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Brexit geographies of transnational education: uncertainty, 'global Britain' and European (re-)integration

Jana M. Kleibert 

ABSTRACT

Higher education in the UK constitutes an important (export) sector that depends on mobilities of capital, labour and students. This article contributes to 'Brexit geographies' by exploring how the economic geographies of British transnational education are reconfigured during uncertainty over Brexit through spatial strategies of universities. Based on qualitative research and in-depth interviews with decision-makers in higher education in the UK, it maps the investments and analyses the rationales, narratives and spatial imaginaries motivating the construction of universities' physical presences abroad. Decision-makers' imagined futures for UK universities, first, reveal a linking to discourses of 'Global Britain' and, second, efforts towards European (re-)integration through campus development in European Union territory. The latter is intended by some to ameliorate risks of regulatory changes and provide an 'insurance policy' against the anticipated financial consequences of Brexit. However, the resulting geographies of risk and vulnerability are unevenly distributed and seem likely to increase the hierarchically structured (economic) geographies of higher education.

KEYWORDS

Brexit; uncertainty; spatial imaginaries; transnational education; international branch campus; European Union

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INTRODUCTION: 'BREXIT GEOGRAPHIES' OF GLOBALIZATION

We are exploring options in Europe, which is a potential *natural extension* to our campus developments in China, Ghana and Malaysia. (Lancaster University spokesperson, quoted in Havergal, 2018; emphasis added)

Could an 'outward-looking' UK university deal with Brexit-related risk, take advantage of progress in developing the EHEA [European Higher Education Area] and the ERA [European Research Area], and contribute to refashioning its future structure and identity by creating a new and *deeply embedded* campus in a nearby (commuting time-wise) Eurostar station city like Lille, France, safely in EU-space? (Olds, 2016)

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The geographies of transnational education are reconfigured in times of heightened uncertainty over the UK's position within and relation to the European Union (EU). Since a narrow majority voted in a referendum on 23 June 2016 to be the first country to leave the economic union since its inception,¹ uncertainty has reigned over the terms and conditions under which the UK will leave the EU, or 'Brexit'. It seems clear that the event will reshape political and economic geographies in a profound and fundamental way.

The exit of the UK from the EU regulatory space involves a reconfiguration of territory and strategies of de- and reterritorialization with new claims on space and territory (Boyle et al., 2018). The 'taking back control' promise advanced in the Brexit Referendum remains impossible to be achieved under any scenario, given the contingency of territorial sovereignty (Agnew, 2019). Different possible scenarios range from the transfer of sovereignty from Brussels to London to recreate classic (national) territorialized British sovereignty, to nostalgic ideas of a revived imperial sovereignty, to bilateral trade agreements following global market logics. However, 'in no case is there a real possibility for the totalistic repatriation of sovereignty promised by Brexit' (Agnew, 2019, p. 12).

Brexit's economic consequences are already being felt and will involve a reordering of economic relations and socio-spatial inequalities. Transnationally stretched manufacturing value chains are expected to be affected by disruptions of cross-border trade through tariffs and customs processes. The UK's economy is heavily dependent on services exports, where potential effects are often less clear. So far, analysis of the strategies of economic actors and ongoing spatial restructuring of economic sectors remains scarce. Economic geographers have to date focused their attention primarily on the repercussions for the financial services sector (Dörry & Dymski, 2018; Hall & Wójcik, 2018; Lai & Pan, 2018; Pollard, 2018). In contemporary knowledge-based capitalism, education has assumed the role of an economic sector in its own right, beyond serving a reproductive function. As such, education is another important services (export) sector for the UK.

According to government statistics, education-related exports from the UK generated almost £20 billion in 2016 and are supposed to grow to £35 billion by 2035. The estimates of export revenue growth are based on the value of a positive national image, a national *brand*: 'throughout the world the UK brand is one earmarked by quality, excellence and pioneering leadership' (HM Government, 2019). Higher education is not simply a multinational service activity like any other but depends as a status good critically on the perception of its value based on the quality of institutions and their respective national backgrounds. 'To a great extent national reputation operates as a proxy for institutional reputation,' and safe for a few highly reputed institutions, 'the global reputation of the university is underpinned by the hegemonic role of the nation' (Marginson, 2004, p. 218; see also Organisation for Economic Co-operation and Development (OECD), 2004, pp. 265f.).

Moisio (2018, p. 91) conceptualizes higher education institutions as geopolitical actors in the knowledge-based economy:

The contemporary university is a peculiar combination of nationalizing and transnationalizing elements. [Universities] increasingly rid themselves of nation-centrism and selected more globally oriented strategies in terms of their stated values and the priorities of their actions, as well as their organizational compositions.

However, the transnationalizing university is seen as a contributor to *national* competitiveness both indirectly through human capital development spurring the knowledge economy and directly as an export sector contributing positively to the national balance of payments (Moisio, 2018).

British universities, like multinational corporations, have benefitted from a single market that enables relatively unrestricted flows of people (students, lecturers and researchers). Now,

uncertainty over their future economic operations looms large. Universities fear that their opportunity to attract 'customers' (students) and 'talent' (teaching and research staff) from the EU, as well as access resources (e.g., EU research funding, Erasmus student mobility funding) may be severely restricted in a post-Brexit environment. Institutions that have become dependent on income from EU sources for their operations, most importantly EU research grants and tuition fees from EU students, are facing considerable financial risks.² As a response to these uncertainties, universities have set up 'EU tasks forces' and devise *spatial strategies* to deal with the repercussions of a loss of access to the EU market. This article addresses the question: How are the global economic geographies of British transnational education reconfigured during uncertainty over Brexit?

Following Thiem (2009), this study explores the restructuring not of the education sector but adopt an outward-looking lens to explore broader socio-spatial transformations *through* education as a *critical case* study of how the sector is constitutive of broader social, political and economic formations. Thus, the article takes up the call to 'explor[e] the processes by which universities and their 'products' are disembedded and re-embedded in place [... to] help ground accounts of 'weightless' knowledge economies' (Thiem, 2009, p. 164). Based on a case study of UK higher education institutions' transnational education geographies in the context of Brexit, understood not as an end-point but as a process, the focus is on investment decisions for constructing physical presences abroad in the form of international branch campuses.

The article does not attempt to predict the outcomes of UK–EU negotiations. It shows how actors imagine the future economic geographies of British higher education and how its external relations are actively reworked. While Brexiteers' rallying call to 'taking back control' might suggest a reorientation of the education sector towards the British nation-state, instead we can observe its increasing transnationalization, requiring cooperation and collaboration with partner institutions and foreign governments. This study contributes to emerging 'Brexit geographies' by taking up several questions and/or provocations stipulated by Boyle et al. (2018), relating to (1) renewed imperialism and the post-colonial project, (2) de- and reterritorialization strategies and new claims on space and territory; and (3) risks, uncertainty and vulnerability. The next section starts by discussing these conceptually in relation to the transnational education sector in the UK, drawing on literatures on economic and spatial imaginaries in relation to decision-making under uncertainty. The paper then outlines the qualitative methodology before a presentation and discussion of the empirical results of the UK's changing geographies of transnational education, where investments are mapped and the rationales for and narratives around the construction of physical presences of universities abroad are explored. The final section concludes by drawing on the wider meanings of these findings and suggests further avenues for research.

UNCERTAINTY, SPATIAL IMAGINARIES AND RISK IN TRANSNATIONAL EDUCATION

The geopolitics of higher education encompass processes of de- and reterritorialization, which are intimately linked to the economic imaginary of the knowledge-based economy (Moisio, 2018). According to Jessop (2004), 'economic imaginaries identify, privilege, and seek to stabilize some economic activities from the totality of economic relations and transform them into objects of observation, calculation, and governance' (p. 163). Imaginaries are not purely imaginary, rather, they are selected from several alternatives based on semiotic and material practices that enable individual and collective sense-making and action in a complex world (Sum & Jessop, 2013, pp. 164–168). The economic imaginary of the *knowledge-based economy* has become hegemonic (through its endorsement and enrolment of powerful actors, including state agencies) and performatively shapes the entrepreneurial reorientation of higher education at large (Jessop, 2017).

The individual spatial strategies of higher education institutions are shaped by – and are in turn shaping – spatial imaginaries. Watkins (2015) has helpfully identified three types of spatial imaginaries: places, idealized spaces and spatial transformation. Globalization and its assumption of a ‘flat world’ (Friedman, 2005) and, similarly, ideas of an ‘end of globalisation’ that have flourished with resurgent economic protectionism and nationalism in debates of Brexit, are imaginaries of spatial transformation. Geographers have pointed out the flaws of spatial imaginaries of globalization (Massey, 2005) and have argued that it is not a single, causal force or end-state (Dicken et al., 1997), but requires constant reworking of connectivities, mobilities and borders. Within these broader spatial imaginaries of transformation spatial imaginaries of idealized spaces (‘Global Britain’) and places (as sites of investment) are enrolled. Spatial imaginaries are representational discourses, socially structured ideas about places and spaces, that can become performative ‘when people act in relation to, or through, this spatial imaginary’ (Watkins, 2015, p. 509). Previous research has shown how spatial imaginaries have played a role in the Brexit Referendum campaigns (Siles-Brügge, 2018; Sykes, 2018). The present paper builds on these findings and investigates how decision-makers in universities act when confronted with high uncertainty of the future.

As Beckert (2016) has convincingly argued, the future in capitalism is always unknown and expectations are *fictional*: ‘Under genuine uncertainty, expectations become interpretative frames that structure situations through imaginaries of future states of the world and of causal relations. Expectations become determinate only through the imaginaries actors develop’ (p. 9). Investment decisions in particular depend on these ‘imaginaries of the future state of the world’ and on narratives (p. 9). Investment decisions are not simply rational calculations but critically depend on how decision-makers make sense of the world around them and envision the future. Whereas Beckert refers to investment decisions at large, the situation of Brexit is particularly acute as decision-makers are inexorably and overtly confronted with uncertainty. It thus provides an interesting point from where to observe their spatial sense-making of the world and the future geographies of their organizations.

The precise terms of the exit are not yet settled, including to what extent rules and regulations of the EU will continue to apply. The uncertainty creates obstacles for economic actors that depend on access to certain territorially defined markets for their operations. Over the past decades, British universities have become heavily internationalized actors, deriving significant income from international sources (McGettigan, 2013, pp. 113–124). They thus also depend on markets regulated at the scale of the EU, such as the European Higher Education Area (EHEA) and the European Research Area (ERA). Higher education institutions may employ strategies of embedding, disembedding and re-embedding in particular territories as a response to political processes of de- and reterritorialization. Investments into foreign presences, or processes of offshoring (relocation of activities across national borders), have long been used by multinational corporations as strategies for market access and regulatory arbitrage.

The uncertainty over Brexit is intimately related to economic risks, which universities are differentially exposed to. Some institutions are highly vulnerable to the negative impacts of Brexit due to a high degree of susceptibility, limited coping capacity and weaker abilities to adapt and minimize exposure through mitigation strategies (Boyle et al., 2018). Financially strong institutions with long-standing reputational capital and revenues stemming from diverse sources and geographically varied markets (beyond the EU) can be expected to suffer less from the ‘shock’ of Brexit. Strategies for risk mitigation of UK universities can involve the setting up of presences abroad to mitigate against the regulatory changes and negative repercussion from being outside of the ERA/EHEA. Important to assess, however, is the risk inherent in the new investments. International branch campuses are the riskiest form of internationalizing education as they tend to involve large capital investments and carry both substantial financial and reputational risks (Altbach, 2015; Wilkins, 2016). Thus, the geographies of vulnerability following Brexit and higher education institutions envisioned mitigation strategies require attention.

METHODOLOGY

The case study of UK higher education institutions sets out to understand how the economic geographies of universities are reworked. Following desk-top research identifying the actors and geographies of international branch campuses, 16 in-depth qualitative interviews were conducted. These included interviews with key, current and former decision-makers with a responsibility for internationalization and 'global engagement' strategies at 12 English universities. The interviews with university representatives were complemented with four additional expert interviews. The experts included representatives of important institutions for British transnational education, namely, Universities UK International, the Quality Assurance Agency, and the British Council as well as an independent education consultant.

Expert interviews are a longstanding method in economic geography that is particularly useful to gain insights into complex social phenomena and, as elaborated by Schoenberger (1991), can be fruitfully employed to uncover the rationales behind strategic decision-making on investment locations. The participating institutions cover a diverse sample of research-intensive (Russell Group members³) and teaching-intensive (including former polytechnic) universities located in different geographical contexts in the UK. Interviews with decision-makers focused on the current and future geographies of higher education institutions, in particular concerning international branch campus development and post-Brexit spatial strategies. The interviews were conducted between October 2018 and March 2019, a period when uncertainty over Brexit was looming large. All interviews were voice-recorded, subsequently transcribed, coded and analysed with MaxQDA. To guarantee the anonymity of respondents and protect what respondents considered commercially sensitive information, the names of universities participating in the study are not revealed.⁴

In order to understand the economic geographic imaginaries of universities, decision-makers were asked to draw the current and future geographies of their respective universities. Not all agreed to participate in this task, but in the instances when they did, the production of drawings enabled valuable conversations around location choices, existing and desired connections, and gave more personal reflections of respondent's imagined future economic geographies. Moreover, secondary data by the Higher Education Statistics Agency (HESA) were analysed to estimate individual institutions' exposure to income from EU sources.

Finally, the author attended industry events and public debates on transnational higher education relations between the UK and EU countries, including a panel discussion on the Berlin-Oxford Alliance with the presidents of the Free University of Berlin, Humboldt University of Berlin, Technical University of Berlin and the Charité Medical School with the president of the University of Oxford in November 2018; an event for decision-makers in higher education on the theme of the 'Internationalisation Imperative' organized by Universities UK International in March 2019 in London and the British Council's 'Going Global' conference for international education leaders in May 2019 in Berlin. The latter included panel discussions with Welsh and Scottish university representatives on post-Brexit strategies and strategic sessions to advance collaborative EU-UK initiatives; a 'match-making' session for UK actors planning to set up institutional collaboration and/or physical presences within EU territory. The attendance of these events helped to triangulate and substantiate the findings from the smaller sample of interviewed universities.

BRITAIN'S CHANGING GEOGRAPHIES OF TRANSNATIONAL EDUCATION

Over the past decades, universities in the UK have been subject to reduced government funding and neoliberal transformations (Pani, 2016; Robertson, 2010). Undergraduate tuition fees and

income-contingent loans have been introduced in the UK to finance higher education (Bryant & Spies-Butcher, 2018; Hall, 2015). English universities, in particular, have become increasingly dependent on tuition fees. International students' play an elevated role in the process, since international student fee levels are, unlike fees for British and EU students, not set by the government.

According to data by HESA, 458,490 non-UK students enrolled in higher education at institutions within the UK in the academic year 2017/18. Beyond the direct tuition fees, the 'export' income from international students is calculated by the industry body Universities UK International to include expenditures by students during their studies (e.g., accommodation costs) and even by their family members and friends when visiting international students in the UK. Calculated in this way, the economic value of international students amounts to £25.8 billion in 2014/15. The economic impact of students is geographically unevenly distributed, with London (£2.74 billion) and the South East (£1.27 billion) receiving most income, and Wales (£526 million) and Northern Ireland (£123 million) receiving the least (UUKI, 2017, p. 11).

In 2017/18, there were 693,695 international students studying for UK higher qualifications *outside of the UK*, almost one-quarter of a million more than international students studying in the territory of the UK. The number of UK students outside the UK has increased by almost 80% since the financial crisis. One element of transnational education is the export of higher education through the establishment of international branch campuses. Robertson (2010) connects the development of campuses offshore as a strategy to access additional funding to the Dearing Report, which impacted the imagined futures of universities in a fundamental way:

Under pressure to find new sources of funds, *universities strategically calculated their own futures* and the likely *moves that would secure this future*. For those HEIs [higher education institutions] willing to chart new waters, this meant looking beyond the borders of the national state to new kinds of activities, including the establishment of branch campuses (p. 195; emphasis added)

The first UK universities set up overseas campuses in the 1990s with a strong uptake over the last decade. The rise coincides with the increase of international branch campuses on a global scale (Kosmützky, 2018). The term escapes easy definition (see also Knight & McNamara, 2017). Actors in the field, moreover, use a range of different terms, including 'partnerships', 'centres' or 'hubs' when describing their ventures abroad. This study uses a broad definition of international branch campuses as *physical presences of higher education institutions in another country that operate under the name of the home university and award foreign degrees*. Only international branch campuses with physical infrastructures that award degrees are included; joint programmes, franchised and licensed degrees without individual physical presences have been excluded. The size of these campuses differs strongly, from smaller facilities offering individual programmes in different locations to the large-scale campuses accommodating thousands of students (such as the University of Nottingham's facilities in Malaysia and China).

Figure 1 shows the locations of the UK's 64 campuses abroad, operated by 43 UK universities (as of June 2018), which were identified through desk-top research of policy-documents, university websites and news reports in higher education outlets. Many of today's UK campuses are located in former colonial territories of the British Empire, above all the United Arab Emirates (10 campuses in Dubai, four in Ras al-Khaimah and one in Abu Dhabi), Malaysia (five campuses), Singapore (four campuses) and Mauritius (three campuses).

The export of British education either through stand-alone international branch campuses or in partnership with other providers has enabled a broadening of the student market beyond the domestic and international students that universities can physically recruit to the UK. By setting up branch campuses universities from the UK are less dependent on state funding and domestic students, as they are able to access to new markets and geographically diversify their revenues. Decision-makers for internationalization strategies and branch campus development at UK



Figure 1. Map of the UK's international branch campuses. Source: Author, based on desk-top research, 2018.

universities explain in interviews that one important rationale for campus development offshore is to circumvent restrictions placed by immigration regulation in the home territory and by being able to charge independent prices which are not set by the UK government.

Being able to avoid certain higher education regulations in the UK comes at the price of having to engage with regulations in the international branch campus host countries. Higher education is a very restrictively governed activity and foreign universities have to adopt to host government regimes, rules and regulations. Offshore campus development is deeply embedded in the strategies and economic imaginaries beyond the UK sending government, for instance, of Asian developmental states' efforts at constructing a knowledge-based economy (Jessop, 2016). International branch campuses in Qatar, Singapore or China are often set up in partnership with domestic public higher education institutions or state agencies and receive (financial) support, including from authoritarian governments. Although Koch (2016) rightly criticizes the construction binary of liberal/illiberal territorial imaginaries around Western offshore campuses in the Arab Gulf states, it is clear that the location in foreign jurisdictions means that regulation of higher education curricula is transferred to foreign governments. Geopolitical influence exerted on international branch campuses can also affect the operation of study programmes in the UK, as accreditation rules often require a mirroring of identical programmes overseas. UK universities are not simply liberated from regulatory restrictions in the home country but have to comply with additional regulatory authorities and potential political sensitivities in the foreign country, a situation of shared sovereignty (Agnew, 2019).

Post-Brexit strategies: a 'global Britain'?

Brexit presents a major challenge for higher education institutions, as for other globalized sectors, due to the high level of uncertainty actors are confronted with. Many interviewees voice a strong sense of stress due to the political situation and an expert states with a view to the sector: 'At the moment, the UK sector operates with a degree of uncertainty, unseen before. And this cannot be positive, it just increases the risks in a paramount way. So, it is a very difficult situation ... the uncertainty.' Despite the awareness that future is unpredictable and unstable, internationalization specialists need to devise spatial strategies for the future of their institutions.

Table 1 lists the types of institutions covered in this research and their respective campus development strategies following Brexit. It shows how two distinct spatial strategies take shape for campus development: (1) an increased focus on overseas markets, including the Commonwealth; and (2) the opening and valuation of European campuses, a previously rather minor category within the offshore campus landscape.

Strategies that involve an increased focus on campuses in Asia, particularly Malaysia, China and, to some extent, African countries, are also influenced by discourses and narratives about the role of the UK in the world. One idea that gained prominence is that of a ‘Global Britain’. The notion involves a ‘clean break’ with the EU and following the logic of a ‘global marketplace’ the UK aims to attract capital and ‘shape the world again as it did in the past’ (Agnew, 2019, p. 10). The British government has used the term ‘Global Britain’ as a geographic imaginary for Britain’s post-Brexit future (May, 2017). The term became the government’s ‘mantra’ and suggested a

Table 1. Higher education institutions and their offshore campus strategies.

Type of institution	Respondent	Offshore campuses	Brexit strategy
General	Pro-vice-chancellor	Campus in Asia and Africa	New European campus for teaching
Teaching-intensive	Pro-vice-chancellor	Campus in the Middle East, several joint programmes franchises	No new offshore campuses planned (but partnerships)
Research-intensive ^a	Director	Several smaller campuses with a focus on Asia and the Middle East	Increasing Commonwealth focus and expanding teaching in large overseas markets
General	Pro-vice-chancellor	Campus in Asia, subsidiary campuses in Europe	Continuing focus on overseas student markets, foster non-campus partnerships in Europe
Teaching intensive	Pro-vice-chancellor	Campus in Central Asia	Not yet decided
Teaching intensive	Pro-vice-chancellor	None	New campus in Europe for teaching
Teaching intensive	Vice-president	Campuses in Asia, Africa and Europe	Building upon an existing European Union campus for teaching
Research intensive ^a	Vice-president	Campus in Asia	Expansion in large overseas student markets
General	Dean	Campuses in Europe	Building upon existing European Union campuses for teaching
General	Former pro-vice-chancellor	Discontinued campus in the Middle East	Not yet decided
Research intensive ^a	Director	Campuses in Asia	Contemplating a European Union campus for research collaborations
Research intensive ^a	Head	Campus in Asia	Expansion in large overseas student markets

Note: ^aRussell Group member.

Source: Author, based on interviews.

closer orientation towards the Anglosphere and, to some, efforts at constructing an 'Empire 2.0' (Coates & Leroux, 2017; Siles-Brügge, 2018). Sykes (2018) argues with respect to the spatial imaginaries of the UK's Brexit debate that 'the "Brexit" project's nationally and externally/globaly orientated imaginaries of "Global Britain/Empire 2.0" ... essentially seek to promulgate a nostalgia-tinged version of the neoliberal and "free trade" focussed accumulation strategies' (p. 156) of earlier periods. Brexit and the resurrected idea of a 'Global Britain' mean that post-colonial scholarship is confronted with 'resurgent reification of colonial imaginaries' (Boyle et al., 2018, p. 102; see also Dorling & Tomlinson, 2019).

The notion of 'Global Britain' also translated into the government's strategies for higher education and is frequently encountered at higher education events. Respondents moreover invoke it when explaining location choice strategies, for instance, through the search for new 'frontier markets', the establishment of 'gateways', 'bridgeheads' and 'footholds', and the generally pervasive use of military language by internationalization strategists, above all with reference to expansion into Africa and Asia.

International education has its roots in colonial projects, when colonizers provided education for local elites to effectively administer the bureaucracies of empires. These legacies continue to shape the contemporary neo-colonial relations of education (Madge et al., 2009). For instance, investments into Malaysia have built upon these legacies, as a pro-vice-chancellor reasons the location choice:

So we have to look at ways of developing our presence beyond the UK ... and probably chose Malaysia on the basis of, in a sense, ease. There were other people there before us. Probably because of language and legal and financial incentives around that, of similar structures that we think we understand from the UK.

In post-colonial contexts, the brand value of 'British education' delivered through transnational education builds on 'neo-colonial fantasies' and asymmetric power relations in the global education field (Sidhu, 2006; Siltaoja et al., 2019; Le-Ha, 2017; Leung & Waters, 2017).

The notion of 'Global Britain' involves a strong international trade orientation. Then Education Minister Damian Hinds argued that

this moment of Brexit should mark us being even more outward looking and international than ever in the past' and that 'British education is renowned the world over ... we have some of the biggest brand names in the industry ... That's a great opportunity for growth for us. (quoted in Atack, 2019)

Some university representatives draw on this statement, for instance, stating that 'the university is committed to be a truly global university. And in the 21st century, universities are all international businesses, sort of knowledge-based organisations'. Already before Brexit debates, in 2012, the Department of Trade and Industry launched the country branding campaign 'GREAT' championing the UK 'brand' to increase trade revenues from tourism but also education. The recruitment of international students to the UK and increasing revenues from international students has been an important pillar of its strategy,⁵ executed together with the British Council.

While national branding strategies can serve to promote the UK higher education sector at large, they only set the broader frame for higher education's individual institutional strategies. Engaging in competition with each other, universities adopt different strategies, depending on their profiles and market segments. For some respondents, for instance the director at a research-intensive university, the notion of a 'Global Britain' entails a stronger fostering of Commonwealth relations, at the expense of European relations. For others, the risk of losing access to the ERA/EHEA are countered precisely through renewed efforts of engagements and the building of closer links with countries in the European Union.

European reintegration: an 'insurance policy'?

The establishment of branch campuses in mainland Europe is one option to serve as an *insurance policy* against the uncertainties presented by Brexit (see also Olds, 2016). The pro-vice-chancellor at a teaching-intensive university elaborates their choice to set up a European branch campus as follows:

With forthcoming Brexit, we wanted to have something which would give us a little bit of protection, dependent on the outcome of Brexit. And therefore, not just for that reason, because we are also interested in building our global reputation and increasing our position within Europe and also globally. But primarily, because of the issues around Brexit, we decided that we needed to establish a base within mainland Europe.

Industry experts similarly observe that UK universities setting up branch campuses in Europe as they 'quite rightly want to – as an insurance policy – have some foothold into the European market ... and that makes absolutely clear strategic sense for any British higher education institution'. Other respondents corroborate this analysis: 'What you see happening in the UK at the moment, was lots of institutions thinking about how they can establish either branch campuses or presence in Europe. It might be about hatching against the consequences of Brexit.'

The decisions for investments into EU space are taken within a general sense of uncertainty about the future rules and regulations. Many institutions have set up committees or taskforces to investigate potential strategies for a post-Brexit future. One such task force, at a research-intensive university, looked at the establishment of branch campuses in the EU, but found that uncertainty about the rules and regulations were too high for investing into a brick-and-mortar structure in mainland Europe. The director overseeing internationalization strategy explains:

Because the rules are all still so very unclear, it was described by a member of that group as 'a solution looking for a problem'. And at the moment, we just do not know what the problem is. If it becomes very clear, you know, that we need to have a European base in order to access funding and continue collaborating with European institutions, and if this is the only way we could ever possibly do it, then we obviously have to re-think it. But at the moment, we just do not know. ... The idea of some bigger physical work in Europe, or a location or campus, is not off the agenda. It has been talked about, but it was not the right time to take a final decision.

Other institutions perceive investment decisions to be highly time critical. Administrative processes are speeded up to be ahead of the competition and receive legal status before the future rules guiding the UK–EU relationship are fully defined. The pro-vice-chancellor at a teaching-intensive institution argues:

It was very rapid for us, compared to our normal approach which would probably being more like two years than a year. But it was because of the pressure of Brexit. We wanted to get established in the market before anything changed. So that hopefully, we have a different level of rights in that market when Brexit actually happens. So, I think, our legal team called it 'grandfathering rights', the fact that we are already in the market. And therefore, it would give us a better position than trying to enter the market afterwards.

Universities that already operate UK campuses in the EU see it as a strategic benefit vis-à-vis other universities and as an opportunity to expand these relations. According to the dean at an institution with long-established presences in Europe, these are not coming under pressure through Brexit but, on the contrary, are an asset now: 'Our operation should function reasonably well in the Brexit environment, precisely, because it is already there. And that is a very good

advantage for us.' The vice-president of another institution that operates a physical presence in a European country argues that his institution feels better prepared for Brexit precisely because they 'obviously got a European foothold'.

The decision to leave the EU does not shift the geographic location of the UK, but will have regulatory consequences, including question of the mutual recognition of degrees, and immediate financial consequences in terms of access to EU research funding and tuition fees. Both forms of revenue affect institutions, depending on their profile, in very different ways. The 'insurance policy' of erecting physical presences can take different forms, depending on the profile of a university. A vice-president of a teaching-intensive university argues that the decision is based upon where income losses are expected to be most significant: 'The imperative is to go where the income loss is greatest.' In the following, exposure to two sources of EU income (research funding and tuition fees) is analysed.

Research funding

The UK has been a net beneficiary of EU research funding. It received €8.8 billion in direct funding between 2007 and 2013, while contributing only €5.4 billion (The Royal Society, 2015, p. 12). In 2013/14, EU funding represented 9.7% of all UK research funding, a figure that had risen by 68% in four years, while the share of UK government science budget declined (p. 19). Figure 2 shows that the UK is the second largest recipient of EU research funding under the Horizon 2020 programme, after Germany. Moreover, the EU student exchange programme Erasmus+ brought €571 million (almost 4000 grants) to UK institutions between 2014 and 2017 (British Council, 2019).

It is important to note that these income flows have been to the advantage of a very small group of 'elite' research-intensive institutions in the UK, which have received a disproportionately high share of EU funding. The top five recipients in the academic year 2017/18 together accounted for one-third of total EU funding to the UK (Table 2). Several institutions' dependency, in relative terms (share of EU funding of total research funding) is much higher. For instance, although nominally small (and thus not shown in Table 2), the Buckinghamshire New University's dependency on EU funding is at 77%; the highest in the database. While the average share of UK universities' EU funding is 12.3%, it nonetheless matters critically for

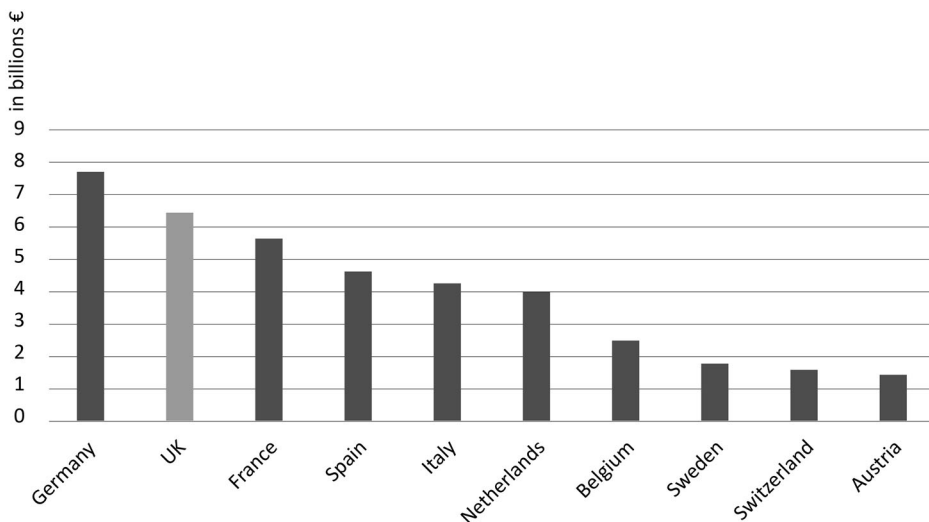


Figure 2. European Union's Horizon 2020 research funding, per country.

Table 2. Importance of European Union (EU) research funding for UK universities.

Higher education provider	2017/20: top 20 ranked by ...		
	research grants and contracts by EU government bodies (£ thousands)	share of research grants and contracts by EU government bodies of all research grants and contracts (%)	share of research grants and contracts by EU government bodies of total income (%)
University of Oxford	63,132	10.9%	2.8%
University of Cambridge	56,833	10.8%	2.9%
University College London	50,723	10.6%	3.5%
Imperial College London	38,843	10.7%	3.8%
University of Edinburgh	36,207	12.9%	3.7%
University of Manchester	28,774	9.6%	2.7%
University of Sheffield	22,237	11.3%	3.2%
London School of Hygiene and Tropical Medicine	20,822	14.8%	9.0%
King's College London	19,862	10.2%	2.4%
University of Bristol	18,572	11.0%	2.8%
Swansea University	18,302	35.4%	5.9%
University of Birmingham	17,384	13.0%	2.6%
University of Southampton	16,147	13.8%	2.8%
University of Glasgow	16,121	8.9%	2.6%
University of Leeds	16,077	11.7%	2.2%
University of Exeter	15,739	20.7%	3.8%
University of Warwick	14,039	11.1%	2.2%
University of Nottingham	14,002	11.7%	2.1%
Newcastle University	13,028	11.9%	2.5%
Queen's University Belfast	11,778	12.9%	3.3%
Total of all higher education providers in the UK	766,344	12.3%	2.0%

Source: Higher Education Statistics Agency (2020) (www.hesa.ac.uk).

some institutions. Continued access to EU research grants seems to be a key driver for EU campus development for research-intensive Russell Group universities with historically high funding income from the European Research Council. The underlying idea is that if scientists are employed more than 50% of their time within EU territory, they might be eligible to compete for EU research funding, though to date no regulatory clarity exists on the issue. Setting up physical presences in EU territory may enable institutions to legally employ UK researchers at these sites. A respondent states: 'I think more than anything else, they need to get access to EU research funds and that is a way of continuing to be involved in that.'

Thus, research-intensive universities are more likely to use this route, which teaching-intensive universities, especially those which lack strong European partnerships, are unable to access. The pro-vice-chancellor at a former polytechnical institution explains their situation:

I do not think it is something you could do easily without having that sort of length of relationship. So, even if we would to start now, I think it would take five years to have that sort of relationship, to be able to do that. So, for us, we have other relationships elsewhere. The institutions that are setting up branch campuses in Europe do have those long-standing relationships and they have a very strong research relationship as well. And again, we do not particularly have that. They're doing it more to protect their research income.

This explains the dominance of highly ranked research-intensive universities being particularly active in establishing presences in the EU. However, teaching-intensive universities are opening branch campuses following a different rationale.

Tuition fees

UK universities received income from EU student fees of £810 million in 2016, an increase of more 133% since 2010 (Department for Education, 2019). Table 3 shows the 20 universities with most EU students. In the academic year of 2017/18 total income to UK universities from EU student fees was £1.125 billion. The highest income went to University College London (£46 million), which is also the university with most EU students in total. For several institutions, EU students are important sources of total university income. On average, EU students account for 6% of total enrolment and 2.9% of total income. For seven institutions EU research funding and tuition fees by EU students account for more than 10% of total income.

The segmented market for different groups of students in England distinguishes between UK students, EU students and 'international students' (meaning non-EU students), who have to pay substantially higher fees. Whereas the fees for UK and EU students were capped at £9250 in 2018, no caps exist for international students, who pay on average an additional £6000. As the conditions for EU students post-Brexit are still unclear, one option is to recategorize EU students as 'international students', increasing the level of tuition fees. This shift would imply that the overall financial effect on individual universities could also be negative or positive, depending on how many EU students will (continue) to enrol and pay augmented 'international' tuition fees.

Beyond rising fees leading to potentially decreased enrolment of EU students, the affordability problem becomes compounded, if EU students lose access to UK government loans post-Brexit, explains the pro-vice-chancellor of an institution that just opened a branch campus in EU territory:

The base within Europe was always intended to give us some protection around attracting European students post-Brexit, because of course, about 80 percent of our European students who come to [home campus city] to study with us, get access to the UK Government student loan book. They get access to student loan facilities in the UK. ... Post-Brexit, the chances of access to that loan facility are pretty low. And also, there is a potential that EU students could be paying international student fees within the UK, rather than home UK student fees. Which would be two reasons, the number of EU students might significantly decline coming to the UK. So, on that basis, first and foremost a base in [European city] would be there recruiting EU students. But we also know, that the fee levels in the EU, and particular [European city], are quite low compared to the UK. So, we also wanted to be able to recruit international students to [European city].

Setting up a branch campus in EU territory thus serves not only as a strategy to safeguard against potentially decreasing numbers of EU students but also to expand the educational services offering to third-country nationals at the international branch campus.

Reconfiguring the geographies of UK–EU relations

At the institutional level, efforts at setting up branch campuses and/or strengthen bilateral relations are supported by governments and organizations such as the British Council. The

Table 3. Importance of European Union (EU) students for UK Universities.

Higher education provider	Top 20 ranked by ...				
	enrolments by EU students (non-UK) 2018/19	share of enrolments by EU students (non-UK) of all enrolments (%) 2018/19	tuition fees by EU students (non-UK) (£ thousands) 2017/18	share of tuition fees by EU students (non-UK) of all tuition fees (%) 2017/18	share of tuition fees by EU students (non-UK) of total income (%) 2017/18
University College London	5075	12.3%	46,263	10.3%	3.2%
King's College London	4230	12.9%	32,715	10.2%	3.9%
University of Edinburgh	3805	11.1%	18,465	6.4%	1.9%
Coventry University	3680	10.5%	26,030	8.9%	7.1%
Imperial College London	3305	17.3%	30,826	11.9%	3.0%
University of Glasgow	3135	10.2%	7919	4.3%	1.3%
University of Manchester	2980	7.4%	19,599	4.4%	1.9%
University of Aberdeen	2900	19.6%	4,477	8.3%	2.0%
University of Warwick	2700	10.4%	25,240	8.5%	4.0%
University of Oxford	2630	10.4%	22,014	8.8%	1.0%
University of Cambridge	2625	12.6%	27,867	11.5%	1.4%
University of the Arts London	2450	12.8%	23,769	12.0%	7.7%
University of Westminster	2215	11.7%	17,685	11.4%	8.6%
London School of Economics and Political Science	2180	18.4%	27,887	16.0%	7.7%
University of Essex	1995	12.8%	15,065	12.4%	6.8%
City, University of London	1960	9.7%	24,099	13.4%	10.0%
Middlesex University	1895	9.7%	20,699	14.5%	10.1%

(Continued)

Table 3. Continued.

Higher education provider	Top 20 ranked by ...				
	enrolments by EU students (non-UK) 2018/19	share of enrolments by EU students (non-UK) of all enrolments (%) 2018/19	tuition fees by EU students (non-UK) (£ thousands) 2017/18	share of tuition fees by EU students (non-UK) of all tuition fees (%) 2017/18	share of tuition fees by EU students (non-UK) of total income (%) 2017/18
Queen Mary University of London	1880	9.1%	23,097	10.2%	5.0%
University of Bath	1825	10.1%	13,483	8.8%	4.7%
University of Surrey	1800	10.7%	16,147	10.8%	5.4%
Total of all higher education providers in the UK	143,025	6.0%	1,124,589	6.3%	2.9%

Source: Higher Education Statistics Agency (2020): www.hesa.ac.uk.

annual conference for key decision-makers in international higher education ‘Going Global’ has for the first time ever taken place in Berlin in 2019, which can be interpreted as a sign for the regained importance of UK–EU, and above all UK–German, relations. Institutions from Germany and the UK have traditionally been the largest beneficiaries of EU research funding (Figure 2). Table 4 gives an overview of announced UK university investments into the EU. The announced investments reveal indeed a large focus on a single nation-state as investment recipient. Only two out of seven investments are outside of Germany. Behind this geographic concentration looms a variety of different constellations, involving several institutions that featured prominently in Tables 2 and 3.

First, we can see that elite institutions form select ‘ties of excellence’ with reputed institutions in the EU. Examples are the Berlin University Alliance with Oxford University, an initiative clearly triggered by Brexit that leads to the establishment of a Berlin House and an Oxford House in the respective places, as well as Imperial College London’s collaboration with the Technical University of Munich. The research strength and reputation of these higher education institutions plus their location in Germany’s largest cities make the sites attractive for UK universities. The other two Russell Group universities, the University of Glasgow and King’s College London, similarly seem to aim at securing further access to EU funding opportunities. The physical presences are dedicated not to teaching, as is usually the focus of international branch campuses, but are instead places for research collaborations in dedicated fields. The result of these collaborations and new physical presences is a deeper integration and bilateral collaboration of select institutions, which may serve to aggravate existing uneven geographies of research funding.

Second, we see how three universities with a teaching focus have established different forms of physical presences with the explicit goal of recruiting EU and international students to these locations. Here the location of domestic research-intensive universities is not a decisive location

Table 4. The UK’s (announced) investments into the European Union.

UK institution	European location	Partner	Focus (anticipated)	Starting date
Oxford University	Berlin (Germany)	Berlin University Alliance (Freie Universität Berlin, Humboldt-Universität zu Berlin, Technische Universität Berlin; Charité – Universitätsmedizin Berlin)	Research collaborations	2018
Imperial College London	Munich (Germany)	Technical University of Munich	Research, innovation transfer	2018
King’s College London	Dresden (Germany)	Technical University of Dresden	Biomedical research (trans-campus)	2015
University of Glasgow	Lüneburg (Germany)	Leuphana University	Research, teaching	April 2019
Coventry University	Wrocław (Poland)	–	Teaching	September 2019
Lancaster University	Leipzig (Germany)	Navitas	Teaching	September 2019
Northumbria University	Amsterdam (Netherlands)	Amsterdam University of Applied Sciences	Teaching	2018

Source: Author’s compilation, based on fieldwork and media announcements.

choice factor. Teaching in two cases is conducted together with partners; an Australian for-profit education provider (rather than with the local academic institution, the University of Leipzig) and a university of applied sciences (rather than the research-intensive University of Amsterdam or Vrije Universiteit Amsterdam). A teaching-focused international branch campus of Coventry University occupies the only Central/Eastern European location.

More projects are currently in the pipeline and conversations with Scottish and Welsh universities suggest that many institutions are currently thinking about establishing teaching facilities, primarily in Europe's peripheries, including Romania, Greece and Cyprus. Several of these may take shape with only very limited physical presences, such as franchises and license agreements and thus remain below the radar of large publicly announced investments. The examples above show how the concept of international branch campuses has become a very flexible strategy whose shape depends on the identified problem that it is supposed to, at least temporarily, solve.

Seemingly paradoxically, the challenges posed by Brexit led to closer formal relations (in terms of investments into partnerships and branch campuses) between several UK and EU-based higher education institutions. These were largely driven by UK institutions' fear of exclusions from the EU common market. More research is required on the receptiveness of different European countries for UK investments and actors' willingness to form partnerships.

What is already obvious is that the geographies of higher education are changing as a result of Brexit. A respondent argues:

It will mean a redrawing of where universities will think of going next. I think we took for granted membership of the European Union. It was not really that much incited [*sic*] to think about doing these branches or partnerships within the European Union, when you had freedom of movement of people and access to research funds and collaboration was easy, no frictions with borders and all the rest of it. I think as soon as those things come into ... are undermined, then you have to think about: ok, what do we do to mitigate the risks? ... You will find research-intensive universities going to the core of the EU. You might find those universities that are just trying to close the income gap created by the absence of EU students going to periphery of the EU.

The reconfigured geographies of 'core' and 'periphery' are likely to remain pronounced within hierarchically organized 'reputational geographies of higher education' (Jöns & Hoyler, 2013) or may even deepen.

CONCLUSIONS

The economic globalization project has come under challenge by new patterns of inequality and a northern backlash (Horner et al., 2018; Martin et al., 2018). At a time when the spatial imaginary of an 'end of globalisation' is gaining ground, the study has shown that we should pay attention to the *reworking of the geographies of globalization*, as processes of integration are not simply reversed, transnational ties are not simply cut but rather global value chains and economic relations are rearranged through and across borders. In the process of de- and reterritorialization of economic actors, uncertainty and spatial imaginaries have played an important role for investment decision-making. On the one hand, internationalization strategists aim at overcoming funding pressures and regulatory hurdles through international branch campus development. Respondents use calculating strategies based on anticipations of future revenue opportunities and risk assessments, develop what they see as an 'insurance policy' against the repercussions of Brexit. Within these strategies they act upon and *bring to life* spatial imaginaries of 'Brexit' through their investment decisions (Watkins, 2015).

Mapping the strategies, narratives and investments of decision-makers imagined futures for UK universities revealed both a linking to discourses of 'Global Britain' and towards efforts at

European (re-)integration through the establishment of international branch campuses in the EU. By showing what is at stake for different (types of) higher education institutions the governance implications for UK and EU negotiators become clearer. UK government strategies, for instance, in relation to negotiating continued access to Horizon Europe funding, assuring a full compensation of (previous EU) funds through a newly developed national system, raising or lowering of tuition fees for particular groups of students, will affect different (types of) higher education institutions as will decisions by EU policy-makers on the terms and conditions of the UK's access to funding programmes.

Although the situation of UK universities may be an extreme case of uncertainty, it still offers some insights that may be relevant to other cases.⁶ Universities are increasingly *mobile actors* whose location is not simply taken for granted but can be actively made (Addie et al., 2015) and increasingly involve operating campuses outside of the domestic territory. The deterritorialization of UK universities through setting up of branch campuses overseas and in EU territory suggests a continued orientation of universities away from nation-state bound actors towards (economic) players in global markets. The dependence on foreign markets and the embedding through foreign direct investments in different national contexts has rescaled the regulation of UK universities, which now increasingly encompasses regulatory authorities in China, Singapore or the United Arab Emirates, or Germany. The transnationalization of UK universities requires cooperation and collaboration with partner institutions and foreign governments, a sharing of sovereignty (in the regulation of higher education) that empirically demonstrates again the 'myth of territorial sovereignty' of the Brexit Referendum (Agnew, 2019).

This analysis of the post-Brexit geographies of higher education complement existing economic geographic analysis on other sectors that have pointed towards a likely increase of spatially uneven development (e.g., Jessop, 2018, pp. 1741f.; Pollard, 2018). Beyond the case of higher education, decision-makers in other relevant export sectors, such as finance and manufacturing, are actively re-evaluating their location choices and transferring parts of their operations to mainland Europe or beyond (Dörny & Dymski, 2018; Hall & Wójcik, 2018; Lai & Pan, 2018).

The future cannot be known and the success of the spatial strategies for UK universities to date remains unclear. Analogous to other analysis on Brexit, a key limitation of this study is its focus on a phenomenon in flux. 'Brexit geographies' are far from settled and the caveat formulated by Boyle et al. (2018) still applies: 'Ours is a restless, dynamic, and incomplete subject matter; our stocktaking, interpretations and commentaries are necessarily tentative, provisional and at times conjectural' (p. 98). Much more research and analysis are required to investigate the longer term outcomes and materializations of these strategies. Future research is required on how protectionist trade policies and rising nationalism in major Western economies will affect contemporary geographies of production and consumption. In addition to quantitative assessments of trade data, we need qualitative research to understand how key stakeholders reorganize transnational economic relations (Hall & Wójcik, 2018) and how these changing relations constitute and reproduce socio-spatial inequalities at multiple scales.

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NOTES

1. The widely felt shock of the Brexit vote has sparked much analysis and speculation on its origins. Several (geo)political drivers of the UK's decision to leave the EU have been identified, including populism, nationalism, imperialism, fragmentation and inequality (Bachmann & Sidaway, 2016; Boyle et al., 2018; Dorling & Tomlinson, 2019). Clearly, neither the origins nor the impacts of Brexit can be understood solely through any analysis that focuses on the internal dynamics within the UK alone – rather, it is important not to disconnect Brexit from the historical and socioeconomic context of the UK and its wider relationship with the world.
2. This paper was written before the COVID-19 pandemic made its presence felt on UK universities. Travel restrictions and an ensuing reduction of international student tuition fees would likely lead to severe and even more acute effects on university finances.
3. The Russell Group (named after its first informal meetings in a hotel at Russell Square, London) is an association of 24 research-intensive universities in the UK. Established in 1994 to represent its members' political interests, the group presents itself as an elite club and receives a disproportionately high share of all research income in the UK, including from European Research Council grants (The Russell Group of Universities, 2017).
4. When names of universities are used throughout the analysis, this solely occurs based on publicly available information and occurs independently of their participation in the research.
5. China has become the single most important trading partner with respect to higher education 'exports'. In 2018–19, more than one-third of all international, non-EU students came from China, contributing a considerable share of tuition fees to UK universities (HESA, 2020).
6. Beyond the UK, populist policies create pressures for universities in the United States, where visa restrictions threaten the recruitment of students and staff. In Hungary an international private university, the Central European University in Budapest, is in limbo over its legal status (and thus permission to operate) and has decided to open a campus in neighbouring Vienna.

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