operations is the increasing emergence of English-taught programmes as part of the higher education internationalisation strategy in East Asian countries. This is a trend which can also be observed in other European countries. Chinese universities have also established TNE activities/operations overseas. For example, the Peking University HSBC Business School in Oxford and Xiamen University in Malaysia. This shows that universities in East Asia have actively developed strategies to internationalise their universities and to improve their competitiveness as world universities with the support of governments. These strategies also have the common aim of attracting international students with scholarships. English-taught programmes had been established in Japanese universities as one of the main objectives in a series of projects (such as the Top Global University Project (2014–2023), carried out by the Japanese Government to internationalise Japanese universities.

There were 126 English-taught bachelor programmes and 531 English-taught master programmes at 74 institutions in Japan in 2018. The Ministry of Education, Taiwan, launched a series of policies and plans for attracting international students from 2002. In particular, their 2011 “Higher Education Output—Expansion of Recruiting International Students Action Project” aimed to recruit 87,000 international students by 2014. There were 159 English-taught bachelor programmes along with 572 English-taught master programmes and 126,997 international students studied English or Chinese taught programmes in Taiwan in 2018. The “Studying China Project” initiated by China in 2010 aimed to attract 150,000 international students studying in higher education by 2020. In 2018, there were 607 English-taught bachelor programmes and 258,122 international students studying English or
Chinese taught bachelor programmes in China. UK universities’ TNE activities/operations compete not only with other TNE programmes delivered by other foreign universities in East Asian countries but also with local universities that will deliver English-taught programmes in the future. While the quality standards of English-taught programmes in universities in East Asian countries are unknown, UK universities’ TNE programmes that are delivered in English will still have a considerable advantage in East Asia.

**Conclusion**

If the UK and the EU fail to reach an agreement, the impact of Brexit will be profoundly negative on EU student recruitment and mobility, research funding from the EU, the mutual recognition of professional—but not academic—qualifications and TNE activities/operations in the EU of UK universities. In contrast, it appears that Brexit will have little negative impact on UK universities’ relations with East Asia and no impact on the mutual recognition of professional and academic qualifications between the UK and East Asian countries. This might be because UK universities’ relations with East Asia have been influenced by more general economic, social, political and cultural factors, which are not related to Brexit. After assessing the four areas of potential impact of Brexit on UK universities, this chapter concludes that Brexit is likely to have a favourable impact on the recruitment and mobility of East Asian students for UK universities. However, it is anticipated that the number of students in the UK from East Asia will decrease in the 2020/2021 academic year due to Covid-19. The positive impact of Brexit on the UK-East Asian research collaboration, including funding, has been observed.

Bilateral agreements might further enhance research collaboration between universities and industries in the UK and East Asian countries. It could also have an indirect impact on UK universities’ TNE activities/operations in East Asia because it might force UK universities to work harder to exploit the competitive East Asian market. UK universities will also begin to experience growing competition in the provision of TNE activities/operations. This is because East Asian higher education providers have started to develop English-taught programmes and engage in TNE in overseas countries, like in the UK. The raising of concerns over UK universities’ reliance on the PRC has become inevitable. Still, this is not just about the growing amount of PRC
students enrolling over the past decade; it also concerns the terms of TNE activities/operations in the PRC. Furthermore, research collaborations between the UK and PRC universities with substantial funding from both their respective governments are increasing. How the UK Government and universities exert their leverage with the PRC for protecting national security, intellectual property and academic freedom has become a major challenge. Strategic and creative responses to these challenges will be required. Brexit could also open up opportunities for UK universities to further adjust their services and competitiveness. It could further serve to aid them in achieving a more comprehensive understanding of the East Asian education systems, employment environments and markets through the recruitment of international students, research collaborations, qualification recognition and TNE activities/operations in East Asia.

Notes

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