Summary

The impact of Brexit on higher and further education in Wales is more than access to tangible factors such as mobility programmes or research funding. At risk, are our links to networks, collaborators and interest groups across the EU at national and regional level – our people-to-people relationships. Maintaining these links will be vital as they are where information is shared and partnerships forged.

Erasmus+ is the largest provider of student mobility for students at Welsh universities, forming the core of Wales and the UK’s international mobility offer and accounting for more than 50% (15,000) of all UK annual student mobility. Hundreds of academics, lecturers and teachers and thousands of students from Wales have benefited from the programme, gaining academic, career and life-enhancing experiences. Experiences that improve students’ employment and careers prospects and are increasingly valued by employers.

To remain globally competitive, Wales needs a strong research base to attract talented students and researchers from around the world. When the UK leaves the EU, mechanisms need to be in place to ensure that talented researchers are still able to access funding to come to the UK.

If UK participation in the Erasmus+ or Horizon 2020 programmes cannot continue after Britain leaves the EU, it is vital that the opportunities for young people are replaced by suitable alternatives with similar scale and reach. The breadth of these activities including volunteering and schools means that there is also a potential impact on social mobility or ‘harder to reach’ young people who may have no other contact with international opportunities.

In addition to the economic benefit of EU students for Wales, the Welsh HE sector also benefits from its appeal to high calibre academics and researchers from Europe and around the world. International students and staff make an important cultural contribution to Wales, enriching our university campuses and cities and helping to maintain the international reputation and profile of our institutions. With a lifelong connection with and affinity for Wales, they provide a huge boost to Welsh soft power.
The British Council
The British Council is the UK’s organisation for international cultural relations and was founded to create ‘friendly knowledge and understanding’ between the people of the UK and wider world. We are present over 100 countries worldwide and have been working with and supporting the Welsh higher and further education sectors promoting the best of Welsh education and culture internationally, through our programmes in education and the arts, since the 1940s.

The British Council has offices on the ground in 24 of the 28 EU member states and interests including the mobility of UK and EU students, the creation and promotion of cultural, research and scientific links, partnerships with governments and other institutions, teaching of the English language and access to UK exams and qualifications.

In considering the impact of Brexit on higher and further education in Wales, we are mindful of practical and tangible factors such as the long-term future of EU funded programmes (Erasmus+, Horizon 2020) and the mobility of people, as well as a broader set of implications around cultural and people-to-people relationships.

Learner Outcomes and Employability
Erasmus+ is the flagship European Union mobility programme offering opportunities for participants to study, work, volunteer, teach and train abroad. It aims to modernise education, training and youth work across Europe and in addition to being the largest student exchange programme in the world, it is open to education, training and youth and sport organisations across all sectors of lifelong learning, including school education, further and higher education, adult education and the youth sector. The current programme will run until 2020, and the British Council in partnership with Ecorys UK is the National Agency, responsible for managing and delivering the programme in the UK.

Erasmus+ is the largest provider of student mobility for students at Welsh universities to countries in Europe and beyond and forms the core of Wales and the UK’s international mobility offer, accounting for more than 50% of all UK annual student mobility (more than 15,000 students). In the previous period (2007-14) more than 4,500 students and over 700 academics and lecturers at Welsh universities participated in Erasmus+ mobility programmes. And during the first two years of the new Erasmus+ programme (2014-16), over 200 staff and 1,500 students have benefitted from the programme (5% of the UK total).

What is the impact of these activities for Wales and Welsh learners? Students who go abroad are more likely to do better at every key indicator in higher education, from attainment to employment. 1 75% of Erasmus students receive a first or

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1 British Council data
2 [https://www.universitiesuk.ac.uk/International/Documents/Stand%20Out%20report_online.pdf](https://www.universitiesuk.ac.uk/International/Documents/Stand%20Out%20report_online.pdf)
upper second-class degree, compared to 60% of students who did not study or train in the UK or abroad.³

An international experience makes young people more employable by improving both hard and soft skills. Employers value foreign language skills and the ability of employees to work across cultures, as well as the soft skills that are developed through international experience, such as communication, critical thinking skills and problem-solving skills. Currently, employers do not feel that education alone gives young people the intercultural skills needed for the modern workplace.⁴

Research involving 650 companies across Europe indicated that 92% of employers are looking for personality traits boosted by the Erasmus+ programme such as tolerance, confidence, problem-solving skills, curiosity, knowing one’s strengths/weaknesses, and decisiveness when making a recruitment decision. One third of Erasmus+ trainees are offered jobs in the company where they worked and graduates who have taken part in Erasmus+ are twice as likely to find employment quickly and also 50% less likely to experience long-term unemployment.⁵

Programmes with the flexibility to offer structured, well supported placements in countries closer (and perhaps more familiar) to the UK have a higher success rate and the wide range of mobility opportunities and funding offered through ERASMUS+ may be more difficult to replicate, potentially making it more difficult to promote mobility particularly for disadvantaged groups who are already less likely to be mobile.

Every year Erasmus+ funds 10,000 British vocational education and training students to get foreign work placements directly linked to their vocational qualifications, as well as 7,500 young people, often from disadvantaged backgrounds, to acquire a volunteering experience abroad. A Course Leader from Coleg Sir Gâr noted that “the opportunity for some is particularly enriching as they had never left the UK before, let alone do a two week work placement. The confidence, social skills and cultural experiences gained by our students have made the Erasmus+ project an important part of the students’ learning journey and one we hope to continue for years to come.”⁶

If UK participation in the Erasmus+ programme cannot continue after Britain leaves the EU, it is vital that the opportunities for young people are replaced by suitable alternatives with similar scale and reach. The breadth of these activities

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including volunteering and schools means that there is also a potential impact on social mobility or ‘harder to reach’ young people who may have no other contact with international opportunities.

Young people in Wales need to be offered opportunities to develop the outlook, knowledge, skills and experience that enable them to take part effectively in an internationally connected labour market. International experiences are one way in which they can build this skillset.

While bilateral programmes exist and could perhaps be enlarged, assuming there is a successor programme (and discussions are already underway), we believe that there would be significant benefit in Wales and the UK’s continued participation (perhaps through a negotiated partnership). We consider this would be a more cost-effective and pragmatic approach compared to developing numerous bilateral programmes within the timeframe and also at the current national scale of Erasmus+.

**Financial Sustainability and Investment Opportunities**

Wales and the wider UK have an outstanding global reputation for Higher Education, and is well known for the high quality of its academics, providing an excellent student experience and welcoming student environment. However, this success is dependent upon its international connections and partnerships. If the UK were to create an impression that it is not as welcoming to international students, this would impact Wales, negatively affecting its power to attract international students and to forge collaborations and partnerships overseas.

The UK currently attracts over 442,000 (2016/17) students from across the world (including 138,000 EU students), ranking second only to the US in attracting the greatest share of the world’s internationally mobile students. Unlike the rest of the UK, Wales saw an overall reduction in the number of international students (21,205), which continues a decline in the number of non-EU students between 2013/14 and 2016/17 (also seen in Northern Ireland).  

More positively, EU students in Wales are at a 5-year high (6,235). Despite Brexit, there has been no decline in EU students between 2015/16 and 2016/17, (although most students starting their first year of studies in 2016/17 would have applied for their course prior to June 2016). However, post Brexit, EU students will be liable for international student fees and it is possible that any increase in income could be countered by a decline in the number of EU students. Increased visa and immigration barriers could further impact numbers.

In January 2018, LSE research indicated that the net economic impact of international students to the UK was estimated to be £68,000 for each typical EU-domiciled student in the 2015/16 cohort and £95,000 generated by each typical non-EU-domiciled student. Put more bluntly, every 15 EU students and every 11 non-EU students generate £1m worth of net economic impact for the UK.

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economy over the duration of their studies.8 Therefore, increasing the number of international students, and maintaining and increasing Wales’ international reputation for education through e.g. expanding the Global Wales partnership (Universities Wales, Welsh Government, British Council, HEFCW and the HE sector) would not only benefit Wales economically, but also serve as a boost to its soft power.9

In addition to economic benefit of EU students for Wales,10 through fee, ‘off-campus’ and tourism income, it is important to remember that they also make an important cultural contribution to Wales, enriching our university campuses and cities and helping to maintain the international reputation and profile of our institutions. When they return home, many of these students go on to positions of leadership in business and other sectors with a lifelong connection with and affinity for the Wales, providing a huge boost to Welsh soft power.

Furthermore, the UK's globally successful university sector benefits enormously from its appeal to high calibre academics and researchers from around the world. With 17% of academic staff and 6% of professional services staff from other EU countries11, it is important that barriers to professional academic mobility are minimised and that there is a consistent message that encourages and welcomes talented staff and students to choose Wales.

EU programmes have continued to benefit Wales’ HE and FE institutions. Since the current programme began in 2014, Wales has benefitted from nearly €30m of funding from Erasmus+ with Welsh universities receiving over €13m, the Vocational Education and Training (VET) sector over €6m and €6.5m for the schools sector. The VET sector saw the largest rise in funding in Wales in 2017, with €2.2 being awarded to colleges, up from €1.3m in 2016.

The UK Government has stated that Britain would remain part of Erasmus+ until the end of 2020, but it is unclear what happens later. There are possible options for the UK to remain in the programme, e.g. several non-EU countries like the Iceland, Liechtenstein, Norway and Turkey have access to the Erasmus scheme but this would, no doubt, be subject to negotiation.

**Research and Innovation Funding and Collaboration**

Wales needs to remain innovative to be globally competitive. This requires drawing on global rather than just national talent and resources. The uncertainty surrounding further EU funding poses a risk for Wales science and technology. When the UK leaves the EU, mechanisms need to be in place to ensure that talented researchers are still able to access funding to come to the UK, ideally through continued access to programmes such as Horizon 2020.

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11 [https://www.universitiesuk.ac.uk/policy-and-analysis/brexit/Pages/brightest-minds.aspx](https://www.universitiesuk.ac.uk/policy-and-analysis/brexit/Pages/brightest-minds.aspx)
Wales’ successful participation in the hugely competitive Horizon 2020 and previous programmes has enabled Welsh organisations to collaborate across the EU and take a leading role in international research and innovation. Welsh organisations have secured just over €83m of Horizon 2020 funding since the start of the programme. This has involved 191 participations and 2000 international collaborations.\textsuperscript{12}

The international profile of the UK’s academic workforce reflects the ability of the UK to attract talent from overseas and this supports the UK’s scientific excellence. UK institutions with greater proportions of foreign researchers and researchers with international experience scored more highly in the recent Research Excellence Framework, which assesses the quality of research in higher education institutions.\textsuperscript{13}

A strong research base needs to attract talented students and researchers from around the world. There are many reasons for Wales and the UK being attractive to overseas students and researchers, including the strength of its research base and a funding environment based upon transparency and merit-based competitiveness. However, a part of this attractiveness could be connected to the UK’s membership of the EU, whether this is because of the funding instruments available to researchers and students coming to Wales, or the fact that researching in Wales gives access to researchers and facilities across Europe.

International research collaboration has increased across the HE sector and while EU membership and funding programmes facilitate collaboration, Wales and UK-based researchers collaborate with partners across the world. However, while the US continues to be the UK’s most frequent partner country, collaboration with EU Member States has increased at a faster rate than with other partners and more than half of the UK’s collaborative papers are now with EU partners.\textsuperscript{14}

There is a risk that in the medium- to long-term, Wales’ attractiveness to the most talented incoming researchers as a hub for world-leading research in a well-resourced, linked-up and enabling environment, a place where they can flourish and develop their careers, will become much reduced should the UK lose continued access to Horizon 2020 and its successor framework programmes.

In addition to funding programmes, academic mobility and EU research students, equally as important are the numerous EU-wide structures, links, conferences and peer to peer interest groups that Wales’ universities and academics are networked into at both a national and regional level. Maintaining these links will be vital as they are where information is shared and partnerships forged. Global Wales is currently looking at options to maintain and develop researcher links in Europe.

\textsuperscript{12} https://gov.wales/funding/eu-funds/horizon2020/?lang=en  
\textsuperscript{13} https://royalsociety.org/topics-policy/projects/uk-research-and-european-union/role-of-eu-researcher-collaboration-and-mobility/snapshot-of-the-uk-research-workforce/  
\textsuperscript{14} https://royalsociety.org/topics-policy/projects/uk-research-and-european-union/role-of-eu-researcher-collaboration-and-mobility/would-international-collaboration-be-affected-if-the-uk-left-the-eu/