

ABOUT UAL – OUR INFLUENCE IN EUROPE AND WORLDWIDE

1. Due to our deep engagement in the European creative economy, UAL is recognised as a UK Top 30 institution for knowledge exchange – the interplay of innovation and expertise between universities, industry, government and civil society.
2. We highly value our place within the European cultural environment. We continue to reinforce our bilateral and multinational relationships with other European countries through education, research and creativity, particularly at city level. This briefing note gives examples of fields in which this will be particularly important following Brexit. It also gives an overview of how we expect Brexit to affect our staff, students and access to European knowledge networks.
3. UAL is Top 2 in the QS World University Rankings 2019 for Art & Design and a Top 30 UK research institution. In 2016, HEFCE again judged UAL’s teaching to be world leading. UAL is made up of six colleges, all leaders in their fields in the EU – Camberwell College of Arts, Central Saint Martins, Chelsea College of Arts, London College of Fashion, London College of Communication and Wimbledon College of Arts.

KNOWLEDGE EXCHANGE AND EUROPE’S CREATIVE INDUSTRIES

4. UAL exists because of a worldwide demand for creativity. The creative industries are recognised as a high capacity engine for economic growth, help to differentiate industrial output, and are more resilient to robotics and automation. For this reason, the creative economy is deeply embedded in the industrial strategy of EU countries, where creative industries represent 11.2% of private enterprise, 7.5% of employment and generate 5.3 % of total European GVA (European Commission, 2016). In the UK alone, creative jobs almost doubled between 1997 and 2016, and are projected to expand from 1.8 million to 2.8 million 2015-2025 (Nesta, 2016).
5. Knowledge exchange will play a central role part in this continuing expansion, particularly as the UK deals with technology disruption. We identify three priorities where the UK will be an attractive partner post-Brexit for ongoing multilateral investment in creative education and the creative economy: Artificial Intelligence, sustainability and fashion tech.

Fashion

6. Textiles and clothing in EU28 turns over €171 billion, employs 1.7 million workers. €45 billion exports, €110 billion imports (EURATEX). The UK knowledge economy makes a strong contribution to this sector in sustainability, design and retail. We rely on Europe in terms of manufacturing, including rapid prototyping.
7. London College of Fashion’s [Fashion Innovation Agency](#) helps designers and brands change the way they make, sell or show their collections. It delivers ground-breaking and award-winning projects in wearable technology, AR/VR and blockchain, and is working on major developments within nanotechnology, IoT and robotics. The agency was listed as “one of the top ten innovators shaping the future of fashion, poised to shake up every aspect of the sector, from manufacture to marketing and retail” by the Creative Industries Council, September 2018.
8. The fashion industry is the nexus where existing big tech trends will meet in the near-term. The UK is emergent (and strong in relation to other EU countries) in fashion innovation and especially fashion tech. New technology is on course to disrupt EU fashion, much as mass production did in the 1970s. The major disruptors are artificial intelligence, augmented reality, big data, robotics and smart materials (aka wearable tech). Garment manufacture will get nearer the consumer, and more specific to their requirements. Within the decade, products including

trainers will be made in-store on-demand. Blockchain will determine luxury goods provenance, increasing consumer confidence and undermining the counterfeit market. 3D prototyping will cut the lead-time between idea and shop window from three weeks to one week. Wearable robotics including exoskeletons and prostheses will change our understanding of apparel. They are at the same point of adoption as drones five years ago. They will soon cross over from defence and medical use into consumer wear, including jewellery. With few mid-sized robotics companies worldwide, InnovationUK suggests that market share is still open to the UK.

9. The job of integrating these trends into industry falls to our alumni, and UAL is spearheading the UK's response with the [Fashion District](#). We established this business cluster in 2018 with the GLA and industry partners to put London at the forefront of fashion technology.
10. UAL is a key partner in several multilateral projects to address the slow take-up of new technologies in the European fashion industry. DeFINE project (Developing a Fashion Innovation Network for Europe) aims to break down four barriers: access to cross-sector networks; links to the technology sector; focused fashion-tech networks; interdisciplinary skills and resources. The ART-CHERIE project promotes the use of digital fashion archives and heritage to shape vocational training and train EU fashion designers. London College of Fashion has developed two online units for the project, which addresses a lack of SME expertise through a common VET – ICT tool for the fashion sector.

Artificial Intelligence

11. AI & Data Economy is the first of the Modern Industrial Strategy's Grand Challenges, aiming to put the UK at the front of the artificial intelligence and data revolution. London's AI cluster is recognised as the European capital of AI. It is centred on the King's Cross Knowledge Quarter, co-founded by UAL and the British Library. The European Commission identifies AI as a priority for future funding and research and recognises London's ongoing influence in this field. This should be fruitful for future multilateral relationships.
12. UAL has recruited two of the world's leading professors to the new [UAL Creative Computing Institute](#). The Institute supports inter-disciplinary teaching, research and knowledge exchange at the intersection of creativity and computational technologies. The Institute works across domains such as machine learning and artificial intelligence, exploring how the contemporary world is defined through human computer interaction and social platforms.

Sustainability

13. Clean Growth is the fourth of the Modern Industrial Strategy's Grand Challenges, to maximise the advantages for UK industry from the global shift to clean growth.
14. UAL has signed long-term strategic partnerships on sustainability in luxury goods with two of the world's leading conglomerates, LVMH and Kering, both of which are based in the EU. London College of Fashion's five-year strategic partnership with Kering delivers sustainability-focused projects for specific brands within the group and an open-access digital course in luxury fashion and sustainability that engaged 10,000 learners in its six-week launch phase. The focus of Central Saint Martin's LVMH partnership is on sustainable innovation, with the aim to enhance R&D capacity for LVMH through numerous consultancy projects, and the development of new commercialisable IP from these engagements. Through close work with our leading academics, LVMH have established Maison/O, an incubator of sustainability intelligence; launched a conference series focused on bio-innovation; and are exploring an R&D collaboration with a leading engineering university.

15. UAL recently established MA Biodesign at Central Saint Martin's as the world's first course in the emerging field of bio-design and bio-innovation. This presents immediate opportunities for major businesses. Our biodesigners work in the context of the bio-circular economy to articulate alternative and innovative design propositions. MA Biodesign builds on our extensive offer at the intersection of art, design and science. This includes the pioneering MA Art & Science, the Fine Art Maths Centre, the Design & Living Systems Lab, and MA Material Futures, which is internationally renowned for its combination of design with science. Each MA Material Futures student works with a scientific mentor and many go on to PhDs in collaboration with Kings and UCL. An exemplar of this approach is the [patent-pending shoe woven with bacteria](#). Students from these courses won the first [global prize in this field](#) at the Biodesign Challenge in New York 2017.

EU & INTERNATIONAL STUDENTS AT UAL

16. UAL has the 8th largest international student body in the whole of the UK and third largest among London HEIs. 13% of UAL students come from the EU27, and 35% from other countries worldwide. EU students are generally amongst our highest achieving students.
17. UAL teaches 100 courses at undergraduate level, and 87 at postgraduate. Particularly at postgraduate level, many courses remain viable and available to Home students mainly because of overseas demand, including from the EU. This includes several MA courses widely regarded as among the best in their field in the world.
18. Overseas students almost all return to their home country post-graduation. Overseas UAL students who stay in the UK post-graduation are consistently more likely than UK graduates to be in highly skilled work or further study (79% of 2015/16 graduates).
19. According to Regeneris Consulting, UAL student expenditure supports £340m GVA and 4,960FTE jobs in the UK economy. Of these, EU students are estimated to contribute 900 jobs and £60m GVA across the UK. These figures are calculated based on the National Student Income and Expenditure Survey 2011/12.

STUDENT RECRUITMENT AND THE IMPACT OF BREXIT

20. We commissioned an independent study on the likely impact of Brexit on international student recruitment. Brexit is likely to reduce the attractiveness of the UK to all international students. We expect our EU student numbers to fall by half, although this will not affect us financially as fee levels will double for remaining students. Under the Equalities Act, we are not permitted to vary the fee level for EU students to compensate for this.
21. The status of EU students coming to the UK in September 2019 is not yet clear. According to our current understanding, they are likely to come under a temporary LTR application for the first three months, after which they would need a Biometric Resident Permit plus evidence that they will not have any recourse to the NHS, for example private health care insurance. Tier 4 students are charged for access to our health service at £500 annually, so this is likely to be the case for EU students coming to the UK post-Brexit regardless of a deal.

MOBILITY

22. UAL is one of the leading UK institutions in the Erasmus+ scheme. That is because students with some measure of outward mobility do better at every key indicator in higher education, from attainment to employability. Other than family background, no other single indicator of achievement is quite as reliable.
23. The Government issued a technical note on the Erasmus+ programme on 28 January 2019. In the event of a no-deal Brexit, there will be no national alternative to enable students to go abroad, assuming that continued Erasmus+ membership cannot be negotiated with the European Union.
24. Nearly half of overall student mobility in the UK is facilitated through Erasmus+. If access to Erasmus+ scheme is lost as an outcome of Brexit, it would have a negative impact on incoming

and outgoing European mobility. If a successful centrally funded national scheme replaced Erasmus+, it might result in a surge of uptake, as evidenced by a 12% increase in uptake after the Swiss National Scheme was introduced.

STAFF

25. Teaching: UAL has 656 staff with an EU background, including 343 associate lecturers. EEA staff make up 11% of academics at UAL, and up to 17% at middle grades — a proportion which may put service provision at risk within individual courses if staff turnover rises. 13% of UAL's technicians and 18% of UAL's associate lecturers are EEA by background. EU staff are generally concentrated in mid-rank academic and technical roles, an example of high skills and relatively low-paid roles which makes any visa control via salary levels problematic.
26. Research: Frictionless immigration is important for research, where we need highly specialised skills and access to a wide pool of candidates to be eligible for consideration for research contracts. It is important to be able to recruit these staff quickly, as funding is contingent upon specific completion timescales. For example, one of the AHRC-funded Creative Economy Fellowships in Circular Design is an EU national. This is her first time working in the UK and on completion of her fellowship she intends to return to her home country where she will work with a company which is a key partner for the Centre for Circular Design. AHRC provided funding for the Fellowships at short notice and expected Fellows to be recruited and in place within two months. This would have been impossible to achieve if there had been any visa considerations and UAL would have lost specialist skills and a future contact. Research Councils like AHRC often have tight turnaround times for their funding schemes so there needs to be alignment between the demands of public funders and the Home Office.